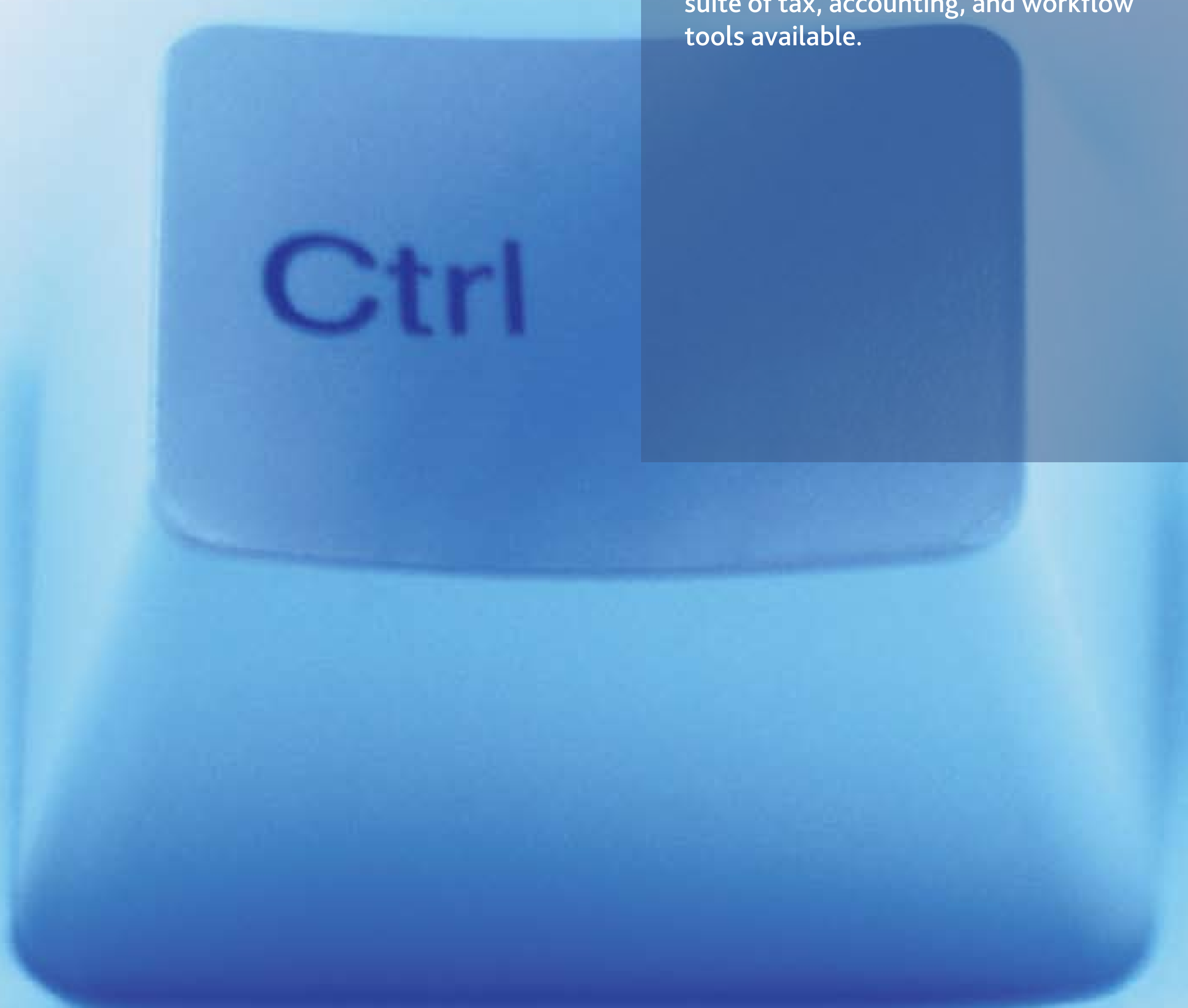
CCH
a Wolters Kluwer business

ProSystem *fx*® Office

The most advanced, tightly integrated suite of tax, accounting, and workflow tools available.



ProSystem *fx* Office

"Integration of our client service and practice management applications is an essential part of our long-term strategy for maximizing the quality and profitability of our business. CCH has the proven products, market presence, and development resources to help us achieve our goals."

– Susan Harris
Burr Pilger, & Mayer LLP
San Francisco, CA

The ProSystem *fx*® Office

A full suite of award-winning, integrated software that works seamlessly together to produce a more efficient and productive workflow.

When it comes to increasing your firm's productivity, CCH, a Wolters Kluwer business, has the complete solution: The ProSystem *fx* Office. This intuitive and robust suite of software is the most advanced, tightly integrated group of tax, accounting, and workflow tools available. Designed by the leaders in tax and accounting research and software products, The ProSystem *fx* Office is used by the majority of the nation's top accounting firms. The suite's across-the-board accuracy, efficiency, and security ensures your peace of mind while helping enhance your relationships with clients and building opportunities for additional revenue.

And, because each module of the suite is designed for ultimate integration with CCH's Tax Research NetWork™, Microsoft® Office, and CCH® ClientRelate™, you have instant access to all the latest tax research and information, when and where you need it. Even the way you interact with the software has been designed so that navigation is intuitive and organized, making the learning curve for new users practically non-existent.

The following award-winning products make up The ProSystem *fx* Office suite:

ProSystem *fx*® Tax – The undisputed industry-leading tax compliance software.

ProSystem *fx*® Document – A complete document management solution built specifically for today's CPA firm.

ProSystem *fx*® Engagement – A complete workflow solution using paperless binders and Microsoft® Word and Excel.

ProSystem *fx*® Profit Driver – A financial diagnostic and analytical solution that allows you to build detailed plans to assist clients in reaching their goals.

ProSystem *fx*® Scan – A paperless software solution that effortlessly and electronically simplifies document preparation and scanning.

ProSystem *fx*® Fixed Assets – A complete asset tracking, management, and reporting solution.

ProSystem *fx*® Practice Management – The most effective way to help you manage your firm's time and billing.

ProSystem *fx*® Practice Driver – A strategic practice management application that helps you in critical decision-making.

ProSystem *fx*® CPAClient Write-Up – A comprehensive write-up package that streamlines your data entry and lets you provide high-value client services with confidence and ease.

