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Executive Summary — Review of Engagement & Trial Balance Software 2006

Jul. 27, 2006

From
[the August 2006 Review of Engagement & Trial Balance Software](#)

The workpaper applications from CaseWare, CCH Tax & Accounting, and Thomson Creative Solutions have the mix of features that firms need to move to a paperless engagement process.

Additionally, firms should take into consideration the integration that the software suites that CCH Tax & Accounting and Thomson Creative Solutions are developing and the impact such development could potentially have on firm processes. Firms that work with small to midsize clients with only basic trial balance and reporting needs will find good value in the product from Pendock Mallorn, LTD. Regardless of the tool(s) selected, a substantial amount of planning, training and monitoring of results should be invested in these products. □

Wolters Kluwer Tax & Accounting • Article

