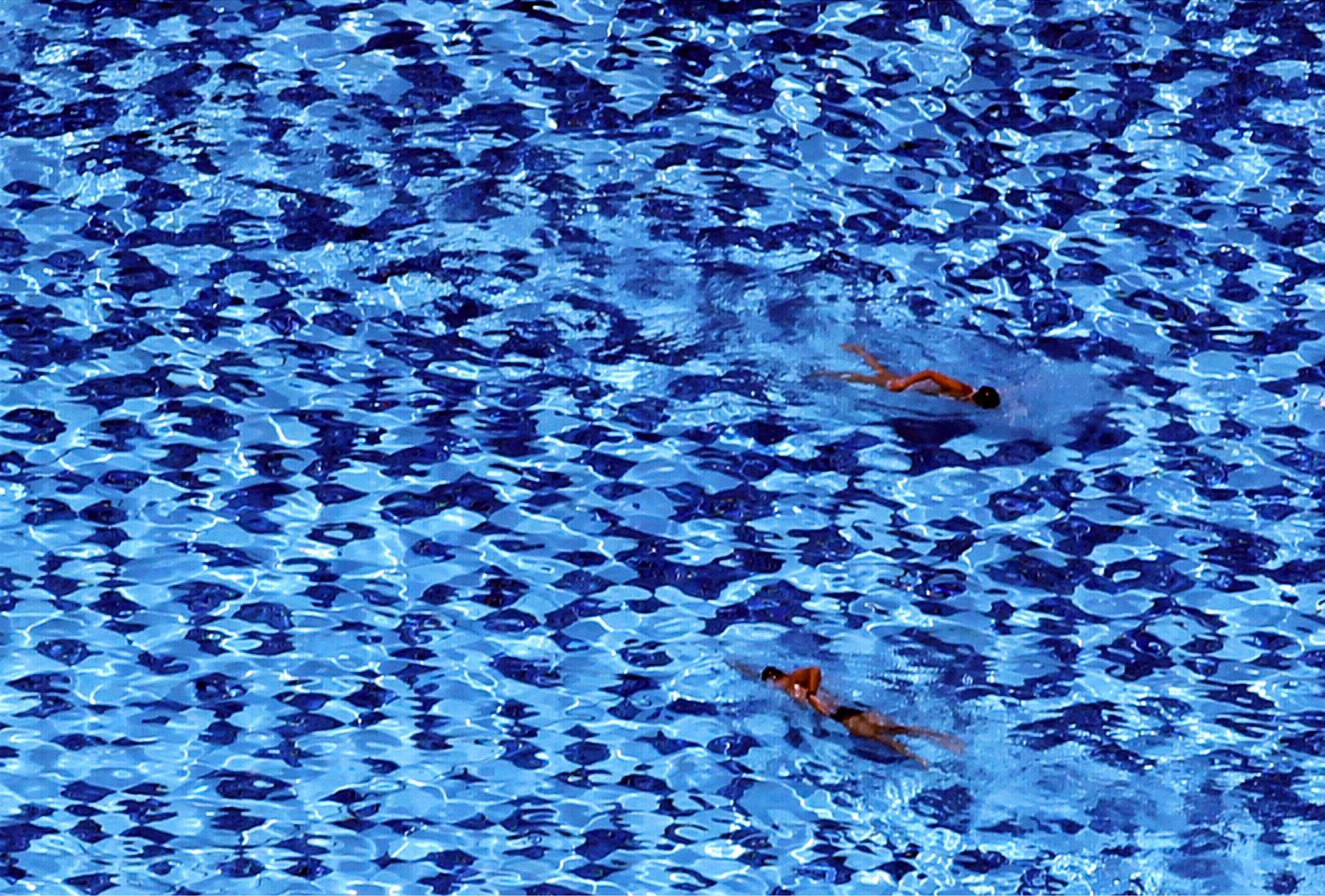


ULTRATAX CS[®]

CS PROFESSIONAL SUITE[®]



REUTERS/Paulo Whitaker

[Tax.TR.com/UltraTaxCS](https://tax.tr.com/UltraTaxCS)

 THOMSON REUTERS[®]



REUTERS/Dani Cardona

CS PROFESSIONAL SUITE FROM THOMSON REUTERS

ANSWERS YOU CAN TRUST

The Tax & Accounting business of Thomson Reuters—the world's leading information resource—brings you the most comprehensive line of integrated software, research and guidance available to the accounting profession.

POWERFUL. PRODUCTIVE. PROFITABLE.

CS Professional Suite combines powerful data sharing, paperless processing and online convenience to help you achieve a more productive and profitable practice. After all, when you're able to customize just the right mix of suite solutions for your firm, you can do some amazing things—like streamline firm workflow, strengthen client ties and maintain a competitive edge. And that's pretty powerful stuff.

Keep reading to experience the power of automated tax workflow with UltraTax CS.

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To view an UltraTax CS video, visit:

Tax.ThomsonReuters.com/CS-Professional-Suite/UltraTax-CS/Resources.



ULTRATAX CS

MAKE YOUR TAX PRACTICE MORE PROFITABLE WITH MORE EFFICIENCY

Running a thriving tax practice requires more than just preparing tax returns. Today's firms need to be profitable, while staying on top of changes in tax laws, technology and client needs. By making your firm more efficient, you can meet the challenges.

Using advanced data sharing, paperless processing and the web, our full suite of top-rated, integrated products combine to create a customizable solution that will effectively serve your firm, your clients and your staff.

UltraTax CS alone adds efficiency to any office workflow. From the ground up, it was designed for tax accountants by tax accountants to eliminate repetitive data entry and other time- and resource-consuming tasks.

UltraTax CS combined with other **CS Professional Suite** products and applications offers the potential to further increase your revenue and grow your firm. And it's all backed by Thomson Reuters, the world's leading information resource. Here's just one example you can enjoy: convenient one-click access to targeted explanations, guidance, analysis and practice aids, using the market-leading research tools from Thomson Reuters Checkpoint®.

NEW FIRMS GET FREE ONBOARDING ASSISTANCE

Our development mission statement is to release UltraTax CS on time, with the maximum filing capability and the highest possible quality.

There's no need to fear change. With our expansive UltraTax CS support system, you won't have to go it alone. We'll be there every step of the way to guide you with many helpful resources.

Built-in Help System—UltraTax CS comes with a comprehensive built-in help system that provides a variety of ways to get help and become familiar with program features.

Expert Support Staff—You can always depend on prompt, courteous and knowledgeable UltraTax CS support from our expert, U.S.-based staff.