ProSystem *fx*® Site Builder – A dynamic, full-featured website solutions provider.

ProSystem *fx*® Outsource – A service that gives you access to highly trained tax professionals when you need it.

ProSystem *fx*® Planning – A planning solution that lets you develop and review multiple tax scenarios for the ultimate in planning.

ProSystem *fx*® Trial Balance – A traditional trial balance system that streamlines compilations, reviews, and audits.

Global *fx*® – CCH's web-based platform that provides 24/7 access to ProSystem *fx* Tax.

ProSystem *fx*® Tax

Handle all your tax compliance requirements with the most comprehensive system in the industry.

Well over two-thirds of the top CPA firms use ProSystem *fx* Tax, the award-winning tax compliance and preparation software from CCH!

This comprehensive system easily handles all types of federal and state returns, offers extensive electronic filing services, and meets your needs for increased productivity. It integrates seamlessly with all components of The ProSystem *fx* Office, as well as Internet tools like the CCH Tax Research NetWork, Accounting Research Manager, the Tax Notebook online tax organizer, and CCH ClientRelate, a data-mining tool that automatically identifies clients affected by law changes or that may benefit from additional services from your firm.

Additional benefits of ProSystem *fx* Tax include:

- Automatic calculations, overrides, and optimizations available for every federal and state return.
- Comprehensive state programs for all entities, including full multi-state capabilities.
- Full-featured depreciation and depletion capability for both individual and business returns.
- Export partner, shareholder, and beneficiary K-1 data directly to the ProSystem *fx* Tax Individual system or applicable business returns.
- A dynamic K-1 and state apportionment import/export spreadsheet link with Microsoft® Excel.
- Extensive Electronic Filing capabilities, including *e*-file for large corporations and consolidated returns.
- Downloadable software updates after the initial CD installation; download directly from the Internet and eliminate waiting for CD deliveries.
- Import of asset, depreciation, and disposition information from Sage FAS asset management software.

ProSystem *fx* Tax offers the following modules which can be purchased individually or bundled to meet your firm's specific needs.

Individual

- Performs optimization computation between Joint and Separate filing statuses.
- Provides sophisticated expatriate and non-resident alien computations and forms.

Partnership

- Provides extensive calculations for foreign partners and partnerships.
- Provides extensive partner allocation capabilities and K-1 options.
- Produces Schedule K-1 multiple activity statements for each partner.

Corporation

- Easily handles a wide array of returns, including 1120, Consolidated, 1120-F, 1120-FSC, 1120-H, 1120-L, 1120-PC, 1120-RIC, 1120-REIT, 1120-POL, 1120-IC-DISC, and 1120X.
- Powerful Consolidated program offers tiered consolidations, stacked and columnar print, extensive SRLY limitations and state combined features.

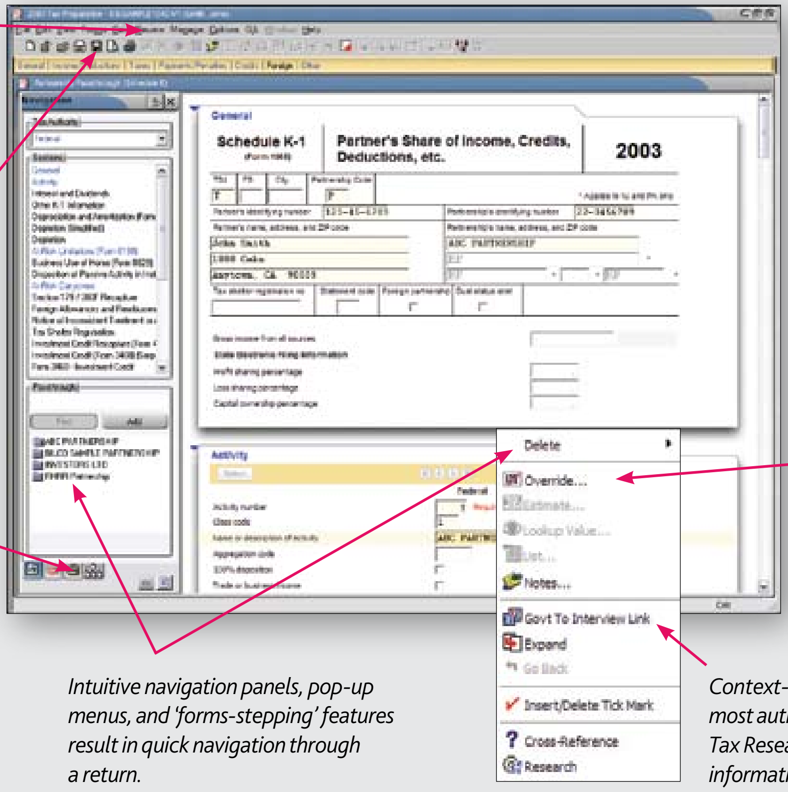
The industry's premier tax compliance system leverages new technologies to help you work smarter, not harder.

A completely integrated client and tax return management system always provides a complete status of returns and staff responsibilities at a glance.

Flexible Print program allows you to direct print jobs to your printer, fax, PDF file, or document management software.

Dynamic links with Microsoft® Word let you customize all client correspondence.

'One Click Tabs' allow quick navigation between input and Government forms.



Full integration lets you transfer data between ProSystem fx Tax and other ProSystem fx Office programs.

The industry's most comprehensive diagnostic system tests for omissions and inconsistencies and allows you to jump back to related input with a single click.

A comprehensive on-screen review system includes color-coded tick marks, field and global notes, lists, overrides, and estimates.

Dynamic links with Microsoft® Excel allow you to import and export K-1 and state apportionment information.

Intuitive navigation panels, pop-up menus, and 'forms-stepping' features result in quick navigation through a return.

Context-sensitive links with the industry's most authoritative source—CCH Internet℠ Tax Research NetWork™—puts valuable information at your fingertips.

S Corporation

- Provides flexible Shareholder Allocation and Distribution features.
- Handles Consolidated S Corporation.

Deferred Compensation

- Produces fully compliant fileable forms and allows for electronic filing.

Fiduciary

- Easily handles all major types of estates and trusts, including Complex, Simple, Decedent's Estate, Grantor, Custodial Agency, Charitable, and ESBT.

Estate & Gift

- Automates the preparation of Forms 706, 709/709A, and supporting schedules.

