



# SOFTWARE NEWS

A Newsletter from CFS Tax Software, Inc.

Summer 2014

## A SIMPLE INCENTIVE TO RENEW EARLY

Starting this year, we have simplified our early renewal incentive program.

### Goodbye Vouchers!

Under the previous “voucher” program, for every program you renewed early, you would earn a \$10 or \$5 discount voucher. However, you could not *redeem* that voucher until the following year—and *then* only if you renewed by May 31st.

### Hello Early Renewal Discount!

From now on, you receive an *immediate* Early Renewal Discount on every program you renew early—\$10 off every program renewed by May 31st or \$5 off every program renewed by August 31st. (If you look at your renewal notice, you will see that the discount has been automatically applied.)

The new Early Renewal Discount program has the following benefits:

- It’s easier to explain and easier to understand: you receive an Early Renewal Discount on every program you renew early. Period.
- Unlike the voucher program, if you didn’t renew early *last* year, you can still get an Early Renewal Discount when you renew early *this* year.
- If you renew between June 1st and August 31st, you *still* receive a \$5 Early Renewal Discount. You would have received *no* discount under the voucher program.

You still get the *best* price if you renew your CFS software by May 31st. However—

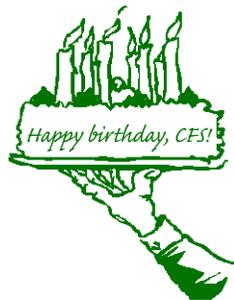
### Renew by August 31<sup>st</sup> to receive:

- **\$5 off** every program renewed early;
- **20% off** the first-time purchase of additional CFS software or network upgrades; and
- **15% off** forms, envelopes, and tax supplies.

## 25 YEARS AND WE’RE STILL HERE— THANKS TO YOU!

This year, *CFS Tax Software, Inc.* celebrates its 25th year in the tax software development business.

An enormous THANK YOU to you, our customers, for your continued support. We wouldn’t be here without you, and we look forward to many more years of doing business with you!



## DIRECT DEPOSIT IS BEING TESTED

One of the most frequent requests we receive from customers is for Direct Deposit in our *LivePayroll* Program. We have wanted to add this feature for some time. However, we first had to contract with a third-party company that processes electronic payments.

We spoke with several such companies, and we finally chose National Payment Corporation (NatPay), “the leading company to offer third-party processing of Direct Deposit for employee payroll.”

Direct Deposit will not add to the initial cost of *LivePayroll*. However, there will be a charge for each transaction.

Direct Deposit has just entered the testing phase. We are not ready to announce a release date, but we will keep you posted.

## TAX QUOTABLE

“Baseball is a skilled game. It’s America’s game—it, and high taxes.”

—Will Rogers

## WHAT’S INSIDE...

### NEW AT CFS...

- CFS** New in CFS Software;
- CFS** E-File Update — *the latest developments in state and federal e-filing.*

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### CFS SPECIALS...

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### CFS REMINDERS...

Some things bear repeating.

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# WHAT'S NEW AT



## NEW IN CFS SOFTWARE

### Foreign Address Support

Foreign address fields were added to the Client database of most CFS programs, providing support for the foreign address fields added to many federal and state forms.

### New Retirement Modules

Two powerful new retirement planning modules have been added to both *TaxTools* and *Financial Planning Tools*:

The **Social Security Optimizer** determines the optimum age to begin receiving benefits for singles and married couples. For couples, it will also determine if it is beneficial to apply social security spousal options, such as File and Suspend, Restricted Spouse Benefit, and Voluntary Suspension of Benefits. Use of the Optimizer can result in a substantial increase in benefits over options typically chosen by Social Security recipients.

The **Retirement Income Withdrawal Planner** generates a long-term retirement income and asset withdrawal plan over client and spouse life expectancies. It includes provisions for income from wages, pensions, social security, part-time work in retirement, and investments. The flexibility of the planner allows the user to not only project a client's current retirement picture, but also to explore a multitude of "what if" scenarios involving rates of growth, inflation, asset shifting, and withdrawal strategies.

TaxTools .....	\$199 <sup>00</sup>
annual renewal.....	\$169 <sup>00</sup>
network upgrade.....	\$150 <sup>00</sup>
Financial Planning Tools .....	\$349 <sup>00</sup>
annual renewal.....	\$299 <sup>00</sup>
network upgrade.....	\$100 <sup>00</sup>

There are three methods of e-filing—(1) web-based, (2) file upload by the preparer directly to the taxing agency, and (3) file-upload to a third-party provider who then forwards the file to the taxing agency. CFS can only support the second method.

With web-based e-filing, the process cannot be automated. The user must log in to a website and manually enter the information. With the file-upload by the preparer method, the software can create the file and the preparer can either log in to a website and upload the file or transmit the file directly to the agency's Internet portal. CFS can create files in the proper format for e-filing, but the taxing agency must allow for the file to be submitted by the preparer. CFS cannot act as a third-party provider handling customers' e-file data.