Welcome Services Program—Our program for firms new to UltraTax CS provides:

- A personal message from our managing director, Jon Baron.
- A Welcome Services tutorial to help you discover the benefits of your CS.ThomsonReuters.com web account.
- Helpful information about getting started with your new products, including links to product tutorials, where available.
- Important details about next steps, and much more.

"We've used ProSystem fx® for the 21 years I've been with our firm. Then we got a new partner who uses UltraTax CS in the cloud. Because he liked it so much and leasing was so much cheaper for our small firm, we switched in the middle of tax season.

The transition was smooth...it really was seamless. The conversion from our old software was done in a week. Since the program is very logical, we've picked it up surprisingly fast and are getting used to it quickly. The e-file works really smoothly, and we're saving time because of the integration between UltraTax CS, Fixed Assets CS® and FileCabinet CS®, so we're exploring more products. And we love working in the cloud.

We're glad we bit the bullet and made the change."

– S.E. Patton, MI

TOP 10

REASONS FOR MAKING THE SWITCH TO ULTRATAX CS

- 1** Ranked one of the top-scoring professional tax solutions in the independent *Journal of Accountancy* Tax Software Survey.
- 2** **Multi-Monitor Flexibility** across up to four separate monitors—view Input, Forms, Prior Year Input, Diagnostics and more, all at once. Plus, all views synchronize with one another, so as you navigate to your Itemized Deductions entry, UltraTax CS automatically navigates to show you the Schedule A and last year's Itemized Deductions entries.
- 3** **Data Sharing** between returns should not require additional work to set up—so that's why we link returns together automatically using Tax ID numbers. Never waste time linking your 1120S, 1065 or 1041 returns to the member 1040 returns. Plus, the next time a 1040 client moves who is a member of multiple pass-through returns, know that you will only have to change his or her address once—and UltraTax CS will push that new address into all other returns.
- 4** **Constant Reinvestment** of our customers' renewal dollars back into UltraTax CS means new features and functionality to boost your firm's efficiency more and more each year. Plus, submit, vote on and track your enhancement requests through the UltraTax CS Ideas Community.
- 5** **Dynamic Diagnostics** in UltraTax CS give you an instant preparation checklist to start each year, providing you with a list of all fields where you had entries for your client in last year's return but have not yet made an entry this year. You can even flag additional missing items and send your client a reminder email of what they still need to provide to you. Plus, diagnostics serve as links to the corresponding Form or Input screen location.
- 6** **Depreciation** and asset management in UltraTax CS will save you more time on data entry than any other system available today. UltraTax CS provides a drop-down list of a large variety of asset types which, when selected, automatically inserts the correct asset method and life—for both Federal and State purposes. Plus, if you additionally use Fixed Assets CS for advanced reporting and monthly accounting, never spend time importing or exporting between programs.
- 7** **Zero Maintenance** of UltraTax CS is enabled by streamlined updates, which allow UltraTax CS to update itself on its own—without ever requiring that you force your staff to exit the system in the middle of a busy tax season (they need only to close and reopen the program to take advantage of the updates on their respective workstations). Or, take it to the next level and provide anytime, anywhere access to UltraTax CS to your staff by partnering with Thomson Reuters to host your software on Virtual Office CS.
- 8** **Multi-State Processing** in UltraTax CS is quick and easy in both preparation and review, between its single-screen Apportionment grid for business returns and Multi-State Allocation grid for allocating Schedule C or K-1 income across states—both of which support Excel imports and exports. You can also prepare PPT returns (tangible personal property) for up to 14 different states automatically based on one-time codes assigned to your asset schedules.
- 9** **Client letters** in UltraTax CS can enhance your firm's brand while also offering flexibility. Letters are editable globally and allow for imagery, such as your firm's logo or partner signatures. Furthermore, you can edit each client's return using Microsoft Word for client-specific changes.
- 10** **Integrate with the rest of the CS Professional Suite** for unprecedented time savings and accuracy—whether importing your account balances from Accounting CS to achieve the coveted 15-minute business return, or tying your billing and status tracking directly with Practice CS®, increasing your margins and eliminating transcription errors by shaving off unnecessary re-entry of data.

A FAMILY OF INTEGRATED PRODUCTS

Manage the Entire Tax Process with UltraTax CS

When you purchase UltraTax CS, you're buying into an inclusive family of tax software that will meet all of your firm's tax preparation and practice needs. No matter how diverse your tax client base, the number of returns you process or the complexity of your workflow procedures, UltraTax CS streamlines the entire tax process so that your firm always operates at maximum productivity and profitability.

With UltraTax CS you receive:

- **An Integrated Workflow System**—Deep integration can move your firm to one-time data entry or even to zero-time data entry.
- **The Most Advanced Technology**—UltraTax CS takes advantage of the latest technology, so your firm can offer unparalleled service and realize unprecedented productivity.
- **A Comprehensive Tax Preparation Process**—A wide variety of features and calculations ensure that UltraTax CS can save you time and meet the needs of your most demanding clients with ease.

SKIP THE LEARNING CURVE

Logically organized in an intuitive folder format, UltraTax CS offers a uniform interface across the entire line of tax products—significantly reducing the learning curve.

So once you're familiar with one UltraTax CS return type, you can prepare any other return type with ease.

"I prepare close to 227 corporate, partnership and trust returns ranging in size from one employee to 300 employees. I couldn't prepare that many returns without UltraTax CS.

For us, the integration between my accounting software and UltraTax CS is essential because we're able to focus more on the client instead of fighting the tax program to make sure the return is right. UltraTax CS is just an extremely powerful tax program that can do everything we need it to."

—Matthew Evans, UT

AN INTEGRATED WORKFLOW SYSTEM

Timesaving Data Entry and Workflow Tools Boost Efficiency

Move quickly through the tax prep process, saving countless hours throughout your busiest tax season.

MULTI-MONITOR FLEXIBILITY

Use up to four monitors with independent views. View prior-year and current-year data together; tile windows; synchronize prior-year data and tax forms with input screens; save off multiple configurations so you can toggle between them in the office or at home; and show clients their tax forms on a separate monitor.



DATA SHARING

Boost your firm's productivity with the powerful and comprehensive data sharing capabilities of UltraTax CS.

When data is entered into a client's return, UltraTax CS will populate all relevant fields in other tax returns.

