



ProSystem fx® Tax – Fiduciary

Simplify your estate and trust returns.

The ProSystem fx® Tax – Fiduciary module lets you easily manage all types of estate and trust returns, as well as distribution and Schedule K-1 options. Increase efficiency with features that provide full flexibility for allocating and presenting deductions.

Streamline Your Work with Smart Features and Speedy Calculating

Whether you're working on a Simple Trust, Decedent's Estate, or Custodial/Agency Account, you'll benefit because ProSystem fx Tax – Fiduciary module:

- Provides extensive computations for Form 1116.
- Distributes income based on amounts, decimals, or a combination of both.
- Allows for specific allocation of income classes, certain deductions, and credits to selected beneficiaries, along with separate distribution of depreciation and depletion — or inclusion with related income amounts.
- Enables a variety of distribution options, including first and second tier beneficiary allocations, per-beneficiary distributions, and the Section 663(b) (65-day) election.
- Provides an option to create a beneficiary tax information letter in conjunction with a Schedule K-1.
- Produces tax information letters for grantors, custodial/agency accounts, and non-resident beneficiaries.
- Creates detailed statements supporting all deduction allocations.
- Offers several methods for allocating deductions to classes of income, including:
 - Pro rata to all classes of income.
 - In a specific order.
 - Specific deductions to specific classes of income.
- Calculates federal and selected state NOL.
- Exports fiduciary K-1 data directly to ProSystem fx Tax – Individual, and applicable business returns.
- Minimizes your data entry with an intuitive Worksheet Interface.
- Simplifies your collection of client federal tax data using a printable Organizer.

Gain Efficiency with Comprehensive Diagnostics and Powerful K-1 Options

ProSystem fx Tax – Fiduciary also computes accounting income, estate tax deduction, creates supporting worksheets, and offers extensive review and audit tools that include comprehensive diagnostics, worksheets, and recap statements for income from pass-through and beneficiary distributions.

Gain efficiency with a fiduciary tax package that includes powerful state and K-1 options:

- Simple Trust
- Complex Trust
- Decedent's Estate
- Bankruptcy Estate (Federal)
- Grantor Trust
- Multi State Grantor Trusts
- Custodial/Agency Account
- Electing Small Business Trust
- Split Interest Trusts
 - Charitable Lead Trust
 - Grantor Charitable Lead Trust
 - Charitable Remainder Annuity Trust
 - Charitable Remainder Unitrust
 - Pooled Income Fund

Simplify Production of State Returns

Continue to maximize productivity with simple-to-use state features, such as:

- Comprehensive programs that work seamlessly with federal data.
- Complete multi-state processing for nonresident returns, including the computation of credit for taxes paid to non-resident states.
- Ability to drill down to individual items to ensure itemized calculation accuracy.

Decrease Non-Billable Hours Through Tight Integration

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

This allows you to:

- Transfer depreciation and asset disposition information to and from ProSystem fx® Fixed Assets.
- Automate project status updating in ProSystem fx® Practice Management.
- Store a PDF or selected pages of the tax return in ProSystem fx® Document.
- Use context-sensitive links to IntelliConnect® and CCH@Hand™, along with integration to ClientRelate™.
- Import or export beneficiary data with Microsoft® Excel®.
- Import asset, depreciation and disposition information from Sage® FAS asset management software.

Training and Consulting Options to Fit Your Needs

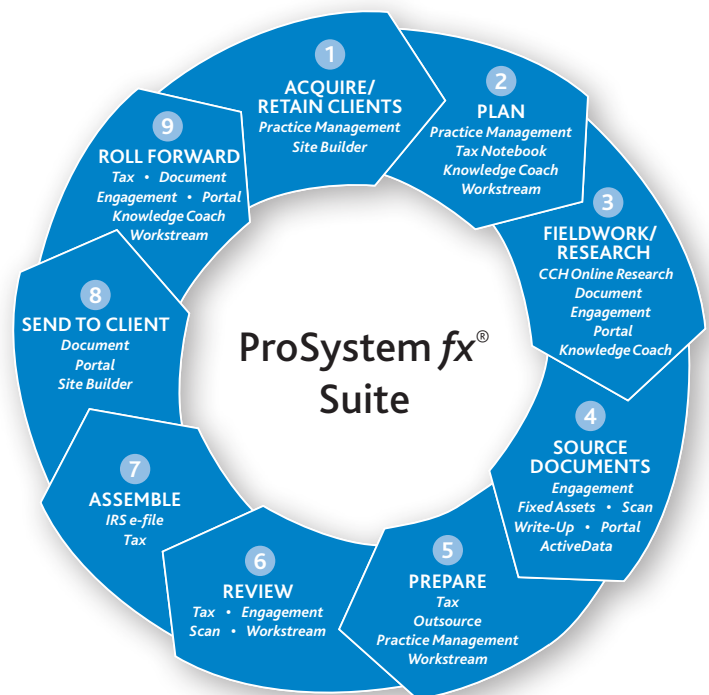
CCH also offers valuable training, consulting and CPE to keep you ahead of the curve. From live training and consulting, to on-demand online learning, CCH provides the tools that everyone, from new hires to seasoned pros, needs to strengthen their abilities. Visit CCHGroup.com/Training to learn more.

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, our Electronic Filing Status System addresses all of the workflow issues associated with e-filing.

Effortlessly submit, track, stop, and change the status of any return exported for e-filing!



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.

For more information on ProSystem fx® Tax – Fiduciary call **800-PFX-9998 (800-739-9998)** or visit CCHGroup.com/Tax

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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