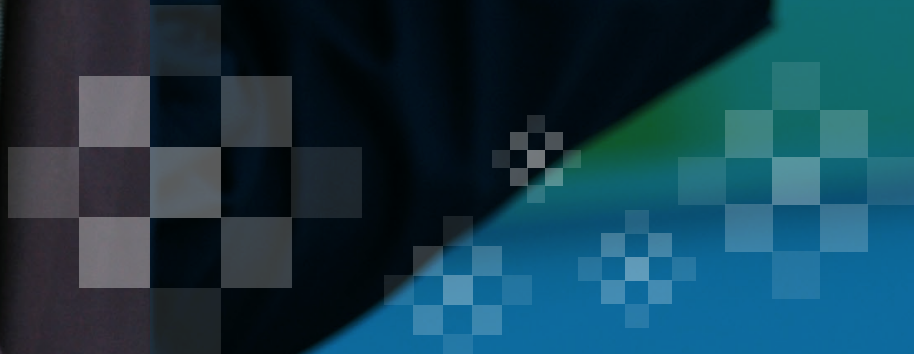




## How does CCH help a small but fast-growing tax firm create a professional website to attract new business?

"We'd made two previous attempts at websites, but they were like static brochures. It took weeks to make changes. But when the CCH people showed me the content management system in ProSystem fx® Site Builder, all my expectations were met right there on the spot. Now I could make changes as fast as I wanted. I like to say that CCH moves at the 'speed of business.'"

— Carlos Lopez  
*President, Lopez Tax Service*





In practice for over 25 years, Lopez Tax Service (Lopez) is a full-service tax advisor to both individuals and small businesses with a flourishing network of six offices in northern California and Texas. With a staff of dedicated professionals, Lopez has a reputation for its personal if not downright passionate attention to the needs of its clients. Positioning itself as a total financial marketplace, Lopez also offers cost-effective accounting services to small businesses; and as a licensed broker in California, it can provide experienced consulting on key real estate decisions as well as day-to-day broker services.

### New website equals new business

Lopez Tax Service has been experiencing an annual growth of 15%, and they'll tell you a good part of the credit goes to their presence on the Internet. By using ProSystem fx Site Builder, this firm has built a professional online presence that enhances their image as a genuine tax authority.

"ProSystem fx Site Builder gave us a huge credibility boost by giving us the look and feel of a nationwide company. People want to go to a large company where they feel they'll be taken care of. And our website creates that feeling."

— Carlos Lopez,  
*President, Lopez Tax Service*

Lopez even directs viewers who see their TV commercials to visit their website. Their multi-tasking website has useful features that not only take care of their current customers, but also offers resources that attract new clients looking for tax help.

"Perception is reality. And the perception to our prospects is that we have a state-of-the-art, world-class website. It's a website I'm proud to market to my customers and prospective clients."

— Carlos Lopez,  
*President, Lopez Tax Service*

## A professional-looking website in minutes

ProSystem fx Site Builder is incredibly simple to set up. In fact, a fully functional website can be created in less than 15 minutes. Lopez selected his firm's website design from a collection of styles with just one click of a button.

What's more, he can change the look or update the content of the firm's website anytime, free of charge, or even preview selections before applying them.

"My old website was so static. Then, CCH made our website interactive with informative, up-to-date features. For the kind of clients we service, this site is ideal."

— Carlos Lopez,  
President, Lopez Tax Service

In addition to helping Lopez build a professional-looking website, CCH created a "Welcome" page that reflects the unique Lopez Tax Service personality and image to website visitors. And, Lopez was pleasantly surprised to learn that whenever changes are made, there's never any downtime on their live website.

"The most attractive feature of ProSystem fx Site Builder is its flexibility. Anytime I need to change or update something, it takes no time at all. And it's user-friendly. In fact, I trained my assistant to make changes in just a few minutes."

— Carlos Lopez,  
President, Lopez Tax Service

## This website comes with all the features critical to online success

Lopez Tax Service took full advantage of all the components that accompany ProSystem fx Site Builder — attractive, informative features that visitors to a website expect, and then some.

- Lopez started with a Firm Profile Page that provides visitors with background information on Lopez Tax Service, including a mission statement that reveals the firm's focus on people and relationships.

- Including a Client Services Page was mandatory for Lopez, because the firm also offers client services in accounting, payroll, and real estate in addition to its principal menu of tax services.
- The Info Center Page provides a wealth of information and resources for visitors to the Lopez Tax Service website, including downloadable tax forms and publications.
- Similarly, the Newsletter Page receives daily, professionally written articles from CCH on subject matter ranging from tax deductions to tax alerts. Lopez controls which reports appear and can even add his own customized write-ups.
- The Financial Tools Page provides useful interactive calculators and tools that not only provide visitors with the answers to simple questions, but also encourages them to contact Lopez for more informed financial decisions.
- The Internet Links Page lets Lopez provide visitors with interesting and useful links to other sites on the Internet.
- Finally, the Contact Information Page displays detailed firm and staff contact information for every office in the Lopez network, including addresses, phone and fax numbers, and email addresses. Visitors just have to click a button to get precise driving directions to the Lopez office.

