

# 2011 TaxACT Information

Workplace Options, our Work-Life & Legal-Financial partner, has developed a relationship with 2<sup>nd</sup> Story, the developer and owner of TaxACT, to make this tax preparation software conveniently available on the Work-Life & Legal-Financial Portal.

## What is TaxACT?

TaxACT offers tax preparation software and Web-based services. It provides its users accuracy and completeness and is designed by in-house programmers, CPAs (Certified Public Accountants), and tax accountants at 2<sup>nd</sup> Story.

TaxACT is available as both downloadable software and a Web-based version. TaxACT also provides a review and alert system to prevent mistakes caused by omissions or missed opportunities to maximize deductions. Regardless of the TaxACT version and / or platform, all forms are IRS- and state-approved.

TaxACT offers free, basic, online preparation assistance, and e-filing for one federal return per customer. Complete product and service descriptions and charges for the 2011 tax season can be found at these four URLs:

- Free online preparation and e-filing of federal tax return—<http://www.taxact.com/taxes-online/free-online-tax.asp>
- *TaxACT Deluxe* with advanced import, help and tool options for federal taxes—<http://www.taxact.com/taxes-online/maximize-tax-deductions.asp>
- Software to assist with preparing state 1040 tax forms—<http://www.taxact.com/products/online-state.asp>
- Bundled options for federal and state tax preparation and e-filing—<http://www.taxact.com/taxes-online/bundle-and-save.asp>
- A comparison chart of the different online products and services offered to consumers—<http://www.taxact.com/taxes-online/index.asp?v=OL&o=OL>
- A comparison chart of the different desktop products and services offered to consumers—<http://www.taxact.com/tax-preparation/>

## Will my customers' information be safe?

TaxACT Online utilizes the latest technology to safeguard customers' personal information:

- SSL 128-bit Encryption ensures all personal information sent over the Internet cannot be viewed or altered while it's in transit.
- TaxACT's site is validated by Trustwave as compliant with the Payment Card Industry (PCI) Data Security Standard supported by all the major credit card associations.
- Certified licensee of the TRUSTe® Privacy Seal Program to ensure privacy and the confidentiality of customers' personal information (including email address)

## Is TaxACT a reputable service?

TaxACT possesses the following safety certifications and memberships:

- Authorized IRS e-File Provider
- Better Business Bureau Online Reliability Program
- BizRate.com Customer Certified
- TRUSTe Certified Privacy
- Trustwave Trusted Commerce
- VeriSign Secured

All TaxACT's products are offered with a 100% Accuracy Guarantee whereby if a customer is assessed a penalty due to a calculation error in TaxACT free, Standard, or Deluxe, TaxACT will pay the penalty and interest.<sup>1</sup> They also offer a Satisfaction Guarantee on their products. However, it should be noted that their Satisfaction Guarantee does not offer a refund for online products once an individual prints the tax return in question.<sup>2</sup>

## Frequently Asked Questions

### 1. How are these services to be bundled with your current services?

They will be provided to all Web clients at no additional charge.

### 2. Are the fees you offer a discount compared to what I would get going directly to TaxACT's Web site?

No, Workplace Options offers the link as a convenience to our customers but there is no discount from the rates available to the general public.

### 3. What are the benefits of offering TaxACT on the Web Portal?

Adding TaxACT to the Work-Life & Legal-Financial Portal is just one more way that Workplace Options is bringing real life to work-life. Our customers come to our site to find solutions to life's everyday challenges. Providing an easy way to do one of the year's most dreaded challenges, taxes, is one more way Workplace Options continues to expand the level of support we offer our customers.

### 5. What if a client doesn't want TaxACT on their Work-Life & Legal-Financial Portal?

Please alert your Account Manager. Workplace Options will remove it immediately.

### 6. Does TaxACT provide any quality assurance of their product?

Yes, TaxACT's online Standard and Deluxe Editions include a 100% Accuracy Guarantee and a Satisfaction Guarantee. If a TaxACT customer is assessed a penalty due to a calculation error in TaxACT Standard or Deluxe, TaxACT will pay the penalty and interest.<sup>1</sup> If a customer is dissatisfied with TaxACT, they may also take advantage of TaxACT's Satisfaction Guarantee.<sup>2</sup>

### 7. Why did you select TaxACT as your partner?

This is the fifth year that Workplace Options has partnered with TaxACT. There are many companies that provide tax return software to consumers. Workplace Options' investigation determined that TaxACT offered consumers the greatest value and it was consistently recommended by tax software reviewers and customers. Workplace Options was initially impressed by TaxACT's open and quick response to our questions and concerns. That initial impression has held true throughout our relationship with TaxACT.

## 8. What products does TaxACT offer and what will they cost my employees/customers?

Complete product and service descriptions and charges for the 2011 tax season can be found at

- Free online preparation and e-filing of federal tax return—<http://www.taxact.com/taxes-online/free-online-tax.asp>
- *TaxACT Deluxe* with advanced import, help and tool options for federal taxes—<http://www.taxact.com/taxes-online/maximize-tax-deductions.asp>
- Software to assist with preparing state 1040 tax forms—<http://www.taxact.com/products/online-state.asp>
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## 9. I thought you said it was free. Why has my customer been charged?

TaxACT is a for-profit business. It provides for free the *online preparation (not downloaded software), printing, and e-filing of one federal tax return*. There are charges for the completion and filing of state taxes and access to various tools. When service options or upgrades requiring fees are suggested during the online preparation process, the related fees are clearly noted.

## 10. Who should my customer contact if they have a question about using TaxACT (signing in to their account, billing questions, technical inquiries)?

TaxACT provides free customer service and support via an e-mail form at [https://www.taxact.com/tsupport/support\\_request.asp](https://www.taxact.com/tsupport/support_request.asp). Technical and tax support are also available by telephone but a fee will be charged to customers for telephone support. The telephone numbers and more information about the fees can also be found at [https://www.taxact.com/tsupport/support\\_request.asp](https://www.taxact.com/tsupport/support_request.asp).

In extreme instances, WPO will facilitate resolution of a customer's concern via its contacts at TaxACT; however, it is generally quicker and more private for customers to contact TaxACT directly.

## References

1. TaxACT. (n.d.) *TaxACT accuracy guarantee*. Retrieved January 10, 2012, from [http://www.taxact.com/company/company\\_aguarantee.asp](http://www.taxact.com/company/company_aguarantee.asp)
2. TaxACT. (n.d.) *Satisfaction guarantee*. Retrieved January 10, 2012, from <http://www.taxact.com/company/satisfaction-guarantee.asp>

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