

LACERTE  
THE FIRST NAME IN TAX SOFTWARE

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Attention Lacerte tax software users.

*INSIDE:  
FREE SOFTWARE  
THAT LETS YOU DO FAST,  
ACCURATE TAX PLANNING—  
USING THE CLIENT FILES YOU  
CREATED WITH YOUR EXISTING  
LACERTE TAX SOFTWARE.*

21TPEN7R



**Get the 2001 Lacerte Tax Planner  
absolutely FREE...**

**When you purchase the new and improved 2002  
Lacerte Tax Planner!**

Dear Lacerte User:

If you offer tax planning to your clients ... or are thinking of doing so ... the Lacerte Tax Planner can save you hours of time vs. doing tax plans manually or with spreadsheets.

You can reserve a copy of the new 2002 Lacerte Tax Planner, fully updated to include the latest tax laws and procedures, for a risk-free 30-day trial, simply by completing and mailing the enclosed card now.

Do it today, and we'll also send you a FREE copy of the Lacerte 2001 Tax Planner (a \$395 value) for your use until your 2002 Planner arrives -- no strings attached.

Use your free 2001 Lacerte Tax Planner to provide valuable tax planning services for your clients. Keep it at no charge -- even if you decide not to invest in the 2002 edition.

**Works instantly with your  
existing Lacerte individual client files.**

With some other tax planning programs, transferring your client files from your Lacerte 1040 tax software is a headache and a hassle.

Only the Lacerte Tax Planner enables rapid, seamless transfer of the 1040 client files you've already created in your Lacerte tax software.

As a result, you eliminate hours of tedious labor re-keying client data into your Tax Planner. You also help prevent keyboard errors and the associated risk of planning with bad data.

Within minutes, you can transfer your individual client files into the Lacerte Tax Planner -- and create plans that show your clients how to minimize their tax liability.

If you perform tax planning manually or with spreadsheets, now you can do it with Lacerte Tax Planner better and faster ... create more plans in less time ... and better ensure that your plans are both more accurate and effective at saving your clients money.

If you don't offer tax planning, the Lacerte Tax Planner makes it easy. In no time, you can be building tax plans that help your clients reach their goal of a secure, comfortable financial future ...

... Which means YOUR CLIENTS can watch their tax liabilities shrink -- and their wealth grow -- while YOU see your practice boom and your income skyrocket.

Doing tax plans with the Lacerte Tax Planner can literally add thousands of dollars of extra revenue to your firm's bottom line.

**The smart tax planning tool  
for Lacerte software users.**

Seamless integration with your current Lacerte 1040 tax software is just one reason why you should take a look at Lacerte Tax Planner -- whether you're thinking about offering tax planning services, already do it manually or with a spreadsheet, or use another tax planning program.

The Lacerte Tax Planner gives you an unbeatable combination of features--including a "watch list," program diagnostics, file password protection, professional report generation with PDF output, federal and state plans, comparison between MFS and MFJ, and more. See the enclosed flier for details.

**Use the 2002 Lacerte Tax  
Planner risk-free for 30 days.**

May I send you the new 2002 Lacerte Tax Planner as soon as it's ready to ship? We'll also give you the 2001 version, absolutely free and available now, to use in the meantime. And we guarantee your satisfaction -- or your money back:

If you are not 100% satisfied with the 2002 Lacerte Tax Planner, simply contact us within 30 days of receipt for a full and prompt refund -- no questions asked.

To request your risk-free 30-day evaluation of the 2002 Lacerte Tax Planner, complete and mail the enclosed reply form. Or call today toll-free 800-964-6436 today.

Sincerely,



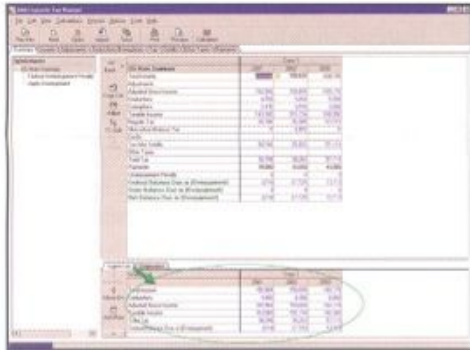
Daniel L. Manack  
Senior Vice President, Intuit Professional Accounting Solutions

P.S. The 2001 Lacerte Tax Planner is yours to keep free, even if you decide not to own our 2002 Tax Planner. And if you DO upgrade to the 2002 version, you get it at \$50 off the list price. See the enclosed reply form for details. Or call toll-free 800-964-6436 today.

