

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

Planning Software

The Lacerte Tax Planner provides comprehensive federal and state income tax planning that features multiple-scenario and multi-year planning, allowing users to project future tax liabilities and provide clients with graphical reports that show how they can best minimize those liabilities. States supported include AZ, CA, CO, CT, GA, IL, IN, LA, MA, MD, MN, NJ, NY, OH, OK, OR and WI. The program also offers a generic state that includes common adjustments for each (generic) State, and includes all of the state-specific tax tables, standard deductions and exemption amounts. The Lacerte Tax Planner costs \$415.

Char Mano has been using Lacerte since 1990, which is what drove the firm to select the Lacerte Tax Planner. Mano's firm is a four-employee LLC that has been in business for about 16 years. The firm does approximately 350 individual tax returns per year in addition to a "boatload" of business/estates. Mano says the most beneficial aspect of the program is "the detailed analysis at a fraction of the cost of other programs with good transfer from the 1040 package to the tax planner." Mano also notes that the program has a lot of functionality that most users don't take advantage of.

Program Use/Data Entry — 5 Stars

The Tax Planner interface is easy to understand and navigate. It features traditional menus at the top, followed by an icon-populated toolbar, which is followed by a set of tax category tabs that open to windows where tax data entry can be performed. The category tabs provide access to a Summary view, followed by screens for detailed input of Income, Adjustments, Deductions/Exemptions, Tax, Credits, Other Taxes and Payment information. Within each category tab screen, the Lacerte Tax Planner provides a worksheet tree to the far left that lists each sub-worksheet that is linked to that particular tax data screen.

Lacerte Tax Planner screens are organized in a familiar row-and-column

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

To speed manual data entry, Lacerte Tax Planner features a Copy Column feature via the transfer of data to any other column in a worksheet. The Lacerte Tax Planner also supports the attachment of notes to any field. Up to 10 multiple-case scenarios are supported over as many as 10 years, with four basic types (or styles) of tax plans: Case/Year Analysis, MFS/MFJ Comparison, Difference Analysis, and Adjustment Analysis. Lacerte Tax Planner is very comprehensive and includes all planned law phase-outs, future changes to tax and deduction rates, IRA contribution

limits, and other items such as capital gains tax rates. An Inflation Rate feature for estimating items like standard deductions that are traditionally indexed by inflation is included. The program does not support non-resident state income tax calculations, but it does include a built-in diagnostics function, which alerts the user to carryover items or overrides within a tax plan.

Reporting — 4.5 Stars

Lacerte Tax Planner provides a variety of report templates together with the ability to create customized reports, featuring user-defined items such as headers, footers, cover sheets and instruction letters. Custom charts and graphs can also be created. Lacerte Tax Planner can generate reports in *.PDF format, allowing simplified e-mailing of plans to clients and integration with document management systems.

Import/Export Capabilities — 4.5 Stars

Lacerte Tax Planner integrates seamlessly with the Lacerte 1040 tax program. All 1040 tax data is transferred and is fully accessible via drill-down to detail.

Help/Training & Support — 5 Stars

The program includes an indexed, built-in Help utility with search, online support tools including FAQs, and toll-free telephone and e-mail-based technical support.

Lacerte also offers a variety of training programs, which include tutorials,

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

© 2024 Firmworks, LLC. All rights reserved