THOMSON REUTERS

TIPS, TRENDS, AND CONNECTIONS FOR USERS OF THOMSON REUTERS SOFTWARE

SOLUTIONS

ISSUE 3 | 2012

IT'S JUST THE BEGINNING

Data mining is one of the latest tools that firms can use to push the boundaries of tax and accounting services.

NEW RELEASES
FIND OUT WHICH PROGRAMS JUST GOT MAKEOVERS

ONLINE SUPPORT
OUR NEW HELP & HOW-TO CENTER IS ALL ABOUT YOU

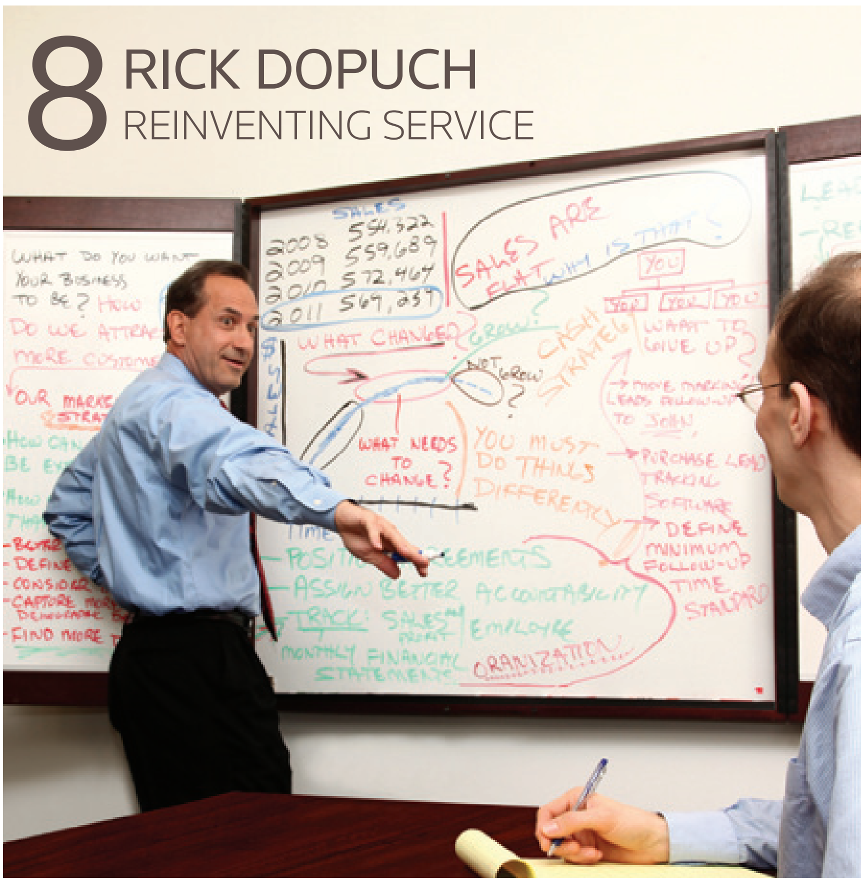
HOW RICK DOPUCH IS REINVENTING SERVICE

THOMSON REUTERS

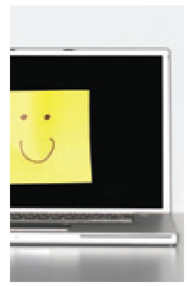
SOLUTIONS

ISSUE 3 | 2012

FEATURES



ALSO INSIDE



Questions or feedback? Email your thoughts to **Solutions@ThomsonReuters.com**.

Join our online users' forum, at **CS.ThomsonReuters.com/Community**.

Find more on the web, at **CS.ThomsonReuters.com**.

CS.ThomsonReuters.com/Facebook

CS.ThomsonReuters.com/Twitter

CS.ThomsonReuters.com/YouTube

CS.ThomsonReuters.com/LinkedIn

Solutions is published by the Tax & Accounting business of Thomson Reuters, 7322 Newman Boulevard, Dexter, MI 48130; **800.968.8900**. Printed in the United States.

Where "New" Comes From: SYNERGY 2012

I still remember watching my oldest son slide behind the wheel of his first car. It was a few years ago now, but it's as vivid as ever in my memory. Here was the same kid who had been leaving his shoes all over the house for the last several years, the same old car that had been schlepping our groceries for what seemed like forever. But when they were combined out there in our driveway, they turned into something new. A whole new outlook, new freedom, new possibilities that weren't there before. It was both fun and frightening, and a compelling example of synergy in action.

