



## Create Tax Plan Report

Kerry M. Kerstetter, CPA

Client: Kerry M. Kerstetter, CPA

Contact
Personal
Employment
Business
Investments
Report
Done/Home
Save

The first time you enter this screen for a client, TaxCoach™ will automatically make selections based on client details, and will save the selections when you leave the screen. After that, TaxCoach™ will automatically load saved selections. If you change any client details, use the **Refresh** button to re-apply the artificial intelligence.

REPORT MODULES	SELECT?
Cover Sheet	<input type="checkbox"/>
Contents	<input type="checkbox"/>
<b>Introduction</b>	
How to Use This Plan	<input type="checkbox"/>
How the Tax System Works	<input type="checkbox"/>
Taxable and Non-Taxable Income	<input type="checkbox"/>
Make the Most of Adjustments to Income	<input type="checkbox"/>
Make the Most of Itemized Deductions	<input type="checkbox"/>
Make the Most of Personal Exemptions	<input type="checkbox"/>
Understand Tax Brackets	<input type="checkbox"/>
Make the Most of Tax Credits	<input type="checkbox"/>
Avoid the Alternative Minimum Tax	<input type="checkbox"/>
Keep Smart Records To Audit-Proof Your Return	<input type="checkbox"/>
Understand Audit Odds	<input type="checkbox"/>
Withholding and Estimated Taxes	<input type="checkbox"/>
Amended Returns To Claim Lost Savings	<input type="checkbox"/>
<b>Family, Home, &amp; Job</b>	
Prepare for Your Wedding	<input type="checkbox"/>
Minimize the Tax Bite of Divorce	<input type="checkbox"/>
Prepare for Your New Baby	<input type="checkbox"/>
Tax-Smart Day-Care Choices	<input type="checkbox"/>
Avoid "Kiddie Tax"	<input type="checkbox"/>
Tax Strategies for College Savings	<input type="checkbox"/>
Tax Strategies for College Students	<input type="checkbox"/>
Tax Strategies for College Financial Aid	<input type="checkbox"/>
Tax Strategies for Supporting Your Parents	<input type="checkbox"/>
Charitable Gifts of Cash	<input type="checkbox"/>
Charitable Gifts of Property	<input type="checkbox"/>
Tax Breaks for Owning Your Own Home	<input type="checkbox"/>
Make the Most of Home Equity Interest	<input type="checkbox"/>
Make the Most of Your Vacation Home	<input type="checkbox"/>
Make the Most of Employee Business Expenses	<input type="checkbox"/>
Make the Most of Your SIMPLE IRA	<input type="checkbox"/>
Make the Most of Your 401(k) Plan	<input type="checkbox"/>
Make the Most of Nonprofit Retirement Plans	<input type="checkbox"/>
Make the Most of Health Savings Accounts	<input type="checkbox"/>
Make the Most of Flexible Spending Accounts	<input type="checkbox"/>
Tax Strategies for Stock-Based Compensation	<input type="checkbox"/>
Tax Strategies for Americans Abroad	<input type="checkbox"/>
Tax Breaks for Military Personnel	<input type="checkbox"/>
Tax Strategies for Energy Efficiency	<input type="checkbox"/>
Tax Strategies for Clergy	<input type="checkbox"/>
<b>Your Business</b>	
Document "Business Intent" to Preserve Tax Breaks	<input type="checkbox"/>
Tax Choices for Startups	<input type="checkbox"/>

**Refresh TaxCoach's Suggestions**

**Select All**

(Use browser's "Back" button to return):

**Generate Report**

Format:  PDF  HTML (I.E. 6-8)

(PDF may take a minute to render)

**Generate Summary**

Format:  PDF  .DOC (editable)

Include module page #s in summary

**The Obamalyzer**

Clear Selections

Tips For Printing in HTML...

