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# 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.

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.

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.

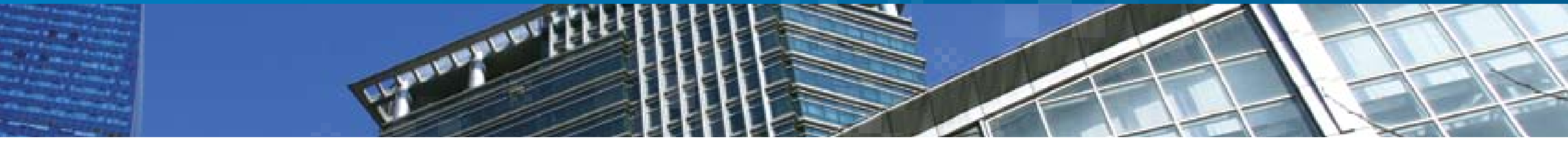
Gain efficiency with a fiduciary tax package that includes powerful state and K-1 options:

- Simple Trust
- Complex Trust
- Decedent's Estate
- Grantor Trust
- 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

## 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 and other CCH solutions, as well as Microsoft® Office products to drastically reduce time spent on redundant manual data entry.

This allows you to:

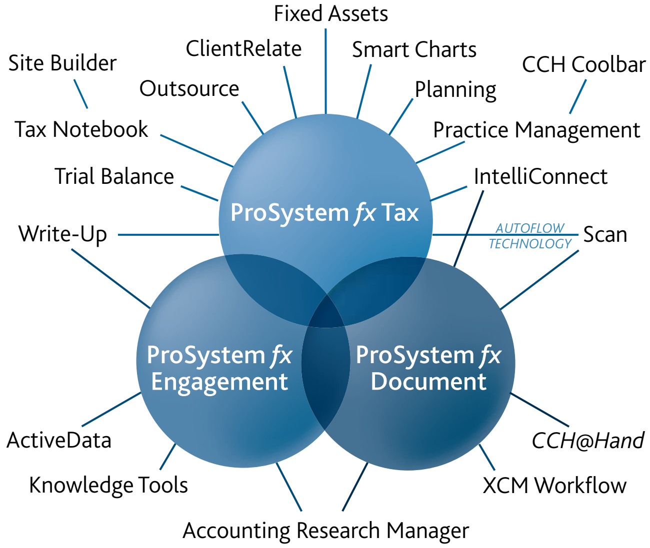
- Transfer depreciation and asset disposition information to and from ProSystem *fx*® Fixed Assets.
- Automate project status updating in ProSystem *fx*® Practice Management.
- Store a PDF or selected pages of the tax return in ProSystem *fx*® Document.
- Use context-sensitive links to the IntelliConnect™ 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.

## 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*!




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

For more information on
ProSystem *fx*® Tax – Fiduciary
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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