

intuit Accountants

What's New in Lacerte 2021

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#TogetherWithIntuit

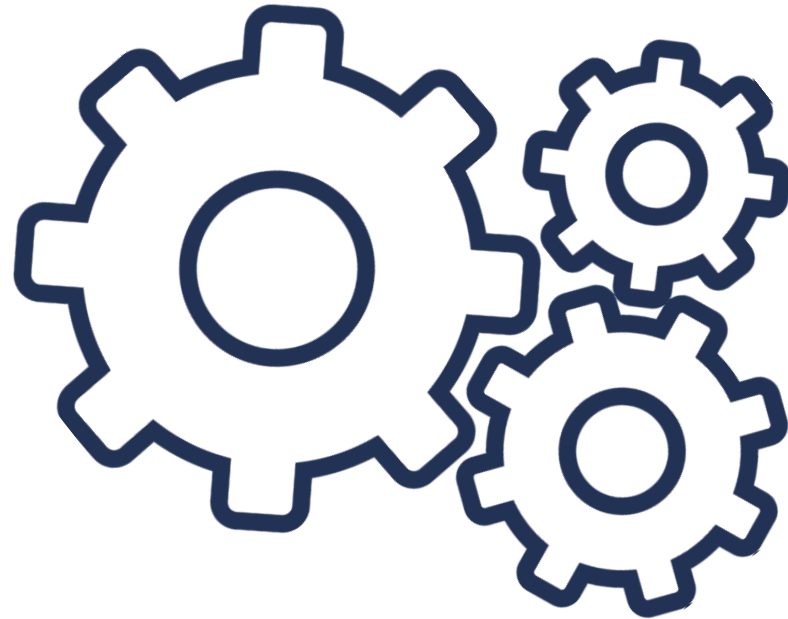
The 2020 Tax Season...You Survived!

- **The 2020 tax season was incredibly challenging**
- **Law changes, remote work, loan processes, etc., etc.**
- **Congratulations on making it through!**
- **Looking forward to a smoother 2021**

Agenda

- **Operational Changes**
- **New Tax Forms (eFile and print)**
- **New eFile types**
- **A Few Lacerte Tips**

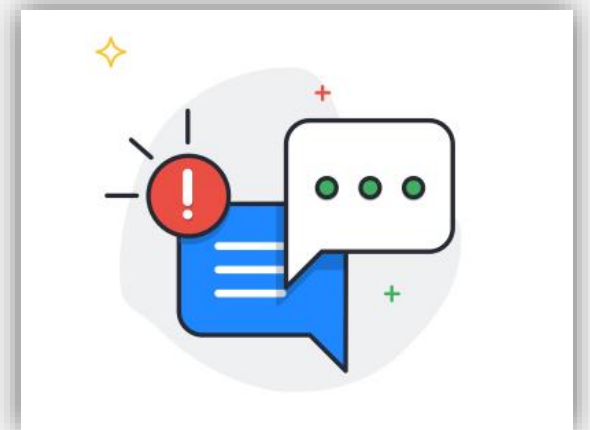
Operational Changes



New Program Operations

Tax Accuracy Notifications

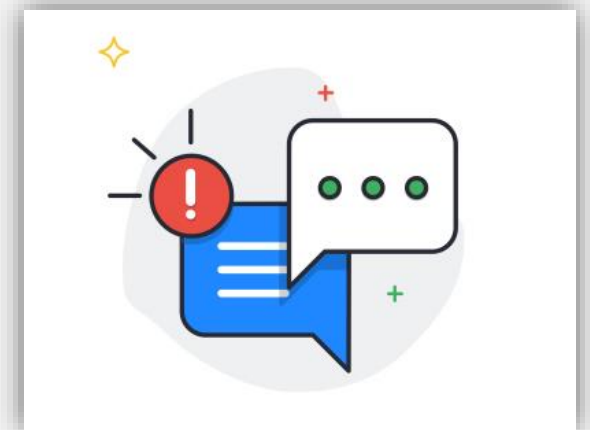
- We are working to eliminate delays from an internally reactive and manual process of identifying and remedying accuracy issues related to tax law changes
- Reduce the stress and hassle of finding returns that were affected by these changes before or after you've filed
- Receive proactive notifications of these events, which of your clients are impacted, and what you need to do next to remedy



New Program Operations

Tax Accuracy Notifications (Continued)

- **Efficiency:** Sooner awareness of issues that affect the accuracy of your clients' returns
- **Timesavings:** Awareness of issues sooner can help reduce the potential number of returns prepared that would have been impacted
- No more stopping to look for those clients/returns, get a list of impacted returns with one click
- See whether or not you've filed them, and understand next steps for each situation



New Intuit Tax Advisor

New Intuit Tax Advisor

What is Intuit Tax Advisor?

- Integrate with Lacerte and ProConnect
- Automate workflow with over 30 tax strategies
- Generate a tax plan within minutes
- Show specific tax savings
- Create custom strategies to save and reuse
- Incorporate tax law updates with ease
- Create custom client reports with your logo and info

New Intuit Tax Advisor

Save time

Leverage powerful AI-driven insights to save your firm significant blocks of time. Seamless integration with Lacerte and ProConnect eliminates the need for data entry and additional spreadsheets to facilitate planning. It also helps you create personalized tax plans in just minutes. Talk about efficient!

Help your team scale planning and advisory services confidently with Intuit Tax Advisor.

New Intuit Tax Advisor



Save time with integration

Import a tax return with one click. No scanning or data entry needed.



Personalized tax strategies

Create custom tax-saving strategies for each client within minutes.



Tax projections

Review the strategies, tax savings, and projected tax liabilities for federal and state.



Client-friendly reports

Share easy-to-read reports that show quantified tax savings and feature your firm's logo and information.

New Intuit Tax Advisor

The screenshot displays the Intuit Tax Advisor interface for a user named Bob Sanders. The interface is divided into several sections:

- Header:** Shows the user's profile (Bob Sanders, MFJ / CA / 1 dependent) and the current tax plan (2020-Q1 Bob Sanders Tax Plan).
- Navigation:** Includes tabs for "Make adjustments", "Add strategies" (which is active), and "Review plan".
- Left Panel:** A sidebar with "Insights" and "All strategies" tabs. Below these are search and filter options, and a list of strategy categories with "Add" buttons:
 - 401(k) employee contributions (1 added)
 - Lifetime learning credit
 - Roth IRA contribution
 - Traditional IRA tax deferred growth
 - Accountable reimbursement plan
- Main Content Area:** Titled "Add strategies", it features a table with columns for "Strategy", "Activity", and "2021 actual".
 - Existing 2020 strategies:**
 - 401(k) employee contributions: Enabled, Activity: IBM (T), Amount: 10,000, W-2 (BOX 1).
 - New 2021 strategies:**
 - 401(k) employer matching contribu...: Enabled, Activity: IBM (T), W-2 (BOX 1).
 - S corporations SE tax savings: Enabled, Activity: Math Tutor, Inc., 1120S.
 - Child tax credit: Enabled, Activity: Credit.

