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## Planning Systems

### Lacerte

Tax Planer is part of the Lacerte Tax preparation suite of products from Intuit. Lacerte Tax Planner can also be used as a stand-alone system. Using Lacerte Tax Planning, you can easily prepare multiple year tax scenarios based on both current and inflation-adjusted future income levels.

#### **PROGRAM USE/DATA ENTRY –**

Lacerte Tax Planner deftly handles calculations for both federal and state tax liability with state code included for AZ, CA, CO, CN, GA, IL, IN, LA, MD, MA, MN, NJ, NY, OH, OK, OR, and WI. A generic state template is also included which you can customize to represent any state not included in the product.

Other calculations included with Lacerte include alternative capital gains, tax phase-outs, farm income averaging, AMT, self-employment and lump-sum taxes, contribution limits, and new tax laws for the current year. Lacerte Tax Planner can be accessed from the Lacerte Tax preparation software, as well as independently, depending on your circumstances. For those using other Lacerte products, you can easily access current clients from within the system, or just enter new client data directly into Lacerte Tax Planner.

The main user interface of Lacerte Tax Planner features a drop-down menu bar at the top of the screen, with a toolbar directly below which provides access to system functions. A series of tabs provide access to specific spreadsheet categories such as Main, Income Adjustments, Tax, Credits, Deductions/Exemptions, and Other Tax and Payments. Entering data into the main spreadsheet will update all related sub-worksheets immediately.

Lacerte Tax Planner allows users to choose from four types of tax plans which

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tool will alert you to any potential red flags regarding erroneous data entered into the system.

### **REPORTING –**

Lacerte Tax Planner offers excellent reporting capabilities, with several plan report variations available. Report templates offer solid customization options, including just accessing the new report option, and choosing report filters from the list of items available. Reports are professional in appearance, and you can easily change fonts and background colors for more personalized options. Reports can also be previewed on screen prior to printing, and all reports produced by Lacerte Tax Planner can be saved as PDF files as well.

### **IMPORT/EXPORT CAPABILITIES –**

Lacerte Tax Planner easily integrates with Lacerte Tax Preparation products, the Lacerte Document Management System, and all other QuickBooks products, making it especially valuable for current QuickBooks users.

### **HELP/SUPPORT/TRAINING –**

Like all Intuit products, Lacerte Tax Planner contains a solid Help system with the Tax Planner. Toll-free telephone support is available during regular business hours, and access to the knowledgebase is available at any time. You can also access online support via email, as well as join the Lacerte Tax community, where information is freely shared among users. Training classes are also available via Intuit Academy.

### **RELATIVE VALUE –**

Lacerte Tax Planner is currently available for \$655, which includes an annual

maintenance fee. In subsequent years, users will only pay the maintenance fee,

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