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Planning Software

Planner CS supports tax planning via comprehensive calculations for federal and all states with a tax (44 plus the District of Columbia). Planner CS also supports non-resident income tax calculations for CA, CT, IL, IN, MA, MD, MI, MO, NC, NJ, NY, OH, PA, SC and WI. It produces income tax projections for (up to) 50 Cases and 100 years of data. Planner CS Federal costs $500. Planner CS States costs $100 for the initial state, and additional states are $50 each (AL, AR, AZ, CA, CO, CT, DC, DE, FL, GA, HI, IA, ID, IL, IN, KS, KY, LA, MA, MD, ME, MI, MN, MO, MS, MT, NC, ND, NE, NH, NJ, NM, NY, OH, OK, OR, PA, RI, SC, TN, UT, VA, VT, WI and WV). Planner CS truly packs muscle with the ability to create many different side-by-side scenarios and related income tax computations. Forget about the force; feel the strength. Kudos to CSI.

Program Use/Data Entry — 5 Stars
Planner CS opens to a spreadsheet interface that is populated with menu buttons and an icon-populated toolbar that provides quick and intuitive access to the program's worksheets and functions. Data entry is a snap — it's easy to learn, and navigation becomes first nature with an organizational flow that makes tax sense. With rows to the left and columns to the right, data entry is fast and plans are created quickly. Planner CS separates data by category, including Income, Activities, Adjustments, Deductions, Other Taxes, AMT, Credits and Payments, with the main (initial screen) worksheet acting as the summary worksheet.

Screens that are similar in design to the main summary worksheet are made available for each of the individual categories. Users can drill down to supporting

detail worksheets by double-clicking on a specific populated cell or by using

Planner CS's (user-selectable) Watch Window splits the user's spreadsheet screen, allowing the user to quickly see the bottom-line effect of underlying data. The Watch Windows can be customized as well. Another program tool, the Result Finder, assists the planning process by calculating desired amounts for selected fields. This tool can be used in two ways. The first is Solve Mode, which allows the user to indicate a desired amount for a selected calculated field. The Result Finder then solves for the dollar value needed for one or two selected data-entry fields in order to achieve that desired amount. The second is Step Mode, which allows the user to see the effect that incremental changes in the values of one or two selected data-entry fields will have on a selected calculated field.

Reporting — 5 Stars
Planner CS has a built-in word processor that supports client communications and letters, and it links to MS Word, allowing the editing of text and graph documents directly into Word so headers, footers and letterhead can easily be added to reports. The program has a strong graphing utility, which makes the creation of illustrative bare, line and pie graphs a snap. Many professionals believe that when it comes to tax plans, "a picture is worth a thousand words." If clients don't understand tax lingo or what all those tax plan numbers mean, the use of graphs will help them get a grasp of the financial consequences of a tax plan very quickly.

Planner CS creates reports for each federal and state tab, showing all data rows and columns. It also allows for user customization of reports, with the ability to set up report templates. Once created, the customized report templates can be reused.

Import/Export Capabilities — 4.5 Stars

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of updates and user bulletins. Users can also access ARNE2, an online community of practitioners. Toll-free telephone support is available, along with a broad array of training options.

2005 Overall Rating: 5 Stars

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