New Intuit Tax Advisor

Client-specific tax plans

Deliver insightful, personalized tax plans that quantify the tax savings for each strategy and highlight your expertise.

Powerful tax engine

Clearly illustrate tax savings to help differentiate your advisory services.

Firm branding

Your firm's logo and color showcase your brand better than in traditional compliance reports.

Your top tax-saving strategies for 2021



Projected tax savings **\$22,315**

 Your Firm Logo

New Intuit Tax Advisor - Strategy Categories

Take your tax advisory services to the next level. Recommend the right tax-saving strategies that will deliver quantified tax savings for your clients

- Retirement plans
- Income and deduction timing
- Income shifting between entities
- Tax-free capital appreciation
- Economic stimulus benefits
- Charitable contributions
- State income shifting
- Tax credits
- Higher education
- Business expenses
- Health and wellness
- Investments

New in Program Operations

Verify your EFIN in Lacerte

- Manage your EFIN more efficiently through a widget in Lacerte.
- Update and verify your information without leaving your software.

Upgraded Login Security

Recommendation for Tax Year 2021

- **Current Login standard** - Single-Factor Authentication with an Opt-In to add 2-Factor Authentication standard
- **PY2022 industry standard** - 2-Factor Authentication with an opt-out if you do not wish to authenticate
- **PY2023 industry standard** - Mandatory 2-Factor Authentication for all accessing taxpayer PII.

Intuit Account - 2-Factor Authentication

- **Minimize the opportunity for remote takeover**
- **Remain logged in for 12 hours before it times-out (TY21)**
- **Each user will need to enable this feature for their login**
- **Username + Password + Cell phone (Text or Google Authenticator App)**
- **Mandatory for all Tax Pros by tax year 2022**

Support Upgrades

One-on-One and Self-serve Assistance

Intelligent voice assistant

- Get what you need faster with a new listening tool that directs you to self-serve solutions
- You won't have to stay on hold to talk to an agent

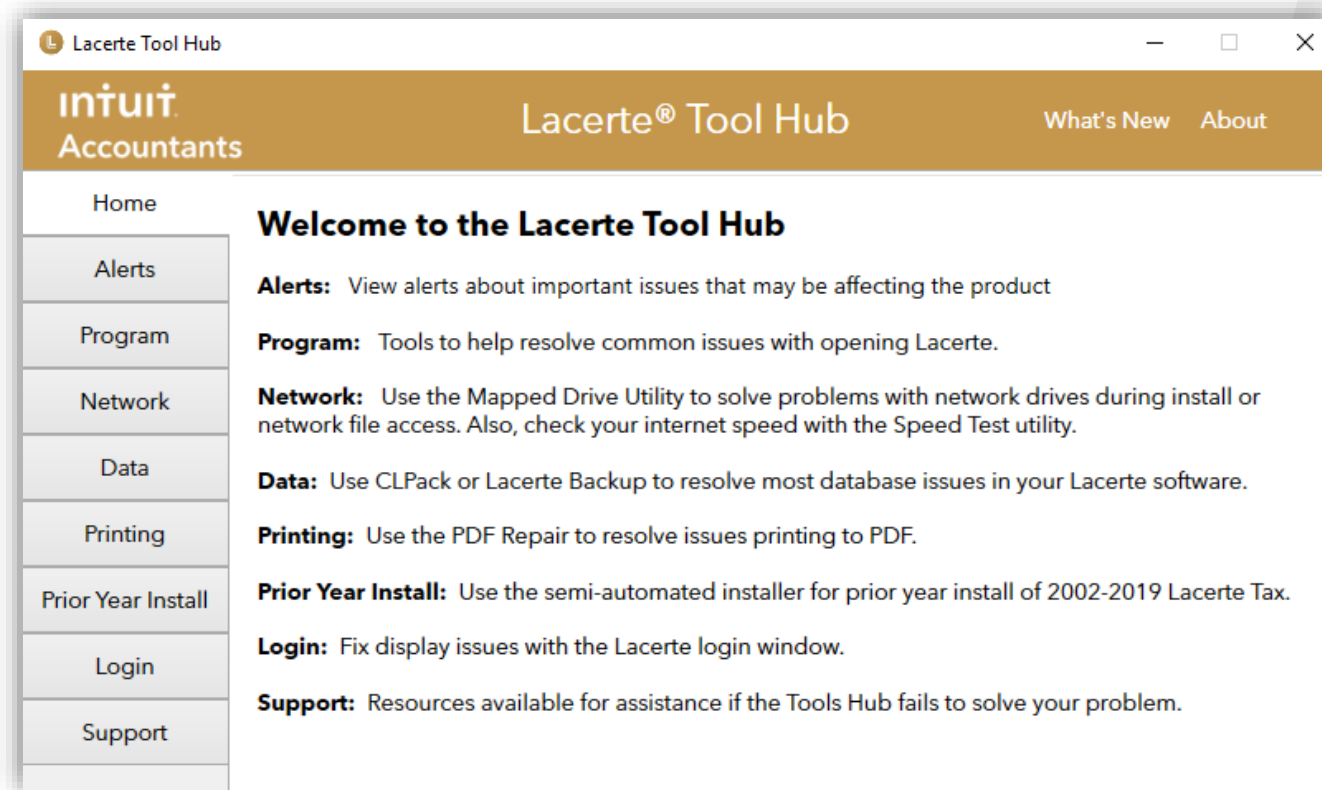
Get product support on your schedule

- Request a support appointment or have the support team call you back

The Lacerte Tax Idea Exchange

- Help us make the product enhancements that are important to you. Vote for the ideas you like most, then get updates on their status

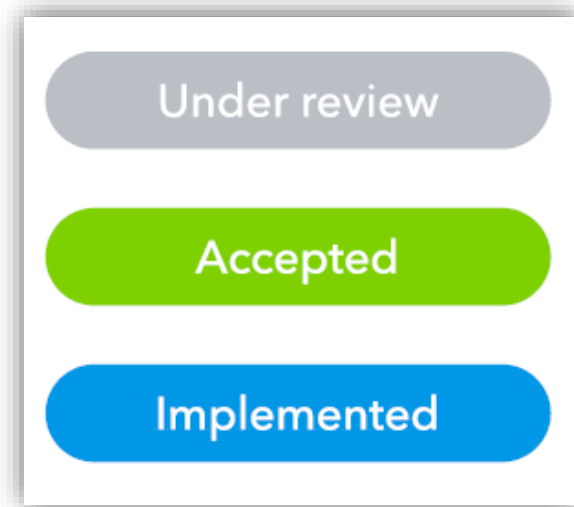
What is the Lacerte Tool Hub App?



