



Tax & Accounting

## CCH<sup>®</sup> ProSystem fx<sup>®</sup> Tax

Tax

More than two-thirds of the nation's top CPA firms use CCH ProSystem fx Tax, a high-performing software solution with unmatched efficiencies, accuracy and completeness. CCH ProSystem fx 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. And now, with the release of CCH Access<sup>™</sup> Tax, the cloud-based tax preparation and compliance solution, firms have a choice when it comes to hosting the software and all client data themselves or letting Wolters Kluwer host it for them.

### 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.

CCH 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, including the ability to check the status of returns from a mobile device.
- 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, Wolters Kluwer 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 CCH 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.

### Go Paper-Free with CCH® eSign

You and your clients can have Form 8879 sent, signed and returned within minutes, directly through CCH ProSystem fx Tax. CCH eSign can also be used for a variety of other client-facing and internal documents common to tax and accounting practices, such as annual engagement letters to your clients, annual independence surveys to your staff, Form W-9, Form 4506-T and Section 7216 Consent. One customer that sent its engagement letters using CCH eSign said it saved them \$12,000 the first year!

### All-Inclusive Tax Modules

CCH ProSystem fx Tax offers the following modules, which can be purchased individually or bundled:

- **Individual** — Save time with extensive automatic calculations, automatic computation between joint and separate filing statuses, and complex expatriate and 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 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 such as simple and complex trusts, split interest trusts (5227), bankruptcy estates, grantor trusts, and qualified funeral 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 CCH 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, CCH® ProSystem fx® Scan and CCH ProSystem fx Tax provide you with the 1040/1041 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 1040/1041 returns.
- Facilitates verification of extracted information.
- Allows for real-time import of verified 1040/1041 information directly into CCH ProSystem fx Tax.



Take advantage of the tight integration among CCH ProSystem fx Scan with AutoFlow Technology, CCH ProSystem fx PDFlyer and your Wolters Kluwer tax preparation and compliance software to bring your firm the digital 1040 and 1041 data-import capabilities you've always imagined.

**Already Scanning Your Source Documents?**

Combine CCH ProSystem fx Tax, ProSystem fx Scan and CCH® ProSystem fx® PDFlyer with AutoFlow Technology and give your firm a complete paperless 1040/1041 solution.

- CCH ProSystem fx Scan creates a consistently organized bookmarked PDF file, whether 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 1040/1041s can now be prepared via data extraction, manually or using a combination of both.

Leverage technology and existing administrative staff to provide cost-effective 1040/1041 preparation services to your clients this year!

**The power of CCH ProSystem fx Scan with AutoFlow Technology is available to you in the cloud!**

CCH ProSystem fx Scan with AutoFlow Technology is within easy reach thanks to its availability online. Now with the cloud version of CCH ProSystem fx Scan, you'll enjoy all the proven benefits of the software with the added convenience and cost savings associated with Wolters Kluwer 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, CCH ProSystem fx Tax can save you time and money by drastically reducing data entry.

In addition to its seamless integration with Microsoft® Office products, CCH ProSystem fx Tax integrates with companion products in the CCH® ProSystem fx® Suite as well as other Wolters Kluwer products including (but not limited to):

- **CCH® 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 CCH 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.
- **CCH® 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 CCH ProSystem fx Tax to dramatically increase productivity in your firm.

**Introducing CCH® My1040Data**

With the participation and feedback of customers and their clients, CCH My1040Data was designed to minimize the data collection effort by making it easier for your clients to submit their forms and information. Responsive data collection keeps your clients from spending time answering questions that don't apply to them. CCH My1040Data makes it easy for your clients to attach source documents like Form W-2 and Schedule K-1 — reducing effort and improving accuracy.

- **CCH® ProSystem fx® Planning** — To simplify your individual tax planning process, get a quick start by importing data directly from CCH ProSystem fx Tax with base-year amounts. CCH ProSystem fx Planning's intuitive spreadsheet-style interface lets you review up to 30 tax scenarios and customize up to 10 years of data for each tax scenario.
- **CCH® ProSystem fx® Practice Management** — The top-rated time and billing system that links directly to CCH ProSystem fx Tax. Easily access automated timekeeping, comprehensive invoicing, standard and custom reports, as well as powerful workflow tools.
- **CCH 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!
- **CCH Access™ 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.

Please note that the levels of integration between products vary depending on whether the solution is cloud-based or hosted on-premise by your firm. Please consult with a Sales Representative for more information.

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

- **CCH® IntelliConnect®** is our revolutionary research platform designed to be the central information resource for your daily work life. This powerful platform lets you search your library of Wolters Kluwer content in a matter of seconds by just using simple keywords. You can capture information from your subscription, then filter it down to exactly what you need.
- **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.
- **CCH® SmartCharts** allow you to quickly and easily chart state tax issues in one jurisdiction or compare tax treatments across multiple tax jurisdictions. CCH ProSystem fx Tax includes a link to CCH SmartCharts that address multi-jurisdictional research needs.

#### **Leading-Edge Technology**

CCH 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.

CCH 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.

### Reduce Cycle Time with Task-Specific Tools

CCH 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](http://CCHGroup.com/TaxFormsandStates). A downloadable PDF is available.

### Training and Consulting Options to Fit Your 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](http://CCHGroup.com/Learning) to learn more.

