



## ProSystem fx® Tax

Improve your bottom line with a completely integrated tax preparation and delivery system.

More than two-thirds of top CPA firms use ProSystem fx® Tax, a high-performing software solution with unmatched efficiencies, accuracy, and completeness, known for its extensive integration with other products and its ability to handle the most complex returns and tax issues. ProSystem fx Tax is 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.

### Industry-Leading Expertise

In the world of tax preparation, with ever-changing government tax guidelines, a shifting regulatory environment and competitive pressures to increase efficiency and lower costs, the software a business chooses is a strategic decision with broad implications.

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 yearly.
- A state-of-the-art Electronic Filing Status System with easy status check.
- Integration with other products and solutions that creates an end-to-end tax preparation workflow that answers all your needs.

Since 1913, CCH 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 changes and advise your clients.

The expertise that delivers all this is also the driving intelligence behind the 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.

### All-Inclusive Tax Modules

ProSystem fx Tax offers the following modules, which can be purchased individually or bundled to meet your firm's specific needs:

- **Individual** — Save time with extensive automatic calculations, automatic computation between joint and separate filing statuses, and complex 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 you can use the S Corporation program's flexible Shareholder Allocation and Distribution features.
- **Deferred Compensation** — 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.
- **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 an industry-leading accuracy rate of 95%.
- **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 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, ProSystem fx® Scan and Tax provide you with the 1040 data import capability you've always imagined, thanks to new AutoFlow Technology™. This process:

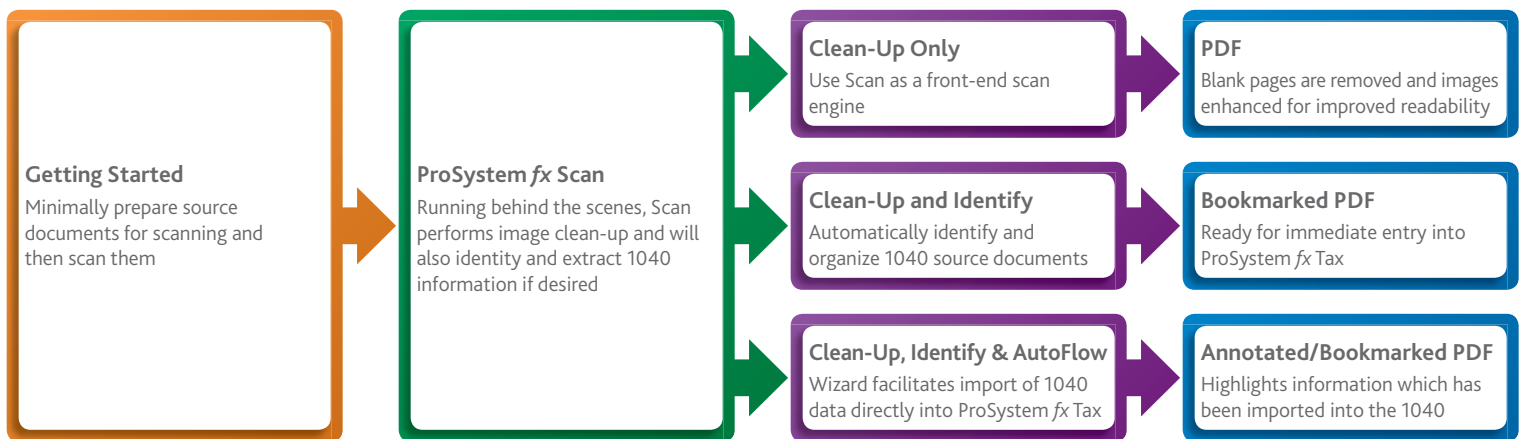
- Extracts data from selected scanned source documents used to prepare the most common 1040 returns.
- Facilitates verification of extracted information.
- Allows for real-time import of verified 1040 information directly into ProSystem fx Tax.

### Already Scanning Your Source Documents?

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

- ProSystem fx Scan creates a consistently organized bookmarked PDF file, whether 1040 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 1040s 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 preparation services to your clients this year!



Coupled with ProSystem fx Tax, ProSystem fx Scan and PDFlyer™, AutoFlow Technology™ brings your firm the digital 1040 data import solution you've always imagined.

