



Many firms battle time constraints during the busy season and struggle with low utilization in the off-season. Our experienced tax professionals can prepare returns while your in-house staff focus on review, consulting, audit, and other high value services.

Xpitax tax professionals are trained to prepare high quality returns that are on par with what your firm produces. This helps you reduce busy season “burnout” and churn, increase customer satisfaction and most importantly, optimizes firm profitability.

With Xpitax you:

- Gain the ability to outsource individual and entity returns
- Work with a dedicated team, including supervisors who each have 14+ years of tax compliance experience
- Use a system with qualified SOC II compliance and security
- Know that Xpitax accuracy during the 2016 filing year was at 99.71%
- Benefit from getting 95% of returns back within a 12-36 hour turnaround
- Receive all workpapers and binders back after tax return is complete
- Mirror the process and hierarchy of your client firms
- Gain predictability around cost with Xpitax’s simple pricing model
- Keep all your existing software. Xpitax will not require you to change your tax prep, engagement, or other software

Xpitax Outsourcing professionals are experienced in using the following software:**U.S Tax Software includes:**

- CCH
 - > ProSystem fx Tax
 - > ProSystem fx Global
 - > AccessTax
- Thomson Reuters
 - > GoSystem Tax RS
 - > UltraTax CS
 - > Virtual Office CS
- Drake
 - > Tax
- Inuit
 - > Lacerte
 - > ProSeries
 - > ProConnect Tax Online

Canadian Tax Software includes:

- CCH Taxprep
- Inuit ProFile
- Thomson Reuters DT Max

By using Xpitax Tax Outsourcing you will gain:

360° Visibility: manage deliverables and project knowledge in a central repository to enable greater transparency and expanded visibility.

Increased Control: reduce compliance, risk and audit concerns by building key controls and sign-offs into each process.

Complete Flexibility: enact continuous process improvements while increasing efficiency and the ability to empower teams to work securely from anywhere, at any time.

Greater Accountability: automating workflow helps ensure standardized best practices are followed and status details and historic information is captured.



Xpitax Tax Outsourcing can assist you with tax preparation for the following types of returns:

US: 1040, 1041, 1120, 1120s, 1065, 990, 706, 5500

Canadian: T1, T2, T3

XCM offers a complete productivity enablement and workflow platform that empowers you to manage all types of work, within all departments, across multiple offices. Our solutions include XCMworkflow, XCMscheduler, XCMportal, XCMmobile, and Xpitax Outsourcing—all designed by tax and accounting process experts to help you work more efficiently and effectively in a digital environment.

XCM is an open platform system that works horizontally across tax, accounting, finance, audit, and operations applications. We manage millions of processes per year, enabling professionals to complete more work, in less time, with greater quality. Our device and browser-agnostic cloud solutions offer real-time anywhere, anytime access to work. Though we integrate with several popular tax and accounting packages, the real payback is through your greatest asset—your people.



To learn more about how Xpitax Tax Outsourcing can increase productivity in your firm or tax department, please contact us at **781.356.5152** or visit our website at **xcmsolutions.com**.