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Tax Research Applications

The Total Kleinrock Office (TKO) bundle of tax research products is designed to integrate with ATX's tax products and is included in selected tax bundles from ATX. TKO, which is available on both CD and online to all subscribers, combines all of the tax research offerings of the vendor, including the Total Tax Guide, analysis of federal and state tax codes, employment tax resources, prior-year archives, unlimited W-2/1099 filing, tax bulletins and 40 hours of CPE credit. The system costs \$600, plus either \$42 or \$145 for shipping, depending upon selection of monthly or quarterly update CDs, respectively. A web-only version is not available. Four-user licenses can be purchased for an additional \$300.

Malvern D. Lusky, CPA, of Sugar Land, Texas-based The LuskyGroup (www.luskygroup.com)

says price and convenience are the driving factors that led him to select TKO. He appreciates the ability to do tax research on his own computer at his own time. "Often, I will take the disk with me when going to a client's office, especially out-of-town locations, in order to perform research on location," Lusky commented.

EASE-OF-USE/SEARCH ROUTINE – 5 Stars

As a web-based product, TKO opens within the user's web browser, providing a well-designed screen that displays available online research libraries, as well as Quick Links to recent tax bulletins, template year-end client letters, and special interest topics such as Katrina relief information. The center of the system displays the Federal Daily Tax Bulletin. The interface also includes tabs for accessing the TaxExpert Research function, Bulletins, Compliance materials and other functions.

Although the system does not provide a “quick search” function

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or using wildcards.

After performing the search, TKO provides a linked list of relevant documents. Within returned documents, the system offers links to cited materials (such as codes and regs). The searched for word, phrase or number appears highlighted within the document. When browsing a library or resources, such as the IRC or Treasury Regulations, TKO provides a table of contents for that resource. Navigation is intuitive, with ample buttons and links as well as forward and back navigation buttons, while also allowing use of web browser forward and back buttons.

CONTENT – 4.5 Stars

The primary component of Total Kleinrock Office is the Federal TaxExpert, which provides 25 volumes of analysis covering codes, regs, and more than 100,000 cases and rulings. The analysis is linked to the 20 libraries of primary source materials, which are also included with the system. Other core components include the Total Tax Guide, All States TaxExpert, Employment TaxExpert, ZillionForms (which has more than 11,000 forms and 20,000 calculating worksheets), unlimited e-filing of W-2s and 1099s, a collection of handbooks, federal tax bulletins, and 40 hours of CPE credit from 26 courses. Kleinrock has also added the Archive Library, Quick Answers Library and Complete Tax Library, the last providing reference information on filing forms 1040, 1041, 1065, 1120, 1120S, 990 and payroll taxes.

Supplementary offerings include current and proposed treasury regs; court actions and rulings; the IRS Penalties Handbooks; treaties; and IRS publications, rulings and procedures.

CUSTOMIZATION – 2.5 Stars

The online version of TKO offers minor customization functions through the web browser and a few nice amenities like the client letter templates. But while

the CD-based version of the program maintains a history of search activity that

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of documents and copying and pasting of documents.

SUPPORT & UPDATES – 4.5 Stars

TKO offers a comprehensive Help utility, even for the online version of the program. This Help system even provides tips on more effective search techniques and program operation. The online program is updated by tax professionals at Kleinrock as code changes and rulings happen, but since the program is not available as an online-only system, users are required to subscribe to either the monthly or quarterly updates.

SUMMARY

TKO is a comprehensive system that integrates well with ATX's tax preparation software, providing excellent analysis and primary materials, as well as a good selection of extras, such as free W-2/1099 filing, the ZillionForms collection and others. The cost of the system has increased from last year, but Kleinrock has added more libraries and other enhancements that continue to make the product a valuable resource for a moderate price, although greater customization capabilities and search scheduling would be welcome additions.

2006 Overall Rating – 4.5 Stars

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