

WHO'S WHO

AMONG **TECHNOLOGY VENDORS** SERVING THE ACCOUNTING PROFESSION

ACCOUNTING BACK UP CONSTRUCTION DOCUMENT MANAGEMENT FINANCIAL SERVICES FIXED ASSETS GUIDANCE **INTEGRATED SUITES** NOT-FOR-PROFIT ONLINE PORT

CCH Small Firm Services



COMPANY OVERVIEW

CCH Small Firm Services is a unit of CCH®, a Wolters Kluwer business and the leader in tax and accounting expertise since 1913. CCH created this new group to focus on the small-firm market following its acquisition of the ATX™ and TaxWise® software lines in late 2006. Small Firm Services currently serves 50,000 tax and accounting firms and nearly 10,000 IRS-sponsored Volunteers in Tax Assistance (VITA) sites and IRS Walk-In Offices. Our programs are developed and tested by seasoned professionals, including CPAs, enrolled agents, accountants and attorneys with hundreds of years of shared experience. Our more than 600 employees are headquartered in Kennesaw, GA, with offices in Rome, GA; Caribou, ME; and Fort Pierce, FL.

MARKETS SERVED

As the name suggests, CCH Small Firm Services focuses on CPAs and other tax and accounting professionals who operate in small firms. More than half of our customers are sole practitioners and over 75 percent have five or fewer employees. They fall into two large groups: practices that provide a wide range of tax, accounting and consulting services and those that focus more on high-volume tax preparation services with less emphasis on other services. As a result, our customers serve the broadest cross-section of clients, from individual taxpayers to businesses of all types and sizes, from lower-income wage-earners with simple tax returns to high-income individuals with complex business, investment and trust challenges.

TRAINING & CUSTOMER SUPPORT

CCH Small Firm Services leads the industry with the widest variety of training and customer support.

You can easily convert your existing client information using the free conversion programs we provide. And as a new customer, you are assigned your own personal orientation specialist, who will help you with client-data conversion, installation and setup of your software.

Our U.S.-based team of expert customer support agents is available toll-free and with extended hours during tax season. Or you can get the information you need on our customer support websites, where you'll find the complete Knowledgebase for all of our products.

And we offer a wide range of training and educational opportunities, from live seminar and classroom events in cities around the country to Webinars that let you learn in the comfort of your home or office.

PRODUCTS AND SERVICES

Because of the varied needs of our clients, we know that one size will never fit all. So we offer a broad range of tax and accounting solutions under our two product lines, ATX and TaxWise. And within these two brands, we offer different packages of software and research products designed to meet the varying needs of each customer. **Tax compliance software** is central to all of our customers, but we have enhanced our tax programs with **expert research** from CCH and Kleinrock™ and with several accounting and workflow solutions, including **Client Write-Up, Payroll, Fixed Asset Manager, Trial Balance and Document Manager programs**.

All of our programs are fully integrated so that client data moves seamlessly and automatically between applications. And you can import client information from third-party accounting programs, including QuickBooks® and Peachtree®.

Because our customers don't have large staffs — or sometimes any staff at all — we're constantly searching for ways to

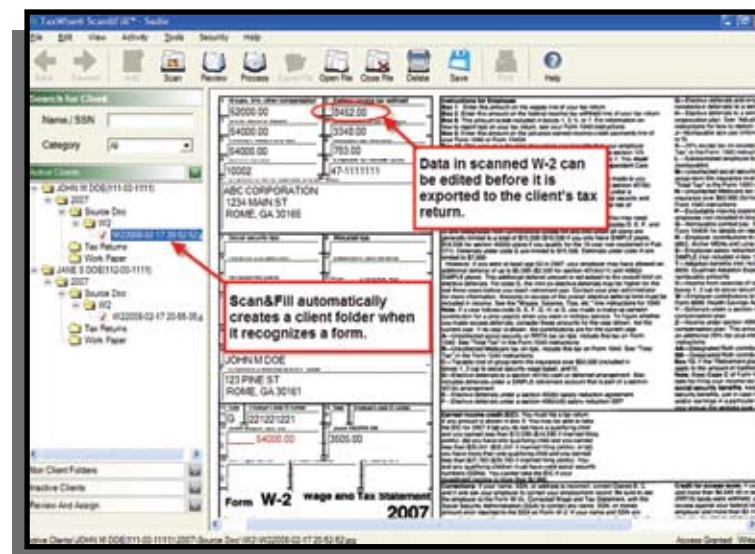
increase their efficiency so they can focus on providing professional value to their clients. For example, there's Scan&Fill™, an innovative new program that recognizes W-2s and 1099s as they are scanned. Using state-of-the-art optical character recognition (OCR) technology, **Scan&Fill** captures the data on those forms so that it can be exported directly into the client's tax return.

