



2018 PLANNER CS, v.2018.3.2

User Bulletin 18\_3\_2: Update

June 6, 2019

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

## CHANGES

### Revised capital gains tax calculation

This release of Planner CS revises the capital gains tax calculation for tax years 2018 through 2025 in accordance with updated 2018 IRS instructions for Schedule D. Previously, in certain circumstances, the tax calculation was incorrect for a plan that included 28% rate gain or unrecaptured Section 1250 gain (taxed at a maximum rate of 25%). Refer to lines 13, 14, and 15 on the Other Taxes > Cap Gain Tax tab for this change.

### NOL carryback adjustment to the charitable contribution base

With this release of Planner CS, you can enter NOL carryback amounts in the new *NOL carryback* data-entry field on the federal Deductions > Contributions tab. Previously, Planner CS adjusted the charitable contribution base by the NOL deduction (including both NOL carryback and carryforward amounts) entered in the *Net operating loss* field on the Income > Other tab.

### 2018 GoSystem Tax RS integration

With this release of Planner CS, you can import data from GoSystem Tax RS to Planner CS for a tax return that includes the qualified business income (QBI) deduction. The following data will import to Planner CS from GoSystem Tax RS: the specified service trade or business indicator, W-2 wages, and unadjusted basis of property.

### State updates

The following state modules are updated with the most recent information available at the time of this release: Arkansas, Colorado, Delaware, Iowa, Kentucky, Missouri, Mississippi, Montana, Ohio, Oregon, South Carolina, and Tennessee.