



ProSystem fx[®] Tax

Improve Your Bottom Line with a Completely Integrated Tax Preparation and Compliance System

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

More than two-thirds of the nation's top CPA firms use ProSystem fx[®] Tax, a high-performing software solution with unmatched efficiencies, accuracy and completeness. Tax is known for its extensive integration with other products and its ability to handle the most complex returns and tax issues. In fact, it's the most comprehensive system in the profession, easily processing all types of federal and state returns while offering extensive electronic filing services that help increase your productivity.

Rely on Industry-Leading Expertise

In the world of tax compliance and preparation, with ever-changing government tax guidelines, a shifting regulatory environment and competitive pressures to increase efficiency and lower costs, the software a firm chooses is a strategic decision with broad implications.

ProSystem fx Tax is the software of choice for thousands of CPA firms, thanks to:

- Thousands of automatically calculating forms and schedules for federal, state, city and county returns, with new forms added annually.
- A state-of-the-art Electronic Filing Status System with easy status check.
- Integration with other products and solutions that creates a best-in-process, end-to-end tax preparation workflow that answers all your needs.

Since 1913, CCH has been leading the industry in providing tax professionals with the most comprehensive, practical and timely analysis of the federal tax law. This exceptional coverage provides the expert analysis, examples and planning strategies you need to quickly understand the complexities and advise your clients.

The expertise that delivers all this is also the driving intelligence behind the ProSystem fx Tax software, ensuring it has the most comprehensive and accurate information and the robust diagnostic and review processes needed to handle any tax situation.

All-Inclusive Tax Modules

ProSystem fx Tax offers the following modules, which can be purchased individually or bundled to meet your firm's specific needs:

- **Individual** — Save time with extensive automatic calculations, automatic computation between joint and separate filing statuses and complex depreciation calculations.
- **Partnership** — Benefit from extensive partner allocation capabilities and K-1 options.
- **Corporation** — This powerful consolidated program features extensive SRLY limitations and state combined features, or you can use the S Corporation program's flexible Shareholder Allocation and Distribution features.
- **Employee Benefit Plan** — Prepare Summary Annual Reports for Form 5500, as well as any combination of government schedules for each plan within a return.
- **Fiduciary** — Simplify your management of all major types of estates and trusts.
- **Estate and Gift** — Perform a variety of calculations to automate the preparation of Forms 706, 709/709A and supporting schedules.
- **Exempt Organization** — Significantly improve your processing of Form 990s, including Form 990-EZ, 990-PF and 990-T.
- **Electronic Filing** — Rely on an IRS-authorized provider for your e-filing and enjoy industry-leading accuracy.
- **Productivity Software** — Choose from a full array of value-added options to help simplify return preparation and provide revenue-generating services to your clients.
- **Data Conversion Services** — Leverage the most comprehensive data conversion service available to accurately and easily convert an extensive amount of information to the ProSystem fx Tax format.

Take a Productivity Leap with an End-to-End Streamlined Paperless Workflow for your 1040 Tax Preparation

Not Yet Scanning Source Documents?

Together, ProSystem fx® Scan and Tax provide you with the 1040 data-import capability you've always imagined, thanks to AutoFlow Technology™. This process:

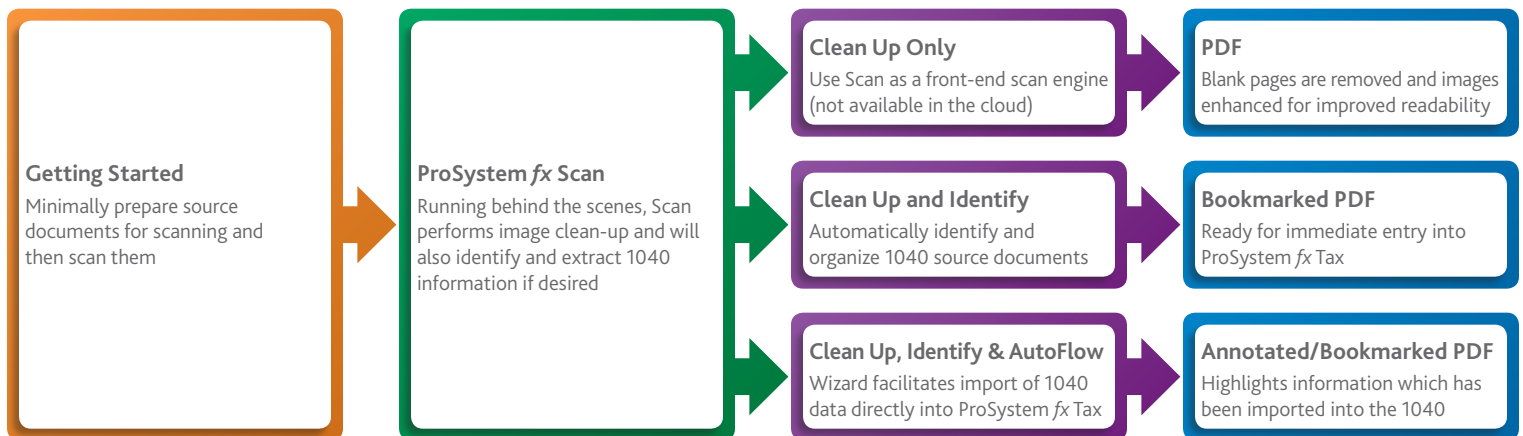
- Extracts data from selected scanned source documents used to prepare the most common 1040 returns.
- Facilitates verification of extracted information.
- Allows for real-time import of verified 1040 information directly into ProSystem fx Tax.

Already Scanning Your Source Documents?

Combine ProSystem fx Tax, ProSystem fx Scan and ProSystem fx PDFlyer™ with AutoFlow Technology and give your firm a complete paperless 1040 solution.

- ProSystem fx Scan creates a consistently organized bookmarked PDF file, whether 1040 data is extracted or not.
- A “merge” feature of PDFlyer lets you easily add subsequently received source documents to the original scanned PDF file.
- Paperless 1040s can now be prepared via data extraction, manually or using a combination of both.

Leverage technology and existing administrative staff to provide cost-effective 1040 preparation services to your clients this year!



Join ProSystem fx Scan with AutoFlow Technology™, ProSystem fx PDFlyer™ and ProSystem fx Tax to bring your firm the digital 1040 data-import solution you've always imagined.

The power of ProSystem fx Scan and AutoFlow is now available to you in the Cloud!

Scan and AutoFlow are now within easy reach thanks to their debut online. Now with the cloud version of Scan, you'll enjoy all the proven benefits of Scan with the added convenience and cost savings associated with CCH providing your IT infrastructure. It's easy to use and will help your practice achieve immediate, dramatic improvements in efficiency and productivity

Leverage Integration to Improve Productivity

Thanks to its tight integration with other technologies you rely on, ProSystem *fx* Tax can save you time and money by drastically reducing data entry.

In addition to its seamless integration with Microsoft® Office products, ProSystem *fx* Tax integrates with companion products in the ProSystem *fx*® Suite, including (but not limited to):

