



Tax & Accounting

CCH® Site Builder

Workflow

CCH Site Builder provides you with the support you need to expand your practice onto the internet so you can build stronger client relationships, grow your practice and increase your bottom line. With a professional website, you can enhance your firm's image, attract clients and provide customers and prospects with relevant, up-to-date resources.

Easily Create a Website in Minutes

With CCH Site Builder, you can:

- Create a fully functional website in minutes, using a simple setup process.
- Easily change the look and content of your website at any time — as often as you wish — free of charge.
- Select your website design from an expansive collection of styles and colors.
- Host your site FREE with a custom domain name that you choose.
- Create custom email accounts, featuring high availability and up to 50GB of storage space per account.
- Securely share any type of file with your clients.

Don't feel comfortable creating a website on your own? Enlist the help of our experienced graphic designers. They'll work with you to create a website branded specifically to your firm's website vision.

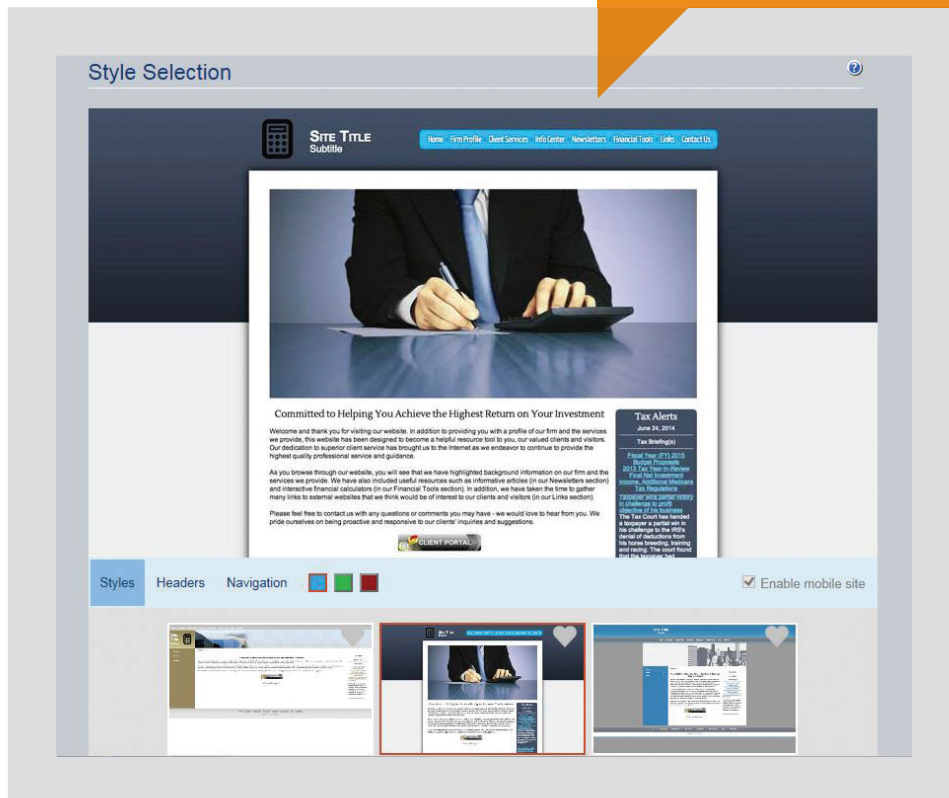
Customize Website Content and Appearance

CCH Site Builder provides you with flexible customization capabilities, allowing you to:

- Upload logos, PDFs and images easily.
- Add custom pages, such as career opportunities, partner services or unique offerings.
- Preview your changes before applying them to your live website.

Whether you use the preset Wolters Kluwer content, or replace it with your own content, your website will be a valuable tool for your firm and your clients.

Choose from a wide variety of attractive and professional looking templates or work with one of our experienced graphic designers to create a website branded specifically to your firm's vision.



Search Engine Optimization

With our expansive Search Engine Optimization (SEO) tools, you can increase your website ranking and drive clients to your website by easily adding relevant key words to each page. This will attract quality clients to your firm and the unique services you offer. Search Engine Optimization configuration is included with your CCH Site Builder subscription. Premium SEO Consulting Options are available.

