



ProSystem fx[®] Tax

The next generation of intelligent tax workflow, preparation, and compliance software

The next generation of ProSystem fx[®] Tax, the industry's leading tax preparation, compliance, and delivery solution, will transform the way you perform your tax work. You'll work faster AND smarter — and you'll be delivering high-quality service to your clients in significantly fewer hours.

Working Smarter, Not Harder, is Now Possible

Many of the features and functionality that make ProSystem fx Tax top of the line have been enhanced and improved, with each change based on intensive client-centered research. We combined the insights gained from listening to our clients (and observing their workflow) with the superior functionality of our new technology platform — and the results are amazing. ProSystem fx Tax is now more intuitive and effective than ever, with a user interface that's a delight to use and productivity features that fully measure up to the task — no matter how complex.

Flexible Delivery Modes Expand Possibilities

The next generation of ProSystem fx Tax is built on a completely new technology platform, Microsoft's .NET 3.5 Framework, resulting in built-in productivity and flexibility you've never seen before — and won't find anywhere else.

This web-optimized solution is being offered first through a Software as a Service (SaaS) delivery model, allowing you to work anywhere... anytime. With the application hosted by CCH, new versions and enhancements will be available immediately and seamlessly.

In the future, the next generation of ProSystem fx Tax will include an on-premise version offering the same exceptional features and functionality.

Interconnecting Products Give You Unparalleled Power

Thanks to seamless integration with the other ProSystem fx Suite products, ProSystem fx Tax provides you with a complete tax preparation and delivery system plus a whole lot more.

All next generation ProSystem fx applications will integrate with a common client database, so you'll have a single point of access for set up and administration of multiple ProSystem fx applications. A shared dashboard provides information in one convenient place. You'll also gain significant portability and collaboration features because the software is designed to be deployed online.



The Dashboard — shared by the ProSystem fx next generation applications — provides quick visibility to work in progress and easy access to other applications, including your Outlook[®] calendar and email inbox.

With the next generation of ProSystem fx Tax, you'll be delivering high-quality service to your clients in significantly fewer hours.

Reducing Time-Consuming Steps Drives Down Associated Costs

The dynamic processes used by ProSystem fx Tax for managing the flow of returns and moving them through the review cycle will streamline any firm's current tax preparation work.

Here are some of the most time-consuming points in the tax preparation workflow that will change for the better with the next generation of ProSystem fx Tax:

- The overall cycle time — from gathering client information, to moving a return through preparation, to creating, calculating, and delivering an accurate tax return — will improve dramatically.
- You'll significantly reduce the time spent reviewing and clearing diagnostics and communicating with others on the team regarding issues and status.
- You no longer need to re-enter data that already exists in other applications.
- No more double-checking input data to ensure everything was included and is in the right area, and then checking the calculation.
- You'll be able to eliminate the time required to assemble all the forms in the right order, with the right correspondence.

Imagine the productivity gains!

Once you have ProSystem fx Tax in place, accuracy will go up, reviewing time will go down, and client re-work will decrease significantly.

Intelligent Direction Every Step of the Way

Get ready for more help than you ever thought possible. The entire return preparation process will be more fluid and productive — from client planning and preparation to final sign-off and delivery, for each and every client, simple to complex.

Many firms have resorted to manual checklists, homemade tools, and manual review processes to ensure that all aspects of the return are addressed properly, all documentation is complete, and all relevant information has been transferred to countless forms. ProSystem fx Tax does this automatically — recommending items that need review or information that may be missing, and flowing information to all relevant schedules and forms. It continually monitors data relationships to ensure accuracy and completeness.



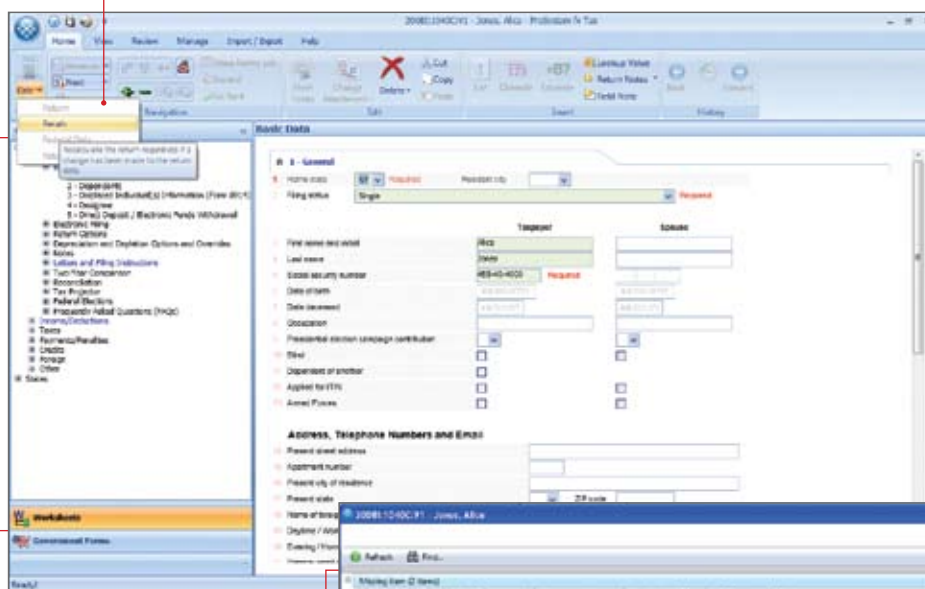
Well-Designed Features Professionals Will Truly Appreciate