- **ProSystem *fx*® Document** — The complete content management system that stores your electronic workpapers, binders, client source documents, financial statements, human resources data files and back-office documentation so that all are easily accessed from ProSystem *fx* Tax. Better manage your email by moving client communication from your inbox to a secure server, where it is accessible by multiple people in your firm. Easily link returns to clients in Document; easily print returns directly to Document.
- **ProSystem *fx*® Engagement** — The software that lets you standardize your firm's tax and audit processes and workpapers with electronic binders that mimic your physical files. Effortlessly access workpapers from ProSystem *fx* Tax to dramatically increase productivity in your firm.
- **ProSystem *fx*® Practice Management** — The top-rated time and billing system that links directly to ProSystem *fx* Tax. Easily access automated timekeeping, comprehensive invoicing, standard and custom reports, as well as powerful workflow tools.
- **ProSystem *fx* Scan** — The time-saver that lets you take the proverbial "shoebox" of unsorted client information, determine what each item is, then output the documents to a single, organized and bookmarked PDF — automatically!
- **ProSystem *fx*® Portal** — A safe document-sharing solution that provides an effective and secure method of exchanging confidential files with clients. With just a few mouse clicks, a firm can publish a return directly to a client's portal, making it available to the client in a matter of minutes. Easily batch print your Organizers to Portal and quickly link (in batch mode) your clients to portals within Portal.
- **ProSystem *fx*® Workstream** — A full-featured software program that manages all your work deliverables using the latest .NET technology. Slice and dice your project views; access standard and custom reporting; link and access your project from within a tax return, and much more.
- **CCH® KnowledgeConnect™** — Harvest the intellectual knowledge, driving firm efficiencies and encouraging team collaboration through a searchable database designed to reduce repetitive Q&A, easily identify subject-matter experts, and share information across communities.

These CCH solutions add value to your tax research and compliance work and help you respond efficiently to individual client situations.

- **IntelliConnect®** is the revolutionary CCH® research platform designed to be the central information resource for your daily work life. This powerful platform lets you search your library of CCH content in a matter of seconds by just using simple keywords. You can capture information from your CCH subscription, then filter it down to exactly what you need.
- **TaxScripts® TaxPro** electronically streamlines the disclosure authorization process so you can submit an IRS transcript request quickly — and receive transcripts in minutes.
- **CCH® Tax Prep Partner Series™** includes explanatory content pulled from our comprehensive tax compliance library, unique practice materials and tools that provide step-by-step analysis of the business tax preparation process for federal tax returns.
- **Smart Charts™** allow you to quickly and easily chart state tax issues in one jurisdiction or compare tax treatments across multiple tax jurisdictions. ProSystem *fx* Tax includes a link to *Smart Charts* that address multi-jurisdictional research needs.

Leading-Edge Technology

ProSystem fx Tax's intelligent workflow tools help the preparer move quickly through the return process, flowing information between forms and schedules and managing reviews and sign-offs. It allows the preparer to focus on the things that are most important — and what they are trained and paid to do.

ProSystem fx Tax's leading technologies will help you work smarter while saving you time. Some features that are sure to increase your efficiency include:

- Easy navigation between returns.
- Automatic calculations, overrides and optimizations for every federal and state return.
- The industry's most comprehensive diagnostic system, which tests for omissions and inconsistencies and allows you to jump back to related input with a single click.
- Comprehensive state programs for all entities, including full multi-state capabilities.
- A client and tax return management system that always provides a complete status of returns and staff responsibilities.
- Intuitive navigation panels, pop-up menus and "forms-stepping" features that allow you to quickly navigate through a return.
- Full-featured depreciation and depletion for both individual and business returns.
- A comprehensive on-screen review system featuring color-coded tickmarks, field and global notes, lists, overrides and estimates.
- Detailed reporting options for audit and planning purposes.
- Extensive data import and export for a variety of programs.
- The ability to easily generate fully compliant fileable forms while also meeting your e-filing needs.

Positively Impact Cycle Time with These Task-Specific Tools

ProSystem fx Tax also has a variety of value-added options to help minimize your data entry and maximize productivity, such as:

- **DataScan Plus**® lets you turn client data into valuable marketing, practice management and client services information.
- **Engagement Plus**™ allows you to monitor all your firm's engagements.
- **Tax Projector**™ lets you show clients how scheduled tax law changes will affect them.
- **Client Manager**™ allows you to set up and maintain complete profiles on all your firm's clients.

Federal Forms, Schedules and State Returns Supported

A list of all federal forms, schedules and state returns supported, including electronically filed forms and states, can be viewed online at CCHGroup.com/TaxFormsandStates. A downloadable PDF is available.

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, 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.

All trademarks and copyrights are property of their respective owners.

Join us on  at CCHGroup.com/Social



CCH

a Wolters Kluwer business

800-PFX-9998 (800-739-9998)
CCHGroup.com