Oct. 29, 2005

CCH's ProSystem *fx* Planning is a comprehensive tax planning program that computes federal taxes and supports the following states: AL, AZ, CA, CO, CT, GA, ID, IL, IN, KS, LA, ME, MD, MI, MN, MS, MO, NE, NJ, NM, NY, NC, OH, OR, SC, UT and WV. ProSystem *fx* Planning supports other states via its built-in Generic State model, based upon user-provided information. Users can compute tax planning multiple scenarios simultaneously with detailed calculations and customizable reports. ProSystem *fx* Planning links directly to CCH's tax preparation products or it may be used on a stand-alone basis. ProSystem *fx* Planning costs $425.

Program Use/Data Entry — 5 Stars
ProSystem *fx* Planning opens to a spreadsheet interface that features pull-down menus and an icon-populated toolbar for easy access to program functions.
Navigation is fast, offering something for the "heads-down" keyboard users or for those who prefer to use Windows conventions and their mouse.

Kudos to the "great thinking department" for the "expand to detail" column — a special column in every worksheet. Each row of the worksheet has a box in the "expand to detail" column. If the box is marked, detailed sub-worksheet information may be viewed by clicking the marked box. Simple, fast and intuitive, this built-in feature may convert a lot of "heads-down" users.

Client data may be imported or manually entered via a spreadsheet-style grid that opens within the Main Worksheet, showing data for each case and allowing

entry of detailed information through 2006. Once imported or entered, ProSystem

tax calculations.

It also provides comprehensive deduction information with related calculations, including (the various) qualified plan contributions, itemized deductions, personal exemptions, and AMT allowables. ProSystem *fx* Planning calculates required federal and state estimated tax payments and thresholds for related penalty calculations. Users can produce federal and state estimated tax-payment vouchers. ProSystem *fx* Planning also has a built-in, user-selectable feature called AutoFlow, which allows for the automatic transfer of data from the initial year into future (columns) years. Users can turn AutoFlow on or off via the Tools icon (button) on the toolbar. The program's (worksheet) screens may be customized to tailor data input to a given user's needs and preferences. Such customization is available on a workstation-by-workstation basis. Thank you!

Reporting — 5 Stars
ProSystem *fx* Planning offers customizable reporting options with the ability to print and view side-by-side reports. It allows printing of comprehensive multi-year tax projections, including all sub-worksheets, tax estimates, plan summaries and plan reports. Reports are not available for previewing prior to printing.

Import/Export Capabilities — 4.5 Stars
ProSystem *fx* Planning fully integrates with and imports data directly from ProSystem *fx* Tax, but does not offer the ability to import data from other tax programs.

Help/Training & Support — 5 Stars
ProSystem *fx* Planning offers strong built-in Help via the F1 key as well as row-specific Help lookups, FAQs, Tool Tips and program updates that

can be accessed online via ProSystem *fx* on the Web. CCH offers traditional

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