Lacerte Community - Capturing your Ideas

Lacerte Tax Idea Exchange

- Now you can share your ideas with us
- Get updates on their status to understand if they are under review, accepted or implemented



New in Program Operations

New billing profile

- In compliance with industry mandates and to enhance your data security, we have consolidated billing for Intuit Lacerte Tax, Intuit eSignature, and Tax Scan
- Now in a single “wallet.”
- You won’t have to re-enter your payment information every time you make a purchase.
- You can securely save payment methods in Lacerte and add, store, edit, or remove payment methods in My Account for all of your Intuit Accountants products.

New in Program Operations

Easier onboarding to Hosting for Lacerte

- Brand new for Lacerte 2021 comes the built-in **Hosting Upload and Import** utility
- This functionality lets anyone with an active Right Networks account to safely and efficiently move their Lacerte, DMS, and Tax Planner data from their local computer to the Right Networks Cloud Hosting desktop
- Thousands of users have taken advantage of Hosting for Lacerte
- New and returning subscribers can get up and running faster with Lacerte in the cloud with automated data transfer
- Streamlines the process of using hosting and eliminates setup time and hassle

New Tax Forms



New Tax Forms - Print and e-file

Federal (US) Individual

- Form 9000, Alternative Media Preference
- Form 8915-F, Qualified Disaster Retirement Plan Distributions and Repayments

Federal (US) Individual, Corporate, S-Corporate, Partnership

- Form 14039-B, Business Identity Theft Affidavit

Federal (US) Individual, Corporate, Exempt, Fiduciary, S-Corporate, & Partnership

- Form 5471 Sch G-1, Cost Sharing Arrangement

New Tax Forms - Print and e-file

Federal (US) Partnership

- Schedule K-2, Partner's Distributive Share Items - International
- Schedule K-3, Partner's Share of Income, Deductions, Credits, etc. - International

New Tax Forms - Print and e-file

Alabama Individual

- Schedule ATP, Additional Taxes & Penalties
- Schedule HBC, First Time Second Chance Home Buyer Deduction

Alabama Partnership & S-Corporation

- Form PTE-E, Pass-Through Entity Election Form
- Form EPT, Electing Pass-Through Entity Payment Return
- Schedule EPT-K1, Electing Pass-Through Entity K-1
- Schedule EPT-C, Electing Pass-Through Credit
- Schedule PTE-AJA, Alabama Jobs Act-Investment Credit

New Tax Forms - Print and e-file

Arkansas Individual

- Form AR2441, Child and Dependent Care Expenses

Arkansas Individual, Corporate, S-Corporate, Partnership & Fiduciary

- Form AR8944, Preparer e-file Hardship Waiver Request

Georgia Individual

- Form IND-CR 213, Adoption of a Foster Child

Indiana Individual

- Schedule IN-40PA, Indiana Post-liability Allocation Schedule

Indiana Partnership

- Schedule IN-EL, Tax Computation Form Electing Partnerships

New Tax Forms - Print and e-file

Indiana Fiduciary

- Form IT-41 Schedule 1, Other Income

Kansas Individual

- Schedule A, Itemized Deductions

Minnesota Fiduciary

- Schedule M1MB, Business Income Additions and Subtractions
- Schedule M1LOSS, Minnesota Limitation on Business Loss

Minnesota Partnership and S-Corporation

- Schedule PTE, Pass-Through Entity Tax

New Tax Forms - Print and e-file

New York Individual

- IT-203-F, Multi-Year Allocation Form
- IT-221, Disability Income Exclusion
- IT-237, Claim for Historic Homeownership Rehabilitation Credit
- IT - 6 - SNY, Metropolitan Commuter Transportation Mobility Tax for START-UP NY

New York Individual and Fiduciary

- IT-112.1, NYS Resident Credit Against Separate Tax on Lump-Sum Distributions

New Tax Forms - Print and e-file

New York Individual and Partnership

- IT-239, Claim for Credit for Taxicabs and Livery Service
- IT-501, Temporary Deferral Nonrefundable Payout Credit
- DTF-630, Claim for Green Building Credit

New York Individual, Fiduciary, and Partnership

- IT-211, Special Depreciation Schedule
- IT-212-ATT, Claim for Historic Barn Rehabilitation Credit and Employment Incentive Credit
- IT-236, Credit for Taxicabs and Livery Service Vehicles Accessible to persons with Disabilities

New Tax Forms - Print and e-file

New York Individual, Fiduciary, and Partnership (continued)

- IT-238, Claim for Rehabilitation of Historic Properties Credit
- IT-246, Claim for Empire State Commercial Production Credit
- IT-248, Claim for Empire State Film Production Credit
- IT-252, Investment Tax Credit for the Financial Services Industry
- IT-253, Claim for Alternative Fuels Credit
- IT-261, Claim for Empire State Film Post-Production Credit
- IT-602, Claim for EZ Capital Tax Credit
- IT-605, Claim for EZ Investment Tax Credit and EZ Employment Incentive for the financial Services Industry

New Tax Forms - Print and e-file

New York Individual, Fiduciary, and Partnership (continued)

- IT-613, Claim for Environmental Remediation Insurance Credit
- IT-633, Economic Transformation and Facility Redevelopment Program Tax Credit
- IT-634, Empire State Jobs Retention Program Credit
- IT-636, Alcoholic Beverage Production Credit
- DTF-621, Claim for QETC Employment Credit
- DTF-624, Claim for Low-Income Housing Credit
- DTF-626, Recapture of Low-Income Housing Credit

New Tax Forms - Print and e-file

New York Fiduciary

- IT-230, Separate Tax on Lump-Sum Distributions

New York Partnership

- IT-250, Claim for Credit for Purchase of an Automated External Defibrillators

North Carolina Partnership and S-Corporation

- Form NC-PE, Additions and Deductions for Pass-Through Entities, Estates and Trusts

New Tax Forms - Print and e-file

Oregon Individual

- Form MC-40, Multnomah County Preschool For All
- Form MC-40-NP, Multnomah County Preschool for All
- Form MET-40, Metro Supportive Housing Services
- Form MET-40-NP, Metro Supportive Housing Services

Oregon Corporate

- Form METBIT-20, Metro Supportive Housing Services Business Income Tax Return for Corporations

Oregon Fiduciary

- Form METBIT-41, Metro Supportive Housing Services Business Income Tax Return for Trusts & Estates

New Tax Forms - Print and e-file

Oregon Partnership

- Form METBIT-65, Metro Supportive Housing Services Business Income Tax Return for Partnerships

Oregon S-Corporation

- Form METBIT-20S, Metro Supportive Housing Services Business Income Tax Return for S-Corporations

South Carolina Individual

- Schedule TC-38, Solar Energy or Small Hydropower System or Geothermal Machinery and Equipment Credit

Poll Question

How do you collect documents from clients today?