- K-1 info automatically flows into the partners', shareholders' or beneficiaries' 1040 returns when you produce your 1065, 1120S or 1041 returns.
- Each time you enter the TIN for an employer or employee, the most current data from your client database is completed for you.
- Without having to import or re-key data, year-end info from Accounting CS® and Accounting CS Payroll are instantly available because of the automatic W-2 and 1099R flow.
- Form 8615 Kiddie Tax info is automatically transferred between the appropriate returns.
- Multiple client addresses are shared across returns and you're prompted to select the appropriate address.

One amazing example of the time you could save—

After changing the address in one return for a taxpayer who is also a partner in 10 different partnerships, UltraTax CS updates all returns automatically.

DYNAMIC DIAGNOSTICS

Track amounts entered last year but not yet entered this year. This provides an instant checklist, allows manual flagging of missing values and creates a client email noting missing data.

INCREDIBLE BREADTH OF RETURN AND FORM

SUPPORT—UltraTax CS provides you with a complete family of products to accommodate all your tax preparation and workflow needs, including:

- UltraTax/1040
- UltraTax/1120 (includes S and C)
- UltraTax/1120 Consolidated (includes S and C)
- UltraTax/1065
- UltraTax/1041
- UltraTax/706
- UltraTax/709
- UltraTax/990
- UltraTax/5500
- More than 200 state and local products, including all 1040, 1120, 1120S, 1065 and 1041 states
- More 706 states than any other product on the market

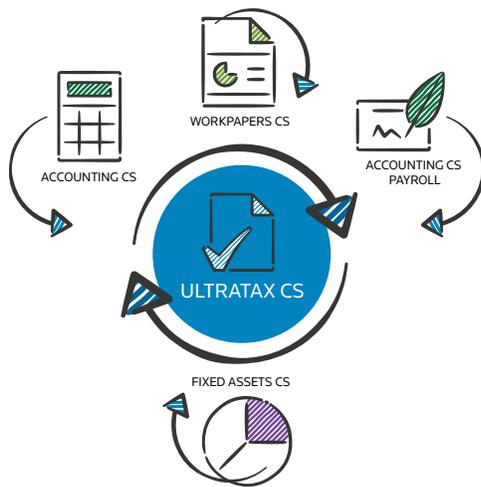
ALL THE AUXILIARY RETURN FILINGS YOU NEED

- More PPT returns than any other product on the market
- LLC filings, where allowed
- Composite returns, withholding returns and annual reports for states, where applicable

SEAMLESS INTEGRATION

UltraTax CS integration saves you time, surpassing any other product on the market. It's comprehensive, state-of-the-art and powerful.

- **Integration with PPC Deskbooks**— Link to relevant tax guidance in seconds.
- **Line Finder Integration with Thomson Reuters Checkpoint**— Automatically navigate from the return to the appropriate research area within Checkpoint.
- **Full integration with the CS Professional Suite, Microsoft® applications and other programs:**
 - Accounting CS
 - Accounting CS Payroll
 - Checkpoint
 - FileCabinet CS
 - Fixed Assets CS
 - GoFileRoom®
 - NetClient CS®
 - Onvio™ Documents
 - PPC Deskbooks
 - Planner CS®
 - Practice CS
 - Workpapers CS™



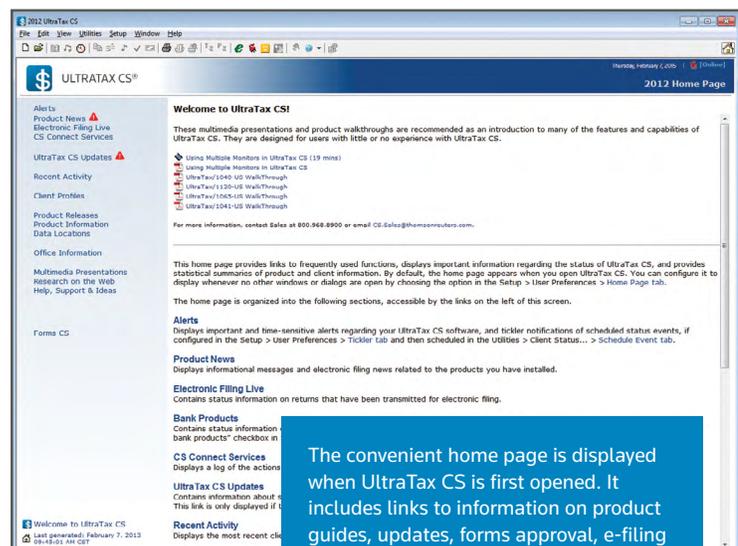
SOURCE DOCUMENT PROCESSING SERVICE

Integration with the FileCabinet CS Source Document Processing service can help you achieve even faster tax processing through the use of optical character recognition (OCR) technology.

- **Let Professionals Review and Analyze**—Your untrained, non-professional staff can scan, verify and export 1040 source documents into tax returns.
- **Integration with Microsoft Excel®**—If your client provides you with spreadsheet data, such as brokerage transactions for Schedule D, make use of the direct Excel import in UltraTax CS.
- **Source Data Entry Utility**—Your non-professional staff can enter source document data and transfer it to clients' returns instantly for more than 25 facsimile versions, including consolidated brokerage statements.

When using UltraTax CS with either FileCabinet CS or Workpapers CS, you can submit 1040 source documents that have been scanned into FileCabinet CS to the Source Document Processing service for labeling and organizing and OCR data capture. Certain tax documents are identified and tax data is captured, which can be imported directly into UltraTax CS. When you're ready to prepare a client's tax return, simply open the UltraTax CS client where information from the scanned source documents can be accepted in UltraTax CS input screens along with other shared data. Your source documents are conveniently labeled and organized (e.g. W-2s, 1099s), making electronic storage and access faster and easier.

For firms with a centralized, up-front scanning tax preparation process, this new functionality can save additional time and costs by shifting the responsibility for advance source document scanning and data entry from the professional preparer to a non-accountant or administrative staff member.



24/7 PORTAL CONVENIENCE

- **Data Import from Web Client Organizer**—Import data directly from the web organizer into UltraTax CS.
- **Final Tax Return Presentation**—Using NetClient CS portals, exchange source documents with clients and provide the final tax return when completed.

EFFICIENCY TOOLS AND RESOURCES

- **View Prior-Year Data**—See the values that appeared on last year’s input screens instantly.
- **Customizable Watch Windows**—Continuously monitor selected values (e.g. AGI or tax due) as you make data entry changes and easily view how they affect total amounts throughout the review process.
- **True Multi-State Processing**—Simultaneously process multiple states in one pass, including automatic computation of credit for taxes paid to other states.
- **Tax Return Summary**—See all of your client’s key amounts, including income items, total tax, amount due, refund, penalties and future years’ estimates.
- **Automatic Client Complexity Factor**—View a rating of the complexity of your clients’ returns (e.g. Client ABC has a high complexity factor because it contains oil and gas) instantly on the home page.

