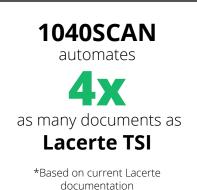# SurePrep®
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1040SCAN vs. Lacerte Tax Scan & Import Comparison

1040SCAN automates more than four times the documents of Lacerte Tax Scan & Import. 1040SCAN includes our award-winning workpaper system, SPbinder, to reduce preparer and reviewer time. Only SurePrep offers an optional OCR data verification service to maximize efficiency. When combined with SurePrep's client collaboration platform, TaxCaddy, 1040SCAN delivers the most automated and streamlined 1040 process for both you and your clients.

1040SCAN
automates
4x
as many documents as
Lacerte TSI

*Based on current Lacerte documentation

Document & Field Coverage	1040SCAN	Lacerte TSI
Organizer Pages	✔️	❌
Source Document Types	40	12
Brokerage Statements	582	136
Exports Margin Interest	✔️	❌
Exports Investment Fees	✔️	❌
Exports Foreign Income	✔️	❌
Exports 65+ Other Fields	✔️	❌
TaxCaddy Fillable PDFs	✔️	❌
Grantor Letters	42	0
State K-1s	22	0

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Integrations	1040SCAN	Lacerte TSI
Includes SPbinder [1]	✔	✖
Integrates with TaxCaddy	✔	✖
RESTful API Available	✔	✖

Verification of OCR Accuracy	1040SCAN	Lacerte TSI
Eliminates Human Verification for Native PDFs [2]	✔	✖
Optional Verification Service [3]	✔	✖
Free Pre-Verification [4]	✔	✖
Optional Full Preparation Service	✔	✖

1. SPbinder is SurePrep's award-winning workpaper system. It supports Outlook emails, Excel, Word, PDF, and TIFF files. Lacerte TSI offers PDF workpapers only.
2. 1040SCAN PRO and 1040SCANverify only.
3. With any scan-and-populate software, it's best practice to verify OCR'd source document data for accuracy before it exports to tax software (Lacerte). Optionally, SurePrep can perform this verification for you.
4. In order to discover new 1099-B formats as early in the tax season as possible, SurePrep offers a Pre-Verification program at no cost.

SUREPREP CUSTOMER FACT

Robert P. Weaver, a Lacerte user and ReNew Group member, reported that SurePrep's solutions increased his firm's 1040 realization rate by more than 20%.

What are Lacerte users saying?
View customer quotes at bit.ly/sptechv

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