

## 2011 TaxPlanner

### What is the TaxPlanner?

The TaxPlanner, a TaxWorks product, is an easy-to-use planning tool for accountants, attorneys, and tax practitioners. It allows users to compare five different tax scenarios on the screen at one time. It incorporates new tax laws as they are available. This is a limited feature software program. It does not attempt to process to the depth that our tax preparation software does. It is, however, comparable to other tax planners on the market and is an excellent tool for quick, straightforward tax planning.

### Why am I receiving the TaxPlanner?

You are receiving the TaxPlanner because it is included in the TaxWorks package that you purchased for 2011 or you purchased the TaxPlanner separately.

### Do I have to wait until the TaxWorks Initial Release CD in order to install the TaxPlanner?

No, you do not have to wait until you have installed the TaxWorks Initial Release CD. You may install the TaxPlanner independently. In addition, you can bridge TaxWorks clients into the TaxPlanner from prior year TaxWorks programs (2010 through 2011) by pressing F5 to import the return information.

### Does the TaxPlanner support network installations?

The TaxPlanner does not support network installations. You may install the TaxPlanner on any or all necessary workstations.

### Installation Instructions

The TaxPlanner Windows installation is easy to use and similar to other standard installation programs. The setup will copy supporting files onto your working drive.

**Important:** Microsoft .NET Framework 4.0 is a prerequisite to installing the TaxPlanner. If it is not installed on your workstation, go to <http://www.microsoft.com/downloads> and enter “.net framework 4 standalone installer” in the search box to locate the installation file. Follow the instructions given by Microsoft to install the framework. After it is installed, follow the TaxPlanner installation steps below.

#### TaxPlanner Step-by-Step Installation

1. Close all running programs.
2. Insert the TaxPlanner CD into your CD drive.
3. If the AutoRun menu does not appear, click the **Start** button on the taskbar and choose **Run**. Type *D:\tpcsetup.exe* in the line labeled **Open**, and click **OK** (if D is not your CD-ROM Drive letter, use the appropriate drive letter).
4. The following are the installation screens in order of appearance:
  - a. **Welcome** – Click the **Next** button or press the **Enter** key to continue.
  - b. **Start Installation** – Click the **Next** button or press the **Enter** key to continue.
  - c. **Installing** – Displays the installation progress. When it is finished, it will make you wait as it updates your system configuration.
  - d. **Installation Complete** – Click the **Finish** button or press the **Enter** key to return to the desktop. You may be prompted to restart your computer. Remove the CD and click the **OK** button to restart the computer or the **Cancel** button if you do not wish to restart at this time.

**Note:** If you do not restart the computer, you may not be able to run the TaxPlanner until you have restarted the computer.

### Updating the TaxPlanner

At the time the TaxPlanner was released, it incorporated all tax law changes and inflation updates that were available from the IRS. As we continue to receive new changes, the TaxPlanner will be updated. Updates will be available once the TaxWorks 2011 Initial Release is installed.