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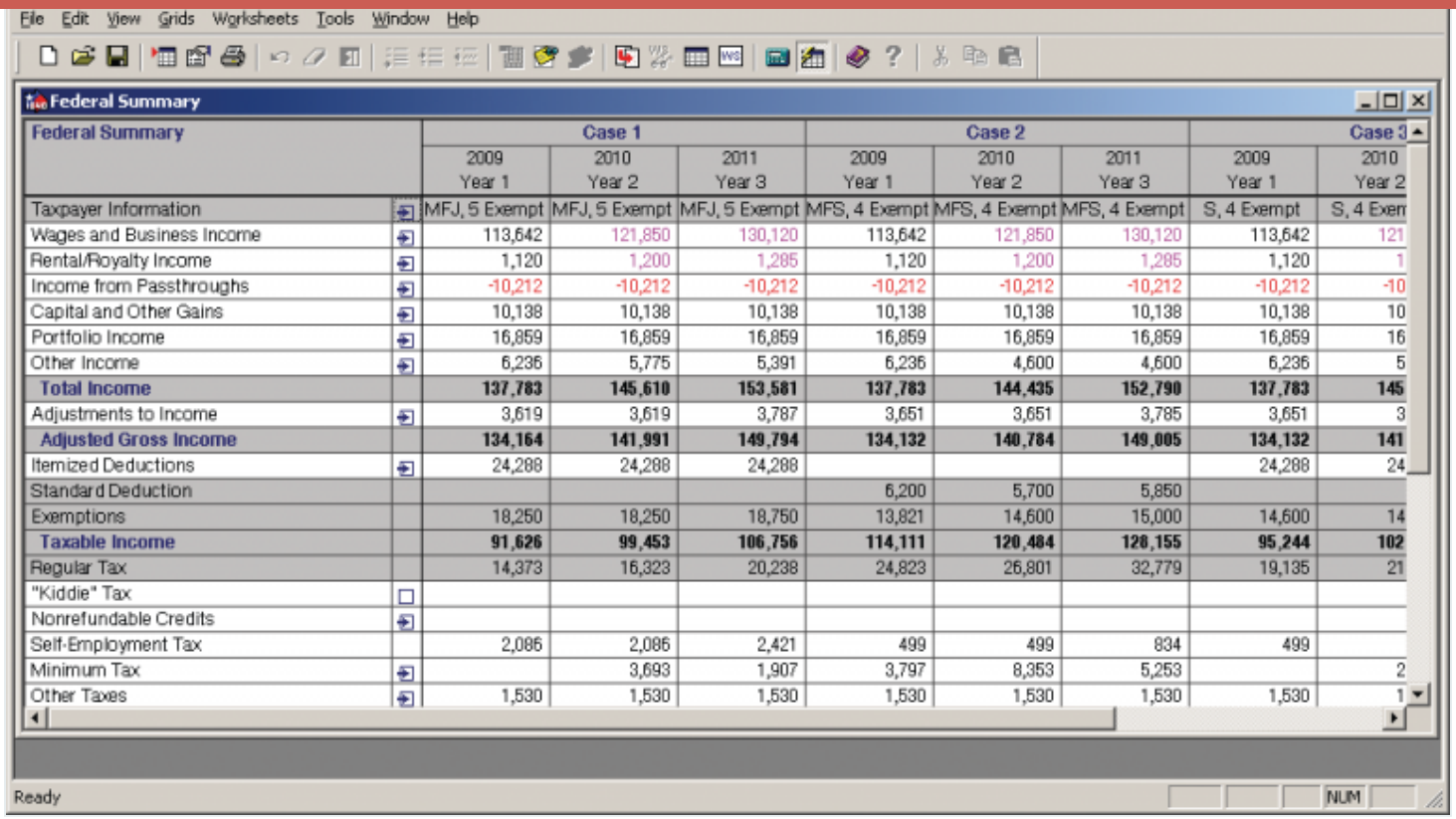