ADVANCED TECHNOLOGY

- **Tax Projection Worksheet**—Predict how tax law changes will impact your clients’ tax returns for the following year.
- **Six-Year 1040 Client Analysis/History**—Assess clients’ history/analysis in one location on the home page or even provide this historical analysis to your clients with their returns in an easy-to-understand graphical format. A multi-year client history/analysis is also available for 1065 and 1120 returns.

ZERO-TIME DATA ENTRY

Integration capabilities eliminate re-keying, saving you time in UltraTax CS during processing.

- **Web Client Organizer**—Let clients complete their tax info online via your website using a customizable questionnaire. Then import the completed data seamlessly into UltraTax CS—without re-keying.
- **The 10-minute 1120 Return**—Account balances in Accounting CS or Workpapers CS transfer directly into UltraTax/1120, virtually eliminating the need for manual data entry. UltraTax CS automatically calculates M-1 and M-2 adjustments. You simply review the return, make necessary adjustments and print or file the return electronically. You can even start by importing QuickBooks® data into Accounting CS or Workpapers CS, making trial balance adjustments and seamlessly transferring the data into UltraTax CS.
- **Proforma Workpaper Information**—Workpapers CS integration with Microsoft Excel connects your work papers electronically to the trial balance, so you can proforma your workpapers automatically each year, much like how you proforma your tax return.
- **Workpaper Management**—Gather, manage, organize and process all types of work papers and source documents with Workpapers CS.
- **Bar Code Scanning Utility**—You can scan bar codes on 1065, 1120S and 1041 Schedule K-1s and on W-2 forms to transfer data from those forms directly into UltraTax CS.
- **Eliminate the Updating of Asset Information**—Asset info updated in Fixed Assets CS throughout the year is instantly available in UltraTax CS, with no need for re-keying or exporting.
- **Perform Digital Review**—Electronic routing, markup and annotation in Workpapers CS lets your team collaborate and review returns quickly and easily.
- **Attached Text Library**—You can add customized text items once to the library, then insert them repeatedly in tax forms—without re-keying.

ADVANCED E-FILE CAPABILITIES

UltraTax CS offers the most advanced, timely and dependable e-filing capabilities available to the tax and accounting profession. You get robust e-file tools to monitor each step of the e-file process, like extensive error-checking to ensure that returns are complete and accurate prior to being transmitted to the IRS and state taxing authorities. And there's detailed information to alert you to the status of a given tax return, including e-file acknowledgements from the IRS or a state—even the option to send the client an automatic email when an e-file return is accepted by the IRS.

- **1040 E-Filing**—UltraTax CS e-filing includes 1040 federal returns (including extensions) and 1040 returns for ALL states that accept e-filing, including the Regional Income Tax Agency (RITA) Ohio Cities return. It also offers banking products through Refund Advantage.
- **Business E-Filing**—UltraTax CS e-filing is also available for all federal 1120, 1120S, 1065, 1041, 990, 5500 returns and various state returns.
- **FinCEN Form 114 E-Filing**—UltraTax CS e-filing includes FinCEN Form 114, Report of Foreign Bank and Financial Accounts (commonly referred to as FBAR) for 1040, 1120, 1065 and 1041.

E-filing not only helps you better meet the needs of your clients, it also relieves you of the labor associated with manual filing. E-filing offers significant value and benefits, including:

- Faster turnaround time for your clients.
- Minimal setup because e-filing is integrated into UltraTax CS.
- Efficient and professional support staff who are knowledgeable about e-filing.
- Receipt of returns acknowledged by IRS and state taxing authorities and even notify your clients of return acceptance automatically via email.

Client ID	Client Name	TIN	Status	Entity	Return	9325	Signature Document	Date Modified
2012PARTNER	ABC Hardware Inc.	38-1234567	Return created but...	1065	US		To Sign	3/21/15 10:30 AM
BANKPROD	Martin, NANCY	432-14-3214	Return created but...	1040	US		To Sign	3/21/15 10:30 AM
BANKPROD	Martin, NANCY	432-14-3214	Return created but...	1040	MI			
EFACC	Accepted, Johnny	999-99-9998	Return accepted b...	1040	US			
EFREJ	Rejected, Reggie	999-99-9999	Return reject...	1040	US			
EFTRAN	Transmitted, Timmy	999-99-9998	Return transmitted...	1040	US			
JAM6552	Jameson, Sandra	621-04-5525	Return accepted b...	1040	US		To Sign	
MAR111	Marks, Howard & Joanne	368-76-6543	Return created but...	1040	US		To Sign	
O'BRIEN	O'Brien, Justin & Sarah	111-88-5599	Error(s) found, no...	1040	US			
REFADVAAA	SMITH, NANCY	400-10-1051	Return created but...	1040	US			
TESTACC	Jones, Beth	999-99-9998	Return accepted b...	1040	US		To Sign	3/21/15 10:30 AM
TESTRECALL	Baker, Samantha	900-00-1111	Return reject...	1040	US			3/21/15 10:30 AM
TESTRECALL	Baker, Samantha	900-00-1111	Return transmitted...	1040	US EXT			3/21/15 10:30 AM
TESTREJ	Smith, Beth	999-99-9999	Return reject...	1040	US		To Sign	3/21/15 10:30 AM
WIL1111	Wilkie, Joseph	388-41-2222	Return created but...	1040	US		To Sign	3/21/15 10:30 AM
WIL1111	Wilkie, Joseph	388-41-2222	Return created but...	1040	MI			3/21/15 10:30 AM

"I like UltraTax CS because of the ease of it. Over the last five years, we've had three different tax software programs and UltraTax CS is by far the easiest to use. Also, the ability to e-file is a breeze. The e-filing transmission status is very good and helpful because you know the status of the e-filed return. Lastly, the integration is the best. The ability to import—data share—the W-2s, cuts down input time and also input errors."

—Lindsey May, UT

THE ULTIMATE IN CLIENT SERVICE

NetClient CS helps you impress by taking your client service to the next level. You can expand your service offerings, provide convenience and flexibility to your clients and adhere to Sarbanes-Oxley compliance.

