



## IntelliConnect® CPA Client Advisor/ Wealth Planning Advisor

Grow your practice by becoming your clients' principal financial and wealth planning advisor.

Primary Sources • Practice Tools and Aids • Daily Tax News • *Multistate Smart Charts™*

CPA Client Advisor, CPA Client Advisor Plus and Wealth Planning Advisor provide three tiers of superior resources and tools under the guidance of consultant Martin M. Shenkman, CPA, to assist you in developing successful financial and wealth planning strategies for your clients. These three wealth planning solutions build on each other to help you build your business. Each higher tier contains everything in the lower tier, plus additional content.

Primary sources, Answer Books, practice tools and aids, calculators, tax news, and more provide all the resources you need to perform successfully in the wealth planning market. Choose the solution that is right for your firm and your strategic goals.

### CPA Client Advisor

Supports the small accounting firm considering, or in the early phases of, providing financial and wealth planning services.

Includes:

- Financial Planning Answer Book
- Estate and Retirement Planning Answer Book
- Individual Tax Answer Book
- Practice Aids
  - Becoming Your Client's Principal Advisor
  - Checklists
  - Questionnaires
  - Client Memoranda
  - Worksheets
  - Charts
- Tax Rates and Tables
- Primary Sources
  - Code and Regulations
  - IRS Publications
  - Cases
  - Rulings and Other Docs
  - Letter Rulings and IRS Positions

- Financial and Tax Calculators
  - Auto Calculators
  - Mortgage Calculators
  - Loan Calculators
  - Credit Card and Debt Calculators
  - Investment Calculators
  - Retirement Calculators
  - Insurance Calculators
  - Tax Calculators
  - Savings Calculators
  - Personal Finance Calculators
  - Business Calculators
- *TaxTracker News™*

### CPA Client Advisor Plus

Designed for the small or mid-sized accounting firm, financial planners and other professionals interested in growing their financial and wealth planning services.

Includes all content and tools of CPA Client Advisor, *plus*:

- CCH Tax Briefings
- Individuals and Small Business Planning Guide
- Asset Protection Strategies
- Evaluating Life Insurance
- Executive Compensation Answer Book

## Wealth Planning Advisor

Extensive, in-depth content for accountants, financial planners, attorneys, consultants and others working with high net-worth clients.

Builds on the content and tools of CPA Client Advisor Plus, with the addition of:

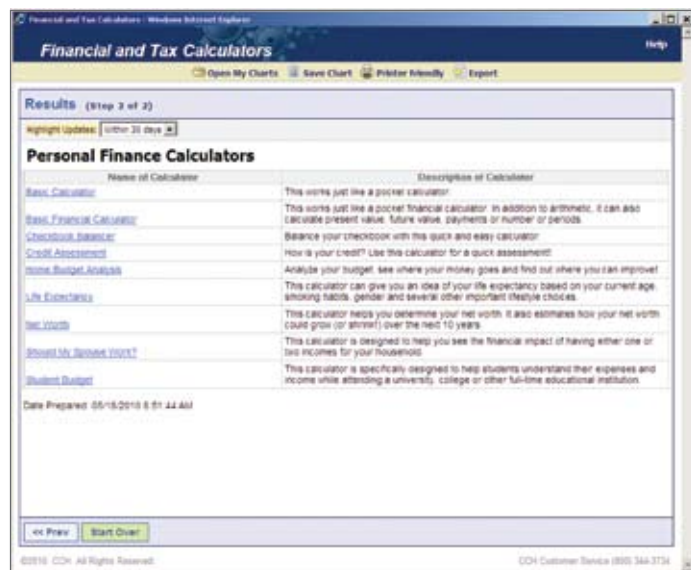
- Articles
  - Investment Planning
  - Individual Tax and Business Planning
  - Executive Compensation
  - Retirement Planning
  - Transfer Tax/Post-Mortem Planning
  - Asset Protection
  - Life Insurance
- Wealth Management: A Concise Guide to Financial Planning and Investment Management
- Tax and Wealth Strategies for Businesses
- Nonqualified Deferred Compensation Answer Book
- Individual Retirement Account Answer Books
- Qualified Domestic Relations Order Answer Book
- Roth IRA Answer Book
- Investment Planning Answer Book
- Taxation of Individual Retirement Accounts
- Estate and Gift Tax Handbook
- Multistate Guide to Estate Planning

- *Multistate Smart Charts™*
  - Asset Protection
  - Estate Administration
  - Wills and Other Directives
  - Trusts and Trust Administration
  - Trusts and Estates Income Tax Rates
- Toolkits
  - Client Letter
  - Depreciation
  - Federal Sales Tax Deduction
  - Election and Compliance
- *Federal Withholding Calculator*
- *IRA Comparison Calculator*
- *Savings Bond Lookup*
- *CCH® FinEst Calcs™*

## 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/Training](http://CCHGroup.com/Training) to learn more.

Quickly access over 150 tax and financial calculators.



To learn more about CPA Client Advisor/Wealth Planning Advisor, please contact your CCH Account Representative at **888-CCH-REPS (888-224-7377)** or visit [CCHGroup.com](http://CCHGroup.com)

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