

1040 Center of Excellence

Kochi, Kerala · India

A center that prepares one thing. Every preparer works on Form 1040 and nothing else, and every return runs through 1040WIZZ automation before a human opens it — which is how we deliver quality and turnaround together, instead of trading one for the other.

30,000

Full-prep returns

2027 Capacity for 2026 Returns

100%

1040-specialised

Individual returns only

1040WIZZ

On every return

Automation runs first

What a Center of Excellence is

Most outsourcing is a pool of generalists who take whatever arrives. A Center of Excellence is the opposite — a dedicated team organised around a single return type, trained on it, measured on it, and doing it all day. A generalist context-switches between four rule sets and four review standards; a COE preparer masters one. Repetition within a single form is what turns a competent preparer into someone who spots the anomaly before the reviewer does.

TECHNOLOGY

1040WIZZ does the mechanical work

- Detects and classifies every source document — W-2s, 1099s, 1098s, K-1s, brokerage statements
- Extracts and validates: TIN cross-checks, total reconciliation, missing-document detection against the prior year
- Imports straight into CCH Axcess, GoSystems or UltraTax CS

PEOPLE

The COE team does the thinking

- Reviews every automated extraction against the source documents
- Handles judgment calls — basis, allocations, elections, state nexus, unusual K-1 footnotes
- Prepares to your firm's review standard, in your software, with your workpaper layout

**Technology handles volume without tiring. Specialists handle judgment without guessing.
Run them together on one form and you stop trading quality against turnaround.**

How a return moves through the COE

01

Documents in

Upload or we pull from your portal. No sorting or indexing needed.

02

1040WIZZ runs

Detection, extraction, validation and import — before a preparer touches it.

03

Specialist prepares

A 1040-only preparer works the return end to end to your standards.

04

Internal review

A senior COE reviewer signs off using the same checklist every time.

05

Back to you

Prepared return, workpapers, open-items list, documents mapped.

What your firm gets

- ✓ **Quality that does not depend on who picked it up.** One form, one standard, one checklist — your reviewers stop re-preparing and start reviewing.
- ✓ **Capacity that scales with the season.** Fifty returns in January, five hundred in March — the COE absorbs the curve.
- ✓ **Turnaround in days, not weeks.** Preparers start at review rather than data entry, because extraction and import are already done.
- ✓ **No hiring, training or attrition.** You buy prepared returns, not a staffing project.

Security & compliance. The COE operates from a controlled facility with access-restricted floors, no removable media, and role-based access to client data. Engagements are set up to meet IRS Section 7216 consent requirements and the safeguards expected under IRS Publication 4557 and the GLBA Safeguards Rule.