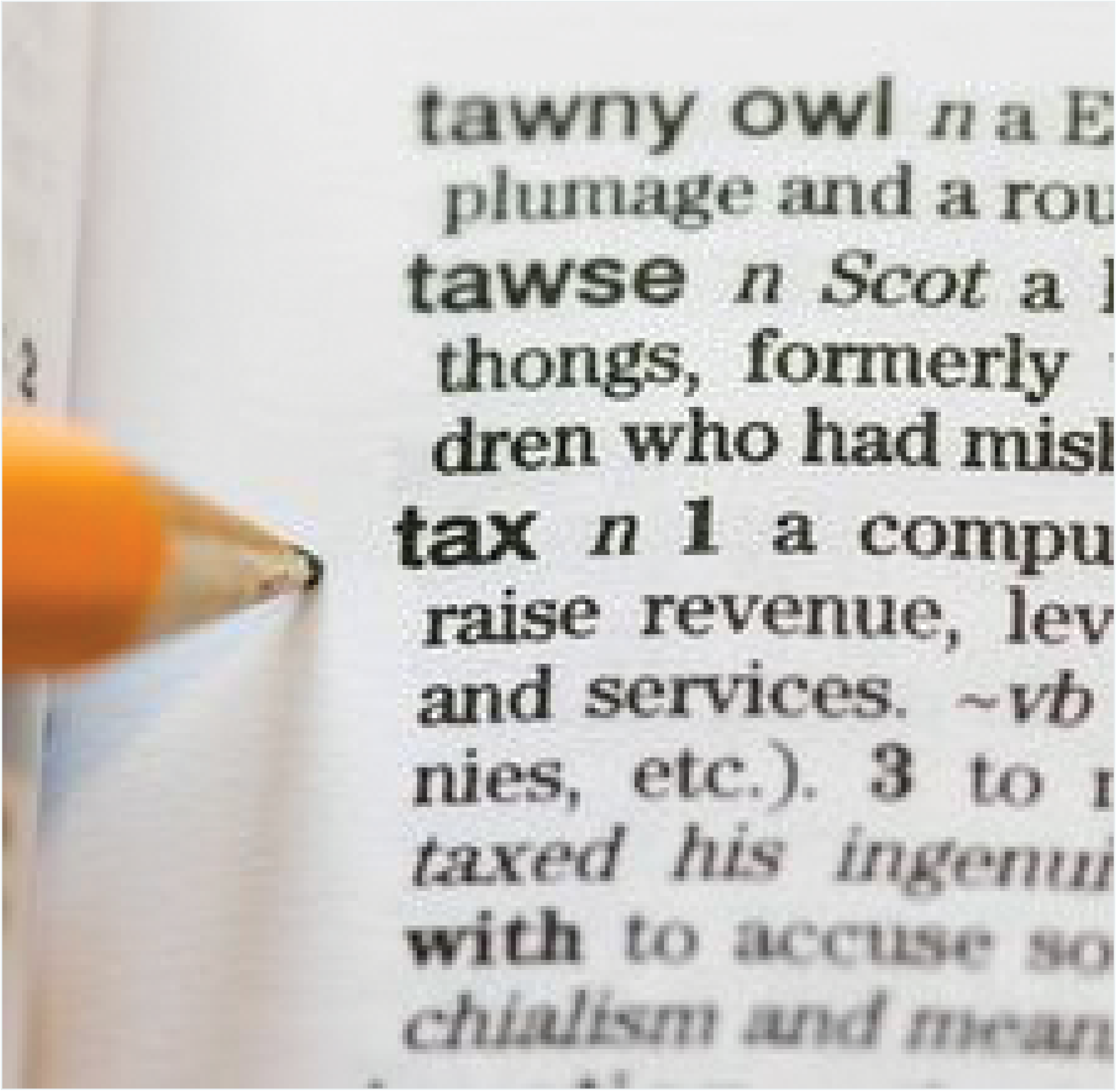
Brian Tankersley • Nov. 29, 2010



Tax & Accounting Research 2010 Review Sections

- **Basic System Functions**
  - General Navigation/Ease-of-Use
  - Content delivery options: paper, CD/DVD, online?
  - Organization sorted by relevance/importance
  - Multiple user management
  - Multiple browser support
  - Various subscription options
  - Search routines
  - Integration with T&B applications for billing, DMS output, etc.
- **Content**
  - Licensing options (named users, concurrent users, site license, etc.)
  - Multiple providers
  - Publicly Available