*Act now and save \$50!*

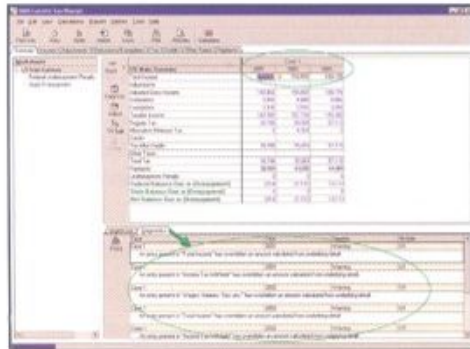
## 5 powerful reasons why every Lacerte tax software user should accept a risk-free 30-day trial of the Lacerte Tax Planner:

**1. Watch List.** When you're doing tax planning, you may want to have certain client information always in front of you as you work. With Watch List, you can select those important line items from your client file. The items are then displayed, at all times, at the bottom of the main data entry window for easy viewing. You can add or subtract rows of data and arrange them in any order you wish.



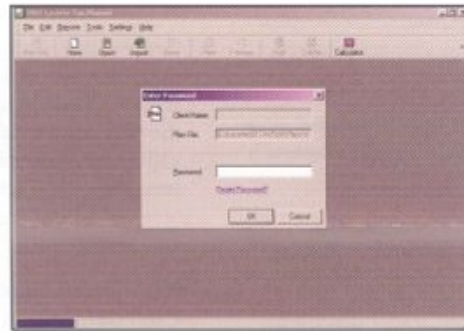
*Watch List displays critical data for easy viewing.*

**2. Program diagnostics.** This feature automatically alerts you when there are any carryover items or overrides within a given tax plan file, identifying the fields in which these items exist. You can also view all diagnostic messages with a single mouse click.



*See all diagnostics at the click of a mouse.*

**3. Password protection.** All client files are fully password-protected, to help ensure confidentiality and prevent unauthorized personnel from entering data or making changes to client files or tax plans.



*Help keep your client's tax plans confidential.*

**4. Report generation.** You can generate virtually any custom letter, report, graph, or invoice you need, from a single-sheet summary to a major client presentation. Reports can be previewed prior to printing and layout adjusted for maximum readability. The result is professional-quality tax plans you'll be pleased and proud to give your clients.



*Lacerte Tax Planner can generate tax plans in the popular PDF format most clients prefer.*

**5. Seamless data transfer.** With a few keystrokes, you can quickly and easily transfer individual activities, 1099s, W-2s, and other data from 1040 client files from your Lacerte individual tax program into the Lacerte Tax Planner. Just install Lacerte Tax Planner on your computer. Then open your individual tax program, select a client, and click on the Tax Planner icon. This launches the Tax Planner and automatically transfers data from your 1040 tax program into the Planner.

A survey of Lacerte tax software users reveals these facts:

- ✓ 87% offer tax planning services to their clients.
- ✓ 57% charge a separate fee for tax planning -- 27% include the fee for tax planning in their bill for tax preparation.
- ✓ The average billing rate for tax planning is \$125 an hour.
- ✓ 63% offer tax planning services year round; 31% offer tax planning just from September through December.



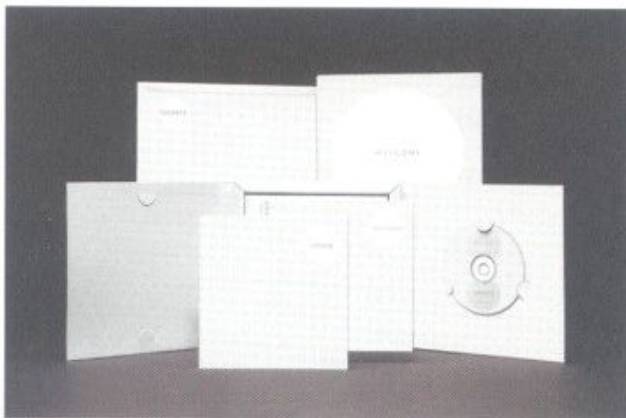
*FOR YOUR RISK-FREE  
30-DAY TRIAL OF  
LACERTE TAX PLANNER,  
CALL TOLL-FREE  
800-964-6436  
TODAY.*

## Just look at what else the Lacerte Tax Planner gives you!

Compare this list of Lacerte features with other tax planning software. Can you find them all in the software you're now using?

