ABOUT TRILOGY SOFTWARE

Founded in January 2010, Calgary-based Trilogy Software Inc. creates tax software for accountants and tax professionals.

Trilogy launched DoxCycle source document management software in the fall of 2011 and TaxCycle T1 professional tax preparation software for personal tax returns in the 2012-13 filing season. T2 corporate tax and T4/T4A, T5 and T5018 t-slips returns came for the 2013-14 filing season. In 2014-15, the line-up expanded to include T3 trust returns, T3010 charity returns and T5013 partnership returns.

Backed by software support you can count on, our support requests are answered in Canada by the tax analysts and developers who build TaxCycle. From EFILE-First workflow to 100% guaranteed tax calculations like the “no-click” split pension optimization, you’ll discover hundreds of delightful innovations.

The Trilogy Team has well over 150 years of combined experience serving Canadian tax and accounting professionals.

FUTURE FOCUS FOR TAXCYCLE

At TaxCycle, we look at accounting trends, the CRA's strategic direction, and innovations in technology to build electronic tools that will meet the needs of Canadian tax preparers now and in the future.

Here are five ways TaxCycle is already focused on the future.

1. **Integration with electronic services** – We work directly with the CRA to propose improvements to the tax preparer experience. For example, TaxCycle was one of the first companies to integrate the CRA's new Tax Data Delivery (TDD) system for securely requesting and receiving data about taxpayer slips, RRSPs, the Home Buyers' Plan, capital gains and losses, and more. Use TaxCycle T1 to download, review, and accept the data into a taxpayer's return through an easy-to-use checklist process.

2. Drive to error-free electronic filing – With electronic filing for T1s, T2s and large volumes of slips mandatory for tax professionals, the CRA continues to expand and streamline data communication. TaxCycle's EFILE-first electronic workflow helps reduce errors and prepare returns for electronic filing. EFILE status is always visible on screen, where comprehensive review messages highlight possible errors in the return, and the step-by-step process helps staff remember to collect T183 consent forms before filing returns.

3. Electronic requests for information – DoxCycle's proprietary scanning technology helps you create an organized electronic archive of each client's supporting slips, receipts and documents. This not only reduces paper and saves space in your filing cabinets, but makes it quick and easy to respond to CRA requests for information. In less time than it takes to retrieve a client's file from your archives, you can upload a PDF of the requested supporting documents to the CRA.

4. Better use of your client data – TaxCycle's Client Manager database helps you leverage the data within your tax return to create a more efficient tax practice:

- Index ALL your tax return files, including those from your old tax software, making it easy to transition to TaxCycle.
- Filter and search to find a list of returns ready to EFILE. Or, find a list of overdue returns and manage your practice workflow in just a few clicks.
- Export client details to Microsoft® Excel for further data analysis or marketing initiatives.

5. Focus on client privacy and security – TaxCycle runs on your computer, not in a web browser, so your clients' data resides with you and not on some unknown server in an unknown jurisdiction. All of our interactions with government electronic services use server-side encryption to prevent third parties from eavesdropping on communications to and from your computer. And, we never transmit taxpayer information to our servers to the CRA. Regular email just doesn't cut it when sending documents requiring signatures and copies of tax returns for review to your clients. For this reason, TaxCycle and DoxCycle integrate with your e-Courier.ca account to encrypt confidential information and share it with your clients, all using highly-secure Canadian servers.

TAXCYCLE: COMPREHENSIVE AND MODERN TAX SOFTWARE FOR YOUR MODERN TAX PRACTICE

1) **Prepare multiple years from one program –** When you buy this year's program, you automatically get all the prior years too. There's never a need to purchase an archives DVD.
2) **Integrated tax suite –** Quickly access multiple applications and tax years from a single program user interface. One install, that's all.
3) **Comprehensive carry forward –** Carry forward data files from most common competitor tax programs. See our website for more details.
4) **Modern database and client management –** Our powerful Client Manager module allows you to quickly and easily filter your clients to manage workflow and perform batch processes.
5) **Proactive review features to ensure accuracy –** Quick Fix messages that let you correct errors without jumping, links to multiple forms from one message, and configurable review messages keep you one step ahead.
6) **Template client emails, letters and invoices –** Our built-in templates make it easy to merge client data into emails, letters and invoices. And the template editor allows you to fully customize your correspondence.
7) **Widescreen and multiple monitor support –** Open as many or as few windows as you want so you can watch schedules update in one window while you enter data in another. Compare previous-year data, or prepare linked spouse's return. Easily resize schedules to show more or less.
8) **Easy file sharing, option handling and network management –** Share options, files and templates easily over all types of networks, from single-desktop users to national multi-office firms.

PROFESSIONAL SOFTWARE FOR TAX PROFESSIONALS

We make professional tax software for tax professionals. Our program is an essential tool for our clients, but it is equally important for our clients to understand the mechanics behind what the software is doing. When our clients understand the ins and outs of the software they can ensure that the results generated are optimal for their clients.

OUR PARTNERSHIP WITH THE KNOWLEDGE BUREAU

While we provide many means for our clients to educate themselves and their staff on how to use TaxCycle, we do not provide specific training in taxation. As an Education Partner, the Knowledge Bureau provides our clients with not only access to up-to-date tax information and commentary through EverGreen, but also a means for our clients to provide ongoing tax training to new staff. In addition, they assist seasoned staff looking to continue their learning journey and enhance their portfolio of services to their clients.

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