

Lacerte TY07 Product Fact Sheet

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Tax Product: ProSeries
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PRODUCT SPECIFICS

Product Specifics

Designed to meet the unique needs of these business:	For the year-round, multiple person accounting firm that offers a full-range of professional services looking to maximize productivity.
Product Overview & Highlights:	<p>The Lacerte tax product is built to maximize the accountant’s productivity in preparing tax returns through its unique design that clearly follows the tax preparation workflow. In addition to the design, Lacerte is a full featured, comprehensive tax product that allows the accountant to prepare virtually any Federal and state tax return. Key features include:</p> <ul style="list-style-type: none"> • The Client Tracker – a workflow management tool embedded in the tax program that enables collaboration across multiple staff and simplifies the process of tracking the tax work in the office. • Missing Data Utility – a patented function that allows the accountant to easily mark data entry fields as missing in order to allow them to generate reports or email the list of missing items to the taxpayer. • Automated functions – K-1 Transfer from business returns to individual returns, Family Link for 8615 returns, import from QuickBooks and other accounting applications, export of billing information to QuickBooks, embedded database management tools, export/import to/from Excel and other file types, extensive diagnostics and worksheets, just to name a few. • Return Review – intuitive design that greatly simplifies the navigation of the tax output by leveraging the keyboard to increase productivity in the review process. Other review features include Lacerte’s Jump-to-Input function, Audit Checks and worksheet links on the tax forms. • Tax Automation – automated calculations for complex tax returns, including multi-state, AMT, NOLs, passive activities, and other, that greatly increase productivity by eliminating manual calculations, which also leads to increased confidence in the accuracy of the tax return.

Product Pricing*

1040 Unlimited	
1040 Federal Unlimited Individual	\$2,450
1040 State Unlimited Individual (per state)	\$395
Network Version (4 users)	\$450
Network Version – Each additional user (4 users)	\$200
E-File Federal Unlimited Fed & State	\$995
Shipping & Handling	0
Business Forms	
1065 Federal Partnership	\$1,195
1065 State (per state)	\$350
1120 Federal Corporation	\$1,195
1120 State (per state)	\$350
1120S Federal S Corporation	\$1,195
1120S State (per state)	\$350
1141 Federal Fiduciary	\$1,195
1141 State (per state)	\$350
Consolidated Corporation	\$620
E-File Business Unlimited Fed & State	\$395

PRODUCT SPECIFICS (cont.)

Special Forms	
990 Federal Exempt	\$995
990 State Exempt	\$185
706 Federal Estate	\$995
706 Federal Estate State	\$185
709 Federal Gift	\$995
5500 Federal Employee Benefits	\$995
Lacerte Pay-per Return Option	
License Fee	\$395
1040 Federal & One State	\$30
1040 Additional States	\$15
E-File Individual Transmission	\$3
Business/Trust/Estate – Fed & One State	\$40
Business/Trust/Estate – Fed & Additional State	\$20
Consolidated Corps	\$52
E-File Business Transmission	\$5
Gift Tax/Employee Benefit – Fed & One State	\$30
Gift Tax/Employee Benefit – Additional State	\$20
E-File Gift/Employee Benefit Transmission	\$5
Lacerte Solutions	
Tax Analyzer	\$350 / \$90 renewal fee
Tax Planner – FED Individual & All State	\$500 / \$125 renewal fee
Tax Planner – BNA Bridge	\$195
DMS	\$600 / \$150 renewal
Forms Library	\$395
Research Library	\$495
E Organizer	\$225 / \$60 renewal fee
Lacerte Trial Balance Utility	\$450 / \$120 renewal fee

*Renewal fees may vary based on discount rates and time of renewal.

Electronic Filing

Provide Direct (DF) filing?	No
Provide service bureau (SB) filing?	Yes
Provide e-file for what forms?	1040, 1065, 1120, 120S, 1041, 990, 5500
Can you electronically file state returns?	Yes (unlimited number of states can be processed simultaneously)
Do you allow for electronic signature?	Yes

Market

Number of individual users of the 06 Tax Year package	Estimated 120,000
Number of firms using the product?	42,000+
Percentage of renewals from the 05 Tax Year?	95%+
Number of years in business	27

PRODUCT SPECIFICS (cont.)

Support

Do you have a toll-free phone number for support	Yes
Days/hours (Eastern Time) of support available during tax season	<p>Jan. 7 to April 15: M-F (9 a.m. to 9 p.m.) Sat. (10 a.m. to 5 p.m.) Sun. (12 p.m. to 5 p.m.)</p> <p>Extended Support Hours: Lacerte offers the following extended weekend support hours for the last week before the April 15 filing deadline. Sat. (10 a.m. to 8 p.m.) Sun. (12 p.m. to 8 p.m.)</p> <p>24 hour technical support will be available on Monday through Friday of the last week before the April 15 filing deadline.</p> <p>The Week Prior to Each Extension Deadline: Announcements regarding extended support hours are made prior to each filing deadline.</p>
Day/hours support available during off-season	After Tax Season: M-F (9 a.m. to 8 p.m.)
Number of support staff during tax season	170
Do you have online support?	Yes

Technology

What operating system(s) does the product run on?	XP Professional or Home, Windows 2000, Windows NT, Windows 98 and Windows ME and Vista
Recommended operating system	Windows XP
Program size in MB	1040 and one stat roughly: 40-50MB
Minimum RAM recommendation	512 MB minimum recommended

Display & Data

Is IRS data displayed on screen?	Yes
Is vendor data displayed on screen?	Yes
Batch processing?	Yes (interview/interactive also)
Heads-down data entry?	Yes

Program Management Tools

Does the product produce:	
Organizers?	Yes
Reports?	Yes
Labels?	Yes
Client letters?	Yes
Scheduling program	Yes
Document management	Lacerte Document Management System available

Other Packages Available

Online tax preparation option?	No
Are state packages available?	Yes
Is a multi-state package available?	Yes (included in product)

Product Includes

1120,1120S, 1065, 1041, 990, 706, 709, 5500	Yes
Are these included in price of 1040?	No

PRODUCT SPECIFICS (cont.)

Web-based Services or capabilities provided during tax season

Ability to download program?	Yes
Ability to download updates?	Yes
Online demos?	Yes
FAQ?	Yes
Searchable Knowledgebase/Infobase Package tracking?	Yes
Online preparation/hosted software?	No
Online billing review?	Yes
Discussion Groups?	Yes
Online Organizer?	Yes (not online/but electronically sent to taxpayer)
Web site construction available?	No
Online storage of complete forms?	No

State Forms/Support

All for 1040, 1065, 1120, 1120S and 1041. Various for 706, 709 and 990

Integration

Product integrates with:	QuickBooks, Intuit's Document Management System, Tax Planner, EasyACCT and BNA Tax Planner, Forms Library, Tax Research, Tax Analyzer, Trial Balance Utility, Lacerte E-Organizer
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Media Contacts

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