



# BUKERS SOFTWARE

## POWER AT YOUR FINGERTIPS

**Spread tax returns and financial statements, both personal and business in a fraction of the time you may currently be spending.**

Powerful, yet easy to use, Bukers software takes the guess work out of spreading both personal and business tax returns and financial statements, from the simplest to the most complex. Our software promises all the power you need and the intuitive simplicity you want in order to lend with confidence.

**START WITH SMART!**





# BUKERS TAXANALYSIS



Bukers Taxanalysis software is our flagship product and original system produced for lending institutions. The software guides you through the analysis of an individual tax return and reveals a borrower's true cash flow. Its powerful, yet easy to use, intuitive interface is so user friendly, it'll make any lender spread tax returns like a seasoned professional.

With the personal financial statement module in Bukers Taxanalysis, you can track up to eleven asset groups, four liquid and seven non-liquid, as well as eight liability groups. These asset and liability groups have multiple subcategories for each year, and unlimited items can be entered into each subcategory.

## FAST ANALYSIS

**If you offer 24-hour loan turnaround, Bukers Taxanalysis has the power you need, or it can be the perfect complement to your existing loan analysis software.**

## LIBERATE YOUR SENIOR LENDERS

**Bukers Taxanalysis allows your junior loan officers and credit analysts to spread complex, multiple-year tax returns with ease.**

## ANALYZE MULTIPLE RETURNS SIMULTANEOUSLY

**Analyze up to five years of tax returns and personal financial statements to determine the cash flow available to service debt for each respective year.**

*I chose Taxanalysis, Inc. to provide software for my bank because Taxanalysis uses the same philosophy regarding cash flow calculations as I was taught and is accepted industry wide.*

*Daniel Brown - The First National Bank, McConnelsville, OH*



# BUKERS BTA

Using actual tax forms as input screens, quickly and easily analyze business tax returns with Bukers BTA Pro. Simply enter data from your borrowers' business tax return into screens that are identical to the tax forms. When done, press finish and GAAP-equivalent balance sheets and income statements are automatically created.

Bukers BTA Pro gives you the ability to spread business financial statements as well. In addition, the software generates 6 cash flow statements - 4 of which are customizable, 19 standard ratios, 31 additional ratios and 22 cash driver adjustments, all based on the data you input from tax returns and financial statements. An optional RMA Peer Comparisons module is also available.

Create tailor-made projections for up to five years by choosing between four different projection methods.

## EFFICIENT ANALYSIS

**We've made Bukers BTA Pro so efficient and easy to use, you can input business tax returns and/or financial statements to produce the analysis you need in a snap.**

## SPREAD ANY BUSINESS TAX RETURN

**Bukers BTA Pro can handle any 1065, 1120S, 1120 or 990 tax return. Schedule K and Schedule M-1 are fully integrated into the analysis of the return.**

## HANDLE ANY BUSINESS SIZE

**With the tax return input screens, Bukers BTA Pro easily spreads and analyzes tax returns from small businesses to large corporations that file the massive M-3.**

*Originally we chose Taxanalysis from a financially feasible stand point however after reviewing the characteristics of both Bukers Taxanalysis and Bukers BTA, the platforms fit our business model perfectly.*

*Theresa Sonny-Smith - Desert Schools FCU, Phoenix, AZ*





# GLOBAL CASH FLOW

Our Global Cash Flow feature is included with both our Taxanalysis and BTA Pro software. With Global Cash Flow, lenders are granted total flexibility when combining the cash flows of individuals with that of their business entities whether they have total or partial ownership of the business. This feature is just another reason Bukers is the go-to software for all your spreading needs.

## RATIOS WHERE YOU NEED THEM

**Global debt service and coverage ratios are provided right on the global cash flow recap in two forms: one with existing debt and the other with existing and proposed debt.**

## TOTAL INTEGRATION

**Combine the cash flow, existing debt, and proposed debt of any number of partnerships, S-corps, and C-corps with their individual owners to see Global Cash Flows for up to five years.**

## OUR SUPPORT

**Once you purchase licensing in Bukers Taxanalysis and/or Bukers BTA software we want to make sure you and your lenders know how to use it. We have found live online training to be the most efficient way to bring you up to speed. We offer both one-on-one and group training, so choose the style that best meets your needs. There are no limits to the number of complimentary training sessions you can have.**

**You also have access to our Bukers Hotline at no additional charge. Whether your inquiry regards troubleshooting or general cash flow analysis, give us a call any time. Make your lenders the best they can be by combining Bukers software with our adept guidance.**

**Licensed users will also receive discounted pricing on our Bukers Taxanalysis Online Course offered through Bukers Academy.**



# OUR COMPANY

Bukers has been operating since 1984, and we've helped over 45,000 bankers enhance their lending skills through our online training, live sessions, and software offerings. Moreover, we have provided training to more than 4,000 Federal and State bank examiners from agencies like the FDIC, OCC, Federal Reserve, NCUA and OTS. It's rewarding to hear that many examiners rely on us as a benchmark to verify other banks' cash flow methods. We appreciate the acknowledgement and emphasis on accuracy, a core value at Bukers.

We are honored to be recognized as the industry's "gold standard" for tax return spreading and analysis. When you invest in a Bukers product, whether it's training or software, you'll receive the most precise and current solution available on the market today.

## CONTACT US



Taxanalysis, Inc. | PGB, Inc.  
1245 SW 158th Avenue, Beaverton, OR 97006



(503) 520-1303



[sales@taxanalysis.com](mailto:sales@taxanalysis.com)



[taxanalysis.com](http://taxanalysis.com)

