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From the January 2006 Issue

It may be an over simplification to say that all clients are different, but this is one of the reasons that tax preparation can be challenging. Couple this diversity with an ever-changing tax code, and tax professionals often find themselves in need of a professional tax research system. Tax research products have evolved considerably over the past decade, from desktop libraries to CD-based systems, and finally to web-based systems.

While traditional CD-based research systems are still a primary resource for most tax professionals, their web-based siblings are rapidly catching up, in large part due to the advantages that web-based systems can offer. Foremost among these benefits is the automatic updating of the program by the vendor. Since users access information over the Internet, the actual databases of research and analysis are located on the company's web servers, which are periodically added to or edited by professionals on that end. No more manual CD updates, no more making sure the right CD is being used, and no more shipping and handling fees.

The move toward web-based research has also resulted in an expansion of research-related offerings, such as some research vendors offering daily and weekly tax news alerts and bulletins, which generally are available through the research program or can be delivered by e-mail. Many CD- and web-based systems have also seen noted improvements in integration with tax systems, improved production functions such as saving searches and documents, and increased search efficiency.

For many firms, it is enough to simply maintain up-to-date primary source

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can become critical to the effectiveness of their client service. The product reviews that follow identify key areas of content and use for tax research products.

Ease-of-Use/Search Routine explores navigation features, including accessibility of primary search tools and functions, and the manner in which research tasks are generally performed and how results of these searches are presented to the user.

Content identifies the research libraries available within a program, including primary federal and state sources, analysis and news content.

Customization covers the options available for users to modify a program to better suit their needs, whether through sorting and filtering, personalized research home pages, saving of personalized search lists or other options.

Integration/Output capabilities of a research system can increase efficiency during tax season. This section observes the ability of the software to work with tax preparation and write-up programs, as well as the ability to attach or link saved research results to appropriate client files. Additionally, the output capabilities of a program can be important. Therefore, this section also addresses print, export and collaboration options.

Support & Updates are different with every vendor. Most of these programs are web-based, so manual updates are not required. But for CD-based systems, keeping libraries up-to-date is crucial. This section also looks at support options within the system. □

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[BNA Tax Management — Tax Management Library](#)

BNA offers both an online and CD-based version of its Tax Management Library, which includes reference and guidance collections for federal, state and foreign taxation, estate/gifts/trusts, and a tax practice library of analytical materials and productivity tools.

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[CCH, A Wolters Kluwer Business — Tax Research NetWork](#)

CCH's Tax Research NetWork (TRN) provides a wide array of content available in modules, with primary source materials, expert analysis, legal opinion and tax news.

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[CFS Tax Software — Tax Research](#)

CFS Tax Software offers online and CD-based research programs for federal tax, audit and collections, and a California-specific reference library.

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[PPC — Federal Tax Compliance Service](#)

The Federal Tax Compliance Service (FTCS) is PPC's comprehensive CD-based collection of tax return preparation guidance and

practice aids.

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Tax Analysts — Web Services

Research

Tax Analysts offers a variety of tax research options, including CD, DVD and web-based research systems.

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Tax Planning Software 2005 —

Executive Summary

We live in a time of constant tax change, characterized by multiple tax acts being legislated in a single year. Recent tax legislation includes the American Jobs Creation Act of 2004, Working Families Tax Relief Act of 2004, Jobs and Growth Tax Relief Reconciliation Act of 2003, Job Creation and Worker Assistance Act of 2002, and the Economic Growth and Tax Relief Act of 2001.

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