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enhancements such as improved data-mining capabilities using the Database Manager; enhanced state property tax support; electronic filing for forms 1120, 1041 and 990; and the ability to import Excel spreadsheet data into the system, including Schedule D. "This import capability will be very helpful," said Jack LaRue, VP of Marketing. "It will allow preparers to import client data such as stock transactions directly into UltraTax, saving a tremendous amount of time on Schedule D data entry." The company also has done the following:

Enhanced client security by allowing the omission of SSNs from organizers and other printable items

Improved its Web Organizer by enabling users to attach Word, Excel, Money, Quicken and other files to the organizer and transfer them directly into UltraTax

Included an Optimization Calculation for Hope and Lifetime Learning Credits

Added new Watch Windows that enable users to monitor selected values such as AGI and tax due by keeping them on-screen during data entry

Mr. LaRue noted that the new Watch Windows will let preparers identify key items to track through the entire tax return, helping them keep tabs on primary concerns.

### **2004 Overall Rating:**

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