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In 2007, like every tax year, the IRS instituted a series of new tax rules and calculations. Chances are that your clients can't name half of them. I know I can't. When offering tax planning services to your clients, it's important to make them aware of the new rules and calculations that affect them. It's also important to advise your clients that tax planning is not just an option for the wealthy. Almost every client that comes into your office to have their tax returns prepared would benefit from some type of tax planning service. So it's best to have tools that will enable you to provide the services they may request or the ones you suggest.

This review of tax planning products considers the following categories:

Program Use/Data Entry

Tax planning programs basically perform a variation of the same functions; the main difference lies in the level of calculations performed. This section answers some of the following questions: How many tax scenarios can be performed? Is the user interface easily navigated? Are fields, toolbars and menus customizable? Do worksheets update in real time?

Reporting

This section explores the reporting options available in each product as well as report customization capability. It also notes the report formats available and the availability of charts, letters and graphs.

Import/Export Capabilities

This area is particularly important when using a stand-alone product. Many of the products reviewed here are truly designed to work in conjunction with their respective tax preparation products, but integration with third-party products is provided by several.

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by looking at each product's capabilities, ease of use, total cost and how quickly it would pay for itself.

As always, I suggest you pay a visit to all of the vendor websites where additional information can be reviewed and online demos accessed. This information can go a long way to help you make a decision as to what product is best for you and your firm.

[BNA Software – BNA Income Tax Planner](#)

If you currently offer tax planning services to your clients or intend to in the future, you may want to take a look at BNA Income Tax Planner. This program is designed to simplify your life, while providing your clients with comprehensive tax analysis and multi-year projections for up to 20 years.

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[CCH, a Wolters Kluwer business – ProSystem fx Planning](#)

ProSystem *fx* Planning is part of the ProSystem *fx* suite of products offered by CCH, a Wolters Kluwer business. Designed to work in conjunction with the vendor's tax preparation product, ProSystem *fx* Planning can also be used as a stand-alone product.

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[Intuit – Lacerte Tax Planner](#)

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to work with the vendor's tax preparation product. TaxPlanner includes federal tax phase-outs of current laws as well as inclusion of future tax laws.

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Thomson Reuters – Planner CS

Planner CS is part of the CS Professional Suite of accounting and tax products from Thomson Reuters. Designed to work with UltraTax CS, Planner CS provides users with income tax planning for both state (where applicable) and federal taxes.

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