## Leverage Integration to Improve Productivity

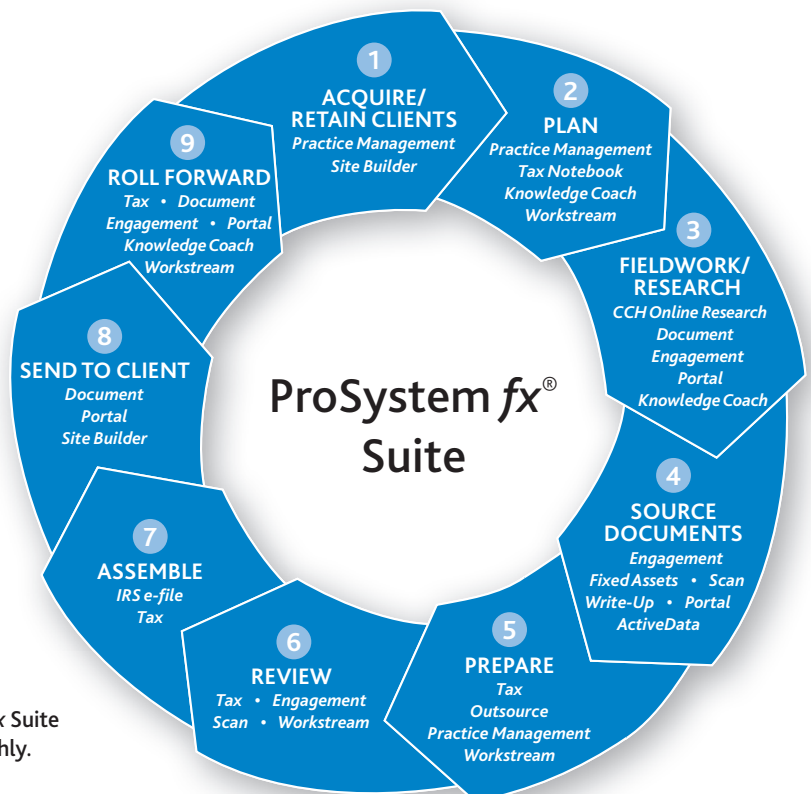
Thanks to its tight integration with other technologies you rely on, ProSystem fx Tax saves you time and money by drastically reducing your data entry.

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

- **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 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.
- **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 and increase efficiency. Effortlessly access workpapers from ProSystem fx Tax to dramatically increase productivity in your firm.
- **ProSystem fx® Practice Management** — The top-rated time and billing system that links directly to ProSystem fx Tax. Easily access automated timekeeping, comprehensive invoicing, standard and custom reports, as well as powerful workflow tools.
- **ProSystem fx Scan** — The time-saver 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!
- **ProSystem fx® Portal** — A safe document-sharing solution that provides an effective and secure method of exchanging confidential files with clients. With just a few mouse clicks, a firm can publish a return directly to a client's portal, making it available to the client in a matter of minutes.

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

- **IntelliConnect®** is the revolutionary CCH® research platform designed to be the central information resource for your daily work life. This powerful platform lets you search your library of CCH content in a matter of seconds by just using simple keywords. You can capture information from your CCH subscription, then filter it down to exactly what you need.
- **TaxScripts® TaxPro** electronically streamlines the disclosure authorization process so you can submit an IRS transcript request quickly — and receive transcripts almost immediately.
- **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® ClientRelate™** helps identify clients who will be affected by new tax legislation, and its integration with ProSystem fx Tax helps you search for and find these clients.
- **Smart Charts™** allow you to quickly and easily chart state tax issues in one jurisdiction, or compare tax treatments across multiple tax jurisdictions. ProSystem fx Tax includes a link to *Smart Charts* that address multi-jurisdictional research needs.
- **CCH@Hand™** facilitates your tax research from ProSystem fx Tax, without having to open a browser window or log in.



From acquiring new clients to gathering source documents and generating the tax return or engagement results, the ProSystem fx Suite offers a multitude of solutions that keep your firm running smoothly.

## Leading Edge Technology

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.

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.

## Positively Impact Cycle Time with These Task-Specific Tools

ProSystem fx Tax also has a variety of value-added options to help minimize your data entry and maximize productivity, such as:

- **DataScan Plus®**, the tool that lets you turn client data into valuable marketing, practice management, and client services information.
- **Engagement Plus™**, the tracking and reporting software that allows you to monitor all your firm's engagements.
- **Tax Projector™**, the tool that lets you show clients how scheduled tax law changes will affect them.
- **Client Manager™**, a software that allows you to set up and maintain complete profiles on all your firm's clients.

## Federal Forms and Schedules

Please visit [CCHGroup.com/TaxFormsandStates](http://CCHGroup.com/TaxFormsandStates) for a complete list of available federal forms and schedules for each ProSystem fx Tax module. The list also includes available state, city and county returns.

## Training and Consulting Options to Fit Your Needs

CCH 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.

For more information on  
ProSystem fx® Tax  
call **800-PFX-9998 (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](http://CCHGroup.com/Tax). If you plan to use multiple ProSystem fx Suite products within the same system, call **800-PFX-9998 (800-739-9998)** and ask to speak to your sales representative about whether or not your system availability is adequate.

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