



ProSystem fx® Planning

Streamline Tax Planning Engagements and
Quickly Review Multiple Tax Scenarios

CCH is Advancing Business with Best in Process™ Solutions, Delivering Faster Answers and Better Results.

Enhance Your Productivity

ProSystem fx® Planning simplifies your tax planning and helps you become more productive. Your staff will be up and running in no time thanks to tutorials, tooltips and a convenient help system that makes it easy to set personal preferences for each workstation and password-protect sensitive files.

This year, start your planning with base-year amounts already set up, by importing pertinent data directly from ProSystem fx® Tax. Not only will your staff be able to include detail transactions or amount totals, they will benefit from:

- **Expanded Years** — Now up to 10 years: Prior year, current year and 8 projection years.
- **Forecasts** — Forecast up to 30 tax scenarios per plan.
- **Plan Variance Option** — Easily pinpoint plan differences by percentage or dollar amounts.
- **Automatic Calculation Feature** — Simply enter data for instant calculation.
- **New Navigation Bar** — Quickly navigate directly to the input grids and tax worksheets.
- **Spreadsheet-Style Interface** — Enjoy an intuitive, easy-to-use interface based on standard Windows® functions and features for a reduced learning curve. Use the Expand boxes available on many input grids to drill down to more specific data input.
- **Integration** — Take advantage of seamless integration with ProSystem fx Tax.
- **Calculator** — Conveniently perform calculations onscreen.
- **PDF Printing Options** — Easily print your plan forecasts such as worksheets, input grids, plan summaries, plan reports and estimates to a ProSystem fx® Engagement binder.

Comprehensive Tax Capabilities

Save hours of valuable time with ProSystem fx Planning's comprehensive features, such as:

- Complete federal tax calculations including:
 - Regular tax.
 - Alternative Minimum Tax (AMT).
 - Capital gains tax.
 - Underpayment of estimated tax penalty.
 - Tax on lump-sum distributions.
 - Tax on premature distributions from IRAs or other retirement plans.
 - Farm income averaging tax.
- Complete calculation of the deductibility of IRA, SIMPLE, SEP, and KEOGH contributions.
- Phase-out calculations for itemized deductions, personal exemptions and AMT exemption for high-income taxpayers.
- All filing status calculations.
- Extensive limitation and carryforward calculations.
- Complete federal estimated tax and penalty calculations, including the ability to produce estimate payment vouchers.
- Integrated state tax computations as follows:
 - Calculation of CA, NY and generic AGI state tax based on pre-configured or user-defined data.
 - Pre-configured state tax rates, deductions, exemptions and credits 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.

