



THOMSON REUTERS

2018 PLANNER CS, v.2018.2.0

User Bulletin 18_2_0: Update

January 31, 2019

This user bulletin describes changes made to this release of Planner CS.®

CHANGES

2018 UltraTax/1040 and Planner CS integration

With this release, you can import data from 2018 UltraTax CS to Planner CS. To do so, you will need to install UltraTax CS/1040 version 2018.3.0 or higher, which is scheduled to release on January 31, 2019.

2019 Form 1040-ES, Estimated Tax Payment vouchers

With this release, Planner CS includes the 2019 version of Form 1040-ES, Estimated Tax Payment vouchers.

Qualified business income calculation, passive activities subject to recharacterization

With this release of Planner CS, the Qualified Busn Inc tab calculates correctly for business activities for which the *Recharacterization of passive income?* drop-down list in the Business Activities dialog is marked Yes.