NETCLIENT CS PORTALS

Provide clients with a secure, convenient and private portal on your firm website where they can access their final 1040 tax returns or Web Client Organizers—Firms are finding that more and more of their clients are getting comfortable using 24/7 online services and many prefer to use the web for banking and managing their financial portfolios. And many tax professionals are finding that offering this level of security and service is highly valued by their clients—and it saves the firm time and money.

NETCLIENT CS® MOBILE

The NetClient CS mobile app offers your clients on-the-go access to the services and content your firm has made available. Your 1040 and business clients can access tax returns, financial statements and other documents pushed to NetClient CS by your firm, as well as online accounting, payroll services and much more.

WEB CLIENT ORGANIZER

Post your clients' organizers to their portals where they can complete them at their own pace—Your clients can return to their organizer as many times as necessary to complete the information. Data already entered is securely saved within their portals. When their organizer is complete, you can import the data directly into UltraTax CS, review the information and accept or discard data as necessary.

TAX RETURN DELIVERY

Post your clients' tax returns to their portals where they can print them as desired and you can eliminate the printing, assembly and mailing time/costs and mail—With NetClient CS, you can post a read-only PDF copy of a client's completed 1040, 1120, 1065, 1041, 990, 706, 709 and 5500 tax returns within the client's private and secure portal. Once the return is available, the client can access and print it as many times as they need throughout the year (e.g. for loan applications or mortgage refinance). You can even build a history of tax returns that your clients can access at any time. If you stored the client's source documents in FileCabinet CS, you can also have UltraTax CS send those documents to the client's portal when you upload the completed 1040 return to NetClient CS.

The NetClient CS portals and app allow firms to use your own branding, enhancing your image. UltraTax CS allows firms to brand all letters and documents which come out of the system with your logo and other imagery.

NETCLIENT CS PORTALS
Allow your clients to enter their tax information online with the Web Client Organizer. Also offer clients a history of their tax returns that they can access at any time.

The screenshot displays the NetClient CS web interface. The browser address bar shows the URL: <https://secure.netlinksolution.com/netgen/go.html#/tax-organizer/form/form.jsp?holderUnit=1&form=18.8&formUnit=1>. The page header identifies the user as 'Parnes, Velano, Martinez & Co., CPAs' with the address '5200 Wolf Rd Suite 110 Albany, NY 12205'. The user is logged in as 'David & Mary Miller'. The main content area is titled 'Income > Salaries & Wages - ABC Hardware' and shows a 'Wages and Salaries #1' form. The form includes a table for 'Please provide all copies of Form W-2, 2015 Information' and 'Prior Year Information'. The table has columns for '2015 Information' and 'Prior Year Information'. The data is as follows:

	2015 Information	Prior Year Information
Federal wages and salaries (Box 1)	125,919	123,744
Federal tax withheld (Box 2)	24,301	23,124
Social security wages (if different than federal wages)	103,015	101,621
Social security tax withheld (Box 4)	6,591	6,405
Medicare wages (if different than federal wages)		
Medicare tax withheld (Box 6)		
SS tips (Box 7)		
Allocated tips (Box 8)		
Dependent care benefits (Box 10)		
Box 13		
Statutory employee	<input type="checkbox"/>	
Retirement plan	<input checked="" type="checkbox"/>	
Third-party sick pay	<input type="checkbox"/>	
State postal code (Box 15)	CA	
State wages (if different than federal wages)	125,919	123,744
State tax withheld (Box 17)	6,482	6,325
Local wages (Box 18)	122,015	120,459
Local tax withheld (Box 19)	144.00	118.00
Name of locality (Box 20)	STATE DIA	

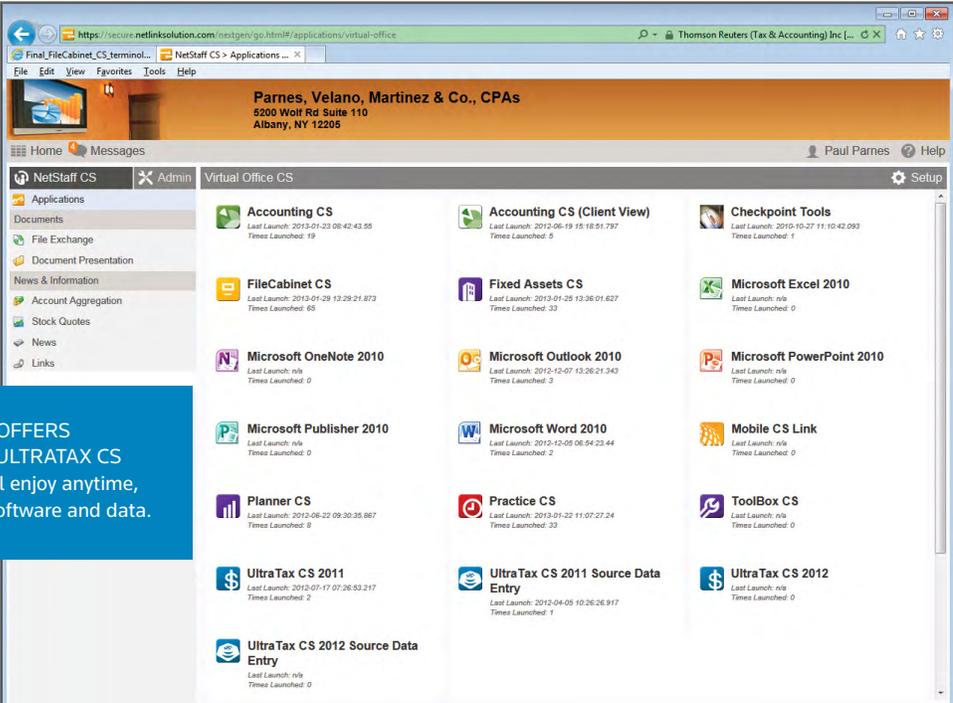
ZERO MAINTENANCE SOFTWARE

SOFTWARE LICENSING—BUY VS. LEASE

We're committed to helping your firm be as productive and profitable as possible, with a variety of flexible licensing options that give you the software you want and give your clients the services they need—all at the most cost-effective price.