**We can only offer e-file where the file-upload method is available and no third-party provider is required.**

Details follow regarding the latest e-file developments in *CFS Payroll System*, *California Sales Tax Preparer*, and *New York Sales Tax Preparer*.

### CFS Payroll System

*CFS Payroll System* currently supports payroll form e-filing for a number of states. We will offer e-filing for additional state forms—and for Form 941—if and when it is possible to directly submit those forms using the file-upload method.

941/940 Payroll System.....	\$139 <sup>00</sup>
annual renewal.....	\$129 <sup>00</sup>
LivePayroll (includes 941/940) .....	\$299 <sup>00</sup>
annual renewal.....	\$289 <sup>00</sup>
Network Upgrade (covers all Payroll System programs) .....	\$150 <sup>00</sup>

### California Sales Tax Preparer

**In 2010, CFS became the first software company certified for the California Board of Equalization's Direct Transmit program.**

Our *California Sales Tax Preparer* software allows the user to complete a Sales and Use Tax Return within the program, then transmit the return and payment directly to the BOE with the click of a mouse button.

CA Sales Tax Preparer .....	\$119 <sup>00</sup>
annual renewal.....	\$99 <sup>00</sup>
network upgrade.....	\$50 <sup>00</sup>

### New York Sales Tax Preparer

Unfortunately, the New York State Department of Taxation and Finance uses a manual web-entry system, which means we cannot program our software for automatic e-filing. However, *NY Sales Tax Preparer* can be used to prepare printed forms to assist in manually entering information online.

If, in the future, New York should ever implement a file-upload system similar to California's, we would hope to be able to develop e-file capability for *NY Sales Tax Preparer*.

**In the meantime, we have discounted the price of *NY Sales Tax Preparer* by 50% until such time as we are able to offer e-file capability.**

NY Sales Tax Preparer .....	<del>\$169<sup>00</sup></del> \$84 <sup>50</sup>
annual renewal.....	<del>\$149<sup>00</sup></del> \$74 <sup>50</sup>
network upgrade.....	\$50 <sup>00</sup>

## AFTER-TAX-SEASON 2-FOR-1 SPECIALS

CFS is currently offering after-tax-season 2-for-1 specials on the following programs:

**TaxTools**—over 300 tax-planning, retirement, and financial utilities, forms, and flowcharts:

TaxTools '14 & '15 .....	\$199 <sup>00</sup>
Annual renewal.....	\$169 <sup>00</sup>
Annual network upgrade ..add	\$150 <sup>00</sup>

**Quick Reference Guide**—tables, charts, and other important information, in a powerful searchable format:

Quick Reference Guide '14 & '15.....	\$39 <sup>00</sup>
Annual renewal.....	\$29 <sup>00</sup>
Annual network upgrade ....add	\$50 <sup>00</sup>

**CA 571 Preparer**—prepares and prints California Business and Agricultural Property Statements:

CA 571 Preparer '14 & '15.....	\$99 <sup>00</sup>
Annual renewal.....	\$79 <sup>00</sup>
Annual network upgrade ....add	\$50 <sup>00</sup>

**MD Personal Property**—prepares and prints Maryland Personal Property Returns:

MD Personal Property '14 & '15.....	\$179 <sup>00</sup>
Annual renewal.....	\$139 <sup>00</sup>
Annual network upgrade ....add	\$50 <sup>00</sup>

**Financial Planning Tools**—comprehensive **Financial Planner**, plus forms, worksheets, flowcharts, and calculators:

Financial Planning Tools '14 & '15.....	\$550 <sup>00</sup>
Annual renewal.....	\$299 <sup>00</sup>
Annual network upgrade ..add	\$100 <sup>00</sup>

**W4 Calculator**—adjust payroll withholding throughout the year:

W4 Calculator '14 & '15.....	\$89 <sup>00</sup>
Annual renewal.....	\$49 <sup>00</sup>
Annual network upgrade ....add	\$50 <sup>00</sup>



## REMINDERS...

### Shipping Policies

**Software** is shipped by first-class mail. When ordering software, customers may choose from the following three options:

1. Receive the initial release of each program on CD and download all updates for **\$7 per order**.
2. Receive the initial release and all significant updates on CD for **\$25 per year**.
3. Download the program and all updates: **no CDs = no shipping charge**.

By choosing option three, you will not only save money on shipping, you will also have immediate access to your software. Some customers will receive the added benefit of not paying sales tax on programs downloaded from the Internet.

**Note:** due to the large number of updates required, users of *NY Sales Tax Preparer* **must** download all updates from the Internet, and therefore cannot choose option two.

**Forms and supplies** are ordinarily shipped UPS Ground. Cost depends upon the size of the order and may be higher for shipments outside the contiguous United States.