Exempt Organization

- Provides extensive Form 990 processing, including Form 990EZ, 990PF, and 990T.

ProSystem fx Tax offers unmatched electronic filing capabilities for Individual, Partnership, Corporation, S Corporation, Fiduciary, and Deferred Compensation returns.

Global *fx*

Take the next step toward increased productivity and improved collaboration between firm members, and benefit from the conveniences of ASP technology with **Global *fx***, which provides Internet access to the powerful ProSystem *fx* Tax system.

Whether working from the office, home, a client site, or a satellite office, Global *fx* conveniently expands your reach to ProSystem *fx* Tax and allows you to work where you want, when you want.

With Global *fx*, the tax software and return data reside on secure CCH servers and can be accessed anytime, anywhere. The time and resources formerly required to install, update, and maintain software on your local system can now be spent meeting your compliance deadlines. You have 24/7 access to the most current programs with no time-consuming desktop installations.

And CCH protects your data, with redundant back-ups and secure storage, both on-site and off-site. You don't have to worry about catastrophic loss of data; we always have it.

ProSystem *fx* Tax and Global *fx* offer unmatched electronic filing capabilities for Individual, Partnership, Corporation, Consolidated Corporation, S Corporation, Fiduciary, Exempt Organization, and Deferred Compensation returns.

ProSystem *fx*® Document

Reduce the costs associated with creating and storing paper documents, and achieve dramatic workflow improvements.

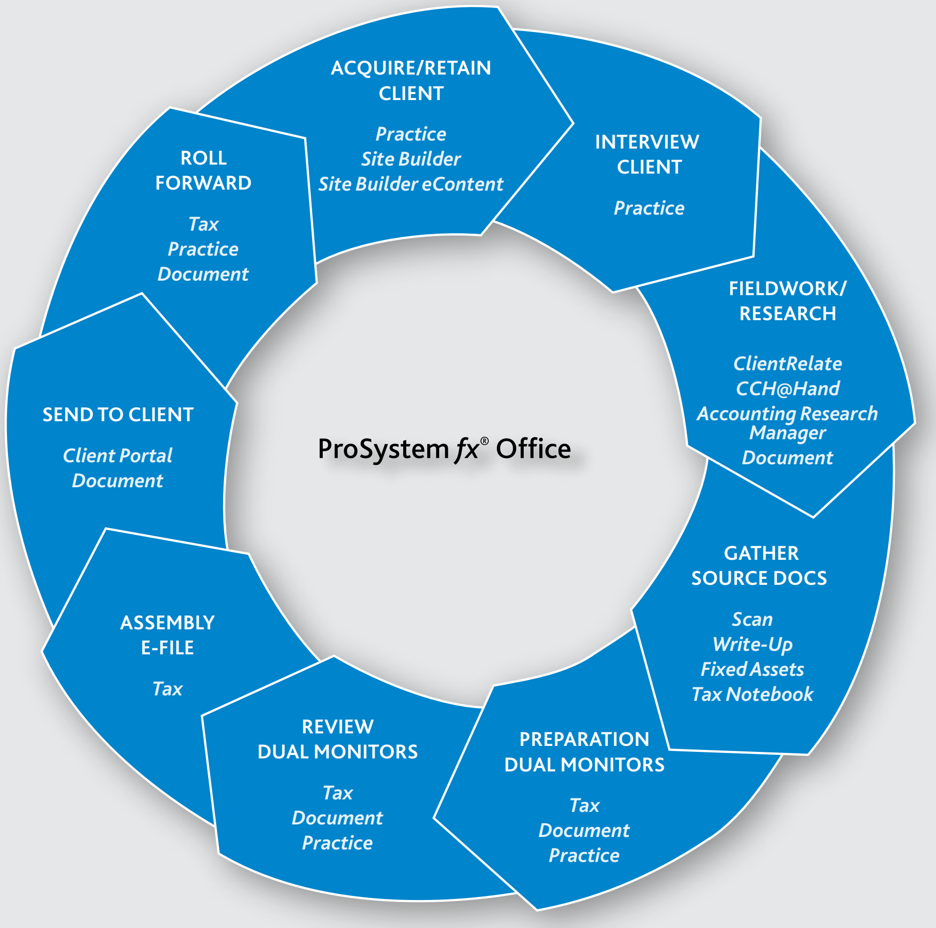
ProSystem *fx* Document is a complete document management solution built for today's CPA firm, enabling streamlined workflows for all processes performed within the firm. It provides an electronic repository for documents, automated document retention policies, and lower costs for storing paper documents.

Document's features and integration with The ProSystem *fx* Office suite allow you to improve the processes that work for you, while providing the tools to fix those processes that don't. All of your tax, engagements, practice management, research, human resource, and other services you provide can now be streamlined to work together where necessary to make your workflow a cohesive end-to-end process.

It frees firm staff members from dependence on physical pieces of paper, allowing access to any document from any location. In addition, it automates document retention and allows you to implement consistent document retention policies firm-wide. This ensures that documents are retained for mandated periods of time then disposed of properly.

Document reduces the costs associated with creating and storing paper documents, resulting in an environment where your staff works together more efficiently. The collaboration features within Document allow you to better communicate with firm members in addition to your clients. Since time isn't wasted hunting down pieces of paper, you deliver better service to your clients while providing a tool for them to access those documents from a secure location – anywhere. With Document:

- **Content Management –** Allows you to index, store, track, access, retrieve, and search all documents saved in your document management system. These files can be saved in their native format for routing and collaboration on documents still being worked on, or in a PDF or other file type for a permanent record that can still be searched and retrieved for review.
- **Client Portal –** The client portal allows your firm to collaborate with your clients in a secure and efficient manner. Files can be made available instantly, even during a phone conversation.
- **Document Retention –** Allows for a one-time set up of retention periods based on firm policies for any document added to your document management system. At the time the documents expire, destruction can be achieved in one easy step.
- **Security –** Provides security on all documents stored to limit access to only those people who are given the appropriate rights, in addition to securing the tasks they can perform on those documents such as editing or deleting. These rights are customizable based on departments, job titles, or any other method desired.
- **Streamlined Document Process –** Enables automatic document routing, archiving, printing, and publishing directly from in-house applications to the document manager.



Workflow Wheel

From acquiring new clients to gathering source documents and generating the tax return, ProSystem fx Office offers a multitude of paperless solutions that keep returns moving through your firm.

