



# ProSystem fx® Tax – Individual

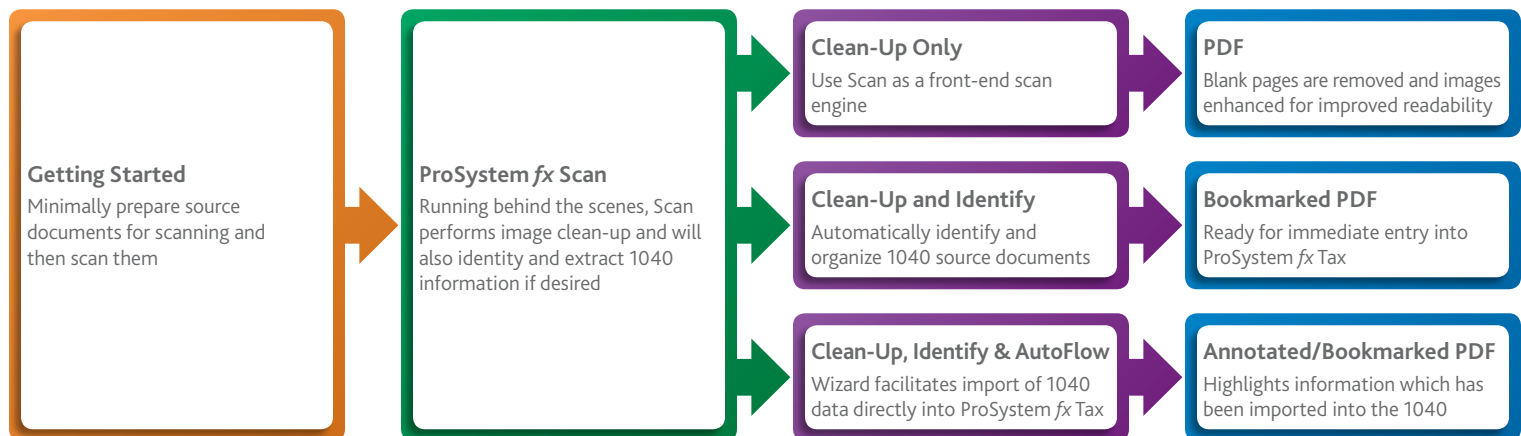
Take advantage of complete, digital 1040 tax preparation.

The ProSystem fx® Tax – Individual module offers robust calculations, automatic computations that dramatically reduce task time, and the ability to create detailed reports for tax planning and audits.

## Minimize Data Entry and Maximize Productivity

Increase your efficiency using these ProSystem fx Tax features:

- Computations between joint and separate filing statuses and complex depreciation calculations.
- Comprehensive and complex basis, passive activity and at-risk limitation processing.
- Inter-return navigation to access all family member returns, with an easy, one-step “Kiddie Tax” calculation.
- K-1 data imports from ProSystem fx Tax Fiduciary, S Corporation, and Partnership returns.
- Direct tax return population from Tax Notebook, the time-saving CCH online organizer.
- Comprehensive diagnostics that check for omissions and inconsistencies, with high-level suggestions to help you in the review and tax planning process.
- Detailed statements, offered historically by year, that include net operating loss, general business credits, contributions, carryforwards and carrybacks.
- Convenient source document look-alikes that speed data entry from W-2s, 1099s, and brokerage statements, including the ability to auto-fill these forms using data imported from ProSystem fx® Scan.
- An easy-to-use wizard for importing or exporting foreign entity information, one at a time or in batches.



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.

## Sophisticated State Features

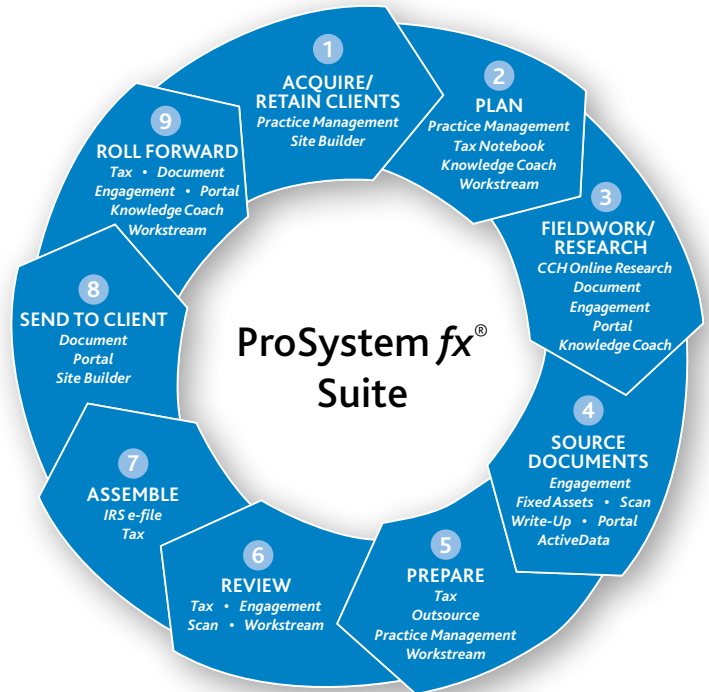
The ProSystem fx Tax – Individual module also includes powerful state features, such as:

- Foreign assignment “tax equalization calculation” for all states.
- Simple one-step multiple-state processing.
- Flexible preparation of state-estimated tax vouchers and “underpayment of estimated tax penalty” computation.
- Efficient generation of amended returns, powers of attorney, and extensions for all states.

## Integration Decreases Non-Billable Hours

The ProSystem fx® Tax works seamlessly with the ProSystem fx® Suite and other CCH solutions, as well as Microsoft® Office products, to help your firm:

- Complete tax returns through use of scanned documents from ProSystem fx® Scan.
- Simplify preparation using integration with TaxScripts® TaxPro for electronically filing Powers of Attorney with the IRS and quickly receiving taxpayer transcripts.
- Populate Schedules E, F and C through ProSystem fx® Engagement.
- Automate the updating of project statuses in ProSystem fx® Practice Management.
- Store a PDF or selected pages of a tax return in ProSystem fx® Document.
- Transfer depreciation and asset disposition information to and from ProSystem fx® Fixed Assets.
- Import financial statement data from ProSystem fx® Write-Up, automatically populating Schedules C, E and F and Form 4835.
- Use context-sensitive links to IntelliConnect®, CCH® Tax Prep Partner™ and CCH@Hand™, as well as integration to ClientRelate™.
- Quickly populate Schedule D from GainsKeeper® Pro and BasisPro Cost Basis Analyzer from Wolters Kluwer Financial Services.
- Import and export data 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

Realize significant productivity gains by relying on ProSystem fx Tax for all of your e-filing needs.

ProSystem fx employs an Electronic Filing Status System to address all of the aspects of e-filing, including multi-state returns, giving you control at all stages of the e-filing process. CCH offers e-filing for all federal and available state and city returns.

## 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](http://CCHGroup.com/Training) to learn more.

For more information on ProSystem fx® Tax – Individual call 800-PFX-9998 (800-739-9998) or visit [CCHGroup.com](http://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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