They mail them to me

They drop them off/bring them to the interview

They upload them to my portal

They email them to me

Other, not specified

New eFile Types



New eFile Types - Main Return

- Hawaii Partnership & Fiduciary
- Indiana Fiduciary
- Kentucky (Louisville) Individual, Corporate, S-Corporation, & Partnership
- Massachusetts Grantor Fiduciary
- North Carolina Fiduciary

New eFile Types - Amended Returns

- Arkansas Individual
- Colorado Individual
- Connecticut Individual
- District of Columbia Individual, Corporate, Fiduciary, S-Corporation & Partnership
- Hawaii Individual, Corporate, Fiduciary, S-Corporation & Partnership
- Indiana Fiduciary
- Iowa Individual
- Kansas Individual
- Kentucky Individual
- Maine Individual
- Mississippi Individual
- Missouri Individual
- Montana Individual

New eFile Types

- New Hampshire (BT Sum) Individual
- New Hampshire (DP-10) Individual
- New Mexico Individual
- North Carolina Individual
- Oklahoma Individual
- Rhode Island Individual
- South Carolina Individual
- Tennessee (Franchise) Individual
- Utah Individual
- Virginia Individual
- West Virginia Individual

New eFile Types - Extension/Estimated Payments

E-filing capability for the following extensions

- Kentucky (Louisville) Individual, Corporate, S-Corporation, & Partnership

E-filing capability for the following estimated payments

- Virginia Individual

Pre-tax Season Reminder... My Account

As you prepare for another successful tax season, we wanted to remind you of all the ways that My Account can help you be even more efficient.

You can:

- Verify that your account information is correct.
- Manage your EFIN or get one if you don't have one yet.
- Add or change users or permissions improvements .
- Order add-ons to boost productivity, like Hosting for Lacerte, eSignature or Pay by-Refund.
- Access your personalized training portal.
- Manage your payment options

Lacerte Program Tips

Adjusting Program Appearance

Does your Client Screen look like this?

Views	Full Name (LNF)	Client No.	Preparer	eSig Status	Intuit Link	Missing Data?	Status	Status Date	Time Spent	Due Date	Unemp. Comp.	Business Income	Refund	Fed Est 1st Qtr	Amount Due	Capital G
All Clients	Jones, Todd and Mary	100	1. John Smith	Request	Invite		On Extension	09/15/2021	00:07	05/17/2021	8500	0	0	0	0	
e-file Clients	Kumar, Vinay	JACOBS	3. Lynn Jones	Request	Invite		Past Due	11/11/2020	00:01	05/17/2021	0	0	0	0	0	
e-file Center	Leon, Angela	TESTWW	4. Michael Erickson	Request	Invite		Past Due	07/12/2021	00:00	05/17/2021	0	0	0	0	0	-3
Tax Import Clients	Li, Justin	ZAAAA	6. Brenda Campbell	Request	Invite		Waiting for payment	11/09/2021	00:00	05/17/2021	0	0	0	0	0	
e-org Clients	Lis, Scott	EEEEEE	2. Teri Anderson	Request	Invite		Schedule Planning Appt	07/20/2021	00:56	05/17/2021	0	0	0	0	0	
Filter	Lukic, Suncica and Elaine	2121	5. Timothy O'Shea	Request	Invite		complete	06/25/2021	00:00	05/17/2021	0	0	0	0	0	20
Client Status	Marshall, Jerry	KREINARD	3. Lynn Jones	Request	Invite		complete	06/10/2021	00:00	05/17/2021	0	0	0	0	0	
Preparers	McT taxpayer, Thomas	NYSHB5E9	1. John Smith	Request	Invite	✓	Waiting for payment	11/09/2021	00:03	05/17/2021	0	0	0	0	0	
Firms	Oldham, Suzanne	32323238	2. Teri Anderson	Request	Invite		complete	11/09/2021	00:14	05/17/2021	0	60000	0	2938	11750	
Federal e-file Status	Ortega, Tabitha	854545	1. John Smith	Request	Invite		Past Due	11/11/2020	00:00	04/15/2021	0	0	0	0	0	
Federal Amended e-file	Palmer, Sara	PLAN32	3. Lynn Jones	Request	Invite		On Extension	02/24/2021	00:00	05/17/2021	*****	*****	*****	*****	*****	****
US-Form 114 e-file	Palmer, Sara	TRTR	3. Lynn Jones	Request	Invite		Waiting for payment	11/09/2021	00:00	05/17/2021	*****	*****	*****	*****	*****	****
US-Form 114-SP e-file	Philip, Tim	TRISTAN	6. Brenda Campbell	Request	Invite		Schedule Planning Appt	06/10/2021	00:02	06/15/2021	0	0	0	0	0	
US Form 114 Amd e-file	Reeth, Lina	COERTE	6. Brenda Campbell	Request	Invite		Ready for Review	06/15/2021	00:36	05/17/2021	0	0	0	0	0	
US Form 114 Amd e-file	Reinard, Kevin	321	1. John Smith	Multiple	Invite		Waiting for payment	11/09/2021	01:59	05/17/2021	0	0	0	662	2648	21
State e-file Status	Rembo, Samantha	54545	6. Brenda Campbell	Request	Invite		complete	11/09/2021	00:21	05/17/2021	0	0	0	0	0	
Arizona Extension e-file	Richter, Leticia	ANN	3. Lynn Jones	Request	Invite		complete	07/16/2021	00:04	05/17/2021	0	0	0	0	0	
California LLC e-file	Sample, Barbara	PLANB	2. Teri Anderson	Request	Invite		Schedule Planning Appt	06/10/2021	00:00	05/17/2021	0	0	0	0	0	
CA Est. e-file Status	Sanders, Diane	TEST	3. Lynn Jones	Request	Invite		Ready to efile	06/22/2021	00:01	05/17/2021	*****	*****	*****	*****	*****	****
State Amended e-file	Sellers, John	AMENDED	5. Timothy O'Shea	Request	Invite	✓	On Extension	08/23/2021	00:17	05/17/2021	0	0	0	0	0	
CO Est. e-file Status	Simms, Eric	ERIC	2. Teri Anderson	Request	Invite		complete	11/09/2021	00:03	05/17/2021	0	0	0	0	0	
CT Est. e-file Status	Simpson, David	MARTIN	2. Teri Anderson	Request	Invite		complete	09/01/2021	00:00	05/17/2021	*****	*****	*****	*****	*****	****
Dist of Columbia UE	Smith, Mary	EIC	1. John Smith	Request	Invite		On Extension	08/26/2021	00:09	05/17/2021	0	0	0	720	2923	
DC Prmts e-file Status	Smith, Tim and Sue	TIM	4. Michael Erickson	Request	Invite		Schedule Planning Appt	06/10/2021	00:46	05/17/2021	0	0	0	0	0	-3
IA Est. e-file Status	Taxpayer, John A.	WESDF-T	2. Teri Anderson	Request	Invite	✓	Info Pending	11/09/2021	00:00	05/17/2021	0	0	0	0	0	
Kentucky LLC e-file	Taxpayer, John A. and Katie A.	WESDF	2. Teri Anderson	Request	Invite	✓	complete	11/09/2021	47:31	05/17/2021	0	68900	0	5270	27828	
KY Prmts e-file Status	Taxpayer, Katie A.	WESDF-S	2. Teri Anderson	Request	Invite	✓	Info Pending	11/09/2021	00:00	05/17/2021	0	0	0	0	0	
Louisiana Extension	Walton, Aaron and Myna	11111	6. Brenda Campbell	Request	Invite		On Extension	08/31/2021	00:05	06/15/2021	0	0	0	0	0	
Maryland Extension	Webb, Mary and john	PLANEE	4. Michael Erickson	Request	Invite		Waiting for payment	06/14/2021	00:01	05/17/2021	0	0	0	0	0	
MD Est. e-file Status	White, Bill and Nancy	KEVIN	4. Michael Erickson	Request	Invite		complete	11/09/2021	00:03	05/17/2021	0	0	0	0	0	
MN-M1PR e-file Status	Whitman, David and Karen	YGYGY	6. Brenda Campbell	Request	Invite		Ready for Review	11/11/2020	00:03	05/17/2021	0	0	0	0	0	-1
MNH-1PR e-file Status																
New Jersey Extension																
NJ Est. e-file Status																
New York Extension																
NY Est. e-file Status																
NY-IT-204LL e-file Status																