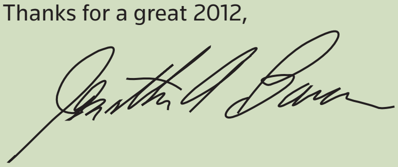
Synergy is something you heard a lot about if you attended the 32nd Annual SYNERGY Users' Conference for Professional Tax and Accounting Firms. To me, it's much more than a buzzword. It's where "new" comes from. It's about choices that complement each other, about turning different perspectives into new possibilities. I think it's an exciting new way to approach the Users' Conference, and judging by our record attendance, I'd say it was a rousing success.

But let's be frank: synergy is not new. Anyone who has ever used an integrated software suite, checked their email on a smartphone, or eaten a peanut butter and jelly sandwich has experienced its power first-hand. It's evident in the combination of portal technology and the mobile web that has turned your iPads, iPhones, and other mobile devices into seamless windows to data and applications. It's behind the new capabilities in NetClient CS, including an improved flat navigation structure, the ability to sign documents electronically, and the ability to perform a wider variety of tasks anytime, anywhere.

But perhaps the best–and oldest–example of synergy in action is the Users' Conference itself, and the countless other gatherings like it that have been held over the years. Every year, it reminds me that anytime-anywhere will never replace here-and-now. Every conference brings new ideas, new enthusiasm, and yes, new synergies to the profession. If you attended, I hope you found it as enlightening and refreshing as I did.

I'd like to thank the attendees of this year's SYNERGY conference. While our own first cars may be ancient history, we're still driving the new ideas that make the profession more productive, more profitable, and more exciting with every new season.

Thanks for a great 2012,



Jon Baron
Managing Director, Professional, Tax & Accounting,
Thomson Reuters

Catch Jon's 2012 Users' Conference keynote address at **CS.ThomsonReuters.com/Solutions**.

NEWSLINE

CS Professional Suite® & Enterprise Suite®

ACCOUNTING & AUDITING

- Accounting CS™
- Accounting CS Client Access
- AdvanceFlow™
- Engagement CS®
- Workpapers CS™