- **Client Relationship Manager –** Maintains consistent client records and links to other contact managers, including Microsoft® Outlook.
- **Audit Trails –** Tracks the history of documents so you can know who has viewed, edited, or checked documents in and out.
- **Set-up –** Eliminates the need to micromanage the features within the application. The creation of security groups, retention periods, storage structure, and client portal creation are one-time set-ups. Updates are only required if firm policies change, additional services are added due to more efficiencies being created, or new legislation dictates change.

Risk Mitigation

Besides increased efficiencies and cost savings, ProSystem *fx* Document provides you with the risk mitigation you need for document storage and retention. Sarbanes-Oxley and other regulatory compliance rules have changed the way business is done, and Document can help you meet these standards, all in the background of your day-to-day work.

- One-time set-up of firm-wide document retention policies can later be applied to every type of document as they are added, whether they are financial statements, correspondence, tax returns, or any other type of document.
- Meet both SEC and PCAOB requirements.
- Store records of all critical accounting policies and practices used.
- Maintain all communications between an auditor and a company regarding alternative disclosures and accounting methods.
- Retain any other documents related to matters that are important to an engagement.
- Keep a detailed audit trail of every document stored to dissuade false entries to documents.

These, along with other risk mitigation such as proper destruction of documents at the appropriate expiration date, are just some of the ways that ProSystem *fx* Document can help you control all of your documents.

ProSystem *fx*® Engagement

Experience the latest innovations in paperless engagements and workflow integration.

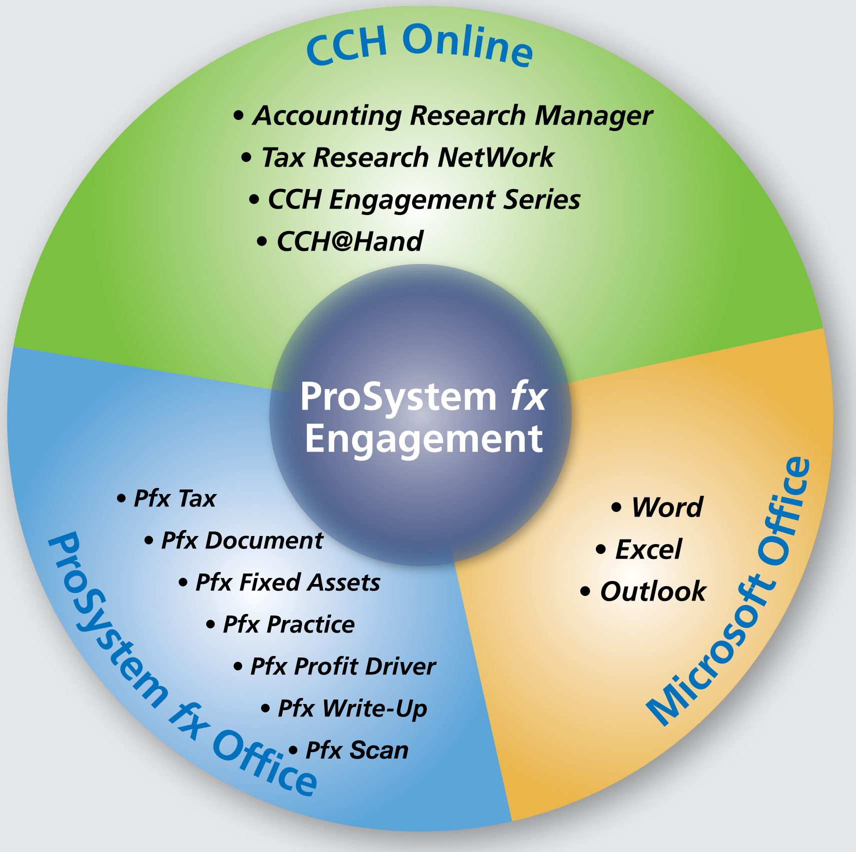
ProSystem *fx* Engagement moves your firm towards true paperless engagements, offering powerful workflow tools that allow you to:

- Enjoy the convenience of instantly accessible workpapers!
- Share every document simultaneously – no more searching for paper binders.
- Synchronize work from any location to the Central File Room.
- Store tax, assurance, and consulting engagement binders in an intuitive Windows® Explorer-style file room.
- Jump-start first year engagements with customized binder templates.
- Let an expert lead you step-by-step through your next engagement! Industry-standard practice aids and checklists deliver real-world strategies, cost-saving ideas, client letters, spreadsheets, and reports.
- Scan documents directly to the binder using enhanced scanning functionality.
- Automatically create PDF files from any application and seamlessly store them in the binder.
- Securely manage every document from inside the program.
- View a list of staff members assigned to each document.
- Insert workpaper references into any Word, Excel, or Adobe file. Open the referenced file with a click of the mouse.
- Create, respond to, and clear multiple types of notes.
- Efficiently review engagements with dual monitors, allowing you to look at workpapers side by side.
- Obtain secure online sign-offs by preparer and reviewer, and lock documents after final review.
- Automate Excel and Word financials by linking them directly to the Trial Balance.
- E-mail financials or any other document to your client from within the binder.
- Easily wrap up the engagement using the Finalize Binder Wizard.
- Roll forward an entire engagement with a single mouse click.
- Make implementation easy using our expert Engagement consultants. Our comprehensive training and consulting options will have you up and running in no time.

ProSystem *fx* Office users benefit from advanced, fully-comprehensive integration with ProSystem *fx* Engagement. The ProSystem *fx* Office suite brings you the end-to-end engagement workflow solution you've been looking for. ProSystem *fx* Engagement takes work you've already done and intuitively interacts with other ProSystem *fx* products to completely streamline your workflow and eliminate costly duplication of effort.

- ProSystem *fx* Tax – Easily map financial statement data with Dynalink/Quiklink; simplify tax return preparation when you simultaneously update both Tax and Engagement; and store a tax return to Engagement as a PDF.
- ProSystem *fx* Profit Driver – Seamlessly export financial data to Profit Driver for quick and thorough analysis and strategic planning, and store reports from Profit Driver files to Engagement binders.
- ProSystem *fx* Fixed Assets – Store reports and Fixed Assets data files directly into Engagement binders.
- ProSystem *fx* Document – View a list of client binders in your Local File Room and open a specific binder from the list.
- ProSystem *fx* Scan – Developed specifically in response to the need of CPA firms to prepare 1040s in a paperless office environment, ProSystem *fx* Scan leverages your existing staff to add value to client services instead of time on your WIP.