With more than 1,000 customers in its first three months, Scan&Fill has already eliminated thousands of hours of tedious and error-prone data entry for both high-volume tax preparation firms and sole practitioners.

Now, let's look at how our two product lines, ATX and TaxWise, are designed to meet the needs of our customers.

ATX™ | Complete. Professional. Affordable.

ATX offers the best value proposition available in the marketplace today. With one of the largest form libraries in the industry and



Scan&Fill recognizes W-2s and 1099s as they are scanned.

an exceptional range of CCH and Kleinrock tax research, ATX provides sole practitioners and small firms the tools they need at prices they can afford.

Take our MAX® package. It includes over 10,000 federal, state and local income tax forms and sales and use tax forms along with a W-2 component that allows users to prepare and e-file wage forms, 1099s and state or federal payroll reporting forms 940, 941 and 944. MAX also includes two widely praised reference guides: Kleinrock's 1040 and the CCH 1040 Quick Answers. Purchased early, the price for all of this professional content is less than \$1,000!

And for practices that require in-depth research and powerful accounting products, our Total Tax & Accounting Office® package includes everything in MAX plus ATX Client Write-Up, Live Payroll, Fixed Asset Manager and Document Manager programs along with the CCH U.S. Master Tax Guide®, Kleinrock Complete Tax Library, All States and Business Quick Answers, Federal and All States Tax Expert

Suite and the bi-weekly Kleinrock Federal Tax Bulletin. The price for this incredibly comprehensive package is less than \$2,300.

ATX tax software is easy to learn and easy to use. Professionals fill in life-like versions of the federal, state and local tax forms they already know, with intuitive links to backup worksheets and information forms. Those not as familiar with some forms can choose the Interview Mode, which fills in forms based on answers to a series of easy-to-understand questions.

To learn more about the fine line of ATX tax and accounting software, call **1-800-681-1752** or test drive ATX at www.atxinc.com/drive.

This year, the 10,000 tax practices using TaxWise prepared more than 10 million tax returns! But that's no surprise. For the past 22 years, TaxWise has been the preferred tax compliance program for independent firms that specialize in tax preparation.

TaxWise grew up around electronic filing, so it's built for speed and accuracy, both vital in any high-volume tax practice. In-program tools include automatic data transfer from federal to state returns, automatic pass-through of K-1 data from business to individual returns, real-time calculations, built-in zip code and EIN directories, and powerful diagnostics that insure returns are complete and ready for electronic filing. There's even a unique Social Security validation tool that identifies when and where Social Security numbers were issued as a check against potential fraud.

And for tax firms offering refund-related loans and other bank products, TaxWise is the only program that works with all the leading refund-loan banks so you get to choose the banking partner you want, not the one someone else has chosen for you.

TaxWise offers unique features for professionals with a bilingual clientele. Preparers can view or print more than 50 of the most commonly used tax forms. And TaxWise offers Spanish help within the program, bilingual sales, orientation, and support agents, and bilingual training events.

To encourage growing firms, there are no networking fees for any number of people working in the same location and discounts of up to 75 percent for satellite locations. And TaxWise offers InterviewPLUS® Online, a unique web-based program that lets you set up a tax office in any remote location with just an Internet connection and a printer.

To learn more about TaxWise, please call **1-800-681-1750** or test drive TaxWise at www.taxwise.com/drive.

TaxWise®
When you're ready to grow,
you're ready for TaxWise.

The image shows a screenshot of the TaxWise software interface displaying a 1040 tax form. Several callout boxes with arrows point to specific features:

- Powerful diagnostics find errors, omissions and inconsistencies.** (Points to a diagnostic tool icon)
- Built-in access to Bank Products.** (Points to a bank icon)
- Unlimited e-filing with most packages.** (Points to an e-file icon)
- Keep up with tax law changes using ATX University.** (Points to a help icon)
- Multi-level Return Manager helps you quickly find and sort returns.** (Points to a search/filter icon)
- Access to the most complete forms library around. Over 10,000 forms!** (Points to a library icon)
- Forms-based interface simplifies data entry.** (Points to the form fields)
- Supporting worksheets simplify return preparation.** (Points to a worksheet icon)
- Keep track of refund or balance due with every entry.** (Points to a balance field)
- Easily access Kleinrock™ reference libraries.** (Points to a reference icon)
- Quickly jump to the supporting form, schedule or worksheet.** (Points to a navigation icon)

ATX has an easy-to-use interface that looks exactly like the tax forms you already know.

FOR MORE INFORMATION ON OUR COMPLETE PRODUCT LINES, PLEASE VISIT OUR WEBSITES:
WWW.ATXINC.COM
WWW.TAXWISE.COM