DOCUMENT MANAGEMENT

- FileCabinet CS®
- GoFileRoom®

MOBILE APPS

- ARNE
- Mobile CS®
- myPay Solutions®

PAYROLL

- Accounting CS Payroll
- myPay Solutions®

FIRM & WORKFLOW MANAGEMENT

- Practice CS®
- FirmFlow™

TAX

- UltraTax CS®
- GoSystem® Tax RS
- Fixed Assets CS®
- Planner CS®
- ToolBox CS®

CLOUD COMPUTING

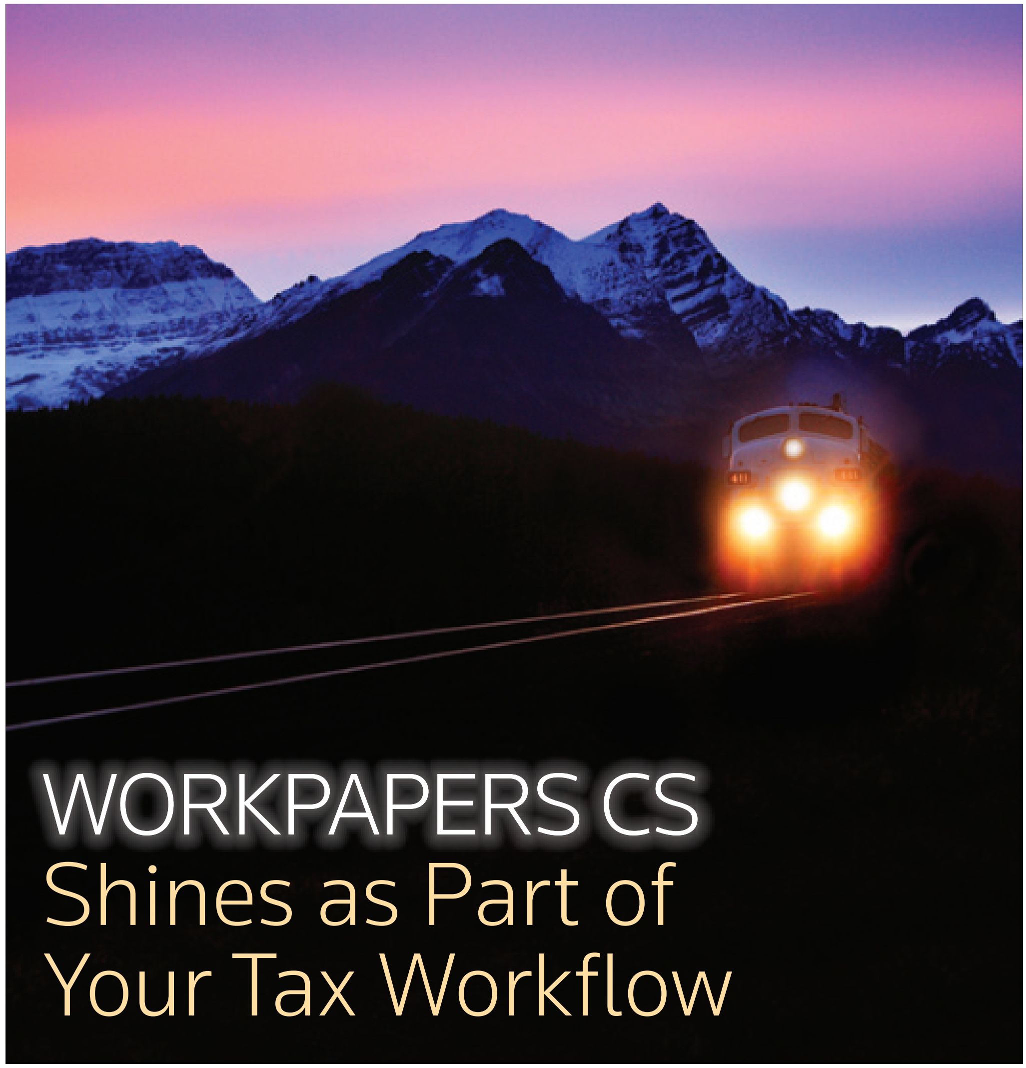
- SaaS for CS Professional Suite
- Virtual Office CS®

WEBSITE DESIGN

- Web Builder CS®

CLIENT PORTALS

- NetClient CS®



WORKPAPERS CS Shines as Part of Your Tax Workflow

Workpapers CS offers a completely new way to manage your source documents and workpapers, with real-time collaboration and powerful tools for managing documents and data from a variety of sources.

The program incorporates a variety of features that make it easier to manage documents and data, perform trial balance calculations, and collaborate with other firm staff members. Workpapers CS can be an invaluable asset to your tax workflow process, thanks to the following features:

- The ability to process all types of live workpapers and to link balances to the trial balance.
- Instant collaboration, with the ability to share workpapers, comments, and instructions with staff in real time.
- Simplified workpaper organization, assignments, and routing for digital review and fast processing.
- Efficient, flexible trial balance reporting and financial statement editing capabilities.

Product Manager Melissa Yard shares her thoughts on the program, saying, "Workpapers CS will cut down on the time the accountant has to spend with working papers by housing accounting and tax documents. A key feature of this program is the user's ability to link the numbers from the trial balance to the working papers so they refresh automatically when the work papers are rolled forward or adjusting entries are made. It just saves so much time and effort."

Learn more about Workpapers CS at **ThomsonReuters.com/WorkpapersCS**.

Accounting CS
Is Now Even Better

Thanks to your suggestions, an extensive list of new enhancements and software changes were included in the November 2012 release of Accounting CS and Accounting CS Payroll, which was made available for download earlier this month. Here's a preview of what you can look forward to in this new release. For complete details, check out the 2012.2.0 Release Bulletin.

Accounting CS and Accounting CS Client Access: The new Accounts Receivable feature, which doesn't require additional licensing for Accounting CS users, provides your staff and clients with an intuitive system to manage their revenue and customer invoices. The automated workflow reduces the amount of time and data entry needed, since data seamlessly flows to all areas of the program and is updated in real time. The Accounts Receivable service allows you to:

- Print invoices directly from the data entry screen.
- Make your invoice and payment data entry workflow smooth and efficient, with minimal keying of data required.

