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product, as well as those wishing to integrate with other Intuit financial products.

Mary Girsch-Bock • Sep. 14, 2016



**Lacerte Tax Planner:** <http://accountants.intuit.com/tax/lacerte/>

**Best Fit:** Lacerte Tax Planner offers a lower price point than many other tax planning products, making it a good fit for small to mid-sized firms with limited budgets.

**Product Strengths:**

- User friendly interface
- Offers easy integration with Lacerte Tax
- Product comes bundled with Lacerte Tax Analyzer

- Offers yearly wage estimation capability

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

An intuitive user interface makes it easy for users to navigate Lacerte Tax Planner – even those new to the product. The main interface, called the Client Scree, has a menu bar at the top of the screen, with a toolbar directly below that contains a series of icons which offers quick access to frequently used system functions. A series of navigation tabs are the basis of Lacerte's structure, and include Client, where users can access client data, Data, which offers access to all data options, Forms, which provides a review of all completed forms, Diagnostics, which displays any red flags with created plans, and Analysis, which provides additional suggestions to users regarding possible tax scenarios. Users can easily customize worksheet size to suit their needs, and color coding (with colors customizable as well) makes it easy to quickly review worksheet data.

Clicking on a client will display a table of contents that offers access to all of the planning tools needed to create a tax plan for a client. The table of contents matches the data flow on a 1040 form, making it easy to located and enter desired information.

The product also offers a watch list, with users able to add additional rows to the watch list as needed.

### **Core Tax Planning Features: 4.25 Stars**

Lacerte Tax Planner allows users to create four different types of plans: Case/Year Analysis, Married Filing Joint and Married Filing Separate comparison, Difference Analysis which compares two tax scenarios, and Adjustment Analysis, which calculates the effects of adjustments on each individual case. Lacerte Tax Planner also contains a W-2 Projector, which allows users to easily project client W-2 amounts by

using a pay stub. Once the projected amount is calculated, it is then automatically

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states not included in the list above.

### **Reporting: 4.75 Stars**

Users can easily print current plan worksheets by simply pressing the print button, or choose to print one of the other system reports as well. Reports can be easily customized by the user, including content order, and header and footer options, as well. Users also have the option to create custom client letter, as well as graphs when desired. All reports can be previewed on screen prior to printing, and can be exported as well.

### **Import / Export / Integration: 4 Stars**

Users can easily import all client data into Lacerte Tax Planner directly from the Lacerte Tax program, with the option to only import one client at a time. Client data that can be imported includes filing status, date of birth, contact information, and dependent information. Additional export options are limited, with users able to save system reports and graphs as PDF's and exporting them to other applications as needed.

### **Help / Support: 4.5 Stars**

There are a variety of help options available for Lacerte Tax Planning users, including a live telephone support option that is included in the product pricing, if the product is not purchased as a standalone product, but as part of the Lacerte Tax program. A comprehensive knowledgebase is also available, and a video library offers tutorials and demos for viewing. A popular online user community is also available, and chat support is available as well.

### **Summary & Pricing**

Those using Lacerte Tax products will reap the most benefit from using Lacerte Tax

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Tax Planning

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