Adjusting Program Appearance

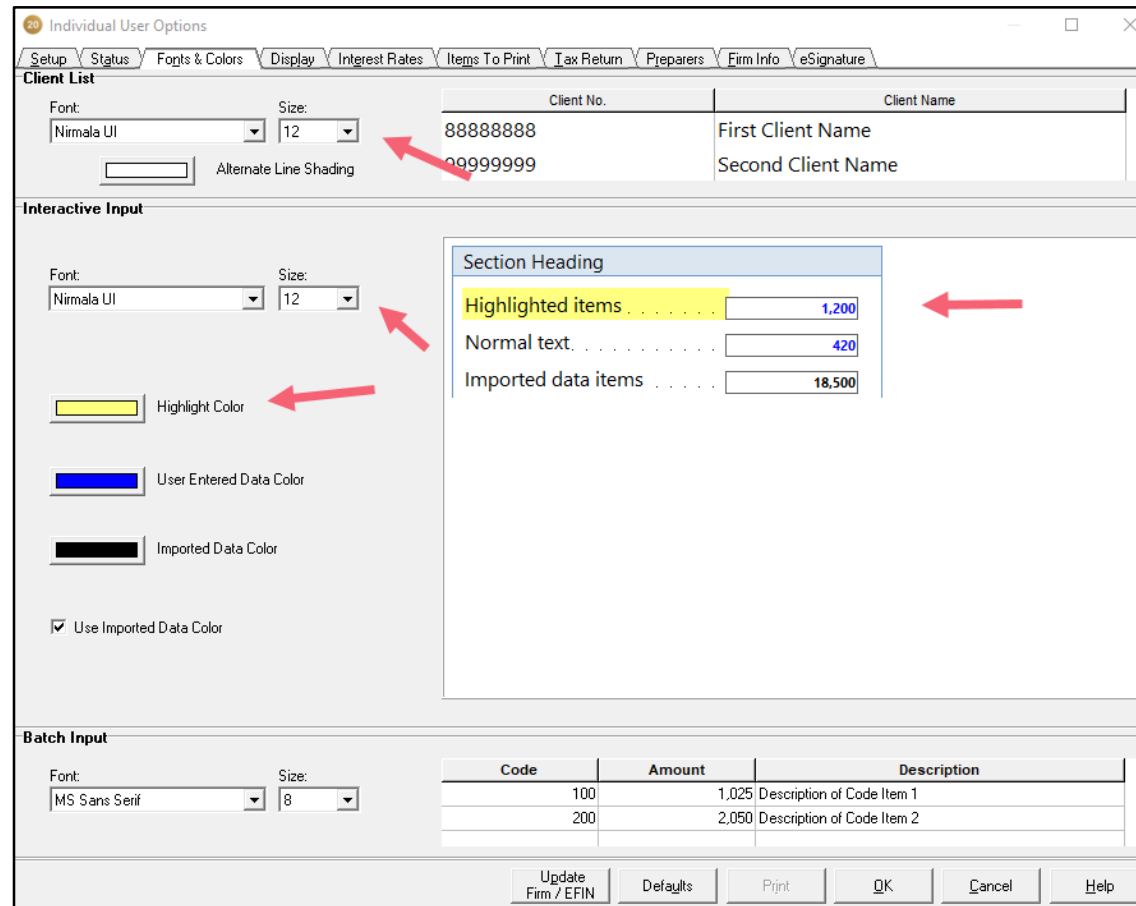
Does your Client Screen look like this?

The screenshot shows the Intuit software interface for a client named 'Client WESDF'. The interface is divided into several sections:

- Client Information:** Married filing joint, Taxpayer: John A. and Katie A., 105 Burnill Dr, Folsom, CA 95630. Contact info: Phone: (555) 555-1212, Cell: (555) 555-1212, Fax: (555) 555-1212. Email: (taxpayer) jaceteinstrutor@gmail.com, (spouse) Kate@website.com, (website) Kate@website.com. Prepared by: Teri Anderson.
- General:**
 - 1 Client Information
 - 2 Dependents
 - 3 Miscellaneous Information/Direct Deposit
 - 3.1 Community Property Income Allocation
 - 3.2 Pay-By-Refund
 - 4 Electronic Filing
 - 5.1 Invoice, Letter, Filing Instr.
 - 5.2 Custom Client Letter
- Payments & Penalties:**
 - 6 2020 Estimated Tax Payments
 - 7 2021 Estimates (1040-ES, W-4, W-4P)
 - 8 Penalties & Interest (2210)
 - 9 Extensions (4868, 2350)
- Income:**
 - 10 Wages, Salaries, Tips
 - 11 Interest Income (1099-INT, 1099-OID)
 - 12 Dividend Income (1099-DIV)
 - 13.1 Pensions, IRAs (1099-R)
 - 13.2 Gambling Winnings and Losses (W-2G)
 - 14.1 SS Benefits, Alimony, Miscellaneous Inc.
 - 14.2 State Tax Refunds, Unemployment Comp. (1099-G)
 - 14.3 Education Distributions (1099-Q)
 - 14.4 ABLE Distributions (1099-QA)
- 15 Net Operating Loss
- 16 Business Income (Sch. C)
- 17 Dispositions
- 18 Rental & Royalty Inc. (Sch. E)
 - 19 Farm Income (Sch. F, 4835)
- 20 Passthrough K-1's
- 21 Oil and Gas

