CCH
a Wolters Kluwer business

ProSystem *fx*® Tax Data Conversion

Accurately and Easily Convert Information to ProSystem *fx*® Tax

CCH is Advancing Business with Best in Process™ Solutions, Delivering Faster Answers and Better Results.

When you're ready to start using ProSystem *fx*® Tax, the last thing you need is a complex data conversion process! With our Tax Data Conversion software, you'll find the transition of your client tax data will go smoothly and accurately. We're more than ready to welcome you and all of your clients' critical tax data to ProSystem *fx* Tax.

Converting Your Client Information to ProSystem *fx* Tax is Easy:

1. Upon processing your order, we send you detailed instructions to kick off the conversion process.
2. Using our Data Conversion software, you convert your files in the convenience of your office.
3. Accurate, comprehensive ProSystem *fx* Tax files are then ready for preparation of your 2012 Pro Forma and Organizer/ Tax Notebook.

Items and Types of Data Converted

The list that follows is representative of the types of client data we convert. A more detailed list, by vendor, is available from the ProSystem *fx* Conversion Department. Please call **800-PFX-9998** (800-739-9998), **option 3,** followed by **option 4**, if you have any questions about the types of data we convert, the data conversion process, or the release dates of any conversion.

Current year to new year conversions (2011 to 2012) are available for all vendors and forms listed in the chart below. Same Year conversions (2011 to 2011) are available for selected vendors and return types.

Conversions Available

Vendor	Individual 1040	Partnership 1065	Corporation 1120†	S Corporation 1120S	Fiduciary 1041	Exempt Organization 990	Deferred Compensation 5500	Gift/Estate Tax 706/709
ATX™	● SY	●	●	●	●			
UltraTax CS® (CSI)	● SY	●	●	●	●	❋		
GoSystem® Tax	● SY	●	● SY	● SY	●	●	❋	
Lacerte®	● SY	●	● SY	● SY	●	●	❋	
ProSeries® Professional	● SY	●	●	●	●	❋		
Taxwise®	● SY	●	●	●	●			
Drake®/ TaxWorks®	#	#	#	#	#			
Manual Conversions	●	●	●	●	●			

† All Corporate Types (1120-F, 1120-L, etc.) are converted at the Demographics level to create placeholders. Only 1120 and 1120S are converted in full unless otherwise noted.

● Indicates the types of client data converted from each software vendor. ProForma Conversions (Release 11/2012) are available for all these products.

SY A same year conversion is also available for extension and in-process returns. SY Release is July 2012.

❋ Limited 'placeholder' conversion only. Review *Items Covered List* for more information.

\# Files must be sent in for processing.

Individual Returns — 1040

General Taxpayer and Spouse Information

Name, Address, SSN, Occupation, Birthdate, Date Deceased, Blind Exemption Indicator, Presidential Fund Election, Filing Status, Qualifying Widower — Year of Spouse Death, Head of Household — Qualifying Dependent Name

Dependent Information

Name, Birthdate, SSN, Relationship to Taxpayer

Income and Adjustments to Income

W-2 Employer Details, 1099R Pension Payer Details, Social Security Income, Alimony Received or Paid, Unemployment Compensation, Other Income — Description and Amounts, Other Adjustments — Description and Amounts

Schedule A — Itemized Deductions

Medical Amounts Including Medical Mileage and Preparer-Entered Descriptions, Tax Amounts Including Preparer-Entered Descriptions, Interest Amounts Including Amortized Points and Seller Financed Mortgage Information, Contribution Amounts Including Charitable Mileage and Preparer-Entered Descriptions, Miscellaneous Deduction Amounts Including Preparer-Entered Descriptions

Schedule B — Interest and Dividends

Interest and Dividend Payer Names, Seller Financed Mortgage Interest ID Number, Tax-Exempt Interest Codes, Total Amount Received from Each Payer

Schedule C — Business Income

Business Name and Address, IRS Business Code, Employer ID Number, Passive Activity Indicator, Accounting Method, Inventory Method, Ending Inventory, Income and Expense Amounts, Preparer-Entered Descriptions and Amounts, Passive Activity Loss C/O, if available