- ✓ Seamless integration between your Lacerte 1040 tax software and the Lacerte Tax Planner.
- ✓ Plan Information Screen—create a new tax plan, open an existing plan, or build a plan by exporting data from your tax program.
- ✓ Rapid “what-if” scenarios show future projections of income, deductions, and other transactions used to calculate the taxpayer’s liability.
- ✓ Four types of tax plans—year/case, MFS/MFJ, difference analysis, adjustment analysis.
- ✓ Year/case analysis—provides a projection over a number of years. Each year can contain multiple cases.
- ✓ MFS/MFJ comparison—shows the tax difference between taxpayer and spouse filing separately vs. jointly. Calculates tax based on appropriate filing status.
- ✓ Difference analysis—calculates the tax difference between two different case scenarios.
- ✓ Adjustment analysis—compares a case with the user-specified data and tax calculation vs. a case in which these amounts have been adjusted through addition or subtraction.
- ✓ Apply increase—applies a percentage or dollar amount increase to any single data field in the input, across multiple years and cases.
- ✓ Copy data—replicates data from existing columns into new years or cases added to an existing plan file.
- ✓ Activity-by-activity data entry—enter amounts at a high level (total income amount) or a low level (e.g., wages, interest).
- ✓ Item-by-item data entry—enter details for W-2s, 1099s and other individual activities on an item by item basis.
- ✓ Watch List—display data you want to view at all times on the screen.
- ✓ Program diagnostics—alerts you to carryover items or overrides.
- ✓ Real-time calculations—software automatically displays results of data input for all items affected. Allows you to quickly identify the effect that taxable events will have on tax liability.
- ✓ Generic state—creates state tax plans for states that begin their state return with the federal adjusted gross income (AGI). From the AGI you can select adjustments that apply to the state plan. Includes prefilled templates for all generic states. Uses appropriate state tax rate to calculate state tax liability.
- ✓ Specific state tax plans—available for California, Arizona, Colorado, Illinois, Oregon, New York, New Jersey.
- ✓ Inflation adjustments—based on inflation rate entered, program adjusts itemized deductions, standardized deductions, and other limitations and phase-outs for future years. You can also enter interest rates for use in the calculation of underpayment penalties.
- ✓ Farm income averaging.
- ✓ Alternative minimum tax and capital gains tax.
- ✓ Self-employment tax.
- ✓ Statutory employee results.
- ✓ Estimated tax penalties and payments. Quarterly annualization for estimated taxes.
- ✓ Phase-out of personal exemption based on AGI.
- ✓ Section 1231 and casualty gains and losses.
- ✓ Capital gains and losses—limitations and carryovers.
- ✓ Securities analyzer—determines appropriate holding period and calculates gain or loss.
- ✓ Tax projections for non-resident states.
- ✓ Value calculator—determines current dollar value of a future transaction such as tax liability.
- ✓ Projections for dependents—based on changes in age and dependency status.
- ✓ Manipulation of schedule C, E, K-1 information—both at the detail level and for entity/activity totals.
- ✓ User-defined notes, statements, and worksheets.
- ✓ Generates PDF files for professional-looking reports that can be emailed to clients as attached files. And, PDF files cannot be tampered with or altered.
- ✓ Clean, intuitive user interface—divided into multiple areas for data entry, worksheet selection, and monitoring key line items.
- ✓ Pull-down menu with icon-based toolbar—text descriptions appear beneath each icon.
- ✓ Multiple worksheets—summary, income adjustments, deductions, exemptions, tax credits, other taxes and payments, custom worksheets.
- ✓ Tabs for quick migration from worksheet to worksheet. Worksheets with side-by-side comparison of years and cases let you work quickly and intuitively.
- ✓ Enter key moves cursor across a particular line item—lets you work across a span of years or cases within the same line item.
- ✓ Up to 10 years and 10 cases per plan—allows for complex tax-planning scenarios.
- ✓ 5 methods of tax planning—cases within years, years within cases, MFS/MFJ analysis, difference analysis, adjustment analysis.
- ✓ Allows data entry from 1998 - 2010.
- ✓ One-Page Summary worksheet—lists all applicable input cells in a single column.
- ✓ Drill-down capabilities—enter data either at a high level or drill down to supporting worksheets.
- ✓ Network Functionality—pay for one copy of Tax Planner. Load onto your LAN network. Multiple users, at the same site, can run the program simultaneously from their desktops.
- ✓ Free online program updates—keeps Tax Planner up to date between annual releases.

