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Dec. 01, 2008

One of the greatest assets of financial professionals is found in their professional knowledge. But sometimes it's not what you know, but whether you know how to find the answer to a question, and how quickly you can do so. With the breadth and volatility of tax law, it is virtually impossible to retain all of the information you need in order to offer the best results for your clients' tax liabilities.

This is especially true when servicing clients whose businesses are affected by multiple taxing jurisdictions.

There have long been print-based resources available, providing the basics such as the Internal Revenue Code and updates on tax legislation as well as analysis from experts in taxation. But the continued movement of tax research products to software and web-based applications has made access to these resources more available to firms of all sizes. Additionally, these applications are more easily

kept up-to-date through periodic

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offer daily tax and financial news updates that can even be tailored to notify users of significant developments in their practice areas. Many disc-based programs have also improved integration between the tax research program and compliance software, allowing users to access research related to specific clients' needs and even electronically attach corresponding materials to their returns for future reference. Most programs also provide varying research-oriented tools and user features.

This review includes disc-based and online research applications, with some focusing exclusively on federal tax law, while others also provide research and additional information for state taxation.

### **ATX/Kleinrock – Total Kleinrock Office/TaxExpert**

#### **Total**

Kleinrock Office (TKO) is offered by ATX through its Kleinrock Publishing division. TKO is part of the Total Tax office plus and Total integrated office bundles, but Federal TaxExpert

is bundled with many other research

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...tax forms, rulings, regulations and other government publications, as well as expert analysis and periodic tax bulletins. Additionally, TKO includes Kleinrock's Employment TaxExpert, ATX's ZillionForms, unlimited W-2/1099 e-filing and Kleinrock CPE courses. The CD-based version reviewed here costs \$500 plus \$125 shipping for a version that includes online research access, monthly CD updates, a biweekly tax bulletin and the annual tax guide. Switching to a quarterly CD update drops shipping to \$35. A multi-user version of the program costs an additional \$250.

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## [BNA Tax Management – Tax Management Library](#)

The online version of BNA's Tax Management Library is a comprehensive tax research system that provides primary source materials and guidance on federal, state and international tax law for individuals and entities, as well as a Tax Practice Library that offers research and productivity

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Research NetWork (TRN) provides a web-based research system that includes subscription modules for CCH's federal, state, international and accounting material. CCH includes more than 100 primary research sources, in addition to analyses and explanations provided by legal and accounting experts, and current news related to specific tax and accounting subjects. Pricing for TRN is based on the research libraries and content to which you subscribe, with single-user subscriptions starting at \$199.

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## CFS – CFS Tax Research

CFS

Tax Research is a research program that provides primary tax-related documents, including code, government publications, regulations, rulings and procedures, a stand-alone California tax research program, and linked access to the tax authorities for other states. The system costs \$149 for a single-user license (\$139 for renewals), which includes four quarterly updates. CFS also now

offers its tax research product

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to the CD versions but offer some different features.)

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## PPC – Federal Tax Compliance Service

PPC

offers one of the largest collections of tax and financial research primary source documents and analysis. The key offerings for tax professionals are traditionally known as PPC's Deskbooks and also include additional PPC and government publications. They are available individually or in bundles through its Federal Tax Compliance Service (FTCS), Business Tax Planning Service and Individual Tax Planning Service. PPC's FTCS is also available as an online service through Checkpoint. The CD-based version of FTCS is the focus of this review. It is available in a version with more than 6,000 federal and state forms for \$895; a version without forms for \$695; or a base package that includes only the core PPC Deskbooks for \$395.

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third-party providers. The system also offers ongoing coverage of tax and finance-related news, legislation and rulings. Checkpoint starts at under \$1,000.

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## [Tax Analysts – Web Services](#)

Tax

Analysts offers a comprehensive selection of CD, DVD and online tax research products comprised of primary source materials, analysis, news and e-mail delivered briefs. The company's new DVD-based OneDisc Premium offers greater content all housed on a single disc with a redesigned web-based interface, search functions and productivity tools. It costs \$359 for a monthly updated subscription. Through Tax Analysts' Web Services, users can subscribe to all of the vendor's primary and analytical research materials, as well as web-only products such as Tax Notes Today and State Tax Today updates. An annual subscription to the company's Complete Federal Research Library plus one

state costs \$435; additional subscription

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