



IntelliConnect™ ClientRelate™

Enhance your client relationships by quickly and effectively analyzing changes to tax law and regulations.

Comprehensive Tax Coverage • Bulletins and Alerts • Client Service Tools • Compliance Software Integration

ClientRelate™ is an innovative productivity tool for accounting firms that combines the power of IntelliConnect and the strength of ProSystem fx® Tax and Global fx® Tax. This unique resource provides complete, authoritative information about current laws, regulations, revenue rulings and procedures. ClientRelate helps you manage your resources better so that you can save time, generate revenue and focus on client needs.

RELATIONSHIP BUILDING BENEFITS

- Alerts you to new tax developments and quickly identifies affected clients
- Targets clients that may benefit from additional services
- Identifies new client service areas and opportunities for your practice

CLIENT SERVICE TOOLS

- Summary
- Explanations of the Law
- Step-by-Step Analysis
- Practice Aids
- Client Letter

PRODUCTIVITY FEATURES

- Timely coverage of new developments
- Comprehensive analysis of step-by-step procedures
- Intuitive search feature
- Return to saved searches
- Fully developed spreadsheets, election and fill-in forms

TAX BULLETINS

- Summary — Highlights the new tax developments, notes follow-up actions required, indicates taxpayers that may be affected, and describes the ClientRelate search of your tax return database
- Client Letter — Communicates the new developments in non-technical language, so you can quickly mail or email your clients.

QUICK SEARCHES

- Search by Bulletin
- Search by Service
- Search by Client



To learn more about ClientRelate,
please contact your CCH Account Representative at
1-888-CCH-REPS (1-888-224-7377)
or visit CCHGroup.com.

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