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Federal Summary

Federal Summary	Case 1			Case 2			Case 3	
	2009 Year 1	2010 Year 2	2011 Year 3	2009 Year 1	2010 Year 2	2011 Year 3	2009 Year 1	2010 Year 2
Taxpayer Information	MFJ, 5 Exempt	MFJ, 5 Exempt	MFJ, 5 Exempt	MFS, 4 Exempt	MFS, 4 Exempt	MFS, 4 Exempt	S, 4 Exempt	S, 4 Exem
Wages and Business Income	113,642	121,850	130,120	113,642	121,850	130,120	113,642	121
Rental/Royalty Income	1,120	1,200	1,285	1,120	1,200	1,285	1,120	1
Income from Passthroughs	-10,212	-10,212	-10,212	-10,212	-10,212	-10,212	-10,212	-10
Capital and Other Gains	10,138	10,138	10,138	10,138	10,138	10,138	10,138	10
Portfolio Income	16,859	16,859	16,859	16,859	16,859	16,859	16,859	16
Other Income	6,236	5,775	5,391	6,236	4,600	4,600	6,236	5
Total Income	**137,783**	**145,610**	**153,581**	**137,783**	**144,435**	**152,790**	**137,783**	**145**
Adjustments to Income	3,619	3,619	3,787	3,651	3,651	3,785	3,651	3
Adjusted Gross Income	**134,164**	**141,991**	**149,794**	**134,132**	**140,784**	**149,005**	**134,132**	**141**
Itemized Deductions	24,288	24,288	24,288				24,288	24
Standard Deduction				6,200	5,700	5,850		
Exemptions	18,250	18,250	18,750	13,821	14,600	15,000	14,600	14
Taxable Income	**91,626**	**99,453**	**106,756**	**114,111**	**120,484**	**128,155**	**95,244**	**102**
Regular Tax	14,373	16,323	20,238	24,823	26,801	32,779	19,135	21
"Kiddie" Tax								
Nonrefundable Credits								
Self-Employment Tax	2,086	2,086	2,421	499	499	834	499	
Minimum Tax		3,693	1,907	3,797	8,353	5,253		2
Other Taxes	1,530	1,530	1,530	1,530	1,530	1,530	1,530	1

Ready NUM

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ProSystem *fx* Planning provides comprehensive scenario-based income tax planning features in a system that can be used as a stand-alone program or as an integrated part of the ProSystem *fx* Suite of professional tax and accounting products. The program includes support for all tax treatments, including regular, AMT and capital gains, with extensive limitation and carry-forward calculations. It can be used for all states, but comes with pre-configured books with state tax rates, deductions, exemptions and credits for 27 states.

Basic System Functions

Initial setup functions are simple, with basic information forms providing for entry

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worksheets, a calculator and the AutoFlow feature.

Data entry is available in spreadsheet mode with data flowing to applicable worksheets and the ability to quickly view those worksheets on-screen. The spreadsheet views display all years of a plan side-by-side. Expandable boxes are also available on many of the input grids, allowing drilldown access to more specific data input. Calculations are performed as data is entered, allowing users to quickly test hypothetical data and see the results on projected state and federal tax liabilities. The program supports any number of concurrent users, with features to prevent overwriting of data and options for user-level security. 4.5

Core Tax Planning Features

ProSystem *fx* Planning allows users to forecast up to 30 separate tax scenarios per plan, with up to four years of projections, including prior years. The system includes complete federal tax calculations, including regular, AMT and capital gains taxes, penalties for underpayment of estimated tax, lump-sum distributions, premature distributions from retirement accounts, and farm income averaging. With a plan variance feature, users can easily pinpoint differences in plans by percentages or dollar amounts.

Additionally, the system can perform complete calculations of the deductibility of tax-deferred savings contributions, phase-outs for itemized deductions, personal exemptions and AMT, and MFJ-MFS comparisons, with integrated state tax calculations that include CA, NY and generic AGI. In addition to federal, it comes with preconfigured tax rates, credits, exemptions and deductions for AL, AZ, CO, CT, GA, ID, IL, IN, KS, LA, MD, ME, MI, MN, MS, MO, NE, NJ, NM, NC, OH, OR, SC, UT and WV. A generic planning tool can be customized for use in planning for other states or local taxes. 4.75

Reporting

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output to ProSystem *fx* Engagement binders and to PDF and ProSystem *fx* Document if users have an optional end-user provided Adobe PDF printer driver. 4

Import/Export/Integration

ProSystem *fx* Planning provides direct integration with CCH's tax and engagement systems, and information can be imported from the tax system or from GainsKeeper Pro. Additional import options are not offered. CCH offers an extensive research platform that can be used independently of Planner. Data export is limited to the integration with the vendor's tax, engagement and document management systems, along with the ability to print to PDF using almost any PDF printer (not included). 4

Help/Support

ProSystem *fx* Planning supports all modern versions of Windows. Built-in assistive features include field and row-specific Help, a traditional Help index and a tutorial, plus several links to CCH's support website, which offers extensive options for product documentation, downloadable system updates, a knowledgebase, and checking firm account and order information. Live technical support is included with program pricing. 4.75

Summary & Pricing

ProSystem *fx* Planning is best suited to firms using CCH's tax, engagement and document management systems, although as a stand-alone system it also provides comprehensive, yet simplified and quick production of tax planning scenarios. While ProSystem *fx* Planning handles challenging state and federal calculations, the lack of sophisticated custom reporting tools and client-ready graphics means that many boilerplate client communications will have to be created manually using Microsoft Office. The program costs $585 for a single-user license.

2010 Overall Rating 4.5

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