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

The TaxWorks TaxPlanner is an add-on product designed to work with the vendor's tax preparation product. TaxPlanner includes federal tax phase-outs of current laws as well as inclusion of future tax laws.

**Program Use/Data Entry — 4.5 Stars**

The TaxPlanner program is located under the File option on TaxWorks' main menu (or can be used as a stand-alone product). It displays as a small grid on-screen, with a drop-down menu bar at the top and an icon bar below that offers shortcuts to system functions. TaxPlanner offers the ability to enter five separate tax scenarios for a quick comparison. Tax year and filing status are found at the top of the screen, with a column to the left for various categories, some of which include Ordinary Income, Schedule D, Adjustments to Income, AMT, and Non-Refundable Credits. Clicking on any of the categories will bring up a sub-worksheet

where you can enter detailed information for each category. Data entry offers easy tabbing between fields, and all data is updated in real time so worksheets display new totals as changes and additions are entered.

TaxPlanner does not include state-specific information for planning purposes, but a generic state worksheet is included that allows you to enter state detail as needed. New state worksheet additions and subtractions allow you to enter descriptions that will be displayed on your generic state worksheet. In the Preferences feature, you can enter an annual inflation rate to adjust for future planning. The Bridge function allows you to import data from prior and current year TaxWorks returns.

## Reporting — 3.5 Stars

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## Help/ Support & Training — 4 Stars

TaxPlanner contains a traditional Help system to assist new users. The program is very simple to use so training would probably be unnecessary. Phone and e-mail support is included with TaxWorks, which likely applies to TaxPlanner as well.

## Relative Value — 4 Stars

The TaxWorks TaxPlanner is a basic tax planning program that is truly best suited to users of the vendor's tax preparation software. Though basic in structure, TaxPlanner is easy to use and can assist with discovering future tax liabilities for clients. The stand-alone program is currently available for \$225 for new users, with a list price of \$295.

## 2008 Overall Rating: 4 Stars

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