Accounting CS has been enhanced to allow import of transactions, deposits, journal entries, and adjustments. This will help you populate new clients with a wide range of source data and let you import periodic transactions from third party sources. Also, amortization tables exported from ToolBox CS and TValue™ software can now be linked to an Accounting CS vendor, which provides for efficient data entry and auto-populates the principal and interest portions of entries.

Accounting CS Payroll users have a new batch check entry customization option, allowing firms to control the default bank account, default sort order, and information displayed in the data entry grid. Users will also see new warning messages alerts to employees with duplicate social security numbers.

To see a more complete list of Accounting CS enhancements, visit the Support page (login required) at **CS.ThomsonReuters.com/Support** and click **Product Enhancements**.

GET READY FOR A PROFITABLE 2013 with Year-End Training

Now is a great time to get your office ready for a profitable 2013. To help you and your staff prepare for the year ahead, we're offering the following classes:

- 2012 Improving Efficiency with Your **E-File Process**
- 2012 Year-End Update & Productivity Training—**UltraTax CS**
- **New this year!** 2012 Year-End Training—**NetClient CS**
- 2012 Year-End Update & Productivity Training—**Practice CS**
- 2012 Year-End Procedures—**Accounting CS**
- 2012 Year-End Update & Productivity Training—**Accounting CS Payroll**
- 2012 Year-End Update & Productivity Training—**Payroll CS & Payroll Compliance**

Register at least two weeks in advance and save $25 off your registration. You can also send a fourth attendee free after three paid registrations. For more information or to register, visit **CS.ThomsonReuters.com/YearEnd** or call **800.968.8900**.

EXCITING CHANGES TO **NETCLIENT CS**

On October 24, 2012, we released an update to NetClient CS to help streamline and simplify navigation and communication with your clients.

Based on your suggestions and feedback, the following enhancements were included in this release:

- **Updated Navigation**—It now takes fewer clicks to access documents, giving you and your clients a more user-friendly experience. For instance, a client with multiple entities will no longer have to look in a different section of the portal for each entity—they simply select the entity they want from a list on the side of the screen.
- **Simplified Document Organization**—Any documents previously delivered to clients through FileCabinet CS/Document Presentation module or UltraTax CS/MyTax are now available in a single location called Documents, which eliminates the need for clients to look in multiple areas of the portal for their documents. You can also easily change the names of folders and the folder structure in Documents.
- **New Messaging Center**—This new feature allows your firm to alert NetClient CS users to items that require their attention. Your clients will see the messaging center as soon as they log in to NetClient CS.

We have resources such as email templates and videos available for you to use as starting points when communicating the changes to your clients.

For more information about these resources, visit **CS.ThomsonReuters.com/Support/MarketingTools/NetClientCS.aspx**.

One Question, **Three Answers**

Every Thomson Reuters account representative works hard to take care of the firms he or she serves. But what makes those relationships click and tick? How do our account reps help drive their clients' success? And what drives our account reps?

To find out, we asked three team members,

"WHAT DO YOU LOVE ABOUT YOUR JOB?"

Pictured left to right: Mallory Curtis, Stephanie Harwick, and Tom Brundage.

Mallory Curtis, with Thomson Reuters since 2009: "The biggest thing for me is knowing our solutions are not only significantly impacting my clients' business but also their quality of life as a business owner. Partnering with them allows me the chance to provide them business guidance and resources they might not have had access to before. Plus, hearing their stories helps me improve myself because I'm learning something from them every day—whether they're a new customer or someone I've been working with since I started here. There's a lot of opportunity in the tax and accounting industry. It's an industry that's always evolving, and we all benefit by working together and sharing information about ways we can be more efficient and effective in what we do."

Stephanie Harwick, with Thomson Reuters since 2001: "I really enjoy learning about a firm and what their goals are, and then being able to offer the solutions Thomson Reuters provides that can help them move toward their personal and business goals. I love calling my firms after they've implemented the software and hearing about the success they've had landing a client or the time they've saved as a result. But I think what I love the most is building long-term relationships with my clients. When I attended last year's Users' Conference, it was great meeting clients face-to-face."

Tom Brundage, with Thomson Reuters since 1985: "The greatest satisfaction I get out of my work is helping firms achieve their goals and a work-life balance that would not be possible without effective processes. That means they can spend more time with their family or building their business. When firms report back to me that using our software has helped them increase their profits and eliminate inefficiencies—such as more accurately measuring the metrics that can guide them in letting go of clients that aren't profitable—it's really gratifying. It demonstrates how software can improve someone's business and their life."