Streamline Your Engagement Workflow



ProSystem fx Engagement allows you the flexibility to continue using processes that work for you, while giving you a powerful tool to replace processes that don't – all of this while offering the most efficient workflow tools, an integrated suite that provides an end-to-end solution, and dramatically reduced start-up and training costs.

Fully integrated practice aids and checklists

Go step-by-step through your next engagement with our fully-integrated practice aids and checklists. These timesaving titles deliver real-world strategies, cost-saving ideas, client letters, spreadsheets, and auditor's reports. You can easily integrate content from the **Engagement Series** and access each title's full text on the **CCH Tax Research NetWork**. What's more, you can link from Engagement to **Accounting Research Manager® (ARM)**, CCH's insightful and in-depth online accounting, audit, and SEC research tool, as well as the Tax Research NetWork.

In addition, a complete binder template has been prepared for you, saving you significant time when setting up new engagements. With CCH (formerly Miller) workpapers that can be added with the click of a mouse, content integration has never been easier!

ProSystem *fx*® Practice Management

Proactively manage and track all aspects of your practice.

More than just time and billing, this full-featured practice management software offers all the tools a CPA needs to efficiently manage their firm, including project management, marketing, data mining, and integration. ProSystem *fx* Practice Management utilizes the latest .NET technology in a powerful, proactive management solution.

Used by nearly 50% of the PAR 100 firms in the U.S., firms of all sizes rely on ProSystem *fx* Practice Management to strategically manage their projects, employees, marketing, data, and integration. Increase your productivity while maintaining focus on client tasks. Fit for firms of all sizes, simply select the edition that best fits the needs of your practice.

- ProSystem *fx* Practice Management – Enterprise Edition is the optimal SQL solution.
- ProSystem *fx* Practice Management – Office Edition is the perfect MSDE solution.
- ProSystem *fx* Practice Management – Basic Edition is the fullest featured time and billing package available on the market.

ProSystem *fx* Practice Management modules include:

- Time and Expense Entry – Encourages employees to manage their own time. The essence of any practice management system, the Time Entry module is a user-friendly, efficient mechanism for capturing and administering time and expenses, as well as scheduling appointments and monitoring "To Do" items.
- Billing and Printing Invoices – Encourages billers to bill on-screen and on-demand, the Billing module streamlines the billing process and provides the flexibility required to make on-the-spot decisions. Quickly identify clients that need to be billed with an on-screen list of clients that can easily be sorted and filtered to quickly see the clients with the highest outstanding WIP and/or clients with the highest AR. Billing and invoicing is fast and flexible.
- Accounts Receivable, including Printing of Statements – Easy management of tracking invoices, payments, credit and debit memos, the Accounts Receivable module includes dunning letter capability so you can easily stay on top of past due accounts.
- Projects, including Due Dates and Client Budgets – Provides due date monitoring of tax returns and detailed budget management tools for multi-step jobs such as audits or IT consulting. Project Management encourages employees to manage their own time on projects. Bill managers can easily bill by project and administrators can complete project maintenance quickly.
- Contact Management for Clients – Treat your small tax client with the same personal attention you give your largest client. The Contact Management module helps your firm consolidate, organize, store, and retrieve information quickly and easily, eliminating the need for multiple databases. You get up to 250 custom fields each for clients, projects, and employees; seven different data types for validation and minimized entry errors; instant access from multiple areas within the software; client communications tracking; and user-defined reports available on all custom fields.
- Reporting – Sort and filter extensive, standard reports in numerous ways, offering powerful views of your firm's activity through the Reporting module. Additional reporting tools include a Report Writer, powered by Crystal Reports, and an add-on *Custom Library* annual subscription.
- Internet Time Entry – The solution for your remote employees. Employee productivity will increase thanks to more efficient access and display of data, resulting in a more responsive performance and a better user experience.

Extensive integration features eliminate repetitive tasks through seamless integration, resulting in improved firm processes and an increased bottom line. Enjoy integration with:

- ProSystem *fx* Tax – Offering you access to over 300 federal, state, city, and county modules to handle all your tax processing requirements. You'll benefit from seamless integration with the industry's leading tax software through an extensive array of federal and state features, in addition to more forms, automatic calculations, and options than on any other system on the market.
- Microsoft® Outlook – Save time and provide consistency at your firm by synchronizing your client contacts from ProSystem *fx* Practice Management to Microsoft Outlook. Contact information can now be set up and updated from one source.
- Sage Abra Payroll – Save time and simplify your data collection by gathering employee hours worked from time entry and exporting them effortlessly to Payroll processing software. Inclusion of paid time off hours and overtime hours further simplifies your data collection.
- Sage MAS 90, 200, and 500 General Ledger – Easily export your firm's WIP, billing, and receipt totals to your firm's general ledger, reducing the risk of error by eliminating duplicate data entry. Save time from printing numerous reports to gather numbers through a simple export that tracks detailed entries offering better firm analysis.

Today's CPA is looking for providers who understand their needs. From productivity to professional necessities, CCH focuses on understanding the challenges and requirements of tax and accounting professionals just like you and focuses on ensuring that CCH solutions help you achieve a strategic advantage.

ProSystem *fx*®
Profit Driver

Improve the quality of your strategic planning services and improve profitability for your clients and your firm.

ProSystem *fx* Profit Driver takes financial analysis to a new level.

You no longer have to settle for a program that only creates static reports! With ProSystem fx Profit Driver, you can effortlessly turn financial data into tactical plans to build not only strategies with your clients, but also build their confidence in you as a trusted financial advisor.

- Dynamic budget vs. actual reporting allows you to make projections as you budget.
- Truly understand financial performance when you produce up to 40 consecutive periods.
- Compare business performance against industry standards with new benchmarking data functionality.

Where others stop with the production of a financial statement, Profit Driver begins. ProSystem *fx* Profit Driver extracts trial balance data directly ProSystem *fx* Engangement or ProSystem *fx* Tax making providing ONLY financial statements to your clients a thing of the past. You can even extract information from other applications that produce financial statemtents.

