



# ProFile & ProTax

## Now there's a choice

Michael Di Lauro

A photograph of two young women with blonde hair, one in profile and the other with her back to the camera, engaged in conversation outdoors at night. The background is dark with some blurred green foliage. The text is overlaid on the right side of the image.

**Take a few moments  
to CONNECT with  
your neighbour**

# CPD Process

## In order to receive CPD credit

- Be sure to sign in or scan your badge for this session
- You must stay in the session for the duration of the training
- This session is eligible for **1 hour of CPD**
- CPD certificates are emailed directly to you within 4 weeks of the conference date to the same email address you used to register

# Today's speaker



**Michael Di Lauro**  
CPA, CMA

# CPD Process

## To earn 1 hour CPD credit

- Sign in or scan your badge
- Stay for duration
- Certificate emailed in 4 weeks

# Input poll

**ProFile User?**

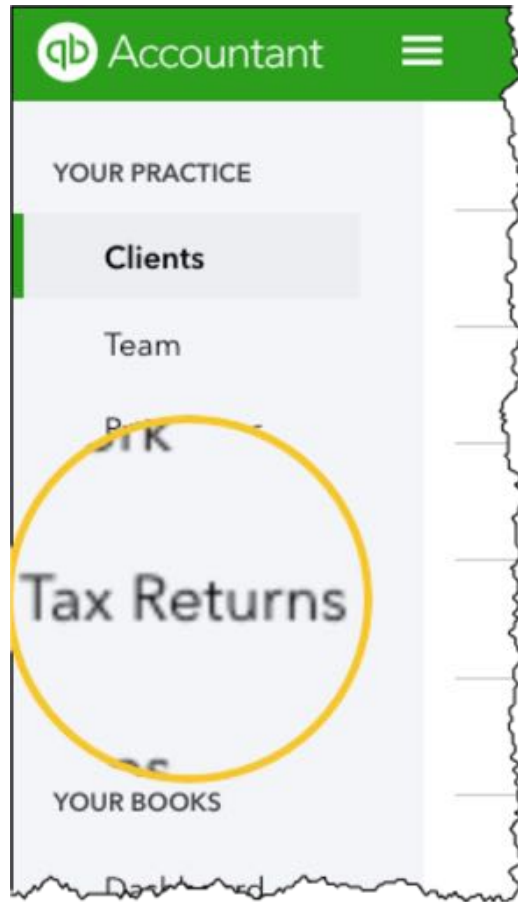
**T1/T2/T3/FX?**

**Pro Tax User?**

“

What's Pro Tax?

# Pro Tax Key Features



**Tax preparation**

**In QBOA**

**T2 only (for now)**



# Seamless Sync





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QBOA **Pro Tax** takes you  
from bookkeeping to year-end  
prep to T2.

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All in one place.

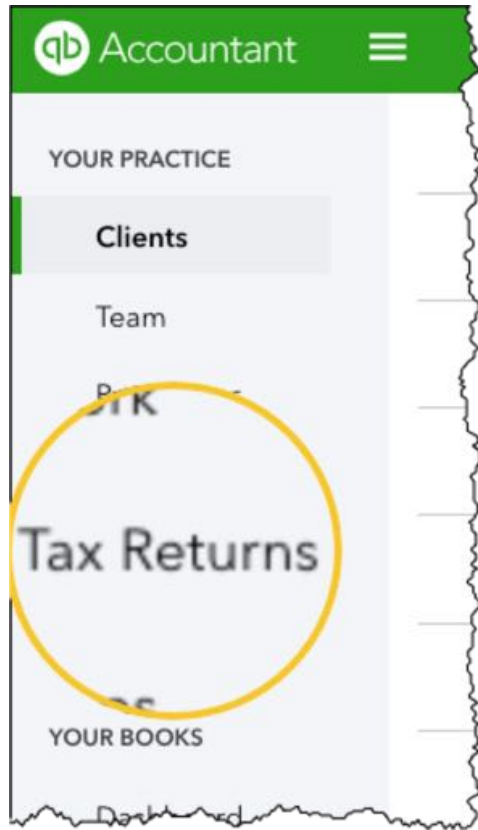
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It's fast. It's easy. It's done.

“

Why Pro Tax?

# Why Pro Tax?



Reduced redundancy

Seamless

Live updates

Easy

Platform independent

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What's ProFile?