- **On-Premise**—Buy our software, install it yourself and relax—because our software seamlessly updates itself, even while staff is working in it. This is the traditional software licensing model, where you purchase the individual software programs and services you need, download the software releases from our website and install them locally to individual PCs and/or your firm's network.
- **Virtual Office CS®**—You can purchase the software and have us host it at our secure data centers. The hosted software applications operate exactly as if they were installed locally in your firm, but we do all the work of installing and configuring each new release and all software updates and automatically backing up your data. Virtual Office CS gives users 24/7 access to CS Professional Suite and Microsoft Office® software and data via the web, enabling staff to work from anywhere. Business continuance is ensured since software and data are stored in a secure environment.
- **Software as a Service (SaaS)**—Lease our software on a monthly basis, have us host it for you and you access it over the web via our data center. As with Virtual Office CS, the hosted software applications operate exactly as if they were installed locally in your firm, but we do all the work of installing and configuring each new release and all software updates and automatically backing up your data. You select the CS Professional Suite and Microsoft Office software you need for your firm based on the profile or roles and responsibilities of each of your staff, such as tax preparer, bookkeeper, etc. You can add, delete or change staff profiles at any time according to firm needs.

For more details on our licensing and delivery options please visit the Buy vs. Lease section of our website at: Tax.ThomsonReuters.com/HostedOptions.



The screenshot displays a web browser window with the URL <https://secure.netlinksolution.com/nextgen/go.html#/applications/virtual-office>. The browser title is "Thomson Reuters (Tax & Accounting) Inc". The page header identifies the user as "Paul Parnes" and shows the firm name "Parnes, Velano, Martinez & Co., CPAs" with the address "5200 Wolf Rd Suite 110, Albany, NY 12205". The interface features a navigation menu on the left with options like "Home", "Messages", "NetStaff CS", "Admin", and "Virtual Office CS". The main content area is titled "Virtual Office CS" and lists various applications with their last launch and launch times:

Application	Last Launch	Times Launched
Accounting CS	2012-06-19 15:18:51.797	19
Accounting CS (Client View)	2013-01-29 13:38:01.627	5
Checkpoint Tools	2010-10-27 11:10:42.093	1
FileCabinet CS	2013-01-29 13:29:21.873	95
Fixed Assets CS	2012-12-07 13:26:21.343	33
Microsoft Excel 2010	n/a	0
Microsoft OneNote 2010	n/a	0
Microsoft Outlook 2010	2012-12-07 13:26:21.343	3
Microsoft PowerPoint 2010	n/a	0
Microsoft Publisher 2010	n/a	0
Microsoft Word 2010	2012-12-05 06:54:23.44	2
Mobile CS Link	n/a	0
Planner CS	2013-06-22 09:30:35.667	9
Practice CS	2013-01-22 11:07:27.24	33
ToolBox CS	n/a	0
UltraTax CS 2011	2012-07-17 07:26:53.217	2
UltraTax CS 2011 Source Data Entry	2012-04-05 10:26:26.917	1
UltraTax CS 2012	n/a	0
UltraTax CS 2012 Source Data Entry	n/a	0

VIRTUAL OFFICE CS OFFERS ONLINE ACCESS TO ULTRATAX CS
You and your staff will enjoy anytime, anywhere access to software and data.

PAPERLESS ELECTRONIC PROCESSING

FILECABINET CS

Integrated with UltraTax CS, FileCabinet CS document management software is the answer to implementing a completely digital workflow or simply reducing the number of paper files in your office.

FileCabinet CS lets you organize, store and archive virtually any document on your computer's hard drive or network. Your clients' tax documents can be accessed, viewed and emailed with a click of your mouse.

The integration between FileCabinet CS and UltraTax CS enables you to access client files immediately. When working in UltraTax CS, all FileCabinet CS documents for the specific client are immediately available to you. You don't even have to open FileCabinet CS. UltraTax CS automatically recognizes the client and makes their documents available to you from within the UltraTax CS workspace in one click.

Imagine the time and cost savings...

Paperless Processing Increases Efficiency—It's simply cheaper and more efficient to produce, manage and distribute electronic documents rather than work with cumbersome paper files. Combining UltraTax CS with FileCabinet CS will save you thousands of dollars and hundreds of hours each year.

Email Accelerates Communication—With UltraTax CS and FileCabinet CS, you can email financial documents to clients and banks—providing faster service, with less effort on your part, at a lower cost.

ENJOY BIG SAVINGS

Save Time—Fulfill document requests immediately—whether it's prior-year tax returns for clients applying for a mortgage, documents for an IRS examination, financial statements or depreciable asset details for insurance coverage purposes. No copying or scanning required.

Save Space—You'll no longer need large, bulky filing cabinets or off-site storage facilities. All your files can be stored easily and economically on your hard drive or network.

Save Money—Your biggest savings will be your time, but you'll also save money.

- No need to spend money on storage space and file cabinets to store files.
- Save on paper and toner costs as the need for printing hard copies decreases.
- Save on the cost of stamps and other mailing supplies because documents can be transmitted via email.

Save Your Data—FileCabinet CS can also automatically create backups of your UltraTax CS data to ensure your data is always available.

The screenshot shows the UltraTax CS interface with a 2015 U.S. Individual Income Tax Return for David and Mary Miller. The form is marked as a 'DRAFT' with a blue stamp. Key information includes: Filing Status: 2 (Married filing jointly); Exemptions: 2 (Joan Miller, Daughter; Ellen Jones, Parent); Total number of exemptions claimed: 4. The software interface includes a file cabinet view on the left and a status bar at the bottom.

PAPERLESS DOCUMENT MANAGEMENT
FileCabinet CS automatically saves files to the appropriate client folder. Association folders in each client folder keep similar items grouped together logically.

Use the built-in stamp library to indicate the current status of a document.

COMPREHENSIVE TAX PREPARATION

Everything You Need to Enjoy a Smooth Tax Season

Whatever the task, UltraTax CS has the tool—from the initial collection of client data to sophisticated review, e-filing and final printing features.

ADVANCED CALCULATION CAPABILITIES

With UltraTax CS, you can handle any client scenario, no matter the level of complexity:

- **Instant, Automatic Calculations and Return Preview**—Calculate data as it's entered, so you can preview fully-calculated results as they'll appear on the government form. For firms using two or more monitors, you can enter data on one screen while viewing the continually updating forms on another.
- **Calculating Statements**—Offers a complete library of pre-defined calculating statements providing unlimited detailed data to support your entries. Or you can create customized calculating statements.
- **Extensive AMT Calculations**—Includes AMT versions of all necessary forms and calculations in both the 1040 and 1120 programs.
- **Extensive Passive Activity Capabilities**—Includes 8582, 8582-CR, AMT 8582 aggregations, significant and material participation, Form 6198 at-risk limitations and partner and shareholder basis limitations, when applicable.
- **Optional Oil & Gas Module**—Offers streamlined, consistent data entry for up to 12 oil and gas cost centers and 9,999 wells in 1040, 1041, 1065 and 1120 returns. UltraTax CS calculates and limits percentage depletion; tax preferences for percentage depletion and intangible drilling costs; and tracks for depletion on a detailed, well-by-well basis.
- **Multi-State Apportionment**—Enter all information in one place on multi-state business returns—saving valuable data-entry time.
- **Elections Library**—Includes the most commonly used federal elections, making it easy to notify the IRS of elections affecting your client's return and including them with the return.

