



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, 990-N, 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, including PDF attachments.
- Prepares IRS Form 5500EZ for paper filings.
- Prepares Summary Annual Reports for Form 5500.
- Prepares any combination of government schedules for each plan within a return.
- Facilitates the Signing Ceremony requirement to protect signing credentials.

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.
- Carries QTIP Trust amounts to Schedule M.
- 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 CCH® ViewPlan® Advanced, CCH's estate planning software.
- 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, 990-N, 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.



Decrease Non-Billable Hours Through Tight Integration

ProSystem fx Tax works seamlessly with the ProSystem fx® Suite, other CCH solutions 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.

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.

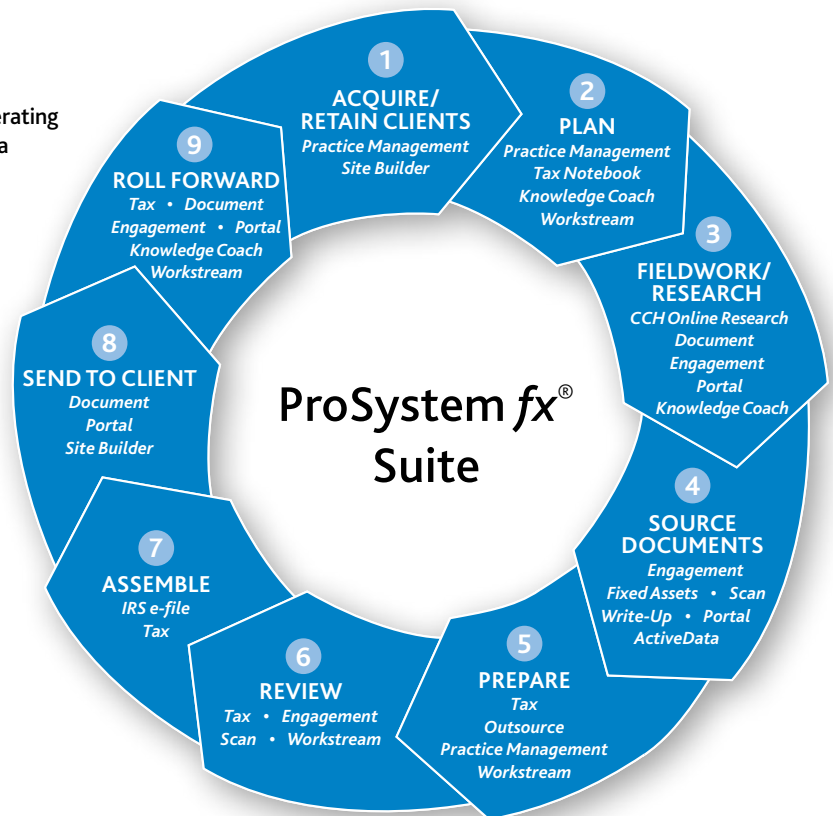
Meet e-filing Mandates with a Proven IRS-Authorized Provider

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.

Training and Consulting Options to Fit Your Needs

CCH also 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 to learn more.



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