# ProFile

Tax software you know and love



# Why ProFile?



Full functionality

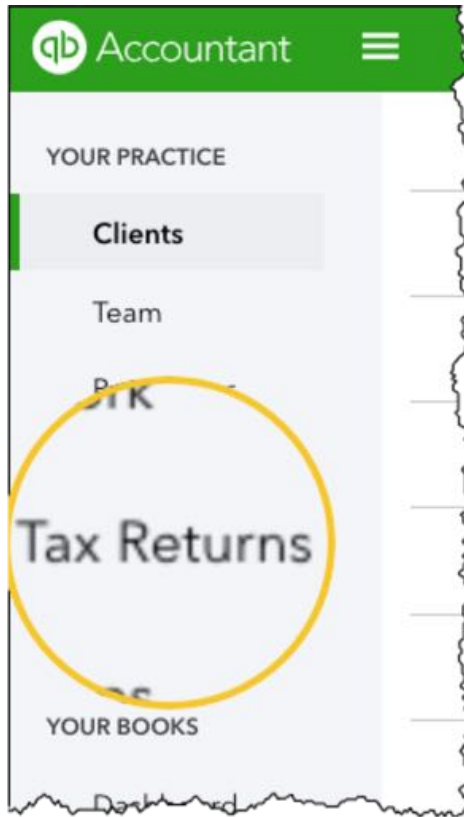
Robust

Reliable

1997 +

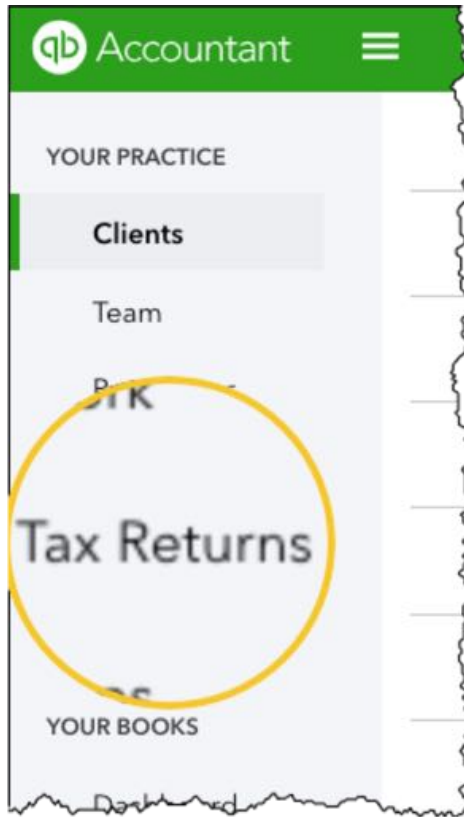
Maui

# So... we have a **choice**?





# So... which should I **choose**?



# Well... that **depends**

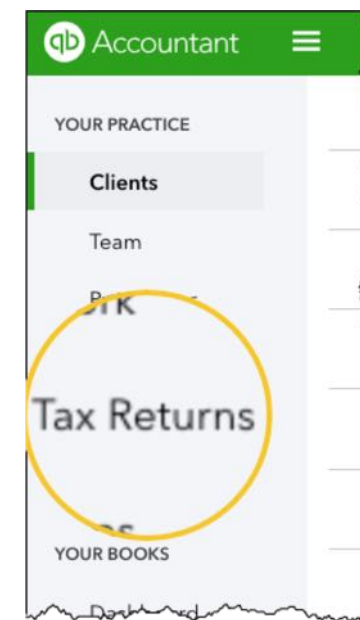
How many tax returns do you prepare?

How much functionality do you need?

What type of tax work do you do?

Do you work with a team?

Are you on a Mac?



