



ProSystem fx® Planning

Streamline tax planning engagements and quickly review multiple tax scenarios.

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.

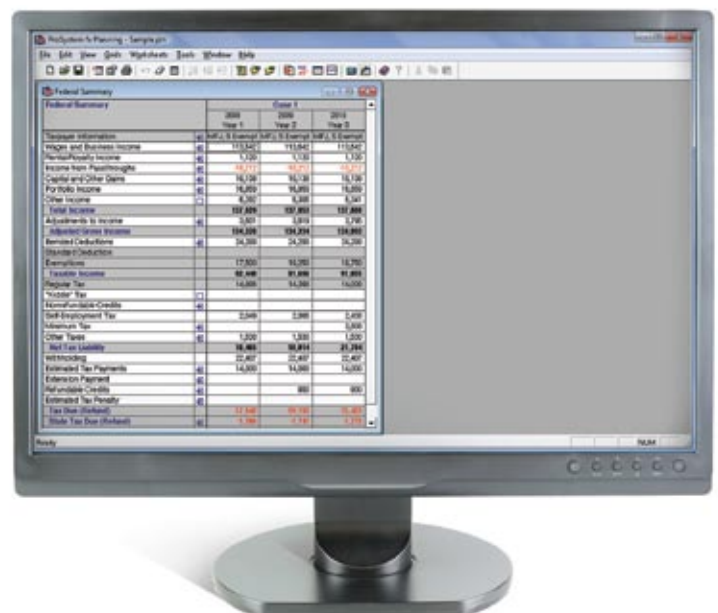
This year, start your planning with base-year amounts already set up, by importing pertinent data directly from ProSystem fx® Tax. Not only will your staff be able to include detail transactions or amount totals, they will benefit from:

- **Expanded 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.
- **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 drilldown 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.



ProSystem fx Planning has an intuitive spreadsheet-style interface that enables you to quickly review multiple tax scenarios and optimize your 1040 tax planning activities.



- 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.

ProSystem fx Planning works seamlessly with ProSystem fx® Suite and other CCH solutions, as well as Microsoft® Office and other software, to improve your effectiveness.

Training and Consulting Options to Fit Your Needs

CCH also offers valuable training, consulting and CPE to keep you ahead of the curve. From live training and consulting, to on-demand online learning, CCH provides the tools that everyone, from new hires to seasoned pros, needs to strengthen their abilities. Visit CCHGroup.com/Training to learn more.

For more information on
ProSystem fx® Planning
call **800-PFX-9998** (800-739-9998)
or visit CCHGroup.com

*The most up-to-date product information, including detailed system requirements, enhancements, and new features, is available at CCHGroup.com/Planning. If you plan to use multiple ProSystem fx Suite products within the same system, call **800-PFX-9998** (800-739-9998) and ask to speak to your sales representative about whether or not your system availability is adequate.*

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