

# The Tools I Use for Managing My Finances



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A change in TurboTax regarding Schedule D: Capital Gains and Losses gave me the inspiration for this week's commentary. Since I'm switching tax software programs, you might appreciate me expanding the conversation from merely TurboTax to discussing the tools I use to manage my finances. None of what I am going to say should be construed as either being the best way or the only way to do it, but rather as just a method that works for me and food for thought about how you approach your personal process.

But, first a few words about TurboTax, since many of you likely use it. I've used TurboTax for possibly close to 20 years, and Quicken even longer. For as long as I can recall, Schedule D was included in the Deluxe version of TurboTax's desktop software. Not anymore. Now taxpayers have to buy the more expensive Premium version. "This will be a surprise" is how a spokesman for Intuit described the change to Matt Krantz at USA Today.

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