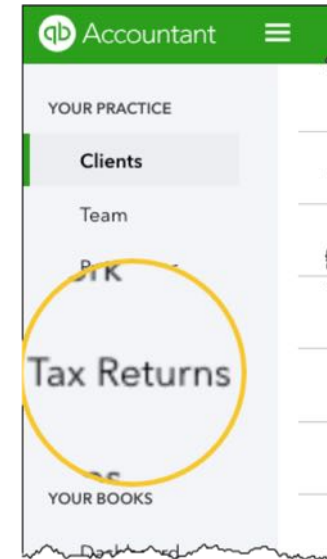
# Compare and Contrast



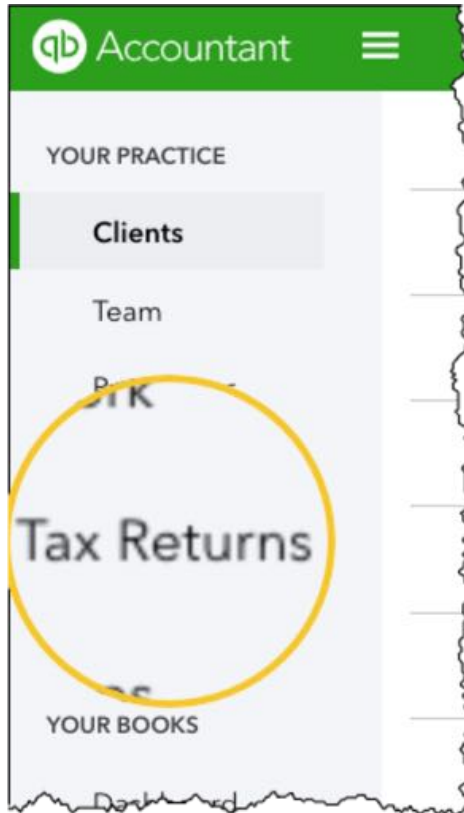
# Compare and Contrast

Feature	ProFile	Pro Tax
Modules	<ul style="list-style-type: none"><li>• T1/T2/T3/FX</li></ul>	<ul style="list-style-type: none"><li>• T2</li></ul>
Functionality	<ul style="list-style-type: none"><li>• Full</li></ul>	<ul style="list-style-type: none"><li>• Limited</li></ul>
QBO Integration	<ul style="list-style-type: none"><li>• Limited</li></ul>	<ul style="list-style-type: none"><li>• Full</li></ul>
GIFI Import	<ul style="list-style-type: none"><li>• 2-step</li></ul>	<ul style="list-style-type: none"><li>• Seamless</li></ul>
Live update	<ul style="list-style-type: none"><li>• None</li></ul>	<ul style="list-style-type: none"><li>• Full</li></ul>
Platform	<ul style="list-style-type: none"><li>• Windows</li></ul>	<ul style="list-style-type: none"><li>• Independent</li></ul>
Pricing	<ul style="list-style-type: none"><li>• \$870</li></ul>	<ul style="list-style-type: none"><li>• \$585</li></ul>

# Compare and Contrast



# So... which should I **choose**?



# ProFile Top 5



It's Familiar

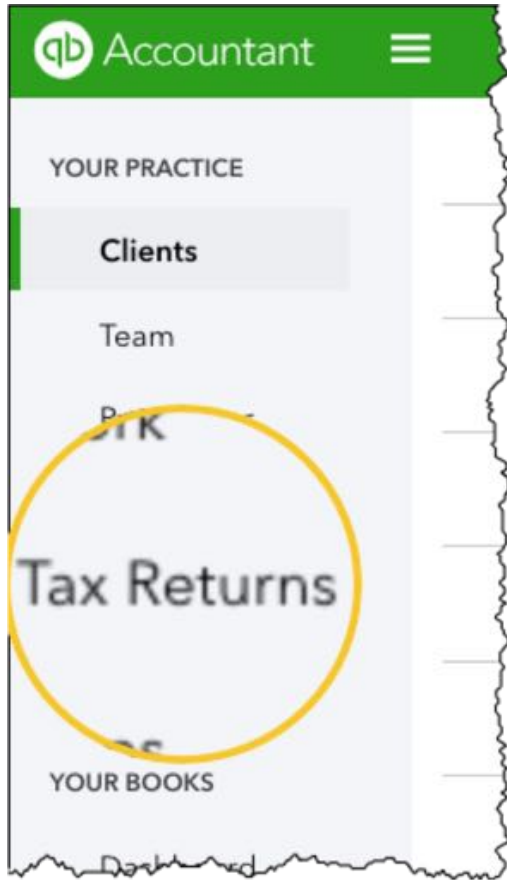
It's Reliable

It works

It's Windows

It's feature-rich

# Pro Tax Top 5



It's Easy

It's Seamless

It's Future-ready

It's scalable

It's platform independent



**But.. wait a minute...**



# Mutually exclusive?

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Does it have to be either / or?

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I mean...Why not use both?