UPS Next Day and 2nd Day shipping options are also available, with cost depending upon shipment weight and destination.

**Note:**

- UPS can only deliver to a street address, not to a post office box.
- Severe weather may cause a delay in delivery. The UPS package guarantee does not apply when transportation networks are disrupted.



### Don't forget to download and install your software!

Remember—if you requested the “no CD” shipping option, you will not receive a CD, so don't forget to download and install your purchased CFS software!

Make sure we have your current e-mail address and our e-mails are not being blocked by your spam blocker, so that we can remind you about program releases and updates. You can also stay informed by signing up for our monthly e-newsletter, and by following us on *Facebook* or *Twitter*.

### Please keep us posted!

If you make changes to the name, address, or phone number of your firm, we need to know about it. Your firm information needs to be accurate and up-to-date so that you receive our mailings, so that we can notify you of program updates, and so that your license code functions correctly to give you access to the programs you have purchased.

It's easy to update your firm information online. Go to *TaxTools.com* and select **Change Firm Name/Address/Email** from the **MyCFS** menu. You can also fax changes to us at 805-522-0187 or e-mail [customerservice@taxtools.com](mailto:customerservice@taxtools.com). Please be sure to include your customer ID number.

Our policy is to require firm changes in writing, but for simple changes such as updating or correcting a phone number or an e-mail address, or if you have any questions, please call our customer service department at 1-800-343-1157.

### Instructional Videos

*CFS Instructional Videos* provide instruction on installing and updating CFS software and performing specific tasks in programs. Each video has controls which allow you to pause, rewind, and fast forward, for viewing at your own pace. Instructional Videos are available from the **Support** menu at *TaxTools.com* or from a link in the Help menu of most CFS programs.

# WHAT CAN YOU FIND AT TAXTOOLS .COM?

At *TaxTools.com*, you'll find all kinds of useful information, including...

## Technical Support...

Need help? You might find the answer in the **Frequently Asked Questions (FAQ)** section of our **Technical Support** page. If not, you can submit a **Technical Support Request** or get live **Chat Support** from a technician. Under the **Support** menu or **Quick Links**, click on **Technical Support**.

## Software Updates...

Need to update your CFS software, or just want to make sure you're running the latest version? Under **Quick Links**, click on **Software Updates**. Click on the CFS program you want to update, and you'll be taken to a screen where you can find the latest downloadable update, along with an **Update History**.

## MyCFS...

Your **MyCFS** account allows you to shop securely at our online store **and** gives you secure access to your personal customer information, including: Renewal Notice, Order History, Package Tracking, and License Codes. Select these options and others from the **MyCFS** menu, or click on **MyCFS Account** under **Quick Links**.

## Instructional Videos...

We've posted instructional videos to guide you through everything from installing and updating software to performing specific tasks within programs. The videos have controls that allow you to pause, rewind, and fast forward for viewing at your own pace. Under the **Support** menu, click on **Instructional Videos**.

## Expected Release Dates...

Want to know when to expect your CD or download the program you ordered? Under the **Support** menu, click on **Release Dates**.

## Show/Seminar Schedule...

Find out where and when CFS will be appearing at tax shows and seminars by selecting **Tax Seminars** from the menu bar.

## More...

At *TaxTools.com*, you will also find product descriptions, customer comments, important news, helpful links, downloadable program demos, and more!

## CFS POLICIES AND DISCLAIMERS

### Return/Refund Policy

Software and tax supplies returns will be accepted no later than 30 days from receipt of item(s). All tax year forms/envelopes must be returned sealed and unused within 30 days of receipt, but no later than December 15th of the same tax year. All refunds will be paid less shipping charges.

Shipping damage must be reported as soon as possible (no more than 14 days).

### Free Shipping

There is no shipping charge or sales tax if you download the program and all updates and do not receive a CD. However, if you later request a CD, CFS is required by law to charge applicable sales tax on the original order.

### Update CD Service

There is an annual charge of \$25 if you would like the initial release and all major updates on CD. **Note:** this option is not available for online programs or NY Sales Tax Preparer.

### Multi-Program Network License

You can purchase network upgrades for CFS programs for an additional fee. However, if you purchase several CFS programs, you might want to consider our Multi-Program Network License, which upgrades all CFS programs to the network version for an annual price of \$329.00. The Multi-Program Network License is not a stand-alone program—you must buy the single-user programs you wish to upgrade. This offer does not apply to Fill-N-Print.

### Financial Planning Tools

The 2014 program will change to read-only mode after May 31, 2015. To enter new data after that date, you must order the 2015 program. The 2014 and 2015 programs may be purchased together for a special discount price of \$550.

### Fill-N-Print

After a Fill-N-Print subscription expires, subscribers may still access saved data in "offline" mode. New files may be created once the subscription is renewed.

