

# Lacerte<sup>®</sup> Tax

## An Intuit ProLine<sup>™</sup> Solution

### Introduction

Lacerte Tax is the most complete and powerful line of professional tax software offered by Intuit ProLine. It is designed for full service tax and accounting firms with multiple staff who need to serve individual and business clients productively—no matter how complex. Lacerte Tax helps optimize the firms workflow and saves firms significant time with an end-to-end system, spanning input, preparation, analysis, research, paperless storage, and more.

### Product Overview & Highlights

#### Key features include

- Unique interface and worksheet-based data entry speed you through input and navigation helping you to complete more returns in a day.
- Automated calculations and deep diagnostics help you to prepare returns accurately.
- Extensive set of forms and schedules for individual and business clients.
- Exclusive SmartMap technology enabling powerful transfer of QuickBooks trial balance data saves you an average of one hour per business client.
- Robust multi-user access, controls and networking for larger firms.
- Missing Client Data Utility reduces the hassle of tracking down client data.
- Schedule D Import Wizard helps quickly transfer client brokerage statements into Lacerte.
- Like-Kind-Exchange Wizard helps input 1031 exchange transactions in minutes, not hours.
- Tax analysis and planning tools helps firms reduce the risk of audit for clients and reduce their tax liability.
- Integrates with Lacerte Document Management System, an electronic data storage system that helps you reduce expenses through the costly storage of paper files and access data significantly faster (sold separately).
- Access to Live Community to ask questions and get answers from peers.
- Built-in tax research powered by BNA helps you find answers fast within the program and enables you to quickly attach the research to the return with one click (Intuit ProLine Tax Research sold separately).
- Intuit ProLine Tax Import<sup>™</sup> enables you to scan source documents and import the data directly into Lacerte, as well as download and import data from financial institutions saving you up to 30% off your tax preparation time (sold separately).
- Intuit ProLine Practice Management suite integration with Lacerte to help practitioners save time. Track client information, critical documents, project status, deadlines, billable time, and invoices across your entire firm—all from one dashboard view (sold separately).

#### What's New in Lacerte for tax year 2010

- **Expanded e-file Offerings:** Dramatically expanded the number of business states and Fiduciary returns e-fileable in Lacerte, including Federal 1041; New York 1041; Colorado 1065, 1120, 1120S; New York City 1065, 1120, 1120S; Georgia 1065; Oregon 1120, 1120S; Illinois 1120; Pennsylvania 1065, 1120, 1120S; Minnesota 1065, 1120, 1120S; Utah 1065, 1120, 1120S; Montana 1065, 1120, 1120S.
- **1041 Tax Organizer:** The Fiduciary (1041) Tax Organizer helps clients collect the documents and information you need, saving you time and reducing errors when preparing the return.
- **Extension Memo Feature:** Tracking extensions manually can take up a lot of your time. With Extension Memo, Lacerte helps eliminate hassle by keeping track of extension payments.
- **Adding Proforma Access Rights:** Control who has access to Proforma (client transfer) functionality so tax returns in progress do not get overwritten.
- **Intuit ProLine Tax Import** (sold separately)
- **Intuit ProLine Practice Management** (sold separately)
- **Refund Advantage Bank Processor:** Switching bank product integration to Refund Advantage from Republic Bank.

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- **My Account Improvements:** We are excited to announce that we recently made some extensive improvements to the My Account portion of the Lacerte Web site, including a more reliable platform, improved sign-up processes, easier access to your information, and much more. Just sign into My Account to see all the new enhancements.
- **Additional Training:** New feature training videos, created by actual customers, help you learn how to save even more time in Lacerte at no additional cost.

### Lacerte Tax is right for firms that

- Serve a wide range of individual and business clients, many that are highly complex.
- May have a high volume of returns and need the automation (less data entry), productivity tools and engine to support.
- Have QuickBooks clients and provide additional services such as write-up, financial reporting and payroll.
- Likely employ several staff and/or include multiple locations requiring multi-user access, controls and networking.
- Run a larger firm requiring comprehensive practice management solutions.

