CPA
Practice Advisor

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DrakeSoftware®

Free with Drake Software, the Tax Planner allows you to add revenue by providing another service to clients, and helps them make the right decisions in an increasingly complex tax environment. Most financial decisions today directly affect a client's tax situation. The tax planner allows up to seven years or seven scenarios of tax planning per client.

Help your clients plan for changes such as:

- Change in marital status
- Change in dependents
- Change in income

Help your clients determine what financial decision would have the best tax implications for:

- Taxable Social Security benefits
- Disposition of capital assets
- Limitation phase-outs
- Self-employment tax
- Alternative minimum tax
- Retirement savings

Various reporting options allow you to provide your clients the level of detail they