



The following are more indepth calculators approved for CPA use. To enjoy the benefit of these calculators please contact us directly. We'd be happy to assist you with your planning calculations and questions.

**Auto**

- Auto Buy vs. Lease
- Auto Loan
- Auto Loan Early Payoff
- Auto Loan vs. Home Equity Loan
- Auto Rebate vs. Low Interest Financing

**Business**

- Breakeven Analysis
- Business Valuation
- Cash Flow
- Debt Consolidation
- Equipment Buy vs. Lease
- Financial Ratios
- Inventory Analysis
- Profit Margin
- Working Capital Needs

**Credit Card**

- Accelerated Debt Payoff
- Consolidation Loan Investment
- Credit Card Optimizer
- Credit Card Pay Off
- How Much Do You Owe?
- Personal Debt Consolidation
- Rolldown your Credit Card debt!

**Investment**

- Annual Stock Option Grants
- Asset Allocator
- Future Contracts
- Investment Loan
- Investment Property
- Investment Returns
- Stock Option

## **Loan**

- Loan & Credit Line Payments
- Alternative Payment Frequencies
- Amortizing Loan
- Balloon Loan
- Debt Consolidation
- Enhanced Loan
- Equity Line of Credit Payments
- Existing Loan
- Home Equity Line of Credit
- Line of Credit Payoff
- Loan & Credit Line Tax Savings
- Loan Comparison
- Loan Prequalification

## **Mortgage**

- 15 Year vs. 30 Year Mortgage
- Adjustable Rate Mortgage
- ARM vs. Fixed Rate Mortgage
- Balloon Mortgages
- Bi-weekly Mortgage
- Maximum Mortgage
- Mortgage APR
- Mortgage Loan
- Mortgage Payoff
- Mortgage Points
- Mortgage Qualifier
- Mortgage Refinance Breakeven
- Mortgage Refinance Interest Savings
- Mortgage Rent vs. Buy
- Mortgage Required Income
- Mortgage Tax Savings

## **Personal**

- Checkbook Balancer
- Credit Assessment
- Disability Insurance
- Home Budget
- Life Expectancy
- Life Insurance
- Long Term Care
- Net Worth
- Student Budget

## **Retirement**

- 401(k) Savings
- 401(k) Spend It or Save It
- 403(b) Savings
- 457 Savings
- 72(t) Distribution Impact

72(t) Early Withdrawals  
How Important Is Social Security?  
Pension Plan Retirement Options  
Required Minimum Distributions (RMD) as Beneficiary  
Required Minimum Distributions (RMD)  
Retirement Income  
Retirement Pension Planner  
Retirement Planner  
Retirement Shortfall  
Roth IRA Conversion  
Roth IRA  
Roth vs. Traditional IRA  
Social Security  
Traditional IRA  
Variable Annuity

### **Savings**

Savings  
Benefit of Spending Less  
Certificate of Deposit  
College Savings Plan  
Compound Interest  
Cool Million  
Don't Delay Your Savings!  
Emergency Savings  
Lunch Savings  
Savings Distribution  
Savings Goals  
Savings, Taxes, and Inflation

### **Tax**

1040 Tax  
1040EZ Tax Estimator  
Estate Tax Planning  
Marginal Tax  
Payroll Deductions  
Self Employment Taxes



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