PROFILE IN EFFICIENCY

What better way to show the benefits of UltraTax CS than profiling a firm that benefits from it? Meet Torosian & Walter LLP.

Based in Fresno, Calif., Torosian & Walter LLP has a staff of about 30 people during peak times. Gary Wolfe, CPA and the project manager who oversees the firm's tax-season processes and workflow, has been impressed with UltraTax CS from day one.

"As we evaluated UltraTax CS, the first thing we noticed was its user-friendliness," he says. "We brought a couple of our staff members who had never worked through a tax season before into the evaluation process. They said UltraTax CS made more sense to them than the program we had been using."

Before adding UltraTax CS, the firm already had Practice CS, NetClient CS, and FileCabinet CS in place. When third-party tax software no longer made sense, switching to UltraTax CS was easy.

The staff at Torosian & Walter appreciated how quickly they were able to get up to speed with UltraTax CS. According to Wolfe, the learning curve was simple. Plus, being able to easily access research and guidance from Thomson Reuters reduced the number of questions the staff needed to ask the firm's managers.

"We require our staff to look at the form and explain how their input affects it," says Wolfe. "I honestly feel the staff has learned much more this year than they ever have before."

The integration between UltraTax CS and other elements of the CS Professional Suite is another advantage. "As we put together our tax process this year, we noticed the amount of time we were saving with the integration," says Wolfe. "UltraTax CS personally saved me at least two hours a week during tax season, because everything was in one place—our CS Professional Suite of products—instead of in two programs."

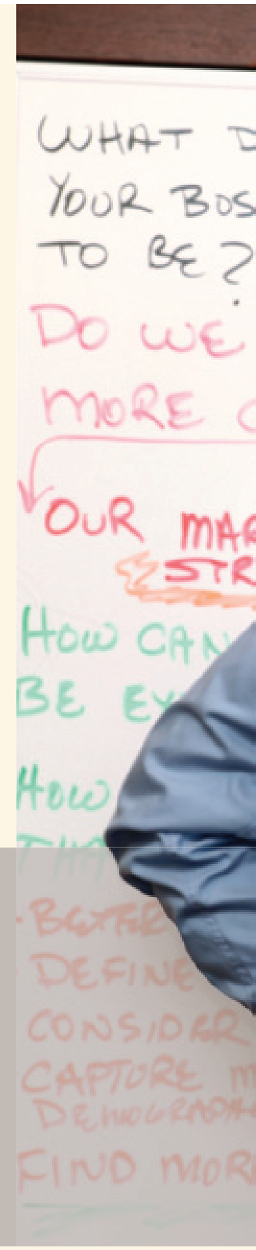
One of the UltraTax CS features Wolfe finds most valuable is that it makes it easy to comply with mandated e-file processes. "Because we're using integrated products, we've been able to move away from CD returns to go to client portals only. Being able to push returns from UltraTax CS directly into the NetClient CS portals saves us an enormous amount of time."

With so many benefits, it might seem like it would be difficult to name just one thing that made the switch to UltraTax CS worthwhile. But Wolfe doesn't hesitate to answer: "The time saved in the workflow process."

GET SMART

Learn more at **CS.ThomsonReuters.com/UltraTaxCS**.

Reinventing the Client-Accountant Relationship



This firm specializes in **going beyond tax and accounting services,** delivering a better model for profit and growth.

Business in Balance would rather you didn't think of them simply as a tax and accounting firm. Instead, the Chesterfield, Mo.–based company acts as a Back End Support Team™—or B.E.S.T.™

According to Client Services Manager Rick Dopuch, the firm's B.E.S.T. services include business coaching, monthly financial statements, tax strategy management and business tax return preparation. It also features something the firm calls Encouragability™, which defines the combination of encouragement and accountability the firm offers.

Business in Balance provides this package of services to about 90 business clients for a fixed fee that ranges from $250 to $6,000 per month. The firm also offers payroll processing and extended business development sessions for an additional fee.

Ultimately, everything the firm offers is designed to help small businesses grow and be more profitable.

"We actually spend more time talking about how companies can better operate their business in order to improve profit and growth than we do talking about their financial statements," says Dopuch. "But our monthly financial statements are a primary tool we use to manage our clients' tax strategy and help them make the best possible financial decisions."