EFFICIENT REVIEW TOOLS

UltraTax CS offers several features to conduct a thorough, accurate and efficient review of each return, every time:

- **Comprehensive, Linked Diagnostic Messages**—Be alerted to any outstanding issues or potential problems, including missing data and modifications required for both paper filing and e-filing. With one click, UltraTax CS opens the input screen in which you must enter or modify the data to resolve the diagnostic message.
- **Review Notes**—Make it easy to communicate with other staff members working on the same return and to flag important information for follow-up. Use notes to confirm information, explain a specific change, identify and flag tentative numbers and indicate where more source information is needed.
- **Tick Marks**—Allow reviewers to insert tick marks on each form, input screen or statement to indicate lines they've reviewed. If the value changes, the tick mark will change colors to indicate the original check is no longer valid and requires another review. Different colors can also be used to identify specific reviewers.
- **Override Amounts**—Override calculated amounts on tax forms if necessary and view a list of those overrides in the diagnostics. Overridden values appear in red for fast and easy identification.

"There's nothing you can't do tax-wise with UltraTax CS. We use it on any kind of tax return whether it's simple or complex, from a kid with a W-2 all the way up to a 20-30 partner partnership or with any business entity. Whatever UltraTax CS says, we go with it because I know it's going to calculate correctly. We've been using UltraTax CS since its inception and you couldn't pay me to change."

—Rick Petrucha, MI

COMPREHENSIVE BUILT-IN ASSET MODULE

Manage complex depreciation calculations and transfer depreciation and asset sales information to the appropriate form automatically:

- Asset information flows to the following federal forms: 2106, 3468, 4255, 4562, 4626, 4684, 4797, 6251, 6252, 8824, 8829, 8910 and 8911.
- Asset information flows to the following federal schedules: A, C, D, E, F, L and M-1.
- UltraTax CS completes most corresponding state data entry upon the entry of Federal amounts, automatically capturing differences and pushing them to applicable state forms and schedules.
- Asset state apportionments for 1120, 1065 and 990 clients flows to state returns.
- Depreciation adjustments for bonus and Section 179 flow to state returns.
- You can quickly produce personal property tax returns for the following states: CA, DC, FL, GA, IN, KY, MD, MI, NE, SC, TX, VA, WI and Puerto Rico.

POWERFUL CALCULATION CAPABILITIES

- **Mid-Quarter Determination and Calculation**—UltraTax CS automatically determines if mid-quarter calculation applies and recalculates depreciation if necessary.
- **Prior-Year Depreciation**—The system calculates and displays value along with prior depreciation of an asset based on information entered.
- **Unlimited Treatments**—Depreciate assets using tax, book, all 50 states, AMT, state AMT, E&P, ACE, state ACE or an unlimited number of custom treatments.
- **Auto Limits**
(Electric, passenger, light trucks and vans)
- **Automatic AMT, E&P and ACE**
- **Section 179 Property**
- **Salvage Value**
- **Section 280F Recapture**
- **Standard Mileage vs. Actual Costs**
- **Investment Tax Credits**

	Tax	CA	AMT	CA AMT	NY
Cost/Basis	2,581.00	2,581.00	2,581.00	2,581.00	2,581.00
Method	MACRS	MACRS	MACRS	MACRS 150% &	MACRS
Life	5.0	5.0	5.0	5.0	5.0
ADS Life					
Sec 179 Expense					
Salvage Value					
Credit/Amount					
Prior Depreciation					
Current Depreciation	2,581.00	516.20	2,581.00	387.15	516.20
Total Depreciation					
Net Book Value					

COMPREHENSIVE DEPRECIATION

Manage complex depreciation calculations and transfer depreciation and asset sale information to the form automatically. You can access depreciation data entry displays from any applicable activity folder just by clicking the mouse.

COMPREHENSIVE STATE CALCULATIONS

Inclusive state calculations within UltraTax CS allow you to accommodate:

- **Complicated Multi-State Depreciation Situations in One Return**—UltraTax CS automatically performs the full range of computations, no matter which combination of non-conforming states or how many you need.
- **The Calculation of Up to 50 State Treatments** and the related state AMT and state ACE treatments for each client.
- **Section 179 limits** for all states.
- **California C Corp** depreciation laws.
- **Pennsylvania Straight Line** depreciation laws (for S corps and partnerships).
- **Hawaii Excise Tax Credit**.

SOPHISTICATED DATA ENTRY AND SORTING TOOLS

- **Method/Life Wizard**—This timesaving data entry tool automatically fills in the methods and lives for an asset. Choose from a list of most of the Revenue Procedure 87-56's 141 asset classes, including Regular, Farm, Indian Reservation, Indian Reservation Farm and Governmental lists.
- **Disposal Wizard**—Walks you through disposal data entry, offers help on amounts that should be entered and supplies the appropriate form instructions, IRS publications, IRS regulations and IRS code sections for further clarification.

COMPREHENSIVE TAX PREPARATION CONTINUED

Comprehensive Monitoring and Management Tools

With UltraTax CS, you can manage all your client returns effectively.

ULTRATAX CS HOME PAGE

This single location lets you view a variety of information, like e-filing transmission status in real time, e-filing news, links to frequently used functions, links to product guides, staff monitoring tools, client profiles, software update information, forms approval information and more. And it automatically displays when you open UltraTax CS.

- **Client profiles** provide non-professional staff an at-a-glance window into client data, without having to open the client.

CLIENT STATUS SYSTEM

Maintain up-to-date statuses on all your clients' tax returns at any time. The system tracks the progress of any event, such as opening, closing and renaming clients, importing data, printing and more. And it automatically logs the date, time and person triggering each system-defined event. The Appointment Event option lets you schedule appointments via the status system. And you can define up to 50 custom items to track.

DATA MINING

Data Mining offers a powerful search tool to manage client services more effectively, while enhancing your firm's marketing efforts. With this built-in feature, you can easily identify clients affected by new tax laws or changes in your service, as well as sort and produce reports based on virtually any search criteria. UltraTax CS also comes loaded with more than 270 predefined queries or you can create your own.

