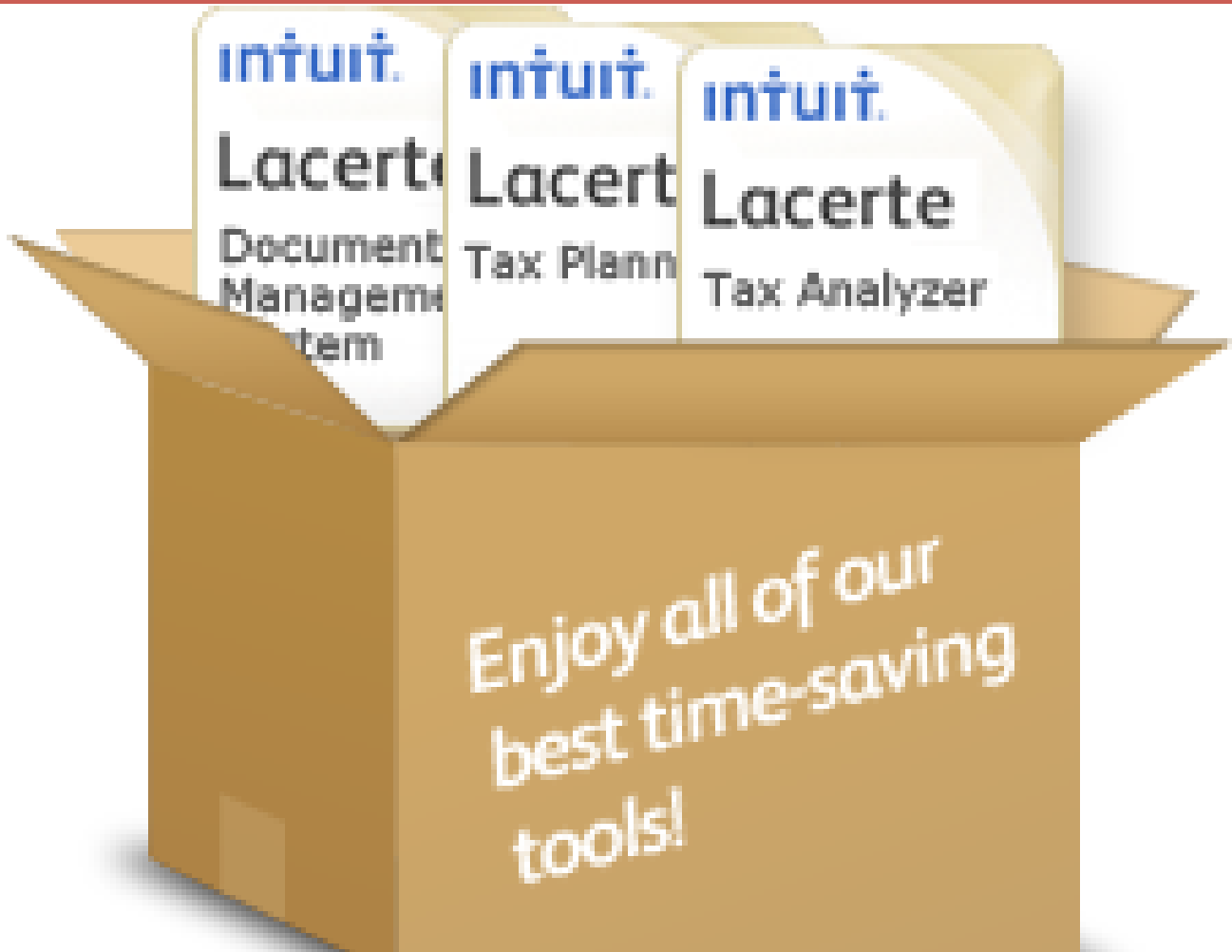


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### **Basic System Functions: 5 Stars**

Firms using the Lacerte tax preparation software will find the tax planner interface to be very similar and easy to navigate. The main window of the program has a menu bar at the top followed by a toolbar with icons. To navigate through the program, there are worksheet tabs below the toolbar and a worksheet list on the left. Users can customize the size of the worksheets by simply clicking and dragging the borders. Worksheet values are color coded, for example, black numbers are input or override fields, blue numbers are calculated amounts, and maroon text indicates a net number

for a worksheet or section. These colors can also be customized. There are graphical

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Case/Year Analysis, Married Filing Joint and Married Filing Separate comparison, Difference Analysis (comparing two scenarios), and Adjustment Analysis (calculates effects of certain adjustments on a case's tax liability).

One of Lacerte Tax Planner's unique features among the products reviewed is a W-2 Projector, which takes part-year data from a pay stub and projects the W-2 amount totals. This feature then takes the projected amounts and transfers them to the planning worksheets.

Though the user can set up generic state worksheets for all states, Lacerte Tax Planner offers preconfigured state-specific worksheets for AZ, CA, CO, CT, GA, IL, IN, LA, MA, MN, NJ, NY, OH, OK, OR and WI. There are also specific worksheets to calculate tax for residents of New York City or Yonkers.

### **Reporting: 4.75 Stars**

When the print button is pressed, the user has the option to print either the current worksheet or one of many types of plan reports. The content, including the order in which it is presented, as well as the header and footer can all be customized for each type of plan report. Users can also create custom letters, questionnaire reports, and graphs. All reports, including customized templates, can be previewed on-screen before printing.

### **Import / Export / Integration: 4.25 Stars**

Lacerte Tax Planner imports pertinent client from the Lacerte tax program, including filing status, dates of birth, information about dependents, contact information, and summary of financial data for income, deductions, credits, tax liability and tax payments. There are several places to export data from within the Lacerte Tax program, but only one client can be exported at a time.

The program's export options are limited to saving reports and graphs as PDF files or

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resources include a searchable knowledgebase, a user community, and chat support. Live support is included with the tax package, but not if Lacerte Tax Planner is purchased separately.

## Best Fit

While firms using Lacerte Tax and DMS will benefit with the direct integration, it may also be considered as a standalone product because it is easy to use and a lower cost alternative than the products reviewed.

## Strengths

- User-friendly interface similar to that of the tax program.
- Easily imports client tax data from Lacerte Tax.
- Reports can be printed directly to Lacerte Document Management System
- Comes bundled with Lacerte Tax Analyzer and DMS
- Quickly estimates yearly wages from pay stubs with the W-2 Projector

## Potential Limitations

- Not preconfigured to calculate tax for all states (though a user can create a generic state)
- Calculates tax for only one state per plan

## New in 2014

- **Intuit eSignature:** For an additional five dollars per return you can use DocuSign to e-File Form 8878 and 8879, complete with signatures.
- **More E-File:** For Tax Year 2014, you will be able to eFile federal amended fiduciary returns, along with more than 50 new eFile return types (such as amended

extensions, estimated payments and more) for over 15 states including individual,

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as part of the Lacerte Productivity Plus Bundle. This bundle, which is \$549 for as many Lacerte user "seats" the firm has purchased, also includes Lacerte Tax Analyzer and Lacerte Document Management System. A free demo comes with the Lacerte Tax program, allowing potential users to try all aspects of the program before purchasing it.

## 2014 Overall Rating: 4.5 Stars

Tax Planning

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