> We're here to transform small business owners into highly effective managers, leaders, and entrepreneurs.
>
> *—Rick Dopuch*

FIRM FACTS

BASICS: Founded in 1987, **Business in Balance** is based in Chesterfield, Mo., and employs a staff of nine. The firm specializes in business growth coaching, business and personal income tax preparation and planning, financial statement compilation, payroll processing, and monthly bookkeeping services.

WEBSITE: The firm offers a wealth of information and resources, including a secure client portal created using NetClient CS, at **bnbalance.com**.

SOFTWARE: The firm relies on a number of Thomson Reuters tools, including UltraTax CS, FileCabinet CS, Practice CS, Accounting CS, Accounting CS Payroll, Fixed Assets CS, NetClient CS, and ToolBox CS.

> We spend three or four hours filling up a large white board with actionable strategies.
>
> *—Rick Dopuch*

A VISION FOR SMALL BUSINESS SUCCESS

The way Dopuch sees it, accounting, payroll, and tax services are available from a multitude of accountants. But very few really know how to coach clients toward successfully driving profit and growth.

"Our dream is to bring balance to small business owners while engaging their dreams," he explains. "As our clients' primary trusted advisor, we are committed to pursuing the process of transforming their small business while keeping score of the results."

Business in Balance's vision is to build a client-centered system of encouragement and accountability—Encouragability—while building a personal relationship that leads the way to balancing profit and growth.

"We work side by side with our clients to reduce their tax burden, improve their accounting systems and inspire them to balance profit and growth," says Dopuch. "We're here to transform small business owners into highly effective managers, leaders, and entrepreneurs."

The process Business in Balance uses to develop profit and growth starts with asking each client to do some homework. First, they read a book called "The E-Myth Revisited," which explores why so many small businesses fail and how to avoid those pitfalls. Then they answer 80 questions about themselves and their business.

According to Dopuch, the book helps clients shift their thinking toward working more on their business, while the questions help the firm identify problems the client might need help working on.

Next, a tax-saving strategy is set into motion and updated accounting systems are implemented. Business in Balance also meets with the client for a business development coaching session.

"We spend three or four hours filling up a large white board with actionable strategies and ideas for increasing profit and growth in their business," says Dopuch. "By the time they get back to their office, they have an encouraging email waiting for them with a

Sometimes, it's the little things that keep the team at Business in Balance focused on the primary goal of client service. One example: Each file has a color photo of the client—maybe even with his or her family—on the front. "It's a reminder that this isn't just a file," says Dopuch. "These are real people who are inside that folder, and it's our job to work as hard as we can for them."

picture of the white board action strategy we worked through together. Clients love that."

FROM THE INSIDE, OUT

The firm's concept of Encouragability has expanded to include Management Encouragability™, a process that urges clients to set aside time for developing new strategies and management duties that can increase growth and profit.

"We encourage and remind clients about their commitment to work on their business while they work in their business by sending emails and calling to check in on their progress," says Dopuch. "By focusing our clients on renewing vision, finding resources, creating better systems, assigning accountability to employees, and improving their products and services, they're much more likely to be successful—and they usually are."

FINDING SOLUTIONS THAT WORK BEST

Because of the amount of time Business in Balance spends working with clients initially, they are selective about the businesses they take on.

They're also particular about the tools they use in their own operation. Dopuch chose Thomson Reuters because he wanted efficient, integrated software and a strong electronic document management system.

"Practice CS has dramatically changed how we communicate with our clients, saving us time and frustration," he says. "We now have dozens of standard client letters that go out like clockwork based on the time of year and assigned contact categories. Our annual questionnaire and tax strategy reminder letter uses standard information, plus important custom-tailored information and instructions for each client."

Processing payroll using Accounting CS Payroll helps Business in Balance manage its clients' tax strategy efficiently. The firm can easily adjust client tax withholdings, salary, bonuses, and taxable fringe benefits as needed, without having to rely on an outside payroll company.

> "Our dream is to bring balance to small business owners while engaging their dreams."
>
> *—Rick Dopuch*

Dopuch is focused on his business, but equally devoted to his wife and two children. He's an art lover who collects works by Siegfried Reinhardt, and recently took up photography as a hobby.

HELP AT HAND

The idea of balance extends from his personal life to his professional life, where he acknowledges the importance of everyone's contributions.

