



CCH Small Firm Services

a Wolters Kluwer business

COMPANY OVERVIEW

CCH Small Firm Services (SFS) provides market-leading tax and accounting research, software and workflow tools to 45,000 small professional firms and tax assistance sites in 72,000 locations throughout the United States and Puerto Rico. SFS is part of Wolters Kluwer Tax and Accounting, which serves professional markets in the United States, Canada, the Asian Pacific region and the United Kingdom. Based in Amsterdam, Wolters Kluwer is *The Professional's First Choice* for information, tools, and solutions that help them make

their most critical decisions effectively and improve their productivity.

Our ATX and TaxWise programs are developed and tested by 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.

To learn more about CCH Small Firm Services, visit www.cchsfs.com.

MARKETS SERVED

As our name suggests, we focus

on the needs of small tax and accounting firms — businesses that generally have five or fewer employees. We also serve commercial tax preparers, with one office or sometimes hundreds of offices, who offer tax services in a retail environment similar to well-known national tax chains. And for 11 years, SFS has provided the tax software used by the IRS-sponsored tax assistance sites under a competitive contract.

Our customers serve a broad 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.

PRODUCTS & SERVICES

In the highly competitive tax and accounting profession, no two firms are the same. That's why ATX and TaxWise are each designed for the needs of different types of small professional firms.

ATX software offers powerful but easy-to-use tax compliance programs that provide the best value proposition available in the marketplace today. With the largest forms library



No two small firms are alike... That's why we offer choices.

We're CCH Small Firm Services, and whether you're a sole proprietor or a growing firm with several offices, we have the software and research solutions that are right for your business.

ATX, with more than 10,000 federal state and local forms, will meet the tax compliance needs of any small practice at prices sure to fit your budget.

TaxWise, built for speed and efficiency, is a great tax solution for multi-office, high-volume businesses. And training your part-time employees is a snap.

Both are available with integrated accounting solutions: Client Write-Up, Payroll, Trial Balance, Fixed Asset Manager and Scan&Fill—a unique program that scans and automatically files client documents.

The choice is yours!



ATX
www.atxinc.com

Complete.
Professional.
Affordable.

TaxWise
When you're ready to grow,
you're ready for TaxWise.
www.taxwise.com

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**Complete.
Professional.
Affordable.**

**Taxes, write-up, payroll and more.
You do it all...and so do we.**

More than 35,000 small firms know the power and value of ATX software. From our award-winning tax software — with over 10,000 forms and expert research — to our integrated accounting and workflow solutions, ATX has the tools you need at prices you can afford.

Quite simply, ATX offers CPAs and other accounting professionals the best combination of quality and value available in the marketplace today.



To find out more, give us a call at | **1-888-455-0183**
Or test drive ATX online at | www.atxinc.com/drive

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

ATX tax software features precise on-screen versions of federal, state and local tax forms together 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.

With five different ATX packages, ranging in price from under \$500 to \$2,295, we're sure to have a package that's right for any practice. Take our popular **MAX®** package, for example, which includes over 10,000 calculating federal, state and local income tax and sales tax forms along with a W-2 component that allows users to prepare and e-file W-2s, 1099s and federal and state payroll reporting forms. MAX also includes unlimited e-filing, toll-free technical support and line-by-line integration with Kleinrock tax research and access to CCH reference materials.

And for practices that require advanced accounting software, users can add the **ATX Trial Balance, ATX Fixed Asset Manager, ATX Payroll** or **ATX Client Write-Up** and **Write-Up with Payroll** programs — all fully integrated with the ATX tax compliance system.

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

TaxWise®

This year, the 13,000 tax businesses using TaxWise prepared more than 15 million tax returns! But that's no surprise. For the past 23 years, TaxWise has been the preferred tax compliance

program for independent firms that specialize in high-volume tax preparation.

TaxWise grew up around electronic filing, so it's built for speed and accuracy with powerful features that enhance productivity. Numerous in-program tools like automatic data transfer from federal to state returns, real-time calculations, built-in zip code and EIN directories and powerful diagnostics work to make your job easier. There's even a unique Social Security validation tool that identifies when and where Social Security numbers were issued as a check against potential errors.

To encourage growing firms, there are no networking fees for those working in the same location and deep discounts for additional offices. To help customers expand their clientele, TaxWise offers **Site Builder**, that helps users create a personalized, profes-

sional website, and **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 printer. And as the leader in Hispanic/Latino markets, TaxWise provides unique features for professionals with a bilingual customer base. Users can view or print 75 of the most commonly used tax forms and Spanish-language help files within the program. And TaxWise provides bilingual sales, orientation, support agents and training events. No other software company offers so many tools to serve this growing market.

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



The solution for growing tax firms... like yours

High-volume tax preparation is never easy. But TaxWise makes it easier.

Every TaxWise package includes free networking, extensive reporting, remote location management, award-winning customer support, training and conversion assistance. Our integrated accounting and workflow solutions enable speed and efficiency. And with our web-based InterviewPLUS® you can easily set up a tax office in any remote location.

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

Let one of our software consultants tell you about the TaxWise advantage. Call us today at **1-888-455-0184** Or test drive TaxWise online at www.taxwise.com/drive

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TaxWise®

www.taxwise.com

AN INTEGRATED SOFTWARE SUITE

While tax compliance is a core service for most of our customers, our tax software is complemented by several accounting and workflow solutions. Our **Client Write-Up, Payroll, Fixed Asset Manager, Trial Balance** and **Document Manager** programs are fully integrated with the ATX and TaxWise tax systems so that data moves seamlessly and automatically between applications. And our Client Write-Up is the only such program to include Spanish-language charts of accounts and common client reports.

For a paperless office, SFS offers **Scan&Fill™**, a combination of digital document management and cutting edge optical character recognition tools. Scan&Fill scans and reads and automatically files client W-2s, 1099s and other information forms to create a digital folder labeled with the client's name, SSN and form type. Scanned documents can be edited onscreen and then exported directly into the ATX or TaxWise tax preparation systems at a click of a button.

CPE, TRAINING & CUSTOMER SUPPORT

We know that the small firms we serve need our help and support. Right from the start, SFS orientation specialists assist new customers with client-data conversions, installation and software setup. And our U.S.-based customer and technical support teams are available seven days a week during tax season. Users also have 24-7 access to our customer support websites, which house our complete Knowledge Base for all products.

Professionals seeking CPE and product training can find both in live classroom and seminar events around the country as well as online webinars and self-study programs.

For more information, click "e-Inquiry" at www.CPATechAdvisor.com and enter e-Inquiry # 10