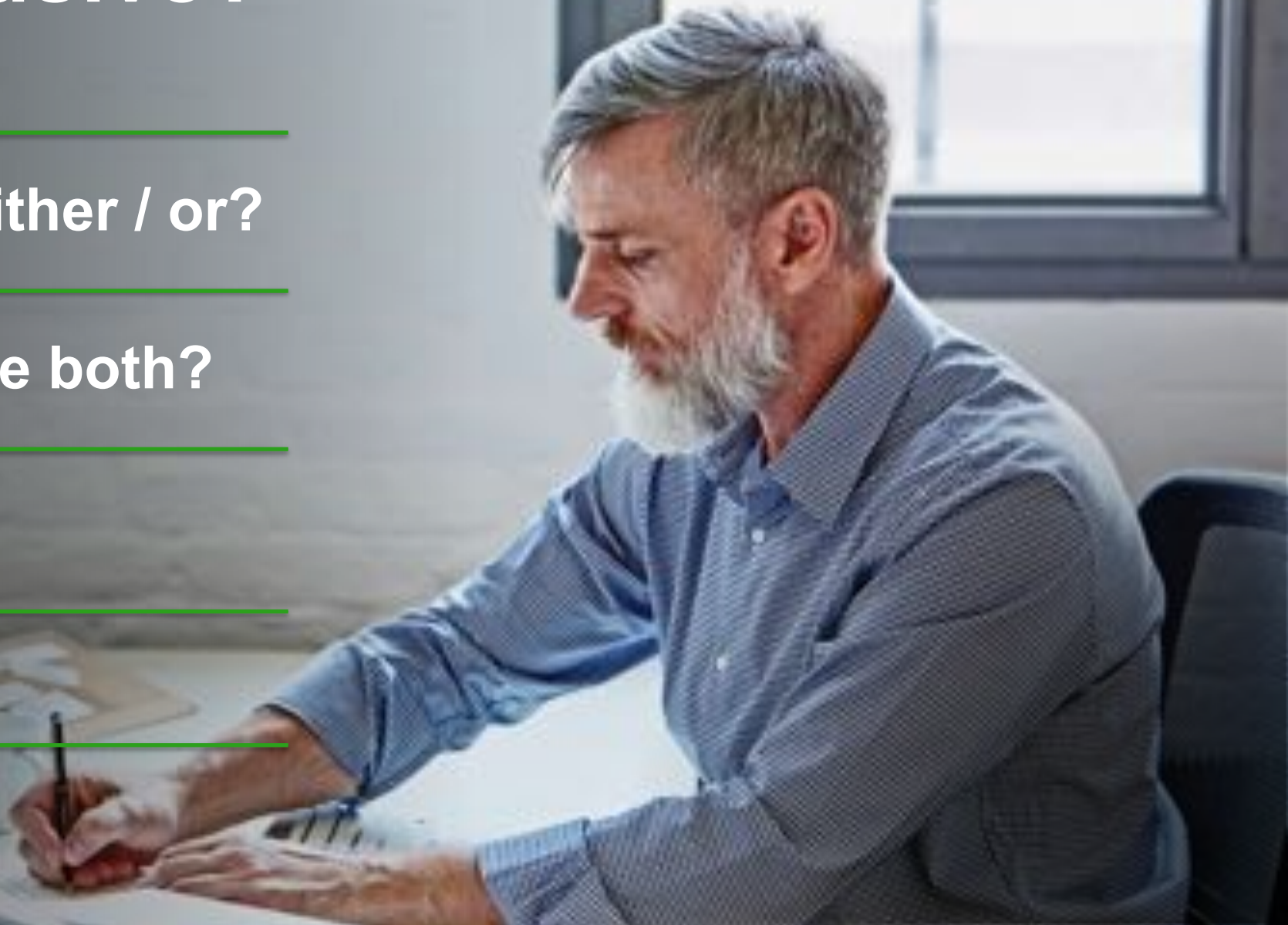
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Start in Pro Tax

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Finish up in ProFile

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# They're **NOT** mutually exclusive

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ProFile is a mature product

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Pro Tax is an emerging product

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ProFile works with QBOA

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Tax also works even better with QBO

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ProFile and Pro Tax work together

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Cloud is the Future

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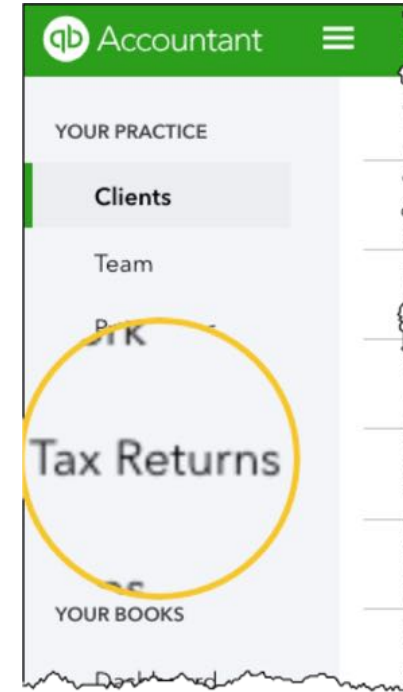


