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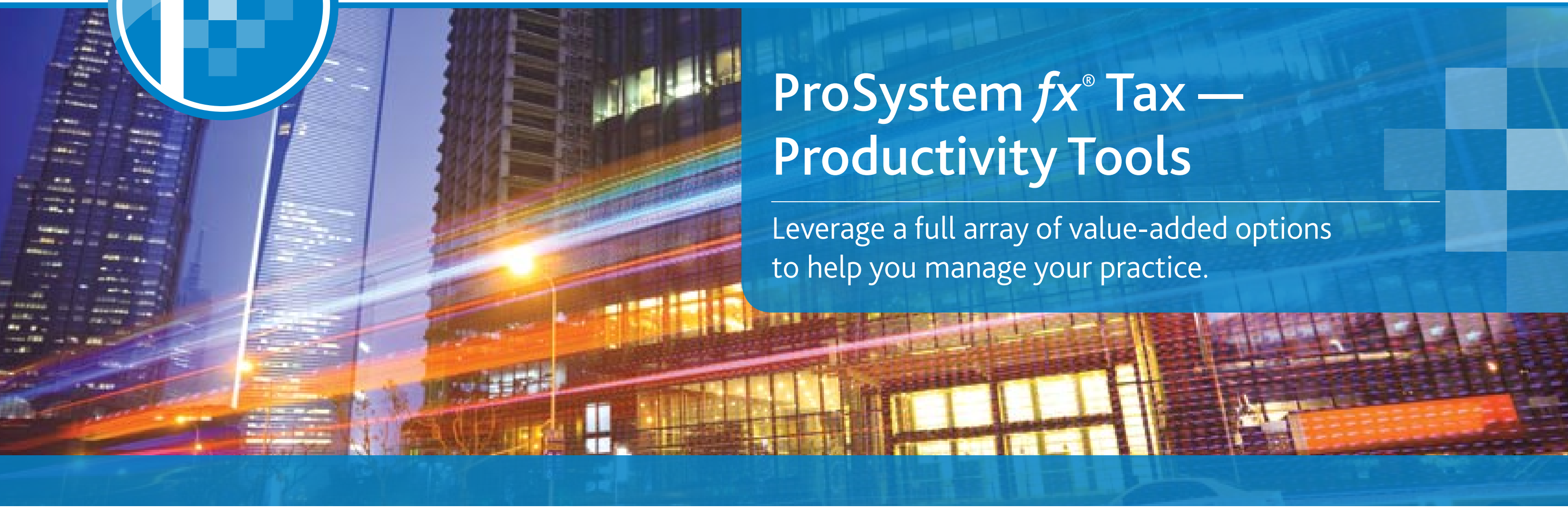

ProSystem *fx*® Tax — Productivity Tools

Leverage a full array of value-added options to help you manage your practice.

Why limit your client services when you have the tools to offer them so much, while saving your firm money through increased productivity? With ProSystem *fx*® Tax, you have a variety of fully integrated options that will support your bottom line.

Datascan Plus™

Turn client data into valuable marketing, practice management, and client services information. It's easy with DataScan Plus™!

DataScan Plus helps you learn more about your clients, respond quickly to new or changing tax laws, and provide fast, personalized service to clients with specific needs. Search your client database for various types of information using the criteria of your choice, such as:

- Tax law changes.
- Particular client profile information.
- Client history.

An easy-to-access list of search options allows you to quickly analyze current and prior-year return data, Client Profiles, Engagements, and Client Status and Activities. Or, effortlessly customize search criteria and search as deeply into your client database as necessary to pinpoint information.

Take full advantage of the opportunities hidden in this information by generating a wide range of analytical reports, lists, and mailing labels. DataScan Plus is flexible and easy to use:

- Build customized searches using simple words and phrases.
- Save frequently-used searches.
- Create customized reports.
- Choose from three types of output: reports, labels, or export files.

Engagement Plus™

Increase your productivity with Engagement Plus™ — the tracking and reporting system that allows you to monitor all your firm's engagements. You'll benefit from an at-a-glance view of any engagement status, for all services provided to your clients.

Engagement Plus easily monitors single items like upcoming due dates, or comprehensive engagement information such as tax preparation tasks, staff assignments, and budget hours.

In addition to on-screen viewing of engagements, you benefit from complete, easy-to-read Due Date, Engagement Summary, and Projected Engagement reports. This tool also saves time by allowing you to create model engagements to avoid repetitive entry of information for multiple engagements.

Benefit from completely integrated features. With Engagement Plus, all engagements are linked to ProSystem *fx* Tax, so you can update each engagement directly from within a tax return. Just click on the "Log Activity" icon in ProSystem *fx* Tax to access and update the engagement.

With Engagement Plus, you'll simplify your workflow by:

- Monitoring upcoming due dates and updating the progress of each client engagement.
- Tracking budgeted and actual billing hours.
- Viewing all activity performed for each client.
- Analyzing your client engagements by week, month, quarter, half-year, or year.
- Attaching notes to client tax returns.
- Creating customized reports.

Tax Projector

With Tax Projector, you can easily show clients how scheduled changes will affect them.

The software gives your staff a snapshot of the next year's tax return based on changes to the tax law. By incorporating new laws in its projections as they move closer to approval, you always know the impact of new tax developments.

Tax Projector produces a specialized report you can use to:

- Predict estimated tax payments.
- Adjust withholding allowances.
- Recommend tax credit options.
- Review a variety of alternatives.

Client Manager™

Keep track of your client information with a flexible, easy-to-use program. Client Manager™ allows you to set up and maintain complete profiles on all your firm's clients — not just tax clients — freeing you to provide the services that matter most to your customers.

Client Manager's search features provide instant information retrieval, and a full range of data can be entered for each client. Easily manage your client records by:

- Viewing clients using an on-screen tool or a simple list version.
- Categorizing your clients by type and maintaining information specific to each.
- Creating up to 10 customized fields for each client category, to fit your firm's specific needs.
- Accessing the history of all activity performed for each client.

With Client Manager, you'll save time thanks to integration. For example, data entered in Client Manager automatically carries over to the tax return and vice-versa, so you enter information just once. You'll also have the ability to simply click on an icon in Client Manager to instantly review a tax return in Tax Preparation.

To Do List™

Organizing your tasks has never been easier. By including To Do List™ with your Client Manager package, you will be able to effortlessly organize your office tasks and keep track of client-related items, personal activities, and tasks sent to you by other ProSystem *fx* Tax users.

To Do List is easy to access and is integrated with ProSystem *fx* Tax Preparation, Client Manager, and Engagement Plus tools to let you:

- Assign an item to a client.
- Assign due dates and prioritize items.
- Include item descriptions.
- Send new or existing items to other users.

FX Direct™

Beneficial to both desktop and Global *fx*® users, this archival CD-ROM tax library gives you immediate, unlimited access to all federal and state prior-year processing programs.

With FX Direct™, you can access prior-year ProSystem *fx* Tax programs from the CD, saving install time as well as disc space needed to maintain prior-year software.

Planbuilder™ For BNA

Combine the power of the premier tax compliance product — ProSystem *fx* Tax — with a leading tax planner: the BNA Income Tax™ Planner.

PlanBuilder for BNA exports federal information from your ProSystem *fx*–Tax Individual tax return files directly to the BNA Income Tax Spreadsheet, including the 50 State Planner.

Start your planning process with your initial base-year plan already set up — you'll save time by minimizing data entry tasks.

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
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.*

Join us on at **CCHGroup.com/Social**

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