

## UltraTax CS

<b>1. What overall rating would you give your tax preparation software?</b>		
1—Very bad	7	0.9%
2	21	2.7%
3	56	7.2%
4	266	34.2%
5—Very good	427	55.0%
<b>Total</b>	<b>777</b>	<b>100.0%</b>

<b>2. Do you plan to use the same tax preparation software next season?</b>		
Yes	679	96.9%
No	22	3.1%
<b>Total</b>	<b>701</b>	<b>100.0%</b>

<b>3. How easy was the update/installation process?</b>		
1—Very difficult	1	0.2%
2	14	2.5%
3	73	12.9%
4	197	34.7%
5—Very easy	283	49.8%
<b>Total</b>	<b>568</b>	<b>100.0%</b>

<b>4. How easy was the software to use?</b>		
1—Very difficult	7	0.9%
2	27	3.4%
3	87	11.1%
4	367	46.8%
5—Very easy	296	37.8%
<b>Total</b>	<b>784</b>	<b>100.0%</b>

<b>5. If you received training from your software provider, how would you rate the training?</b>		
1—Very poor	7	2.3%
2	11	3.7%
3	69	23.1%
4	125	41.8%
5—Very good	87	29.1%
<b>Total</b>	<b>299</b>	<b>100.0%</b>

<b>6. Did your software contain all of the forms you needed?</b>		
Yes	725	93.4%
No	51	6.6%
<b>Total</b>	<b>776</b>	<b>100.0%</b>

<b>7. How well did your software handle updates during tax season?</b>		
1—Very poorly	2	0.3%
2	10	1.3%
3	48	6.1%
4	211	27.0%
5—Very well	511	65.3%
<b>Total</b>	<b>782</b>	<b>100.0%</b>

<b>8. How well did your software handle transfers of data within returns?</b>		
1—Very poorly	7	0.9%
2	15	1.9%
3	59	7.6%
4	270	34.6%
5—Very well	430	55.1%
<b>Total</b>	<b>781</b>	<b>100.0%</b>

<b>9. How easy was electronic filing?</b>		
1—Very difficult		0.0%
2	10	1.3%
3	44	5.6%
4	187	23.9%
5—Very easy	540	69.1%
<b>Total</b>	<b>781</b>	<b>100.0%</b>

<b>10. If you filed multistate business returns, how well did your software handle them?</b>		
1—Very poorly	8	1.3%
2	19	3.2%
3	85	14.3%
4	247	41.4%
5—Very well	237	39.8%
<b>Total</b>	<b>596</b>	<b>100.0%</b>

<b>11. If you ran the software's conversion package, how would you rate it?</b>		
1—Very bad		0.0%
2	9	7.8%
3	23	20.0%
4	42	36.5%
5—Very good	41	35.7%
<b>Total</b>	<b>115</b>	<b>100.0%</b>

<b>12. What did you like best about your tax preparation software? (choose three)</b>		
Accuracy	496	23.5%
Conversion process	6	0.3%
Ease of importing data	92	4.4%
Ease of use	387	18.3%
Installation process	76	3.6%
Integration with other software	233	11.0%
Learning curve	58	2.7%
Number of forms/comprehensiveness	405	19.2%
Price	78	3.7%
Support	209	9.9%
Tax research included in package	45	2.1%
Other	28	1.3%
<b>Total</b>	<b>2113</b>	<b>100.0%</b>

<b>13. What did you like least about your tax preparation software? (choose three)</b>		
Accuracy	25	1.7%
Conversion process	39	2.6%
Ease of importing data	68	4.5%
Ease of use	77	5.1%
Installation process	40	2.7%
Integration with other software	91	6.1%
Learning curve	130	8.6%
Number of forms/comprehensiveness	25	1.7%
Price	565	37.6%
Support	208	13.8%
Tax research included in package	148	9.8%
Other	87	5.8%
<b>Total</b>	<b>1503</b>	<b>100.0%</b>

<b>14. How well did your tax preparation software integrate with your accounting and other software?</b>		
1—Very poorly	28	3.8%
2	44	5.9%
3	171	23.0%
4	240	32.3%
5—Very well	259	34.9%
<b>Total</b>	<b>742</b>	<b>100.0%</b>

<b>15. Did you ever need technical support from your software vendor during this year's tax season?</b>		
Yes	670	85.7%
No	112	14.3%
<b>Total</b>	<b>782</b>	<b>100.0%</b>

<b>16. How easy to was it to get technical support from the vendor?</b>		
1—Very difficult	44	6.6%
2	67	10.0%
3	139	20.8%
4	229	34.3%
5—Very easy	189	28.3%
<b>Total</b>	<b>668</b>	<b>100.0%</b>

<b>17. How good was the technical support you received?</b>		
1—Very bad	26	3.9%
2	56	8.4%
3	118	17.6%
4	234	35.0%
5—Very good	235	35.1%
<b>Total</b>	<b>669</b>	<b>100.0%</b>

<b>18. For how many clients did your firm prepare returns during this year's tax season?</b>		
1 to 50	35	4.5%
51 to 100	43	5.5%
101 to 200	84	10.7%
201 to 500	216	27.6%
501 to 1,000	214	27.4%
1,001 to 2,000	121	15.5%
2,001 to 5,000	62	7.9%
5,001 or more	7	0.9%
<b>Total</b>	<b>782</b>	<b>100.0%</b>

<b>19. What percentage of those returns were for individuals?</b>		
0%		0.0%
1% to 25%	22	2.8%
26% to 50%	165	21.2%
51% to 75%	456	58.5%
76% to 100%	137	17.6%
<b>Total</b>	<b>780</b>	<b>100.0%</b>

<b>20. What percentage were business returns?</b>		
0%	4	0.5%
1% to 25%	298	38.3%
26% to 50%	411	52.8%
51% to 75%	56	7.2%
76% to 100%	10	1.3%
<b>Total</b>	<b>779</b>	<b>100.0%</b>

<b>21. How much responsibility do you have for tax preparation software purchasing decisions in your firm?</b>		
I make the decision	469	59.9%
I have input into the decision	233	29.8%
I am not involved in the decision	81	10.3%
<b>Total</b>	<b>783</b>	<b>100.0%</b>

<b>22. How many preparers work in your firm?</b>		
1	147	18.8%
2 to 5	335	42.8%
6 to 20	249	31.8%
21 to 100	50	6.4%
101 to 500	1	0.1%
501 or more	1	0.1%
<b>Total</b>	<b>783</b>	<b>100.0%</b>