Email Marketing

Keeping in touch with your clients throughout the year is a perfect way to build client relationships and increase referrals. With CCH Site Builder email marketing services, you can email your clients an attractive, personalized newsletter each month.

Collaborate with Clients with FileShare

The CCH FileShare module allows you to easily and securely transfer files to your clients, partners and associates at any time.

FileShare allows you to:

- Upload and temporarily store a variety of documents and data, such as QuickBooks® data files, financial statements, prior year tax returns, spreadsheets and images.
- Quickly access a large file by either downloading it or launching it directly from FileShare.
- Activate users, set user-specific storage limits for uploaded files, and grant or disable the ability to upload documents.

“One of our overriding goals was to make our Web presence much more comprehensive than it had been previously. We wanted to communicate the value proposition the firm had to offer, and also ensure this was reflected in the content. We wanted to demonstrate that the firm had strong expertise and capabilities in a range of practice, industry and service line areas.”

— Lauren Wilson,
Director of Marketing,
Michael Silver & Company CPAs

Your Firm, Online and Accessible

CCH Site Builder generates the kind of comprehensive website your clients expect. Attract new business and better serve existing clients with features that include:

- **Welcome Page** — Welcome prospective and current clients with your name, your firm’s name — or both — along with a personalized greeting message.
- **Firm Profile Page** — Provide visitors with background information about you and your firm, such as a brief history or perhaps a mission statement that expresses your client service philosophy. This is a great place to include profiles of individual firm members.
- **Client Services Page** — Attract prospective and current clients with a complete list of professional services available from your firm. Select from a default listing of over 40 types of services and related descriptions, or add your own custom services to the list.
- **Info Center Page** — Provide an abundance of valuable information and resources for visitors, including downloadable tax forms and publications. You can add special firm events and other important dates to the Events Calendar, and you can purchase a number of eContent add-ons for even more useful content.
- **Newsletter Page** — Each month, a new collection of professionally written articles automatically appears on your Newsletter page, giving visitors a reason to revisit your website. You control which default articles, if any, you want to appear on your site or you can even add your own custom articles.
- **Financial Tools Page** — Provide useful interactive calculators and tools that not only provide visitors with the answers to simple questions, but also encourage them to consult with you to make more informed financial decisions. You simply indicate which financial tools you want included on your site, and our exclusive Web engine takes care of the rest.
- **Internet Links Page** — Give visitors to your website a wealth of interesting and useful links to other sites on the internet. Simply select from default links or add your own favorite links. You can even include a listing of your firm’s professional referral sources.
- **Contact Information Page** — This page displays detailed firm and staff contact information for multiple locations, including address, phone numbers and email addresses. Visitors can also click a button to get detailed driving directions to your firm.
- **Add Your Own Custom Pages** — You have the ability to add custom pages to meet your firm needs. This could be a Career Opportunities page to attract prospective staff, or a Media Relations page where you can upload information about your firm in the news. You can easily modify and change the content and pages on your own.

Solidify Your Image as a Trusted Business Advisor with eContent Services

You probably don't have time to write a monthly newsletter filled with interesting articles that are both informative and insightful. Let Wolters Kluwer take care of it. With eContent from Wolters Kluwer tax experts, your website will reinforce your image as a trusted authority. CCH Site Builder provides the following eContent:

- **Wolters Kluwer Premium Content** — Help educate your clients with up-to-date news and information presented as coming from your firm.
- **Tax Alerts** — Keep your clients coming back for informative plain-language federal and state-specific Tax Alerts that compel them to take action and contact your firm. You can customize the Tax Alerts for any and all states where you have clients.
- **Monthly Federal and State Tax Events** — Notify your clients of relevant federal and state-specific tax due dates and custom firm events with your Events Calendar, which includes detailed descriptions and information.
- **Useful Calculators** — Allow clients to perform basic financial analyses with powerful interactive financial calculators. CCH Site Builder offers almost 200 different calculators — far more than any other website provider.

