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**Best Fit:** Firms using the Thomson Reuters CS Professional Suite that can benefit from the integration between Planner CS and the suite's tax preparation and document management products.

### Strengths

- Capable to producing projections for an unlimited number of years
- Integration with several components of the CS Professional Suite
- Many options for customizing reports and graphs
- W-4 Calculator

### Potential Limitations

- No option to export reports to Excel

The CS Professional Suite from Thomson Reuters offers an integrated set of tax, accounting, and practice management applications. Planner CS tightly integrates with the suite to provide tax projections for a virtually unlimited number of years and scenarios.

### Basic System Functions: 4.75 Stars

Planner CS opens into a customizable welcome screen with a list of recently used plans, links for support and research, as well as other program information. The layout of Planner CS, with its menus, toolbar, and navigation through tabs, will be very familiar to users experienced with UltraTax CS and other programs in the CS Professional Suite.

The program's planning screen's are in a table format with years and scenarios shown side-by-side. There is an option to turn automatic calculations on or off. Like

other products in the CS Professional Suite, fields are color coded. White cells are

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### **Core Tax Planning Features: 5 Stars**

Planner CS can create tax projections for virtually unlimited number of years with 50 alternatives (scenarios) for each year. In addition to Federal tax projections, when licensed, the program performs resident and nonresident state tax calculations for all states including the District of Columbia.

The program has a watch window so that certain variable amounts (such as total federal tax) can be monitored at the bottom of the screen no matter what input windows the user has open. Planner CS has a tool called the Result Finder which automatically varies the dollar amount of one federal data entry field until it produces a desired result in a selected federal calculated field.

One of the unique features of Planner CS among the products reviewed is its W-4 Calculator. This features calculates withholding allowances and can print Form W-4 for up to four employers.

### **Reporting: 4.75 Stars**

Planner CS has several options for customizing reports and graphs, including a layout designer for modifying details like fonts and text sizes for all aspects of reports, such as the title, rows, header and footer. When printing, the user can select a report layout and choose the alternatives and years to print. Reports can be previewed prior to printing. The program also prints IRS Form 1040-ES and W-4.

### **Import/Export/Integration: 5 Stars**

Planner CS can import client data from the two Thomson Reuters tax preparation systems: UltraTax CS and GoSystem Tax RS. Reports can be sent directly from Planner CS to FileCabinet CS, which can then also push those reports to the Thomson Reuters

portal product, NetClient CS. Reports and letters can be saved as PDF, RTF, and Word

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included in product pricing. Users can download product licenses and updates through the CS Connect button on the menu. Thomson Reuters offers training courses and consulting services for Planner CS, with more information available at <http://cs.thomsonreuters.com/training>.

## Summary & Pricing

Planner CS is a powerful tax planning product for firms with clients who have complex tax situations and multistate issues. Users of the CS Professional Suite will find time savings and efficiency gains because of the integration. When not attached with UltraTax CS, the standalone current price is \$710 for the Federal application, \$200 for one state, and \$320 for all states.

## 2013 Overall Rating: 4.75 Stars

Software • Tax Planning

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