

The Tax Planner

Quicken offers a tax planner as a tool to prepare you for tax season and to give you a “overview” of the state of your taxes throughout the year.

Keep in mind that the Quicken Tax Planner only supports two years of tax calculations: the current year and the year prior.

After you categorize your transactions, you can use the Tax Planner to import data from tax preparation software, enter data that may not be reflected in Quicken transactions (such as marital status or annualized values for certain types of income or expenses), and estimate the amount of taxes you may owe or the size of the refund you may receive.

You can also [create scenarios](#) to test different circumstances that might affect your tax situation like if you plan on purchasing a house.

Please visit this [support article](#) for more information and the steps to view the Tax Planner in Quicken for Windows.



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