Strategies for Limited Liability Companies	<input type="checkbox"/>
Strategies for "S" Corporations	<input type="checkbox"/>
Strategies for "C" Corporations	<input type="checkbox"/>
Maximize Car and Truck Deductions	<input type="checkbox"/>
Buying vs. Leasing Your Vehicle	<input type="checkbox"/>
Make the Most of Business Meals/Entertainment	<input type="checkbox"/>
Make the Most of Business Gifts	<input type="checkbox"/>
Make the Most of Business Travel	<input type="checkbox"/>
Make the Most of Home Office Deductions	<input type="checkbox"/>
Make the Most of Business Equipment	<input type="checkbox"/>
Separate Entities for Business Assets	<input type="checkbox"/>
Gift-Leasebacks for Family Tax Savings	<input type="checkbox"/>
Employees vs. Independent Contractors	<input type="checkbox"/>
Take Advantage of "Certain Fringe Benefits"	<input type="checkbox"/>
Hire Your Family	<input type="checkbox"/>
Consider Health Savings Accounts	<input type="checkbox"/>
Consider a Section 125 Plan	<input type="checkbox"/>
Consider a Medical Expense Reimbursement Plan	<input type="checkbox"/>
Consider an Education Assistance Plan	<input type="checkbox"/>
Consider a SIMPLE IRA	<input type="checkbox"/>
Consider a Simplified Employee Pension (SEP)	<input type="checkbox"/>
Consider a Profit Sharing Plan	<input type="checkbox"/>
Consider a 401(k) Plan	<input type="checkbox"/>
Consider a "SIMPLE" or "Safe-Harbor" 401(k)	<input type="checkbox"/>
Consider a Cross-Tested Plan	<input type="checkbox"/>
Consider a Defined Benefit Plan	<input type="checkbox"/>
Consider Non-Qualified Deferred Compensation	<input type="checkbox"/>
Consider a Closely-Held Insurance Company	<input type="checkbox"/>
<b>Your Investments</b>	
Make Smart Use of Tax Deferral	<input type="checkbox"/>
Make the Most of Your IRA	<input type="checkbox"/>
Early Withdrawals from Retirement Accounts	<input type="checkbox"/>
Minimum Required Withdrawals	<input type="checkbox"/>
Consider a Roth IRA	<input type="checkbox"/>
Employer Stock in Your Qualified Plan	<input type="checkbox"/>
Minimize Tax on Social Security Benefits	<input type="checkbox"/>
Tax-Smart Cash Choices	<input type="checkbox"/>
Tax-Smart Bond Choices	<input type="checkbox"/>
Municipal Bonds for Tax-Free Interest	<input type="checkbox"/>
Tax-Smart Stock Choices	<input checked="" type="checkbox"/>
Understand Mutual Fund Distributions	<input type="checkbox"/>
Tax-Efficient Funds for Taxable Portfolios	<input type="checkbox"/>
Separate Accounts for Taxable Portfolios	<input type="checkbox"/>
Buy and Sell Funds Efficiently	<input checked="" type="checkbox"/>
Harvest Tax Losses	<input type="checkbox"/>
Tax-Advantaged Income Generators	<input checked="" type="checkbox"/>
Immediate Annuities for Tax-Advantaged Income	<input type="checkbox"/>
Fixed Annuities for Tax-Deferred Savings	<input type="checkbox"/>
Variable Annuities for Retirement Savings	<input type="checkbox"/>
Tax Strategies for Permanent Life Insurance	<input type="checkbox"/>
Make the Most of Investment Expenses	<input type="checkbox"/>
Qualify as a "Trader" for Bigger Deductions	<input type="checkbox"/>
Consider a "Mark-to-Market" Election for Traders	<input type="checkbox"/>
Entity Structures for Ultimate Trader Tax Savings	<input type="checkbox"/>
Depreciate Real Estate for Maximum Savings	<input type="checkbox"/>
Real Estate Repairs vs. Improvements	<input type="checkbox"/>
Tax Credits for Real Estate Investors	<input type="checkbox"/>
Hire Your Spouse to Manage Your Property	<input type="checkbox"/>
Hire Your Family to Manage Your Property	<input type="checkbox"/>

