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## NEWS RELEASE

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### Thomson Reuters releases the 2011-2012 edition of its PDI Global *Tax Planning Guide*

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*Updated guide helps tax service providers demonstrate thought leadership and build stronger client relationships*

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**NEW YORK, June 29, 2011**—PDI Global, part of the Tax & Accounting business of Thomson Reuters, has released its *2011-2012 Tax Planning Guide*. The latest edition of this annual client tax guide incorporates recent U.S. tax legislation to help professionals in the financial services sector inform clients and other taxpayers about important tax law changes and practical tax strategies. The personalized guide also helps tax service professionals market themselves as value-added thought leaders, strengthen existing client relationships, and promote their firm to prospective clients.

The guide has been updated for the Tax Relief, Unemployment Insurance Reauthorization, and Job Creation Act of 2010 and other recent tax legislation. “What’s new!” sidebars focus on key features of the Act, such as:

- Enhanced bonus depreciation for businesses;
- The 100 percent exclusion for certain qualified small-business stock; and
- Estate tax exemption portability.

In addition, the guide contains charts of various tax rates and limits, as well as case studies illustrating how taxpayers can use various tax strategies. The content is organized into categories, such as Investing, Family & Education, and Charitable Giving, making it easy to access information on specific topics.

“As competition for tax clients intensifies, tax professionals in accounting firms, law firms, banks, insurance companies, trust offices, and financial planning businesses are looking for ways to differentiate themselves from competitors,” said Linda Kranz, director of PDI Global Operations, Thomson Reuters. “The PDI Global *Tax Planning Guide* is designed to do exactly this.”

PDI Global’s *Tax Planning Guide* is the only tax guide in the industry that offers a choice of three personalized formats: online, e-mail, and print. This gives tax professionals more flexibility, impact, and cost-effectiveness.

- The online version, *WebTaxGuide*, is automatically updated for relevant tax law changes. The guide is accessed through a button on the provider’s website, which opens to a personalized splash page that’s branded with the provider’s logo and links to specific sections of the guide.
- The e-mail *Flex-E-guide* option provides a trackable e-mail distribution system that enables service providers to send out a template that links to the various sections of *WebTaxGuide*, providing quick, convenient access to information on specific tax subjects. Providers can customize *Flex-E-guide*’s HTML template with their business names, logos, and personalized messages.
- The print version offers service providers a choice of content for different audiences. The Classic edition is geared to the tax needs of small business owners, privately held companies, self-employed, and individual taxpayers. The Executive content is aimed at high net-worth taxpayers. Only Thomson Reuters offers a guide aimed at this high-end market.

The print guide can also be branded with a firm’s logo and personalized with other information, such as a welcome message, a tax calendar, or partner photos and biographies.



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**2011 – 2012 edition of PDI Global Tax Planning Guide**

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For more information about PDI Global's *2011-2012 Tax Planning Guide*, visit [www.pdiglobal.com](http://www.pdiglobal.com) or call 800-227-0498.

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