Unlimited strategy. development options

- Projections – Using minimal steps in an easy-to-use wizard, Profit Driver allows you to take your current financial information and create future projections based on either past years results or customized information, such as revenue increases.
- Create, save, and manage unique client Chart of Accounts – suitable for every industry group.
- Take advantage of the seamless integration with the industry leading ProSystem *fx* Office suite and make your financial statements work for you.

Flexible benchmarking tools expand your financial analysis capabilities

Evaluate how your client's business compares to industry standards with powerful benchmarking functionality. Traffic lighting on the strategy screen allows you to easily identify both areas of the business where your client excels and where there is room for improvement compared to competitors. Profit Driver crunches the benchmarking data and provides guidance for success in all areas where a business needs improvement.

- What If? Analysis – Take the benchmarking of data to a whole new level. The powerful What If? Analysis lets you modify any of the factors that drives your clients business results, such as price changes, accounts receivable days, or income taxes. The strategy screen allows you to view these drivers and create the What If? Analysis as it relates to industry standards.
- Goalseeking – The powerful goalseeking tool will let you show your clients how to reach their goals as they relate to business vs. industry, with just one click. This can include profitability percentages, total liabilities to equity, cashflow, or any other number of results for that business thanks to integration with the benchmarking data.

Reporting

To support all of these tools, Profit Driver also provides a variety of reports to support all the features within the application. Reports range from a health check to a full financial diagnostic report. These reports are all displayed in a professional format that include graphical representations throughout.

Accounting Today 2005 Top 100 Product

ProSystem *fx*®
Practice Driver

Assess your practice and find new ways to grow and increase profitability.

Improve your firm's performance with ProSystem *fx* Practice Driver.

Practice Driver makes time and billing information come alive, giving you a clear view of what's working and what's not in your practice. It also highlights what has to change and by how much to realize opportunities, avoid pitfalls, and achieve goals. Practice Driver imports data from your practice management system's time and billing. By taking data that's basically stagnant and making it dynamic, you can see what makes your practice tick and how to make it better. This strategic decision support tool performs three main functions:

- Marketing performance assessment – Helps you analyze client attrition by partner, staff profitability, clients by cross-sell, client retention, and more.
- Opportunity analysis in your firm – Uncovers golden opportunities to grow your practice utilizing the visual indications via traffic lights.
- Dynamic data-mining of time and billing information – Identifies your most productive employees, projects, and clients.

You will be able to take advantage of real-time decision-making features to give you the latest information instantly. The amount of information generated within a firm can be difficult to understand just due to the volume. Practice Driver provides the tools to sort and organize the data in summary views, with all the detail available with a click of the mouse.

- Practice Summary 'dashboard' – Displays YTD results and "Best of Breed" performance.
- Four-dimensional views – Practice data includes staff, clients, work codes, and periods, all at your fingertips. Drill down into the detail that makes up the summary level view so you can see everything within your firm.
- Focus – Transforms your practice data into knowledge and provides in-depth analysis of what's driving your business, including reporting using the 80/20 rule.
- Trend analysis and graphics – The key to unlocking critical intelligence hidden behind a mountain of time and billing transactions. This will allow you to sort through what used to be an unmanageable amount of information in an efficient manner and in easy to understand formats.

ProSystem *fx*® Fixed Assets

Make asset tracking, management, and reporting much more efficient and accurate.

Simplify asset management tasks with ProSystem *fx* Fixed Assets.

Your firm will enjoy a smooth setup and efficient handling of all depreciation tasks, as well as seamless linking capabilities with ProSystem *fx* Tax, Engagement, and Global *fx*.

ProSystem *fx* Fixed Assets allows you to:

- Store PDF versions of the Fixed Assets generated reports in the client's engagement binder, which will allow you to easily move toward a paperless office.
- Save your clients' Fixed Assets data files in an engagement binder, allowing you to maintain data and workpapers in the same location for added ease of use.
- Directly import client, asset, disposition, and depreciation information to-and-from ProSystem *fx* Tax and Global *fx*, ensuring a smooth set-up and maintenance of all tax return depreciation information.
- Automatically convert data from many of the major asset management programs, and import data from Microsoft Excel spreadsheets and other common file types.
- Create up to eight different books – including Financial, Federal Tax, AMT, ACE, State Tax, and three user-defined books – viewable side-by-side on one screen.
- Dispose of partial assets or group multiple assets for simplified disposal as one unit.
- Project all depreciation types for the depreciable life of an asset.
- Produce numerous predefined financial and tax reports. It also lets you define common report groups, filter, sort, and set reporting periods to produce reports specific to your needs.
- Generate ready-to-file IRS forms for inclusion in tax returns.
- Add user-defined fields to standard asset information entries such as serial number, GL account numbers, category, and location.
- Easily handle like-kind exchanges, creating books, and continuation assets.
- For each asset, you can choose to display the calculation for the current-year depreciation by corresponding book. From the Display Calculation dialog, you will also have the option to print the detail or select to view another active book.
- Reports can be easily created and printed for prior years. The same level of customization is available for prior year reports that exists for the corresponding report for the current year.

ProSystem *fx*® Scan

An electronic, paperless solution that simplifies document preparation.

It's a fact that working with client source documents has always been an inevitable, tedious, and time-consuming problem. Now there is a solution to this problem, and answers to many more.

ProSystem *fx* Scan is a paperless software solution that effortlessly and electronically takes the proverbial shoebox of unsorted client information, determines what each item is, and outputs the organized documents to a single, organized, and bookmarked PDF file. Document preparation and scanning has never been this quick and easy. Now when the preparer receives the file, your administrative staff has the information all ready to go immediately into the return. Be more productive, and see your revenue rise, with ProSystem *fx* Scan.

Add PDFlyer and you now have an extremely efficient system for preparing paperless 1040s. Designed by accountants for accountants, PDFlyer is an Acrobat plug-in that adds special functions accountants need when working with PDF files in a paperless environment, and the functionality does not even stop with your typical accounting work. PDFlyer's features work with any PDF file created by any program.

The ProSystem *fx* Scan paperless process is all about improving workflow and it begins when client information arrives at your office. With minimal preparation, any firm employee is now fully qualified to prepare and scan client documents. All the employee needs to do is type the client name or number, and determine which documents are single page versus multiple pages. It's that easy! Requiring no user intervention and working completely behind the scenes, ProSystem *fx* Scan retrieves, processes, and outputs an identified, organized, and bookmarked PDF file. Now your administrative staff can quickly and easily accomplish tasks previously performed by expensive professionals. Empower your professional staff to get back to what they do best – adding value to client services.