Establish a Corporation to Manage Your Property	<input type="checkbox"/>
Maximize Your Rental Real Estate Loss Allowance	<input type="checkbox"/>
Tax Opportunities for "Real Estate Professionals"	<input type="checkbox"/>
Real Estate in Retirement Accounts	<input type="checkbox"/>
Minimize the Tax Bite on "Dealer Properties"	<input type="checkbox"/>
"GO Zone" Incentives for Businesses and Investors	<input type="checkbox"/>
<b>Cashing Out</b>	
Exclude up to \$500,000 in Home Sale Gains	<input type="checkbox"/>
Ease the Sting of Home Sale Losses	<input type="checkbox"/>
Tax-Smart Business Sales	<input type="checkbox"/>
Installment Sales for Business and Real Estate	<input type="checkbox"/>
Sell Your Business to an ESOP	<input type="checkbox"/>
Understand Capital Gains	<input type="checkbox"/>
"Tax-Engineered Products" for Single-Stock Gains	<input type="checkbox"/>
Section 1031 Exchanges to Defer Tax on Sales	<input type="checkbox"/>
Charitable Trusts for Appreciated Assets	<input type="checkbox"/>
Consider a Family Limited Partnership or LLC	<input type="checkbox"/>
Avoid Probate on Taxable Assets	<input type="checkbox"/>
Minimize Estate Tax	<input type="checkbox"/>
<b>State Taxes</b>	
Alabama	<input type="checkbox"/>
Alaska	<input type="checkbox"/>
Arizona	<input type="checkbox"/>
Arkansas	<input type="checkbox"/>
California	<input type="checkbox"/>
Colorado	<input type="checkbox"/>
Connecticut	<input type="checkbox"/>
Delaware	<input type="checkbox"/>
District of Columbia	<input type="checkbox"/>
Florida	<input type="checkbox"/>
Georgia	<input type="checkbox"/>
Hawaii	<input type="checkbox"/>
Idaho	<input type="checkbox"/>
Illinois	<input type="checkbox"/>
Indiana	<input type="checkbox"/>
Iowa	<input type="checkbox"/>
Kansas	<input type="checkbox"/>
Kentucky	<input type="checkbox"/>
Louisiana	<input type="checkbox"/>
Maine	<input type="checkbox"/>
Maryland	<input type="checkbox"/>
Massachusetts	<input type="checkbox"/>
Michigan	<input type="checkbox"/>
Minnesota	<input type="checkbox"/>
Mississippi	<input type="checkbox"/>
Missouri	<input type="checkbox"/>
Montana	<input type="checkbox"/>
Nebraska	<input type="checkbox"/>
Nevada	<input type="checkbox"/>
New Hampshire	<input type="checkbox"/>
New Jersey	<input type="checkbox"/>
New Mexico	<input type="checkbox"/>
New York	<input type="checkbox"/>
North Carolina	<input type="checkbox"/>
North Dakota	<input type="checkbox"/>
Ohio	<input type="checkbox"/>
Oklahoma	<input type="checkbox"/>
Oregon	<input type="checkbox"/>

Pennsylvania	<input type="checkbox"/>
Rhode Island	<input type="checkbox"/>
South Carolina	<input type="checkbox"/>
South Dakota	<input type="checkbox"/>
Tennessee	<input type="checkbox"/>
Texas	<input type="checkbox"/>
Utah	<input type="checkbox"/>
Vermont	<input type="checkbox"/>
Virginia	<input type="checkbox"/>
Washington	<input type="checkbox"/>
West Virginia	<input type="checkbox"/>
Wisconsin	<input type="checkbox"/>
Wyoming	<input type="checkbox"/>
<b>Appendices</b>	
About Your Tax Planner	<input type="checkbox"/>