"We have a systems innovation procedure that everyone participates in when changes are being considered," Dopuch explains. He believes you can't build a successful business without help from others, so he thanks the organizations the firm works with, PASBA and especially Thomson Reuters, and the firm's dedicated staff.

"I think what accounts for our success over the years is being driven by a continuous desire to learn and to serve our clients better tomorrow than we did today."

BEST PRACTICE

Practice CS has dramatically changed how the firm communicates with clients, according to Dopuch. Hear other professionals talk about the program at **CS.ThomsonReuters.com/PracticeCS**.

Selective Service

Business in Balance applies significant energy toward developing a unique package of services for every client. For that reason, the firm is selective about the clients it takes on.

"We generally don't work with start-ups, because the mortality rate for new businesses is so high," says Client Services Manager Rick Dopuch. "It would be a really poor business model for us to spend a bunch of time on start-ups only to have so many of them go out of business. It takes a little while for us to start making money on any of our clients because of our front-end time investment and our flat fee basis."

Dopuch has also found that businesses that have been in operation for at least three years tend to be better listeners. "They've already gone through discovering they don't know everything," he says, "so they're more willing to try the new ideas we present to them."

GET PERSONAL
In addition to the professional support offered by data mining, it can also help foster rapport with clients. The information in a client's file usually includes their birthday. Reaching out with good wishes is a simple way to grow personal connections.

DIG DEEPER

Data mining can help you provide proactive guidance to your clients.

According to Jordan Kleinsmith of the Enterprise product management team, there's a paradigm shift happening in the industry. "We're moving away from the idea of the tax return as the primary service rendered," he says, "and moving toward more proactive tax planning guidance for clients."

Kleinsmith asserts that there's a new set of clientele coming into focus, especially younger ones, who place the highest value on forward-looking advice and tax planning.

The latest tool to help you offer this kind of guidance? Data mining. Pulling specific details from a client's electronic file can give you targeted information to provide a new level of service.

PREDICTING THE FUTURE

"Data mining lets you find all your clients who are impacted by a particular area of taxation, instead of looking at a single client and trying to determine all the different ways they might be affected," says Kleinsmith. When a change in tax laws is introduced, for example, firms can use data mining to easily identify every client who may be impacted.

Data mining also gives firms the ability to assign staff members with particular expertise to certain tasks. If a staff member is especially knowledgeable about healthcare taxes, that person might be tasked with identifying every client who will be impacted by tax changes related to provisions under the Affordable Care Act.

THE BIGGER PICTURE

While data mining can be used to hone in on areas that need extra attention, a tool like Planner CS (see box below) lets firms create and evaluate action plans to address those areas.

"Say it's getting toward the end of the year and a client calls wondering about the impact of selling some stock or a rental property," says Kleinsmith. "It's easy to use the data to mock up different scenarios for the outcome of a variety of decisions."

Instead of looking reactively at what already happened on last year's tax return, firms can help clients be more deliberate in the actions they take to affect their tax outcome.

"Particularly in an era when more and more people want to do their own tax preparation," explains Kleinsmith, "data mining gives professionals a reason to rethink their core value proposition in a way that solidifies their client relationships."

The Ultimate in Planning

For firms using data mining to proactively guide their clients, Planner CS is a tool to facilitate continuing the conversation. An add-on to UltraTax CS, Planner CS is regularly updated with new releases.

We watch closely for any tax law changes being implemented by Congress and at the state and local level.

"We keep our fingers to that pulse and then release a corresponding update to Planner CS that identifies what impact that tax law change is going to have on clients," says Jordan Kleinsmith.

Planner CS can create reports and side-by-side comparisons that help clients determine their next steps.

For step-by-step instructions on how to do data mining in UltraTax CS, check out Jordan Kleinsmith's data mining blog series at **CS.ThomsonReuters.com/DataMining**.

NEW **HELP & HOW-TO CENTER** DEBUTS

Have you visited our new online Help & How-To Center? This valuable resource gives you one-stop access to the information you need while using your software, including:

- Details of new features
- Procedures for various tasks
- Answers to frequently asked questions
- Tips for increasing productivity and troubleshooting issues
- Alerts about timely issues
- Instructional videos and PDFs
- All former Knowledgebase content
- And much more

And it's all available in a single location that's easy to access from your software application or from the Support section of our website.