**and remember...**



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Pro Tax is free



\$ 0.00



**Demo**

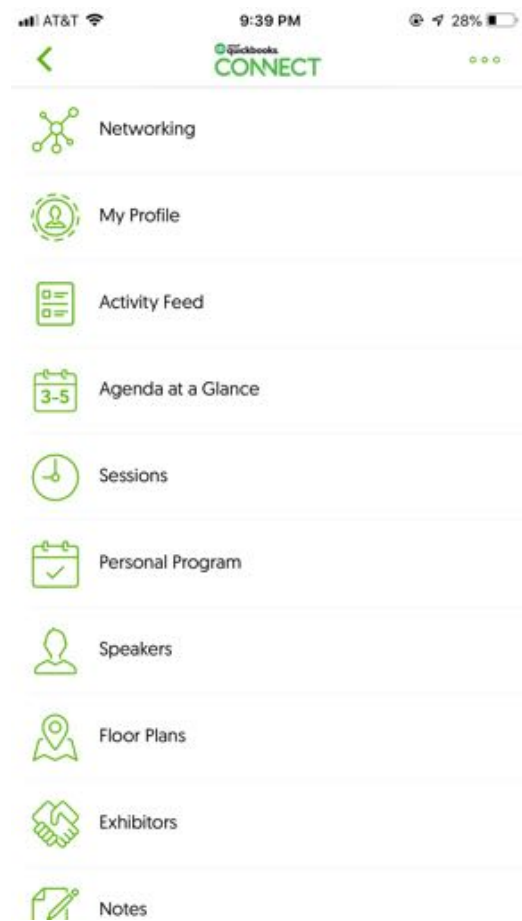


**And... that's a wrap!**

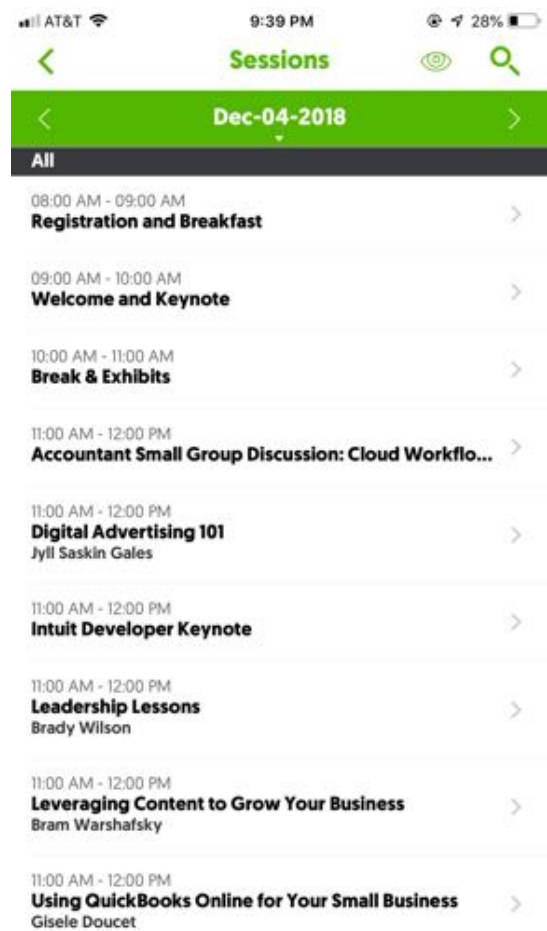
**Questions?**

# Rate this session in the mobile app

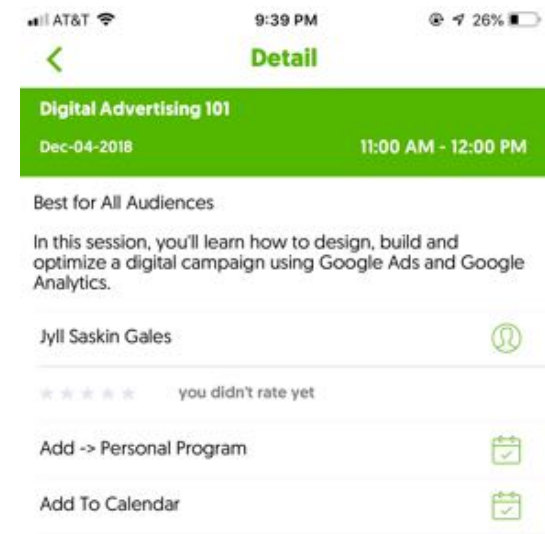
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## 2. Select Title



## 3. Add Rating





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	Leveraging Content to Grow Your Business	+
	Leadership Lessons	+
	Using QuickBooks Online for Your Small Business	+
	Warrior Approach to Productivity • session repeats	+
	Accountant Small Group Discussion: Cloud Workflows	+
	Intuit Developer Keynote • session repeats	+



CONNECT