- Deductions:**
- 22 Depreciation
- 23 Direct Input (4562)
- 24 Adjustments to Income
- 25 Itemized Deductions (Sch. A)**
- 26 Noncash Contributions (8283)
- 27 Moving Expenses (3903)
- 28 Investment Interest (4952)
- 29 Business Use of Home (8829)**
- 30 Vehicle/Emp. Bus. Expense (2106)
- 31 Foreign Income Exclusion (2555)
- 32 HSA/MSA/LTC Contracts (1099-SA, 5498-SA)
- Credits:**
- 33 Dependent Care Credit (2441)
 - 34 General Business & Vehicle Credits
 - 35 Foreign Tax Credit (1116)
 - 36 Fuel Tax Credit (4136)
 - 37 Adoption Credit (8839)
- 38.1 Education Credits / Tuition Deduction (1098-T, 8863, 8917)
 - 38.2 Recovery Rebate, EIC, Residential Energy, Other Credits
 - 38.3 Credit to Holders of Tax Credit Bonds (8912)
 - 38.4 Credit for Sick Leave and Family Leave for SE (7202)
- 39 Premium Tax Credit (1095-A, 8962)
- Taxes:**
- 40 Alternative Minimum Tax (6251)
- 41 Retirement Plan Taxes (5329)
- 42 Household Employment Taxes (Sch. H)
- 43 Certain Children (8615)
- 44 Parent's Election (8814)
- 45 Other Taxes**
- Other:**
- 46 Elections
- 47 Notes
- 48 Prior Year Summary**
- 49 Control Totals
- State & Local:**
- 50 Income
- 51 Modifications
- 52 Other State Tax Credit
- 53 Other Credits**
- 54 Taxes:**
- 55 Part-Yr./Nonres. Information
- 56 Contributions
- 57 Other
- Miscellaneous Forms:**
- 58.1 Nonresident Alien (1040-NR)
- 58.2 Foreign Withholding (RRB-1042S, 1042-S, SSA-1042S)
- 58.3 Statement of Withholding on Dispositions (8288-A)
- 58.4 Foreign Partner's Information Statement (8805)
- 59 Amended Return (1040-X)**
- 60 Tentative Refund (1045)
- 61 Claim for Refund (843)
- 62 Discharge of Indebtedness (982)
- 63 Deceased Taxpayer (1310)
- 64 Multiple Support (2120)
- 65.1 Notice Concerning Fiduciary Rel. (56)
- 65.2 Power of Att. (2848)/Tax Info. Auth. (8821)**
- 66 Change in Accounting Method (3115)
- 67 Copy or Transcript of Tax Rtn. (4506, 4506-T)
- 68 Information Return of U.S. Persons (5471)
- 69 Disclosure Stmt. (8275, 8275-R)
- 70 Release of Exemption (8332)
- 71 Injured Spouse Allocation (8379)
- 72 Asset Acquisition Stmt. (8594)
- 73 Change of Address (8822, 8822-B)
- 74 Treaty-Based Rtn. Position Disclosure (8833)
- 75 Pre-Screening Notice for Emp. Credits (8850)
- 76 Innocent Spouse Relief (8857)
 - 77.1 EIC/CTC/ODC/AOC After Disallowance (8862)
 - 77.2 Paid Preparer's Due Diligence Checklist (8867)
- 78 Tax Shelter Statement (8886)
- 80 Installment Agreement (9465)
- 81 Employer I.D. No. App. (SS-4)
- 82 Foreign Reporting (114, 8938)

Customize Your Fonts and Colors



Settings > Options > Font's & Colors Tab

Bold the Data in Forms View

The image shows a screenshot of the Intuit Accountants software interface. The main window displays the 'SCHEDULE C Profit or Loss From Business (Sole Proprietorship)' form for the year 2020. The form is titled 'SCHEDULE C (Form 1040)' and includes the following information:

- Department of the Treasury Internal Revenue Service (99)
- Name of proprietor: **John A. Taxpayer**
- Social security number (SSN): **111-11-1111**
- Principal business or profession: **Sample Business**
- Business name: **Sample Business**
- Accounting method: Cash Acc
- Did you "materially participate" in the operation of this business? Yes No
- Did you start or acquire this business during 2020, check the box that applies: Yes No
- Did you make any payments in 2020 that would require you to file Form 1099? Yes No

