



Tax Notebook

Eliminate the administrative and mailing costs associated with paper tax organizers, and enjoy a secure transfer of data with your clients.

Tax Notebook is the online tax organizer that delivers expanded levels of convenience and technology to improve your interaction with existing clients and help you reach new prospective customers.

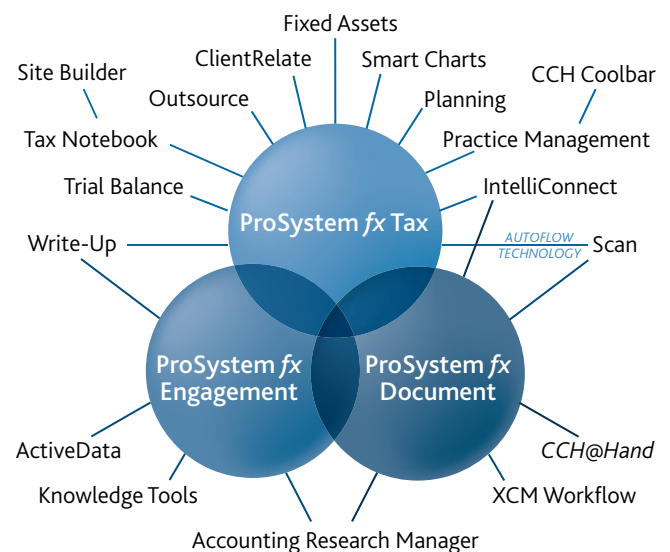
MAXIMIZE PRODUCTIVITY

Tax Notebook is a dynamic Web application – not just a static electronic copy of the paper organizer – which means that Tax Notebook can automatically adapt to a client's changing tax situation. For example, if a client has a new rental property, the system will automatically provide input to capture all of the new information.

The following are just a few of the many benefits Tax Notebook offers your firm. You can:

- Import Tax Notebook data seamlessly into ProSystem fx Tax and virtually eliminate data entry.
- Quickly and accurately populate Tax Notebook with last year's Pro Forma information.
- Enable your clients to give you details about any particular piece of data via a Notes feature on each page. These notes will automatically print out and download to ProSystem fx Tax for accountant review.
- Monitor and rapidly track the status of each client's Tax Notebook through the powerful status system, included within the Tax Notebook Toolkit.

- Enhance your professional image with a fully customized Tax Notebook (classic, expanded or foreign versions), complete with a personalized Welcome Page with your firm name and logo.
- Drive clients to your website, where they'll quickly learn the full scope of services offered by your firm.
- Import W-2 data from a variety of payroll providers, as well as Schedule D data from GainsKeeper® Pro™, Morgan Stanley, and Charles Schwab.
- Take advantage of available marketing materials (postcards, flyers, sample letters, and email text) to help you promote the advantages of Tax Notebook to your clients.



Increase productivity through CCH integration that lets you share data between applications so you can quickly access the information you need.

INCREASED EFFICIENCY FOR YOU AND YOUR CLIENTS

Using any PC with Internet access, your clients can conveniently access their personalized tax notebooks directly from a link on your firm's website, if you choose to provide that option – and Tax Notebook will automatically guide your clients through a streamlined tax interview.

There are benefits for your staff as well as for your clients. For example, you can:

- Use the powerful online status system to track your clients' progress so you know exactly when their tax notebooks are complete.
- Review completed tax notebooks online, then download the information to your local system for seamless integration into ProSystem fx Tax.
- Leverage the Tax Notebook Toolkit to completely customize your clients' tax notebooks to meet the professional standards of your firm, and even create notebooks that mirror the specific tax situations of each client.
- Determine what firm information appears on the tax notebooks your clients access, including your firm name, address, and logo.
- Modify the Personal Profile, Checklist, and Welcome Page so the notebooks reflect the specific tax situation (e.g. retired, foreign, etc.) for each client, or group of clients. After the Pro Formas are created, upload Pro Forma data into the tax notebooks – either one client at a time, or all your clients at once.
- Using a powerful status system, track each client's tax notebook progress that is reported as Unopened, In Progress, or Completed. Once a notebook is completed, your staff can review the data entered by your clients either online or via printed reports.
- Import the Tax Notebook data you collect into our powerful Tax modules and simplify the process of creating returns. You have now eliminated error-prone, time-consuming data entry from your workflow!
- The Toolkit allows you to control exactly who on your staff accesses each tax notebook. The same security levels you established in ProSystem fx Tax can be used, or you can easily create new users within the Tax Notebook Toolkit.

TAX NOTEBOOK SECURITY

CCH regards the security of your confidential data as paramount, and Tax Notebook was built with thorough security measures in every step of the tax organizer process.

From SSL technology, data back-up, and redundancy steps, to unique passwords and logins for each client, the integrity of your client information is always secure and private.



Use the Electronic Filing Status System significantly reduce the amount of administrative time you spend on e-filing returns.

For more information on Tax Notebook 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/Tax. 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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