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Formerly under the Creative Solutions brand, which is now part of Thomson Tax & Accounting, Planner CS is part of the CS suite of tax, accounting and practice management programs. Planner CS provides individual income tax planning for federal and all states with an income tax and also supports non-resident income tax for most states. Planner CS gives users the power to create and compare an unlimited array of tax scenarios for any number of years forward, as well as diagnostic and reporting tools. The system costs $550 for the federal-only version. One state can be purchased for $125 or an all states (and D.C.) package is available for $250.

Program Use/Data Entry — 5 Stars
Planner CS initially opens into a mostly blank screen that allows access to creating new clients, opening existing ones, reporting and a few other functions that are available from icons across the top of the window. The program shares a similar interface to all of the other programs in the CS suite, with most program functions available after opening a client from the client selection window, which provides sort and search functions, as well as a preparer filter. With a spreadsheet as its primary component, the data-entry interface is impressive, displaying all Alternatives (scenarios) and each of the years in the client plan as columns, with each of the tax variables as rows. A selection of buttons provides quick access to general sections, including Main, Income, Activities, Adjustments, Deductions, Other Taxes, AMT, Credits and Payments.

When creating a new client plan, the user sets the number of scenarios for the number of years to be estimated. Planner CS can support an unlimited number of scenarios and plans. The plan data-entry screen starts out in the Main plan area on the Summary tab, showing filing status, exemptions claimed, income, adjustments,

regular tax, AMT, credits and other top line items, while additional client plan-

Capital Gains/Loss line brings up the data entry for that type of income. Users can then drilldown further to Passive Short Term G/L, Carryovers, Section 1231 Gain or distributions. This interface is outstanding, providing unparalleled intuitiveness and ease-of-use that gives quick access to extreme detail, but also allows users to produce quick, rough plans by entering simple or estimated data on top level summaries. Users can easily make changes to individual data fields, or can apply a percentage or dollar amount change across several or all years. All data is immediately calculated and flows to all worksheets and across to the state planner. Planner CS also has customizable Watch Windows that keep summary data viewable while making changes to specific worksheets.

Reporting — 5 Stars
Reporting functions include customizable client-ready documents with full-color charts and graphs. The system's word processor makes editing of client letters and other reports very simple, and offers integration with Microsoft Word, which further enables the use of headers, footers and firm letterhead. Summary and detail reports can be viewed or printed on-screen, and professionals can also set up report templates.

Import/Export Capabilities — 5 Stars
Planner CS offers complete integration with UltraTax CS and FileCabinet CS for paperless document management, and enables the import of data from the GoSystem tax application. As noted previously, the program's integration with Word contributes to its report and letter customization capabilities and allows for easy output into Word formatted documents.

Help/Training & Support — 5 Stars
Comprehensive Help and assistance features are readily available within Planner CS, with a traditional Help index, right-click functions and context-specific Help and

instructions. The program also includes built-in links to research websites and

client-ready deliverables that are easily customizable and can include charts and graphs to aid in communicating a plan to a client. The system's thorough integration with UltraTax CS makes it an absolute ideal application for firms using this tax system, but it can also operate as a stand-alone system, delivering outstanding planning capabilities.

2007 Overall Rating: 5 Stars

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