SUPERIOR SEARCH CAPABILITY

The Help & How-To Center features a more powerful search engine built on Google's proven search technology, expanding your search capabilities in several ways:

- "Smart" search engine results list the most relevant topics first. Over time, popular topics will appear earlier in the search results.
- Too many search results? Narrow the search by subject (e.g., "installation") or (if applicable) by module (e.g., "payroll" or "1040"). You can even choose multiple subjects at once.
- When you search for information from an application, by default you'll get results that apply to that application. Alternatively, from any page in the Help & How-To Center you can open the Search Options page, where you can search for information on a different application—without having to leave the application you're working in.

VISIT OUR REDESIGNED **SUPPORT PAGE**

We've revamped our main Support page to give you a more enjoyable user experience. Among the changes:

- A cleaner, more organized design
- Quick access to product support resources
- A new Google-powered search box for more effective searches

Check it out now, at **CS.ThomsonReuters.com/Support**.

FINDING ANSWERS IN THE **HELP & HOW-TO CENTER**

TO ACCESS THE HELP & HOW-TO CENTER:

1. **From our website:** Click the **Support** tab, then the **Help & How-To Center** link. Choose the application you have questions about.

2. **From within an application** (Note: Procedure may differ by application):

   - Use the **search field** in the application's toolbar to search for topics about that particular application. Press **CTRL+Y** or (except in web-based applications) F1 to open a topic relevant to the current screen.

   - Click the question mark button, or for applications that have Help menus, choose **Help > Help & How-To Center** to open a topic you can browse by subject.

We invite you to visit the Help & How-To Center at **CS.ThomsonReuters.com/Help** and try it out now.

SUPPORT FOR MULTIPLE BROWSERS

Topics in the Help & How-To Center open in your default web browser, so an active Internet connection is required. Use your browser to navigate between topics, print a topic, bookmark frequently visited topics, etc. Supported browsers include the most current versions of Internet Explorer, Mozilla Firefox, Google Chrome, Apple Safari, and Opera.

YOU HAVE A VOICE!

Everything you do in the Help & How-To Center—the terms you use to search for information, the topics you refer to most often, the questions you pose to our Support and Training staff—helps us respond more quickly with the answers you need.

MEET YOUR **SUPPORT REP**

CASEY BLAIR, Senior Support Representative and Old House Restorer

Casey had his own public practice before coming to Thomson Reuters. For the past 11 years, he's called UltraTax CS Support home.

Here's something we bet you didn't know: Casey and his wife, Cathy, (who also works in Support) spent 12 years restoring their 140-year-old house. They knew nothing about remodeling when they started, but they've since built a kitchen, installed windows, refinished floors, hung drywall, and done plumbing and electrical work.

"Lots of blood, sweat, and tears," is how Casey describes the process. But they have a beautifully restored home to show for it.

THOMSON REUTERS

7322 Newman Boulevard
Dexter, MI 48130
CS.ThomsonReuters.com

PLANNER CS:
PAINLESS TAX PLANNING

BE PREPARED FOR ANY TAX LAW CHANGES

Structured tax planning now can mean thousands of dollars in tax savings for your clients when tax law changes occur. Planner CS can help you project the impact of these changes on your clients, with its built-in word processing and graphing capabilities that allow you to create professional presentations that clearly communicate tax advice and various tax alternatives to clients.

With Planner CS, you can:

- **Help clients make decisions with a significant tax impact**—As your client's trusted advisor, Planner CS gives you a quick and easy way to determine the benefits and pitfalls of a tax-related decision.
- **Save time with quick-to-learn, easy-to-use tax analysis tools**—Simple navigation and timesaving templates let you quickly and easily analyze complex tax planning needs.
- **Cut the time you spend re-keying data**—Automatically import client data directly from UltraTax CS and GoSystem Tax RS to minimize data entry.
- **Generate dynamic tax plans and letters**—Professional-grade presentations—reports, estimate vouchers, Form W-4, and more—clearly communicate tax advice and alternatives to your client.
- **Enjoy timely program updates in response to legislative changes**—We actively monitor federal and state legislatures for impacting taxation, and release timely program updates to give you time to assist your own clients in reacting to the changes.

Learn more about Planner CS by visiting **CS.ThomsonReuters.com/Planner**, or call us at **800.968.8900.**

TL24778