

## CrossLink Conversion Job Aid

Conversion Tool	Internal Conversion	*Cannot Convert
Drake	ATX	OLT
Drake Business	Lacerte	WinTax 1040 (Taxware)
ProSeries	TaxAct	TRX (TaxExact)
ProSeries Business	TurboTax	MyTAXPrepOffice
TaxSlayer	UltraTax	
TaxSlayer Business	ProSystem FX	
TaxWise	TaxSlayer Pro	
TaxWise Business	... to/from CLO and Hosted	

\* While we cannot guarantee the conversion from a competitor's online software, we have had some success in cases where customers were able to provide us with a backup of their tax return file

Drake	ProSeries	TaxSlayer	TaxWise
Client Contact Info	Client Contact Info	Client Contact Info	Client Contact Info
W-2	W-2	W-2	W-2
1099-R	1099-R	1099-R	1099-R
2441	2441	2441	2441
Schedule B	Schedule B	Schedule B	Schedule B
Schedule C	Schedule C	Schedule C	Schedule C
	Schedule D	Schedule D	
Schedule E	Schedule E	Schedule E	Schedule E
Schedule F	Schedule F	Schedule F	Schedule F
4835	4835	4835	4835
6252	6252	6252	6252
	8606	8606	
8829	8829	8829	8829
Schedule K-1 (1041)	Schedule K-1 (1041)	Schedule K-1 (1041)	Schedule K-1 (1041)
Schedule K-1 (1065)	Schedule K-1 (1065)	Schedule K-1 (1065)	Schedule K-1 (1065)
Schedule K-1 (1120S)	Schedule K-1 (1120S)	Schedule K-1 (1120S)	Schedule K-1 (1120S)
Assets (Depreciation)	Assets (Depreciation)	Assets (Depreciation)	Assets (Depreciation)

Drake Business	ProSeries Business	TaxSlayer Business	TaxWise Business
Business Information	Business Information	Business Information	Business Information
Balance Sheet	Balance Sheet	Balance Sheet	Balance Sheet
1065	1065	1065	1065
Schedule F (1065)	Schedule F (1065)	Schedule F (1065)	Schedule F (1065)
Owner K-1 (1065)	Owner K-1 (1065)	Owner K-1 (1065)	Owner K-1 (1065)
1120	1120	1120	1120
1120 Schedule G	1120 Schedule G	1120 Schedule G	1120 Schedule G
1120 Schedule N	1120 Schedule N	1120 Schedule N	1120 Schedule N
1120S	1120S	1120S	1120S
Owner K-1 (1120S)	Owner K-1 (1120S)	Owner K-1 (1120S)	Owner K-1 (1120S)
1125-A	1125-A	1125-A	1125-A
1125-E	1125-E	1125-E	1125-E
8825	8825	8825	8825
Assets (Depreciation)	Assets (Depreciation)	Assets (Depreciation)	Assets (Depreciation)

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