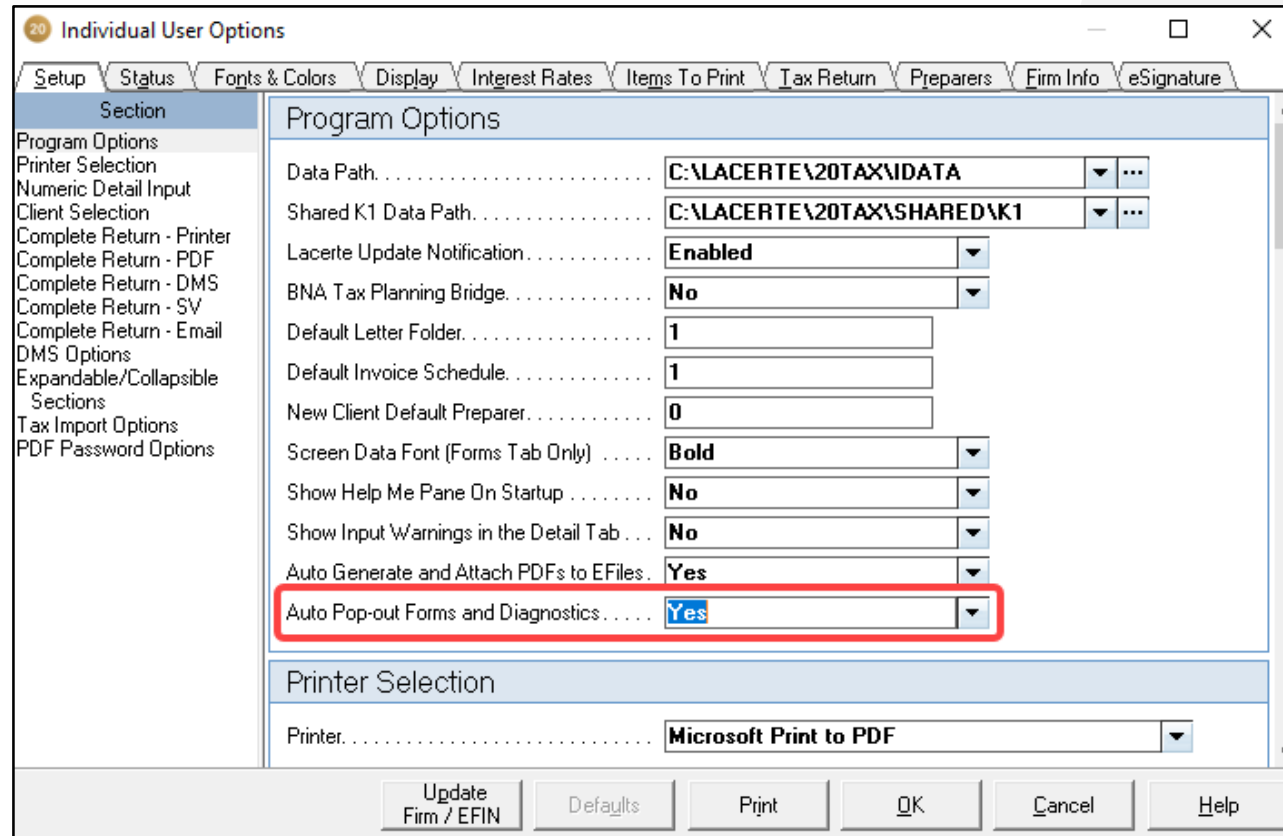
The form is currently in 'Part I Income' section. The data is displayed in a bold font. An 'Individual User Options' dialog box is open over the form, showing the 'Setup' tab. The 'Program Options' section is expanded, and the 'Screen Data Font (Forms Tab Only)' option is set to 'Bold', which is highlighted with a red box. Other options include 'Data Path', 'Shared K1 Data Path', 'Lacerte Update Notification', 'BNA Tax Planning Bridge', 'Default Letter Folder', 'Default Invoice Schedule', 'New Client Default Preparer', 'Show Help Me Pane On Startup', 'Show Input Warnings in the Detail Tab', 'Auto Generate and Attach PDFs to EFiles', and 'Auto Pop-out Forms and Diagnostics'. The 'Printer Selection' section shows 'Microsoft Print to PDF' as the selected printer.

Settings > Options > Setup Tab

Take Advantage of your Multi-monitor Setup

View the three most used tabs at once

- Detail Tab
- Diagnostic Tab
- Forms Tab

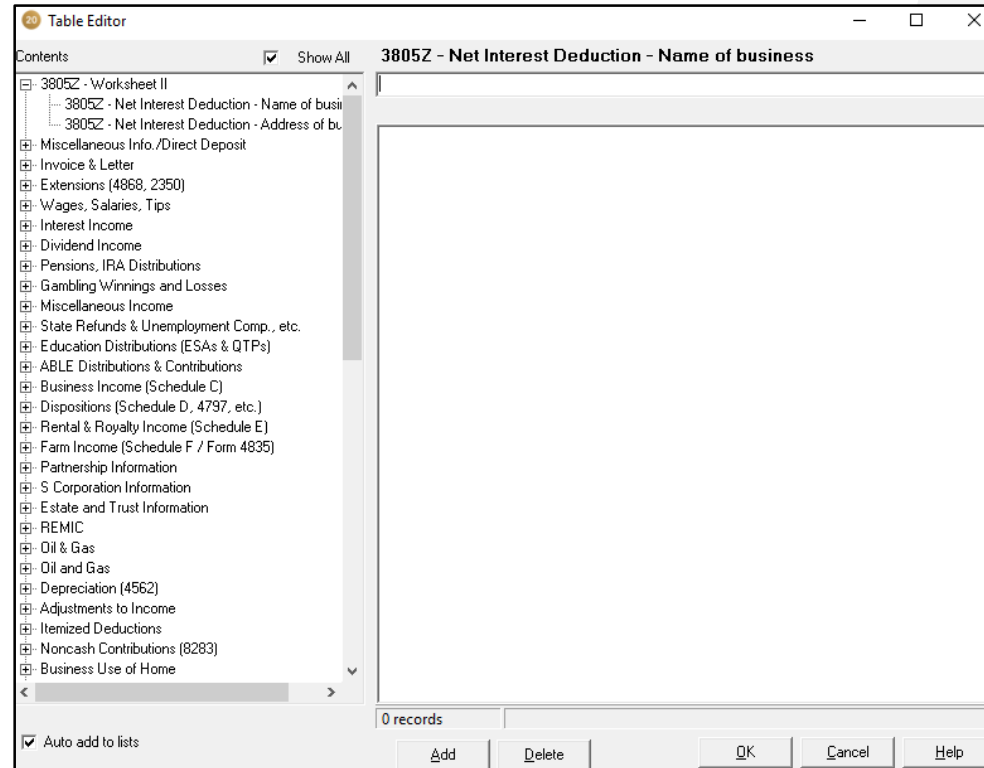


Settings > Options > Setup Tab

Clean Up Those Tables!

Table Editor

- Remove unused items
- Get better program performance



Settings > Table Editor

Managing Partner Data and Oil and Gas Properties

- Do you have large partnerships...lots of partners?
- Do you have clients with lots of oil and gas properties?
- Do you manage this information in excel?
- You can import this information into Lacerte through an import wizard

Managing Partner Data and Oil & Gas Properties

Partner Data Import

The screenshot shows the 'Partner Information' form. The 'Import' button is highlighted with a red box. The form contains the following data:

Name and ID Number	
Partner Name	Bill North
Partner DBA	
ID Number	123-45-6789

Address and Telephone	
Foreign Address?	<input type="checkbox"/>
Street Address	456 Ridgeside
City	Any Place
State	US
Zip Code	77777
Region	
Postal Code	
Country	
Resident State	US
Telephone Number	
E-Mail Address	

Miscellaneous Info	
Type of Entity	Individual
If LLC, Federal Classification	
Unique ID Number (Internal)	

Oil & Gas Data Import

The screenshot shows the 'Oil & Gas' form. The 'Import' button is highlighted with a red box. The form contains the following data:

Set Information	
Depreciation	
Set name	
Form (Ctrl+T) (MANDATORY)	1065, page 1 (ordinary income)
Include non-passthrough expenses in cost of goods (Form 1125-A)	<input type="checkbox"/>
Suppress carry of overhead expense to designated form	<input type="checkbox"/>
Overhead allocation method (Ctrl+T)	
Overhead expense description (Ctrl+E)	

Overhead Depreciation and Amortization	
Regular tax [O]	
Geological and geophysical expenses [O]	
Section 179 deduction [O]	
Section 179 carryover	
AMT [O]	
State, if different (-1=none)	
Regular tax [O]	

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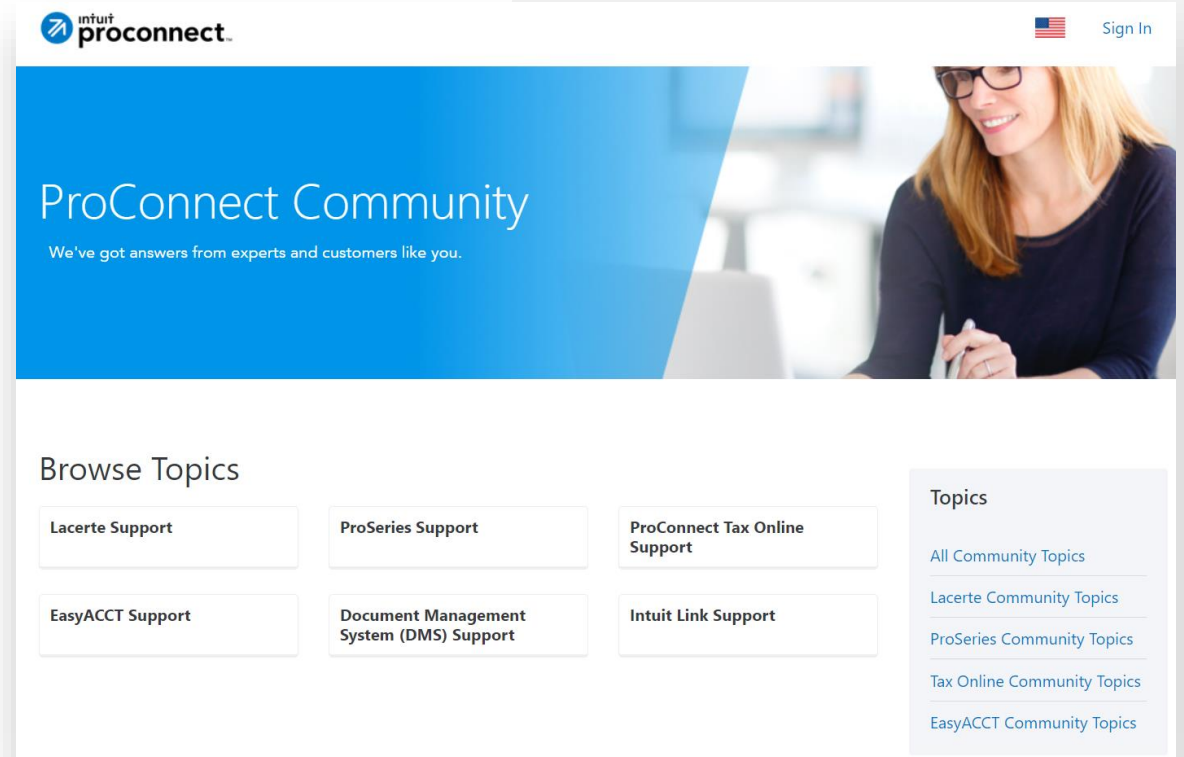


#TogetherWithIntuit

Community

- Answers to tax/product questions from Intuit Accountants.
- Access and search directly through programs.
- Post your product and workflow recommendations.
- Forum contests!

<https://proconnect.intuit.com/community/>

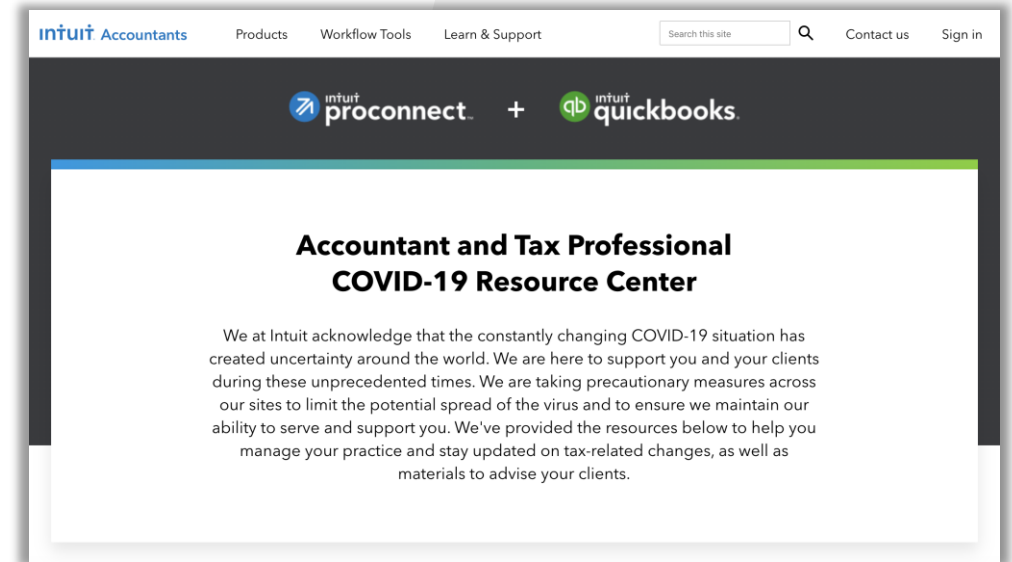


The screenshot shows the Intuit ProConnect Community website. At the top left is the Intuit ProConnect logo, and at the top right is a "Sign In" button with a US flag icon. Below the header is a blue banner with the text "ProConnect Community" and the tagline "We've got answers from experts and customers like you." To the right of the banner is a photo of a smiling woman with glasses. Below the banner is a "Browse Topics" section with six buttons: "Lacerte Support", "ProSeries Support", "ProConnect Tax Online Support", "EasyACCT Support", "Document Management System (DMS) Support", and "Intuit Link Support". On the right side, there is a "Topics" sidebar with a list of links: "All Community Topics", "Lacerte Community Topics", "ProSeries Community Topics", "Tax Online Community Topics", and "EasyACCT Community Topics".

Growing your practice during challenging times

Navigating an ever-changing environment is challenging for you and your customers, you're not alone.

At Intuit Accountants, we're here with helpful resources like webinars, trainings, legislation updates, tips for remote working, and much more, available to you today, at your fingertips.



<https://intuit.me/COVID19RC>



<https://intuit.me/COVID19Webinars>