Tight integration between ProSystem *fx* Scan and ProSystem *fx* Document provides a seamless flow of data from your scanned documents directly into your document management system. The combination of Scan and Document frees staff members from dependence on physical pieces of paper, while managing all of your source documents in your workflow process. Benefit from quick, easy access to any document from anywhere; simple enforcement of your firm's retention policy; integration with other Windows-based applications; and more. The combination of ProSystem *fx* Scan and ProSystem *fx* Document literally puts all of your firm information instantly at your fingertips.

Add to this the most comprehensive tax compliance products and advanced technologies to help your firm be as productive as possible, and preparation of returns is now easier than ever before. With more time-saving features and capabilities, like extensive automatic calculations, comprehensive diagnostics, and extreme flexibility, ProSystem *fx* Tax is the complete solution for all your tax software needs. Add ProSystem *fx* Scan to the mix and you have further increased your firm's productivity.

ProSystem *fx*®
CPAClient Write-Up

Expand high-value client services with ease and increase profits.

Streamline and accelerate your data entry for more profitable write-up work. ProSystem *fx* CPAClient Write-Up combines general ledger, and after-the-fact journal, check entry, and payroll functions into a single, comprehensive write-up system designed to handle your client's most complex needs.

Enjoy seamless data import capability, complete after-the-fact payroll processing, powerful and flexible financial reporting, and complete federal and state reporting with this flexible, easy-to-use write-up product. Benefits include such things as:

- Firm efficiency instantly increases with after-the-fact payroll that automatically updates employee statistics.
- Capabilities expand for financial statement presentation.
- Quarterly payroll reports, which are included, become quick and efficient.
- Data entry is delegated to the client's office, for your customers who use Peachtree by Sage, Sage MAS90, QuickBooks, or Quicken.
- Accuracy is ensured by eliminating duplicate data entry through convenient integration with the #1 rated ProSystem *fx* Practice Management and the industry-leading tax software ProSystem *fx* Tax.

ProSystem *fx* CPAClient Write-Up is designed to fit the needs of any size accounting firm. Now you can service all of your client's in-depth accounting needs, including:

- A full bank reconciliation with the ability to edit a check amount on-the-fly.
- The ability to enter book or tax basis journal entries.
- 52/53 week reporting capability.
- And more!

ProSystem *fx*®
Site Builder

Build your own website in 30 minutes or less with this dynamic, full-featured package.

Designed to enhance your image, help you gain a competitive edge, and grow your practice, ProSystem *fx* Site Builder offers an optional on-line content syndication solution – eContent.

ProSystem *fx* Site Builder offers the following benefits and features:

- Website building tools to market your firm and your service offerings.
- Dynamic content can be uploaded to your existing website, even if you already have one.
- Content prepared by CCH, a reliable source of information for more than 90 years.
- Content updated on a regular basis.
- Increase your efficiency by utilizing Tax Notebook and GainsKeeper integration.
- Generate more revenue through CompleteTax.
- Leverage the convenience and flexibility of the Internet to share critical, time-sensitive information moving between you, your clients, partners, or associates with File Share.

eContent will be a primary source of financial and business information to your clients. It includes the following services:

- Info Center page contains a calendar where clients can view important dates and tax deadlines. They can also download IRS tax forms and publications.
- Newsletter page where visitors have access to new in-depth articles and timely tax development analysis written by top editorial experts from CCH.
- Financial Tools page that is packed with utilities that make tax planning a snap, this page includes interactive calculators.
- CCH Tax Guide – Over 500 pages of straightforward explanations of tax issues.
- Business Owner's Toolkit – An award-winning content package designed specifically to help your small-business owner clients and would-be entrepreneurs start, run, and grow their own small businesses.
- Financial Planning Toolkit – Effectively translates complex financial detail and transforms it into user-friendly information.
- Client Life-Cycle Reading Rack – A series of helpful guides that ensure your clients understand the basics while helping you market your practice online.

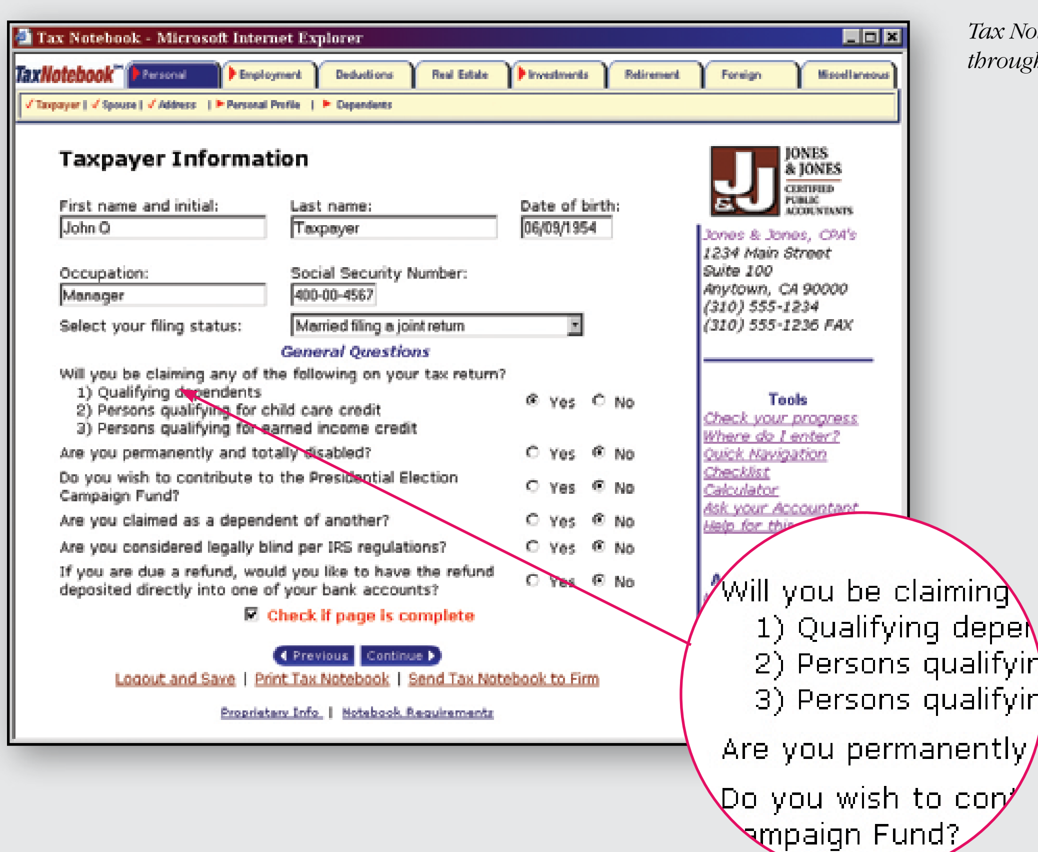
Tax Notebook

Eliminate paper tax organizers and reduce costs.