Online Financial Tools

Make your website a destination point for clients and prospects seeking tax reference material and financial resources with Online Financial Tools. These additional tools will increase website traffic and client loyalty. And because your clients can get answers and advice on their own, anytime, you can focus on more profitable engagements. Offering free premium content and tools to clients will enable you to compete with large financial services institutions.

Tax Guide

The Tax Guide is packed with over 500 pages worth of straightforward explanations of virtually any tax issue your clients are likely to encounter — from a tax deduction question to how to claim the child tax credit.

The Tax Guide includes:

- Clear explanations related to tax planning.
- Tax Tools with dozens of worksheets, forms and tables.
- A Tax Calendar containing significant filing dates.
- A “What’s New This Year” section highlighting current year law changes.
- A Tax Glossary that defines frequently used tax terms.

Take Charge of Your Business

CCH Site Builder offers several content packages to better help you serve your clients.

Business Owner's Toolkit (BOT)

The Business Owner's Toolkit (BOT) is an award-winning content package designed specifically to help your small business owner clients and would-be entrepreneurs start, run and grow their own small businesses. BOT offers over 4,600 news and advice documents providing answers to your clients' business, tax and legal questions and gives practical tips on working smarter, saving money and staying in compliance with the law.

With BOT you'll be able to provide access to:

- Model business documents, such as customizable sample letters, contracts, forms and policies.
- Financial spreadsheet templates for tasks such as balancing the books for creating financial statements.
- Checklists for a variety of topics, from qualifying for a home office write-off to the right things to do and say during an employee termination interview.
- Official government forms and publications used to file taxes with the IRS or contract with the federal government.

Financial Planning Toolkit (FPT)

The Financial Planning Toolkit (FPT) effectively translates complex financial details into user friendly information. FPT provides more than 1,500 financial planning documents, tools and interactive calculators to meet your clients' needs.

Information in FPT is organized in a life cycle structure to provide the novice user with a logical starting point. Seasoned users can drill down through the comprehensive table of contents to access more detailed information. The site is continuously updated with the latest information, and augmented by articles on consumer finance-related topics written by Wolters Kluwer staff of business and finance professionals.

Client Life Cycle Reading Rack

The Client Life Cycle Reading Rack is a series of helpful guides that ensure your clients understand the basics while helping you market your practice online. Covering both individual and business topics, they provide the most current tax resources and online technology available today. They can even be customized with your firm's logo.

“Integrates a terrific Basic Tax Guide into a larger framework of lifetime financial planning. Another plus: up-to-date financial news reports by the site’s own staff.”

— Forbes

Expand Services with CCH Site Builder Modules

CCH Site Builder offers the following interactive, Web-based tools that provide a gateway to additional client collaboration opportunities:

CCH Access™ Portal

Email is a very insecure form of communication, and using it to exchange sensitive information places that data at risk of unwanted third-party interception. States are aggressively passing strict data privacy legislation, and nearly every state has Security Breach Notification legislation on the books. To ensure compliance with these laws and to mitigate your risk of security breach, add CCH Access Portal to your CCH Site Builder website.

CCH Access Portal is a powerful hosted application that allows you to share files of all types — safely and securely.

With CCH Access Portal, you will be able to:

- Exchange confidential files and documents.
- Enhance client relationships by quickly and easily sharing files of any size.
- Store your clients' information in a secure online environment that allows them 24/7 access to their important information.

For optimal efficiency and convenience, CCH Access Portal integrates with other products within the CCH® ProSystem fx® Suite, including CCH® ProSystem fx® Tax, CCH® ProSystem fx® Engagement and CCH® ProSystem fx® Document.

CCH® ProSystem fx® Tax Notebook

- Reduce shipping and mailing costs as well as the administrative efforts associated with traditional paper organizers.
- Securely exchange data with your clients via the internet.
- Save hours of data entry and review time by linking CCH ProSystem fx Tax Notebook data directly to CCH ProSystem fx Tax.
- Easily monitor and track the status of each CCH ProSystem fx Tax Notebook.

Training and Consulting Options to Fit Yours Needs

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

“Many publishers of small business books maintain websites carrying advice, but few are as comprehensive and generous as Wolters Kluwer’s Business Owner’s Toolkit.”

— Fortune