## An easier, more secure way to work with clients

ProSystem fx Site Builder offers effortless integration with Web-based tools such as File Share, a module that enhances communication with customers. This remarkable tool provides shared access to critical files and documents for the clients, partners and associates of Lopez anytime, anywhere. Select clients can quickly access a file either by downloading it, or by launching the file directly from File Share.

Carlos C. Lopez, EA founded Lopez Tax Service in 1983 after graduating from Pacific Union College and completing Organizational Behavior/Accounting coursework at the University of San Francisco. In due course, he passed the Internal Revenue Service Enrolled Agent exam. During the hectic times of tax season, his ever-expanding firm employs nearly 60 people in Salinas, California, all dedicated to the Lopez mission of total customer satisfaction. The firm has won the "Best Tax & Accounting Service" honor not once, but twice, as awarded by *The Californian*, a newspaper serving Salinas and greater Monterey County. In 2006, Lopez Tax Service received the Blue Ribbon Small Business award from the U.S. Chamber of Commerce — no small feat considering it meant Lopez Tax Service was ranked in the top 60 of over two million companies. Finally, Mr. Lopez takes singular pride in being the Founder and Executive Director of the Latino Tax Professionals Association, a group dedicated to excellence in the field of tax preparation.

"It's company policy at Lopez that nothing comes in or goes out by fax. So the ProSystem fx File Share feature on our website provides a secure way to send sensitive information. People love it! So whenever a customer moves, they stay a customer because we have a safe, easy way to download their information to our website."

— Carlos Lopez,  
President, Lopez Tax Service

With File Share, Lopez also has the ability to upload and temporarily store a variety of documents and data, such as QuickBooks®, financial statements, prior year tax returns, spreadsheets, and images. Thanks to CCH's extensive experience in Internet protection, Lopez knows they can rely on CCH to back up and safeguard their sensitive data from viruses, disk crashes, and file corruption.

## How to come across as a tax or financial expert without lifting a finger

The plain truth is that CCH does all the heavy lifting by providing Lopez with the latest news, information and tax content on their website via eContent from ProSystem fx Site Builder.

CCH taps into their powerful knowledge base and automatically delivers premium content to the Lopez website daily. The content is presented in an easy-to-understand style that appears as if it is generated by the staff at Lopez Tax Service.

*“The newsletter feature of eContent is absolutely great — every day there’s a fresh news item. CCH makes us look like we’re really on-the-ball with relevant, up-to-date information. I’m really pleased with the Tax Alerts and the newsletters.”*

— Carlos Lopez,  
President, Lopez Tax Service

Lopez also takes advantage of another useful Site Builder service: interactive financial calculators. These powerful calculators allow visitors and clients alike to easily perform basic financial computations and analysis. These financial tools are just one more way CCH helps position Lopez Tax Services at the leading edge of customer service.

## How Lopez successfully competes against the bigger firms

With their new website serving as a destination point for clients and prospects, the network of Lopez offices found they were better equipped to compete in the marketplace. Offering free premium content and tools to clients puts Lopez on an equal footing with larger financial institutions.



For example, the Lopez Tax Service website includes a Client Tax Organizer that facilitates the client process of pulling together their tax information. The basic tax organizer is designed for new clients, allowing them to enter tax details on screen, then print it out and send it to the firm.

## Being eco-friendly can save time and money

By having the Lopez website incorporate CCH-syndicated content, visitors started using it to find answers and advice on their own, leaving the Lopez staff more time to focus on more profitable activities.

Moreover, the benefits of having downloadable forms and files results in reduced paper and mailing costs. Thanks to ProSystem fx Site Builder, the “less is more” principle clearly results in real money for the Lopez network.

*“We emphasize that we’ve gone ‘green’ at Lopez. So instead of mailing out a brochure, we email our prospects, providing them with a link to our website where they can get answers to their questions. Once there, they can take advantage of our Info Center resources as well as our financial calculators. So anyone can go to our website and just print out the information they need. It’s a money-saver, and people like that.”*

— Carlos Lopez,  
President, Lopez Tax Service

Finally, with an online presence, Lopez makes it easy for do-it-yourself customers to file their federal and state tax returns. Their special Internet tax-helper program complies with the latest tax laws to help minimize taxes and maximize refunds. Customers are then able to file directly with the IRS and state at no extra charge.

To learn more about  
ProSystem fx Site Builder,  
call **1-800-PFX-9998** (1-800-739-9998)  
or visit **CCHGroup.com**.

The most up-to-date product information, including detailed system requirements, enhancements, and new features, is available at [CCHGroup.com/SiteBuilder](http://CCHGroup.com/SiteBuilder). If you plan to use multiple ProSystem fx Suite products within the same system, call **1-800-PFX-9998** (1-800-739-9998) and ask to speak to your sales representative about whether or not your system availability is adequate.

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