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CCH, a Wolters Kluwer business — ProSystem *fx* Tax

2011 OVERALL RATING ★★★★★



CORE PRODUCT FUNCTIONS/FEATURES



INTEGRATION



PAPERLESS WORKFLOW



REMOTE CAPABILITIES

OVERALL RATING 4.75

800-PFX-9998 (739-9998)

CCHGroup.com

Product delivery methods:

On-Premises

SaaS

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- Integration with other CCH applications & tools, including ProSystem *fx* Engagement, Gainskeeper, IntelliConnect & CCH Tax Prep Partner Series
- New Global Integrator tool supports those with multi-national filing or complex consolidation requirements
- Ability to mask confidential data on printed returns offers some additional protection against identity theft & support for outsourced returns
- The only product suite offering an optional locally-installed scan, organize & populate tool (ProSystem *fx* Scan)
- Strong spreadsheet & GL import capabilities

POTENTIAL LIMITATIONS

- SaaS version (Global *fx*) requires Internet Explorer 7 or later
- Implementation of IntelliConnect & Next Generation applications in 2010 was a large amount of change in one year for users of these applications
- Supported write-up solutions limited

EXECUTIVE SUMMARY & PRICING:

With traditional and Internet-based solutions available, ProSystem *fx* Tax fits a wide market range from single users to large multi-user organizations. Pricing for the traditional DVD-based software is \$3,585 for the individual tax preparation module and \$2,235 for business modules (minus any applicable discounts). State returns are grouped and priced by complexity and start at \$435 per state module. Per-return pricing is also available for all modules. Global *fx* pricing starts at \$25 per user, per month with an annual \$100 setup fee.

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4.75 – INTEGRATION

- • **w/in publisher's own suite**
- • **w/tax research tools & guidance**
- • **w/other or external programs**
- • **w/practice management**
- • **w/external services**

4.75 – PAPERLESS WORKFLOW

- • **paperless creation**
- • **paperless open items**
- • **paperless review**
- • **access control for limiting access into returns**
- • **digital document storage/mgmt.**
- • **data import/output**

4.75 – REMOTE CAPABILITIES

- portal
- remotes access
- 1099 depot
- Outsourced document prep
- Hosting
- Web-based

Software

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