### Product Pricing

#### Lacerte Tax Bundles

Complete 1040 Bundle \$5,049.00

Tailored for firms preparing more than 60 individual returns and a limited volume of business returns.

- Unlimited Federal 1040 forms/schedules
- Unlimited Local forms/ schedules for Individuals in one State
- Unlimited Individual e-File - Federal and State
- Tax Almanac & e-File Atlas
- Tax Analyzert
- Tax Planner†
- Document Management System (DMS)†

Complete 1040 + Business Bundle \$7,549.00

Everything in the Complete 1040 bundle Plus:

- Unlimited Federal and State for ONE Business form: 1120, 1120s, 1065, 1041, 990
- Unlimited Business e-File - Federal and State
- Trial Balance Utility

Full Service 1040 + Business Bundle \$12,949.00

Everything in the Complete 1040 + Business bundle Plus:

- Unlimited Federal and State for TWO more Business form: 1120, 1120s, 1065, 1041, 990
- Unlimited Consolidated Corporation
- Network Version (4 users)

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### Individual a la carte

1040 Unlimited	\$2,799.00
1040 Unlimited Individual State Modules (per state)	\$449.00
1040 Unlimited with Unlimited e-Filing (1040 & state returns)	\$3,799.00
Network Version (4 users)	\$589.00
Network Version – Each additional user (4 users)	\$299.00

### Business a la carte

1065 Federal Partnership	\$1,579.00
1065 State (per state)	\$479.00
1120 Federal Corporation	\$1,579.00
1120 State (per state)	\$479.00
1120S Federal S Corporation	\$1,579.00
1120S State (per state)	\$479.00
1141 Federal Fiduciary	\$1,579.00
1141 State (per state)	\$479.00
Consolidated Corporation	\$749.00
E-File Business Unlimited Fed & State	\$445.00

### Specialty a la carte

990 Federal Exempt	\$1,079.00
990 State Exempt	\$209.00
706 Federal Estate	\$1,079.00
706 Federal Estate State	\$206.00
709 Federal Gift	\$1,079.00
5500 Federal Employee Benefits	\$1,079.00

### Productivity Tools

Document Management System	\$830.00 †
Trial Balance Utility	\$625.00 †
Forms Library	\$495.00
e-Organizer	\$320.00 †
Intuit ProLine Tax Research	\$849.00
Intuit ProLine Tax Import (Pay-Per-Imported 1040 Return)	\$9.99
Intuit ProLine Tax Import (150 Imported 1040 Returns)	\$999.00
Intuit ProLine Tax Import (Unlimited Imported 1040 Returns)	\$1,499.00

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### Client Service Tools

Tax Analyzer	\$495.00 ‡
Tax Planner	\$690.00 ‡

### REP (Pay-per Return) \*

License Fee	\$395.00
1040 Federal & One State	\$39.00
1040 Additional States	\$18.00
E-File Individual Transmission (Federal or State)	\$5.00
Business/Trust/Estate – Fed & One State	\$54.00
Business/Trust/Estate – Fed & Additional State	\$24.00
Consolidated Corps	\$63.00
E-File Business Transmission	\$5.00
Gift Tax/Employee Benefit – Fed & One State	\$34.00
Gift Tax/Employee Benefit – Additional State	\$23.00
E-File Gift/Employee Benefit Transmission (Federal or State)	\$5.00

Call one of our sales consultants to purchase your Lacerte products: (800) 765-7777

License of Lacerte Tax 2010 tax products entitles customer to prior year versions of the same tax products still supported by Lacerte.

### Media Contacts

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† License is for the prior tax year (2009) and the tax year purchased (2010). Does not include subsequent years' upgrades.  
‡ 25% of cost is the annual maintenance fee. In subsequent years you only pay the maintenance fee when repurchasing.  
§ One-time, annual license fee of \$395.00, which includes service & delivery, will only be charged to customers opting to prepare returns on a REP (pay-per-return) basis only. Customers with any unlimited Federal license can prepare alternate returns on a REP basis without paying the \$395.00 license fee