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**From the Dec. 2013 issue.**

## **Overview**

CCH Site Builder is the website creation tool from CCH, part of Wolters Kluwer. The application is a template-driven website generator which allows firms to use a menu-driven application to create an internet presence for a firm. Firms can either bring their existing internet domain name (e.g. firmname.com) to CCH for use with the subscription, or CCH will assist the firm in obtaining a domain name and pay the first year's charges. (After the first year, domain renewal fees are approximately \$20 per year.)

Site builder includes support for both Google Analytics as well as basic tools for search engine optimization. Sites can also include social media icons in the website and e-newsletters to drive contacts to interact with the firm online. Firms can integrated an appointment calendar into the site as well as share financial calculators which have been rewritten to work on most smartphones and tablets.

Firms can choose to exchange data with clients using the optional integrated ProSystem *fx* Portal product, which provides secure client portals for data exchange, or use a more rudimentary file exchange application called FileShare which is included with the site subscription. CCH has upgraded the base storage for FileShare from 50MB per firm up to 1GB per firm, with additional storage available for purchase in 100MB increments.

Firms can also deploy client-facing applications for data input such as the Tax Notebook digital organizer and the Gainskeeper Pro basis tracker. Practitioners can increase their productivity by using these tools to systematically organize client-

submitted documents and hopefully avoid the dreaded shoebox of documents in

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template.

CCH Site Builder is hosted from a high-availability secure data center operated by a leading cloud computing provider in the Midwest US. The service is provided with a 30-day free evaluation period.

### **Summary and Pricing**

Pricing is tiered based upon a number of options, with annual subscriptions available starting at \$785 per year. Optional content and toolkits including items such as the Financial Planning Toolkit, Business Owner's Toolkit, ProSystem fx Portal, and a client-facing Tax Guide are sold separately, with pricing available upon request.

### **Best Firm Fit**

- Firms who use CCH applications for client engagements, especially those who utilize ProSystem *fx* Portal and the product's FileShare module.
- Firms who wish to share syndicated CCH content with clients.

### **Strengths**

- Good integration with a wide range of CCH products, including ProSystem *fx* Portal, CCH Tax Guide content, toolkits for Financial Planning and Business Owners, ProSystem *fx* Tax Notebook, and Gainskeeper Pro.
- CCH tax content can be scrolled across website, and can be customized to show only targeted states.
- Includes a good newsletter tool with syndicated content, and custom content can be added by the firm to meet the needs of their client base.
- Some of the available templates include page layouts for viewing on either a computer or on a mobile device.

- ProSystem *fx* Site Builder includes a library of financial tools, web-based

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Firm Management

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