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Tax professionals weigh in on various tax software pros and cons

National Association of Tax Professionals releases annual software survey results

APPLETON, Wis. (Aug. 13, 2021) – Each year, the National Association of Tax Professionals (NATP) conducts a survey of its members' opinions and experiences with various tax software. This survey allows tax preparers to see what software other preparers are using, and what they like or dislike, to help make an informed decision as to what software to use in their own firm.

For 2021, the survey data shows NATP member respondents are overall very satisfied with their various software, with Drake Software coming in as the most commonly used with 37% of respondents using the software. Following Drake for most commonly used is ProSeries Tax Professional by Intuit (17%), ATX by Wolters Kluwer (9%) and Lacerte Tax by Intuit (8%). The survey also found 41% of respondents consider reliability of software as the most important factor when choosing a brand.

Drake Software and TaxAct Professional Edition come through as the most reliable software and most reasonably priced. TaxAct Professional Edition and TaxSlayer Pro have the highest rating for ease of software installation (4.8 out of 5) TaxAct Professional Edition is tied with TaxSlayer Pro for ease of e-filing (4.8 out of 5).

When asked if they would use the same software again next season, most tax professionals answered yes. Drake software is showing the highest retention rate at 96%. For the full report or to speak with someone about the results and what it means for tax professions, please contact Nancy Kasten at nkasten@natptax.com. The completed software survey can also be accessed by anyone with a free online NATP account.

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About NATP: The National Association of Tax Professionals (NATP) is the largest association dedicated to equipping tax professionals with the resources, connections and education they need to provide the highest level of service to their clients. 23,000 members rely on NATP to deliver professional connections, content expertise and advocacy that provides them with the support they need to best serve their clients. The NATP headquarters is located in Appleton, WI. To learn more, visit www.natptax.com.

Looking for a tax expert? Rhonda Collins, EA, CPA, MBA, is the director of tax content and government relations at the National Association of Tax Professionals (NATP). Collins has a diverse background of over 25 years in the industry. As a licensed CPA and EA, Collins can represent clients before the IRS. She is available for phone or video interviews to discuss federal tax topics including tax law change and its implications, taxpayer issues, tax preparer regulation and more. To schedule an interview with Collins, contact nkasten@natptax.com.