Schedule E — Rents and Royalties

Property Description and Address, Passive Activity Code, Partial Ownership Information, Income and Expense Amounts, Preparer Entered Descriptions and Amounts, Passive Activity Loss C/O, if available

Schedule E — K1 Pass-through Income

Name and Address, Employer ID Number, Passive Activity Code, Tax Shelter Registration Number, Pass-through Entity Type, Most Amounts, Passive Activity Loss C/O, if available

Schedule F/4835 — Farms and Farm Rentals

Principal Product, Employer ID Number, Agricultural Code, Passive Activity Code, Accounting Method, Accrual Farm Inventory, Cash and Accrual Income, Other Income — Total and Taxable, Expense Amounts, Preparer-Entered Descriptions and Amounts, Passive Activity Loss C/O, if available

Schedule Form 2106 — Employee Business Expense

Occupation, Special Occupation Codes, Business Expenses, Date Vehicle Placed in Service, Preparer-Entered Descriptions and Amounts

Form 2441 — Child Care Credit

Provider's Name and Address, Employer ID Number (or SSN), Amount Paid

Form 6252 — Installment Sales

Description, Date Acquired and Sold, Sale Type, Gross Profit Percentage, if available, Prior Year Payments, Related Party Information

Form 8615 — Child Tax

Parent's Information — Name, SSN, Filing Status, Income and Tax Amounts, Other Children's Information — Income and Tax Amounts

Form 8814 — Parents' Election to Report Child's Interest

Child's Name, Child's SSN, Interest and Dividend Amounts

Form 8829 — Home Office Expense

Area Used for Business, Total Area of Home, Expense Amounts (direct and indirect)

Form 4562 — Federal Tax Depreciation

Attachment Information, Description, Date Acquired, Method and Convention, Life, Cost or Basis Amount, IRS Amortization Code Section, Business Use Percentage, Listed Property Type, Prior Depreciation, Current Depreciation, Section 179 Allowed, Bonus/Special Depreciation, ITC Amount Allowed, Salvage Value, AMT Life, if different, AMT Basis, if different, AMT Prior Depreciation, AMT Current Depreciation

Business Returns — 1065, 1120, 1120S

Items converted for all business products:

General Tax Return Information

Business Name and Address, Employer ID Number, Fiscal Year Dates, IRS Business Code, Principal Activity, Principal Product/Service, Accounting Method, Inventory Method, General Information Questions

Income, Cost of Goods Sold, and Deductions

Gross Receipts, Returns and Allowances, Interest, detail where available, Dividends, detail where available, Rental Income, Other Income, Beginning and Ending Inventory, Purchases, Cost of Labor, Additional 263A Costs, Detail of Other Costs, Deduction Amounts, Preparer Entered Descriptions and Amounts

Balance Sheet

End of Year Amounts for All Fields, Other Current Assets Descriptions and Amounts, Other Investments Descriptions and Amounts, Other Assets Descriptions and Amounts, Other Current Liabilities Descriptions and Amounts, Other Liabilities Descriptions and Amounts

Rents and Royalties/Form 8825

Property Description and Address, Partial Ownership Information, Income and Expense Amounts, Preparer-Entered Descriptions and Amounts

Schedule F/4835 — Farms and Farm Rentals

Principal Product, Employer ID Number, Agricultural Code, Accounting Method, Accrual Farm Inventory, Cash and Accrual Income, Expense Amounts, Preparer-Entered Descriptions and Amount, Other Income — Total and Taxable

Form 6252 — Installment Sales

Description, Date Acquired and Sold, Sale Type, Gross Profit Percentage, if available, Prior Year Payments

