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Lacerte

May. 05, 2005

Lacerte (www.lacertesoftware.com), an Intuit company, has introduced a new 1040 Tax Analyzer that assists in reviewing returns by comparing Schedule A and C against norms, offering reports and tax tips and providing a query tool to quickly find clients affected by new tax law changes. Additionally, a new Document Management System allows preparers to store and retrieve documents in a paperless environment. The module allows saving of multiple file formats, including Excel spreadsheets. Also new for TY2003 are the following:

The addition of 24 business states completes the company's library, which now provides state programs for 1040, 1120, 1120s, 1065 and 1041

Integration with Intuit's new Client Manager to provide a central data point for synchronizing client contact information and data

Improved integration with QuickBooks

Ability to e-file state returns individually

Other e-file enhancements including support of forms 2350, 2555, 2688, 4868 and 6198

"Completing the state libraries was a top priority for us," said Jennifer Kitto, a marketing manager with Lacerte. "And the 1040 Tax Analyzer helps our customers offer their clients the most accurate and professional service possible by helping to identify potential tax savings opportunities while saving the preparer significant amounts of time normally spent reviewing returns to find these opportunities."

2004 Overall Rating:

Intuit, Inc. • Article

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