



Contact:

Edward A. Lyon, JD

513-340-7965

elyon@taxcoachsoftware.com

New Tax Planning Tool Lets Financial Advisors Deliver Immediate Results

Internet-based application presents tax-saving and tax help strategies in simple, easy-to-understand presentation for clients; increases sales for financial advisors

Loveland, OH (PR Web) February 28, 2006 -- TaxCoach Software, LLC announced the launch of www.taxcoachforfinancialplanners.com, a new sales channel for its breakthrough TaxCoach™ tax planning system. The internet-based application lets tax and finance professionals prepare custom tax plans for new and existing clients.

“Traditional income tax software crunches numbers to illustrate ‘what-ifs’ in more detail than most clients want or need,” says TaxCoach founder Ed Lyon, a nationally recognized author, speaker, and consultant. “We designed our system to let tax professionals give their clients specific strategies and concepts, presented in plain-English, and packaged to deliver the savings clients *really* want.”

“We expected our subscribers would be accountants, enrolled agents, and other tax professionals using planning to supplement their tax prep business,” adds TaxCoach partner Keith VandeStadt, himself a CPA. “But financial advisors have discovered how to use our system to give their clients tax help beyond what clients get from their tax accountant or tax preparation provider.”

“Our system lets financial planners deliver immediate results,” continues Lyon. “Subscribers use TaxCoach™ to give their clients the savings they *want*. These may include converting day-to-day expenses like family medical bills into deductible business expenses, using family income-shifting strategies to pay for private school and college costs, or turbocharging

retirement plan contributions. Subscribers can then use those savings to finance the insurance and investments they *need*.”

Licenses start at \$49 per month, with no long-term contracts. Subscribers can deliver unlimited plans for a single price and access the system from any computer with an internet connection.

Tax plans are fully sourced and footnoted to the appropriate Internal Revenue Code sections, regulations, and case law. This reassures clients that audit flags won't be raised.

Subscriptions also include marketing tools to make business development effortless and effective. These tools include a marketing guide, sample forms and templates to implement strategies, complete “seminar-in-a-box” kits, and automatic client alerts to deliver breaking news of changing tax rules and opportunities.

A free virtual tour and the risk-free trial subscription are available at www.taxcoachforfinancialplanners.com.

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