## The 2001 Lacerte Tax Planner—Yours FREE When You Act Now!



*The 2001 Lacerte Tax Planner is yours FREE—when you accept our offer of a risk-free 30-day trial of the Lacerte 2002 Tax Planner now!*

*Call toll-free 800-964-6436 today.*

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*“Lacerte not only matches the capabilities  
of its competition, but also raises the technology  
bar in the tax planning market place...  
sophisticated and very, very well designed.”  
— CPA Software News (5/2002)*

**LACERTE**  
THE FIRST NAME IN TAX SOFTWARE

AN INTUIT® COMPANY 5601 HEADQUARTERS DRIVE, PLANO, TX 75024

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## 2002 Lacerte Tax Planner Risk-Free Trial Request Form

**YES, please send me the 2002 Lacerte Tax Planner software indicated below.**

I understand I also get the 2001 Lacerte Tax Planner right away to use now at no extra cost, until my 2002 version is shipped this coming January. If not 100% satisfied, I may contact you within 30 days of receipt for a prompt and full refund on the 2002 Tax Planner -- no questions asked. Either way, the 2001 Lacerte Tax Planner is mine to keep FREE, with no further obligation of any kind.

Module	Price
<input type="checkbox"/> Federal (special offer: you save \$50)	\$345
<input type="checkbox"/> All states, generic and specific, listed below (special offer: \$150 package price for all)	\$150
<input type="checkbox"/> State (generic)	\$50
<input type="checkbox"/> California	\$50
<input type="checkbox"/> Arizona	\$50
<input type="checkbox"/> Colorado	\$50
<input type="checkbox"/> Illinois	\$50
<input type="checkbox"/> Oregon	\$50
<input type="checkbox"/> New York	\$50
<input type="checkbox"/> New Jersey	\$50
Subtotal _____	
Sales Tax* _____	
Total _____	

*Please correct name and address if different than below:*

\*Please add appropriate sales tax, if applicable, if you are in: AZ, CA, CO, FL, GA, IA, IL, LA, MA, MD, MN, MO, NC, NJ, NY, OH, OK, PA, SC, TN, TX, VA, WA, WI only.

*(over, pleas*



**Method of payment:**

Check enclosed (Please make check payable to "Lacerte." Add applicable state and local sales tax.)

Please charge my:  Amex  Visa  MasterCard  Discover

Card #: \_\_\_\_\_ Exp. Date: \_\_\_\_\_

Phone #: \_\_\_\_\_ Signature \_\_\_\_\_  
(just in case)

➤ Your e-mail address—needed to receive free upgrade announcements and product news via email: \_\_\_\_\_

➤ Name of tax planning software you are using now, if any —

BNA Tax Planner  CGS Tax Tools  Creative Solutions

CCH ProSystem fx Tax Planner  Other: \_\_\_\_\_  None

**3 easy ways to order:**

1. Call toll-free 800-964-6436
2. Fax this form to 214-387-2805
3. Mail to: Intuit/Lacerte, 5601 Headquarters Drive, Plano, TX 75024

**LACERTE**

THE FIRST NAME IN TAX SOFTWARE

AN INTUIT® COMPANY 5601 HEADQUARTERS DRIVE, PLANO, TX 75024

**Our 100% Money-Back Guarantee**

If you are not 100% satisfied with Lacerte Tax Planner 2002, simply contact us within 30 days of receipt for a full and prompt refund—no questions asked.

**Our privacy policy**

The information that you provide to Lacerte, an Intuit company, will be used to fulfill your order, resolve support issues, provide services that you may request, and for internal administrative purposes. Intuit and its subsidiaries may exchange customer information with each other to fulfill your requests or to provide you with information about other products or services.

*Intuit does not share your information with outside companies for their promotional use.*

Occasionally, Intuit may contact you about products, services, or special offers that may interest you. If you prefer not to receive this information, please go to <http://privacy.intuit.com> or write us at Intuit, Customer Communications, 2800 East Commerce Center Place, Tucson, AZ 85706. If you choose not to receive promotional materials from Intuit, you will continue to receive information relating to the annual renewal of the products and services you order from Lacerte.

Tax Planner



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