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*From the August 2008 [Review of](#)
[Tax Planning Systems](#)*

ProSystem *fx* Planning is part of the ProSystem *fx* suite of products offered by CCH, a Wolters Kluwer business. Designed to work in conjunction with the vendor's tax preparation product, ProSystem *fx* Planning can also be used as a stand-alone product. ProSystem *fx* Planning offers both federal and state planning and future-year estimating scenarios.

Program Use/Data Entry — 4.5 Stars

Program navigating is easy. The main interface features a drop-down menu with function icons below. Data entry is done using input grids that are layered beneath the summary grids. The grids also offer an "expand to detail" option that allows you to pull up all supporting data that has been entered in sub-worksheets. ProSystem *fx* Planning can forecast up to 30 tax scenarios per plan, and up to four tax years. Calculations are performed in real time as data is entered so all corresponding worksheets are updated, as well. In addition to regular tax, calculations include AMT, Capital Gains Tax, Lump-Sum Distributions, Farm Income Averaging, Phase-Outs, and Federal Estimated Tax and Penalties.

Along with federal tax planning, state-specific information is included for the following states: AL, AZ, CA, CO, CT, GA, ID, IL, IN, KS, LA, MD, ME, MI, MN, MO, MS, NC, NE, NJ, NM, NY, OH, OR, SC, UT and WV. Also available is an option to set up generic city tax information or to add a state not already pre-configured. User-defined options allow you to add details not included.

ProSystem *fx* Planning contains several new program updates, including

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Plan Summaries, Plan Reports and Plan Estimates can all be slightly customized by choosing the columns you wish to display, along with page borders, footers and customized text if desired. However, there is no option to view reports prior to printing, nor can you save reports in different file formats.

Import/Export Capabilities — 4 Stars

As expected and as previously noted, ProSystem *fx* Planning completely integrates with the vendor's tax preparation product. For data import, simply choose the location from which you wish to import data: local, laptop or network. All data is easily shared between programs, globally updating files between. ProSystem *fx* Planning does not offer import or export options to other tax preparation products at this time.

Help/ Support & Training — 4.5 Stars

ProSystem *fx* Planning features a traditional Help system. Telephone support during regular business hours is included with the purchase of the product. The vendors' website also offers program updates, product release notes, FAQs and tutorials. The Getting Started Guide takes new users through basic system setup, entering new data and printing reports. Various seminars and product tutorials are offered as well.

Relative Value — 4.5 Stars

Priced at \$515 for a single-user, stand-alone license, ProSystem *fx* Planning is at its best when used in conjunction with the ProSystem *fx* suite of tax products. Besides the obvious benefit to current ProSystem *fx* users, an intuitive user interface and various customization options make this product worth considering if you're looking to expand your client services to include tax planning.

2008 Overall Rating: 4.5 Stars

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