



ProSystem fx[®] Tax 5500, 706/709, 990

Extensive 5500, 706/709, and 990 form processing that helps you comply with regulatory controls.

ProSystem fx Tax is the award-winning tool that produces fully compliant fileable forms for Form 5500, automates the preparation of Forms 706/709 and supporting schedules, and provides extensive Form 990 processing, including Form 990-EZ, 990-PF, and 990-T.

5500 DEFERRED COMPENSATION

Make your Employee Benefit plans filing compliant by using ProSystem fx Tax! This tool:

- Produces fileable forms fully compliant with Department of Labor requirements.
- Allows for federal electronic filing.
- Prepares Summary Annual Reports for Form 5500.
- Prepares any combination of government schedules for each plan within a return.

706/709 ESTATE AND GIFT

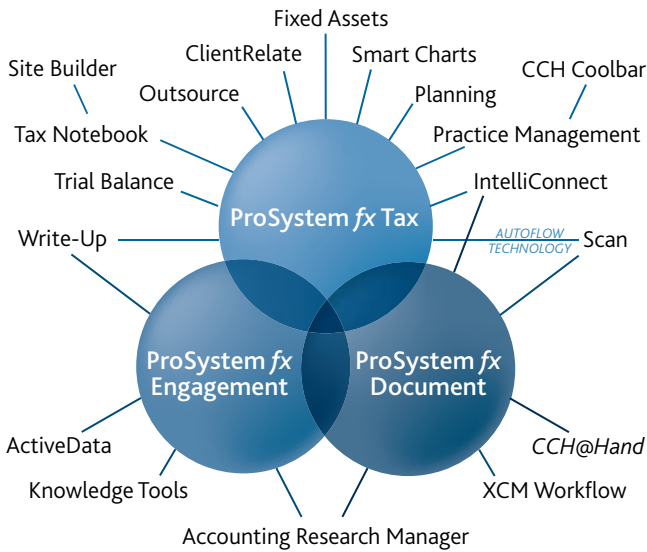
Automate your Estate and Gift calculation with ProSystem fx Tax, the versatile tool that:

- Produces Form 706, including continuation schedules and supporting schedules.
- Provides the interrelated calculation of the marital deduction and charitable deduction.
- Calculates community property exclusion.
- Produces the election to pay estate taxes in installments.
- Calculates regular interest and penalties for late payment and late filing.
- Produces Form 709 for both taxpayer and spouse, including Notice of Allocation of GST Tax Exemption.
- Processes Power of Attorney and Declaration of Representative for Forms 706 and 709.
- Provides the import or export of data between ProSystem fx Tax and ViewPlan[®] Advanced, CCH's estate planning software.
- Carries QTIP Trust amounts to Schedule M.
- Imports client and tax-related data directly from EstateWorks trust administration software into Form 706.

990 EXEMPT ORGANIZATION

Simplify your exempt organization calculations with software that:

- Offers new "modernized" *e-file* for federal Form 990, 990-PF, and 990-EZ returns and Form 8868 Extension.
- Provides extensive Form 990 processing, including 990-EZ, 990-PF, and 990-T.
- Supplies flexible and comprehensive preparation of Estimated Taxes.
- Provides annualized income and adjusted seasonal installment methods for computing Underpayment of Estimated Tax Penalty.
- Allows flexible adjustments and options for reconciling balance sheet discrepancies.
- Includes an "automatic sales feature" that transfers depreciation to all applicable forms.
- Automatically calculates proxy tax on Schedule C and carries it to Form 990-T.
- Handles state depreciation capability, if different.
- Dynamically links with ProSystem fx[®] Engagement, the full-featured trial balance and paperless engagement system.
- Allows transfer of depreciation and asset disposition information to and from ProSystem fx[®] Fixed Assets.
- Provides Form 4720 for automatic calculation of excise taxes on undistributed income and excess lobbying expenditures.



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

DECREASE NON-BILLABLE HOURS THROUGH TIGHT INTEGRATION

ProSystem fx Tax works seamlessly with ProSystem fx® Suite, CCH solutions, and Microsoft® Office products to drastically reduce time spent on redundant manual data entry.

Some benefits you'll experience from these integrations include:

- Transfer of depreciation and asset disposition information to and from ProSystem fx Fixed Assets.
- Increased efficiencies through integration with ProSystem fx Engagement, CCH's full-featured trial balance and paperless engagement system, and the updating of project statuses in ProSystem fx® Practice Management.
- The ability to store a PDF of the tax return, or the selection of what to print from the tax return, with ProSystem fx® Document.
- Context-sensitive links to IntelliConnect™ and CCH@Hand, along with integration to ClientRelate™.
- Imports and exports to Microsoft® Excel worksheets.

MEET e-filing MANDATES WITH AN IRS-AUTHORIZED PROVIDER

Save hours of administrative legwork and experience immediate productivity gains by relying on ProSystem fx Tax for all of your e-filing needs.

You'll enjoy the convenience of being able to do everything online – anywhere, anytime. Additionally, the Electronic Filing Status System will address all of the workflow issues associated with e-filing. You will be able to effortlessly submit, track, stop, and change the status of any return exported for e-filing.

For more information on ProSystem fx® Tax 5500, 706/709, 990 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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