Form 4562 — Federal Tax Depreciation

Attachment Information, Description, Date Acquired, Method and Convention, Life, Cost or Basis Amount, IRS Amortization Code Section, Business Use Percentage, Listed Property Type, Prior Depreciation, Current Depreciation, Section 179 Allowed, Bonus/Special Depreciation, ITC Amount Allowed, Salvage Value, AMT Life, if different, AMT Basis, if different, AMT Prior Depreciation, AMT Current Depreciation, ACE Basis, if different, ACE Prior Depreciation, ACE Current Depreciation, Book Methods, Lives, and Depreciation details if different than Federal Amounts

Partnership Returns — 1065

General Tax Return Information

Partnership Start Date

Schedule K

Interest Income, Dividend Income, Pass-through Entity Income, Contribution Descriptions, Other Amounts, if available

Partner Information

Name and Address, EIN/SSN, General Partner Designation, Partner Entity Type, End of Year Profit Percentage, End of Year Loss Percentage, End of Year Capital Percentage, End of Year Capital Account, if available

Corporation Returns — 1120

General Tax Return Information

Date Incorporated, Corporation Type

Schedule E — Officers' Compensation

Name and Address, SSN, Title, Time Devoted, Percentage of Stock Owned

S Corporation Returns — 1120S

General Tax Return Information

Date of S-Corporation Election

Schedule K

Interest Income, Dividend Income, Contribution Descriptions, Other Amounts, if available, Pass-through Entity Income

Shareholder Information

Name and Address, EIN/SSN, End of Year Shares or Percentage of Stock Ownership, if available

Fiduciary Returns — 1041

General Fiduciary Information

Estate Name and Address, Fiduciary Title and Address, Employer ID Number, Date Trust Created, Fiscal Year Dates, Return Type, Decedent's SSN, 1041 Exemption Amount

Beneficiary Information

Name and Address, EIN/SSN, Date of Birth

Income and Deductions

Preparer-Entered Descriptions, Charitable Contribution Name, Address, and Purpose

Schedule B — Interest and Dividends

Interest and Dividend Payer Names, Total Amounts Received

Schedule C — Business Income

Business Name and Address, IRS Business Code, Employer ID Number, Passive Activity Indicator, Accounting Method, Inventory Method, Ending Inventory, Income and Expense Amounts, Preparer-Entered Descriptions and Amounts

Schedule E — Rents and Royalties

Property Description and Address, Passive Activity Code, Partial Ownership Information, Income and Expense Amounts, Preparer-Entered Descriptions and Amounts, Passive Activity Loss C/O, if available

Schedule F/4835 — Farms and Farm Rentals

Principal Product, Employer ID Number, Agricultural Code, Passive Activity Code, Accounting Method, Accrual Farm Inventory, Cash and Accrual Income, Other Income — Total and Taxable, Expense Amounts, Preparer-Entered Descriptions and Amounts

Form 6252 — Installment Sales

Description, Date Acquired and Sold, Sale Type, Gross Profit Percentage, if available, Prior Year Payments, Related Party Information

Form 4562 — Federal Tax Depreciation

Attachment Information, Description, Date Acquired, Method and Convention, Life, Cost or Basis Amount, IRS Amortization Code Section, Business Use Percentage, Listed Property Type, Prior Depreciation, Current Depreciation, Section 179 Allowed, ITC Amount Allowed, Salvage Value, AMT Life, if different, AMT Basis, if different, AMT Prior Depreciation, AMT Current Depreciation

Training and Consulting Options to Fit Your Needs

CCH also offers valuable training, consulting and CPE to keep you ahead of the curve. From live training and consulting, to on-demand online learning, CCH provides the tools that everyone, from new hires to seasoned pros, needs to strengthen their abilities. Visit **CCHGroup.com/Learning** to learn more.

For more information on ProSystem *fx*® Tax Data Conversion call **800-PFX-9998** (800-739-9998) or visit **CCHGroup.com/ProSystemTax**

The most up-to-date product information, including detailed system requirements, enhancements, and new features, is available at ***CCHGroup.com/ProSystemTax****. If you plan to use multiple ProSystem fx Suite products within the same system, call* ***800-PFX-9998*** *(800-739-9998) and ask to speak to your sales representative about whether or not your system availability is adequate.*

Join us on at **CCHGroup.com/Social**

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