The struggle with most offerings is to find a way to make the most detailed, comprehensive offering possible for the technical specialist, and yet make the basics easy enough to use so that novices can find the information they want as fast as possible. Some services are expensive and offer every database imaginable, while others are value-oriented with no inclusion of even basic offerings for practice areas related to payroll, human resources and employee benefits … beyond what's included in the income tax research databases.

Practitioners must determine their real research needs, as the limits on simultaneous users and the expense associated with individual accounts may make some of the higher end solutions inaccessible to the average preparer. The need is clear for every preparer in a firm to have access to some research tools, and technical specialists may need access to additional sources to find on-point guidance for complex issues or specialized industries. Some users may simply need a desk reference like The Tax Book or a U.S. Master Tax Guide, while others will need a comprehensive subscription that includes federal, state, international and industry-specific guidance.

- Breadth of Content (Fed,

  - Saved searches/documents
- **Integration/Import/Export**
  - Integration with Word? Document & client letter integration
  - Integration with DMS? Portal? Browser toolbar?
  - Save/print to multiple file formats
  - Activity/usage reporting
  - Support for capturing info for billing back charges to clients?
- **Help/Support**
  - Built-in support features
  - System/Content update frequency
  - Support Website/Documentation
  - Live Support? Where is support located? Hours?
  - Live chat with other users?
  - Multiple training options
- **Summary & Pricing**
- **Overall Rating**

When selecting a research offering, it is most

important to determine how your organization uses tax research tools, and select the proper tool (or tools) to meet those needs.

Here are a few tips for those who may be adopting a new service or who feel like they are not getting as much as what's needed out of their research service:

1. Take the service provider's training courses, or discuss with peers how they use the services and what tips/tricks they have.

2. Consider if the databases included in your subscription meet your needs.

3. Perform research for common questions early, and document available practice aids so that you can find them when you need them.

4. Learn how your research service integrates with your applications so you can become more efficient at your work. Most applications provide a high level of integration within the publisher's tax preparation software, providing a link to guidance associated with the active input screen.

It's important to make the right tools available for your partners, staff and employees. After all, there is nothing more expensive for a tax professional than giving or receiving bad advice.

including offerings from Thomson Reuters, CCH, and Intuit. Here we review BNA's Tax & Accounting Center.
Read Full Review

CCH, a Wolters Kluwer business – CCH IntelliConnect

CCH made significant changes to its research platforms in the summer of 2009 when it launched IntelliConnect, its next generation research platform to replace the previous offering, Tax Research Network. With the switch to IntelliConnect, the key tax, human resources, payroll and employee benefits databases for domestic and many international jurisdictions are on a common, consistent platform (although CCH's accounting & auditing research service, Accounting Research Manager, remains on a separate, legacy platform).
Read Full Review

Intuit Inc. – Intuit ProLine Tax Research

Intuit has slowly and strategically added solutions to its ProLine family of solutions for tax and accounting practitioners, including the addition in 2009 of Intuit ProLine Tax Research as an integrated, context-sensitive option into its Lacerte and ProSeries income tax preparation applications. This is a solid, easy-to-use offering for practices focused on compliance matters, and its integration into the tax preparation software means that users can toggle between entering information into a return and determining how to report a particular transaction from within a familiar interface.
Read Full Review

Thomson Reuters – Checkpoint

Checkpoint is a research product for accounting and tax practitioners that includes reference sources in areas such as U.S. Federal, state, and local taxation; accounting, auditing and corporate finance; estate planning; international taxation; as well as ancillary topics such as payroll, pensions and employee

needed for detailed technical guidance on unfamiliar topics, TheTaxBook is designed to provide general guidance, including current rates, per diem amounts, and summaries of law changes from the previous year, and can be used to explain basic provisions of tax law to clients and others.

Read Full Review

2010 Review of Tax & Accountnig Research Applications— Comparison Chart

Taxes