With the next generation of ProSystem fx Tax, you'll benefit from:

- **New look and feel.** Having the same familiar user interface as Microsoft® Office 2007 translates into ease of use. Helpful tooltips provide instant information about the function of a particular icon. You can drag and drop your most-used tools into the Quick Access Toolbar.
- **Customized views that are transparent to the way you work.** Customize what information about returns is displayed with enhanced Return Manager functionality. Choose the information to include and change views on the fly. Use quick filters and groupings to arrange returns in the desired order.
- **Practical tools for on-screen review.** Increase the efficiency of your on-screen reviews with features that include tick marks and diagnostic sign-offs.
- **Robust diagnostics.** The application alerts you to incomplete returns or steps, changes that need to be reviewed, conflicts that need to be resolved, and more.
- **Dynamic preparer notes.** A fully integrated preparer notes system allows preparers to create and respond to an array of note types with powerful features that help you assign, review, and batch purge — with a click.
- **Routing Sheet.** If you are also using ProSystem fx® Workstream, you can click on the icon and update the routing sheet. You always know where things are in the process.

- **Expert guidance.** With real-time links to content on IntelliConnect® you can efficiently research topics and find answers to compliance questions — without leaving the return preparation process.
- **Instant Notes.** Integration with the Suite dashboard gives immediate notification to the tax manager/preparer when a return needs their attention, eliminating the time returns are waiting for the next step in the cycle. By clicking on the note in the dashboard, the return is launched and the tax manager/preparer is taken directly to the specific field within the return and form needing their attention.
- **The best of high-tech and high-touch for client communications.** Create professional correspondence that you build from templates and edit in Microsoft® Word. Then, save to libraries and easily reuse the content in any return. You'll have complete control over your correspondence.
- **Streamlined, sophisticated printing options.** Create custom print sets for everything to be printed with a return, for every return type. Send a job to multiple destinations, insert objects and add watermarks.
- **Numerous return distribution possibilities.** Tax returns can be sent to CCH's e-file system, printed to a printer, archived in ProSystem fx® Document, or published in ProSystem fx® Portal for clients to access.

Detailed tooltips describe each option, saving time and increasing efficiency.



An intuitive navigation pane helps you move around the return and switch between Worksheet View and Government Forms.

Four different kinds of notes help you communicate more effectively throughout the process. Retention rules determine which notes are purged, saved or carried forward when the return is rolled forward.

Work Order Link	Note Created date	Note created by	Note assigned to	Note Type	Subject	Closed	Closed By	Closed Date	Retention	Requires A
Removed Deductions B	8/21/2009	Compliance, To Ann	Brad Archers	Multiple Item	2008120001 - Jones, Alice - Worksheet	Open	Full Access	8/18/2009 4:03	Direct	True
Added to next year (2 Item)	8/24/2009	Compliance, To Ann	Brad Archers	Multiple Item	2008120001 - Jones, Alice	Open			Direct	True
Basic Data - General	8/15/2009	Full Access		Note to read in	2008120001 - Jones, Alice - Worksheet	Open			Carry forward	False
Preparer (2 Item)	8/18/2009	Full Access	Preparer	Preparer	2008120001 - Jones, Alice - Worksheet	Open			Save	True
Other Income - Return	8/24/2009	Compliance, To Ann	Brad Archers	Review	2008120001 - Jones, Alice - Worksheet	Open			Direct	True

Smooth Access to Tax Guidance and a Familiar Interface Add Value Every Day

If tax content and guidance doesn't work well within a tax solution, valuable efficiency is lost, and risk and frustration increase.

ProSystem fx Tax is fully integrated with IntelliConnect®, the most powerful research platform available that gives you unprecedented access to the industry's best content, and TaxScripts® TaxPro, the powerful tool that creates Disclosure Authorizations (DA) and IRS transcript requests in seconds, helping to ensure optimal efficiency and productivity on all returns.

Ensure a High-Performing Team with a Well-Aligned Training Program

Because the next generation of ProSystem fx Tax leverages the familiar technology, menus and functionality of Microsoft® Office applications, training and orientation are much simpler. CCH offers a wide range of training options for applications, methodologies and best practices that support consistency across the Suite.

Through its integrated system of intelligent tax workflow and preparation software, superior reference materials, exceptional tax guidance and outstanding training programs, CCH provides a one-stop shop that allows firms to thrive in this demanding industry.



All of the next generation ProSystem fx applications share a common database, with a single point of access for set up and administration.

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.

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