Tax Notebook is a powerful online tax organizer that allows you to collect client tax data and promote your firm's services via the Internet, enabling you to better interact with existing clients and easily reach potential new ones. With Tax Notebook, you eliminate the administrative and mailing costs associated with paper tax organizers, while enjoying a secure, online transfer of data.

Here are just a few of the many benefits Tax Notebook offers your firm:

- Create customized Notebooks for different types of clients, like retirees, and eliminate information irrelevant to their tax situation.
- Save hours of data entry and review time by using Tax Notebook to instantly create returns in ProSystem *fx* Tax or Global *fx*.
- Drive clients to your website where they can learn about the full scope of services offered by your firm.
- Enhance your professional image by customizing Tax Notebook with a personalized welcome page that includes your firm's name and logo.
- Maximize accuracy by fully populating Tax Notebook with last year's Pro Forma information.
- Monitor and quickly track the status of each client's Tax Notebook through a comprehensive status system included within the Tax Notebook Toolkit.



Tax Notebood guides your clients through a streamlined tax interview.

ProSystem *fx*® Planning

Optimize 1040 tax planning engagements and expand your professional services.

With ProSystem *fx* Planning, you can easily generate comprehensive multi-year forecasts and view or print results in customized, side-by-side forecasting reports. The system offers seamless integration with ProSystem *fx* Tax, allowing you to start your planning with the base-year amounts already set up. In addition, you benefit from expanded forecasts that allow up to 30 tax scenarios per plan and tax projections of up to three future years.

ProSystem *fx* Planning offers complete federal tax calculations, including regular tax, Alternate Minimum Tax (AMT), capital gains tax, underpayment of estimated tax penalty, tax on lump-sum distributions, tax on premature distributions from IRAs or retirement plans, and farm income averaging tax.

ProSystem *fx*® Outsource

Reduce peak season overtime and costs.

Streamline your firm's operations, convert the variable cost of tax preparation to a fixed cost, and dramatically increase your profitability with ProSystem *fx* Outsource.

This service leverages highly trained domestic and/or offshore tax professionals that allow you to effectively manage your resources and efficiently maintain your bottom line, especially during peak tax season. It's an efficient, accurate, and secure outsourcing solution that lets you take advantage of time zone differences and refocus your staff on higher-value, client-specific tasks. Increase office morale and productivity by maintaining a balanced work load. You also benefit from paperless technology when storing bookmarked documents electronically. Along with each return you'll receive a bookmarked file with all source documents organized and hyperlinked to our reconciliation workpapers, making on-line review even easier.

ProSystem *fx*® Trial Balance

Streamline your compilations, reviews, and audits with this traditional trial balance program.

If your firm is not yet ready to take advantage of paperless engagements, ProSystem *fx* Trial Balance is an excellent way to help you make a traditional trial balance system work more efficiently. It can help you provide better service while controlling your engagement costs and offers the following features:

- Directly imports trial balance data from Quickbooks® and virtually any other accounting or write-up package.
- Provides interim reporting capabilities, allowing you to produce financial statements on a monthly, quarterly, or semi-annual basis.
- Provides full-featured processing for non-profit, governmental, and consolidated corporation engagements.
- Supports multiple journal entries, including adjusting, passed adjusting, reclass, tax, and eliminating; includes features for recurring and intentionally unbalanced entries.
- Includes source journals such as Cash Receipts, Cash Disbursements, and General Journals for easy transaction data entry.

CompleteTax® Affiliate Program

Expand into new markets and create additional revenue streams.

CompleteTax Affiliate Program allows you to link to a co-branded or private label version of CompleteTax.com, an online tax prep tool that is backed by the power of ProSystem *fx* Tax. Tap into the rapidly expanding "do-it-yourself" market, promote your firm's services, and harvest potential new professional engagements. Hosted by CCH servers, CompleteTax includes more than 500 pages of detailed, easy-to-read explanations of virtually every tax issue your clients may encounter, including dozens of examples, worksheets, due dates, and highlights of important changes. Your firm's professional image is instantly enhanced. If your firm uses ProSystem *fx* Tax or Global *fx*, you can automatically import data from CompleteTax, making it easy to assist taxpayers with their returns. And with the CompleteTax Toolkit, you can set your preferences and branding, and customize CompleteTax to meet your business objectives.

ProSystem *fx* Office

" For many years, I've been impressed with the support staff of ProSystem *fx*. Good service and support are the primary reasons I have retained CCH as my tax software vendor."

—Martin J. Reitinger, CPA
Burlingame, CA

At CCH, a Wolters Kluwer business, we are dedicated to providing the best available Customer Support, Service, and Training. Our professionals are well versed in all facets of ProSystem *fx* products and operating environments and will go the extra mile to assist you.

We also do everything we can to minimize delays in answering calls to ensure firms are as productive as possible. Our state-of-the-art Aspect CTI and HEAT telephone systems accurately handle all calls and quickly route them to the appropriate ProSystem *fx* specialist.

When you work with CCH, you can count on a variety of support options, including:

- A Team of Experts – Professionally trained in all areas of tax and technical support, just a toll-free call away.
- CCHGroup.com Website – Instant access to product and training information, support, and program updates via the Internet.
- Regional Support Team – Ensures your smooth transition to ProSystem *fx* and assists with any training needs.
- Effective Training Options – From in-office sessions to community seminars to Web conferencing.

For more information about The ProSystem *fx* Office suite of software and workflow tools, call us at 1.800.PFX.9998 or visit us at CCHGroup.com

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