You can also mail or email any of the system's predefined client letters for client engagements, tax planning services, firm privacy policy, appointment reminders or extension reminders. And you can create custom letters to meet your unique communication needs.

With data mining, you can:

- Identify clients affected by **new tax law changes**.
- Produce **sophisticated reports** for detailed internal analysis.
- Identify clients with **estimated payments** and generate reminder letters.
- Identify clients with **unused capital loss carryovers** for future years' investment strategies.
- Identify clients with **dependent children** to take advantage of Education IRAs.
- Identify clients with **potential minimum tax liabilities**.
- Identify clients who are **self-employed** to determine level of Keogh/SEP funding for maximum tax benefits.

BNA BRIDGE

The UltraTax CS BNA Bridge exports your client data files from UltraTax/1040 to the Bureau of National Affairs (BNA) Income Tax Spreadsheet. A client's federal and state data is transferred and converted to BNA format in a matter of minutes, so you can quickly compare tax information from different years and plan for future tax years. The BNA Bridge integration requires separate licensing.

FLEXIBLE CLIENT CORRESPONDENCE FEATURES

Word processing capabilities let you create your own letter or use predefined letters and invoice templates, so you can edit documents without ever leaving UltraTax CS.

You can also:

- Add customized paragraphs to personalize client communications.
- Modify fonts for emphasis.
- Print your firm's logo on letterhead for fast, professional-looking documents.
- Add predefined paragraphs based on client attributes.

The screenshot displays the UltraTax CS interface. On the left, a letter template is shown with a blue callout box. The letter is dated February 28, 2015, and is addressed to DLH&R Limited Partnership. The letterhead includes the PVM logo and the name PARNES, VELANO, MARTINEZ & CO., CPAS. The letter body contains a confidential notice and a list of services provided. A blue callout box over the letter text reads: "BUILT-IN WORD PROCESSING Create your own letter, edit a predefined letter, add your logo and more, without ever leaving the program." On the right, an invoice template is shown with a blue callout box. The invoice is dated February 24, 2015, and is addressed to Bill & Michelle Stephenson. The invoice lists various tax forms and their associated costs, totaling \$525.00. A blue callout box over the invoice text reads: "CUSTOMIZABLE INVOICING You can provide form-by-form pricing, list forms but show only the total invoice amount or just invoice the total for 'services provided'—whatever works best for you."

PROFESSIONAL, CUSTOMIZED INVOICING

You can specify how you wish to bill your clients: by flat fee, per item, per form or "the greater of." You can also specify how much detail you want your clients to see on each invoice, such as listing all charges for individual entries or forms, totals of charges or discounts.

Invoices prepared in UltraTax CS can be imported into Practice CS, our practice management software, which will then record the amount of the invoice and enable you to update and track the accounts receivable, invoice clients and accept payments online.

CUSTOMIZED COLLATION AND PRINTING

The printing and collation features in UltraTax CS help remove the tedious task of printing and packet assembly—saving you time and the expense of wasted paper.

- Print separate government, client and preparer return information to speed up the assembly process.
- Collate a copy of the non-resident state return behind the resident state return to support your credit for taxes paid to other states.
- Customize default settings to support your unique printing requirements and more.
- Use Microsoft Word® to edit letters on a client-by-client basis.

TAX PLANNING WITH PLANNER CS

Giving Your Clients Advice on the Future Adds Revenue and Dependence

With the ever-changing tax laws, tax planning has become a valuable service for your clients and a quick way for you to increase firm revenue. Planner CS makes it easy to analyze multiple tax strategies for multiple years. And you can communicate the analysis results to your clients using the extensive built-in reporting and word processing tools.

With Planner CS, you can:

- **Save time with integration** between programs—Planner CS imports client data directly from UltraTax CS and GoSystem Tax RS.
- **Ensure state-by-state compliance**—Built into Planner CS are state-specific tax calculations, allowing you to plan for any number of nonresident states which might apply to a client.
- **Analyze virtually unlimited alternatives** and years forward.
- **Apply percent or dollar changes** across the entire plan.
- **View the implications of different tax alternatives** as you make them using the unique Watch Window, which is customizable so you can easily monitor any key items you desire.
- **Carry forward applicable items** from one year to the next—automatically.
- **Produce professional-looking client communications** with built-in word processing capabilities.
- Choose from a number of included tax planning letters, or draft your own using the **Microsoft Word** interface.
- Use the standard group of reports or **customize a set of reports** for specific clients.
- Communicate your recommendations to your clients with the **built-in graphing capabilities**.

	2011	2012	2013	2014	2011	2012	2013	2014
Income	271,807	358,739	358,9		30	17,406	17,406	17,4
Adjustments								
Adjusted Gross Income	271,807	358,739	358,9		30	17,406	17,406	17,4
Itemized deductions?	Yes	Yes	Yes	Yes	Yes	No	No	
Standard / Itemized deductions	21,860	25,726	22,789	22,208	13,450	11,900	10,150	10,1
Personal exemptions	7,400	7,600	2,028	2,028	7,400	7,600	7,800	7,8
Taxable income	242,547	325,413	334,082	334,845	74,780	-2,094	-544	-5
Regular tax	57,495	84,293	96,654	97,128	10,944			
Alternative minimum tax	221	10,766						
Allowed credits								
Tax net of credits	57,716	95,059	96,654	97,128	10,944	0	0	
Self-employment tax								
Other taxes			985	985				
Total Federal Tax	57,716	95,059	97,639	98,113	10,944	0	0	
Total federal payments	73,305	73,305	73,305	73,305	14,057			
Refundable credits	3,080	2,941	4,119	4,119				
Underpayment penalty								
Federal Balance Due/-Refund	-18,669	18,813	20,415	20,669	-3,113	0	0	
Adjusted Gross Income	271,807	358,739	358,909	359,081	95,630	17,406	17,406	17,406
Taxable income	242,547	325,413	334,082	334,845	74,780	-2,094	-544	-544
Total Federal Tax	57,716	95,059	97,639	98,113	10,944	0	0	0
Federal Balance Due/-Refund	-18,669	18,813	20,415	20,669	-3,113	0	0	0
Total state tax	17,591	20,673	20,673	20,673	4,729	22	22	22
State due/-refund	5,781	8,783	8,783	8,783	1,249	22	22	22

- 1 View key information and see changes in the plan with the customizable and resizable Watch Window.
- 2 Double-click one of the green fields—also known as the “pulled fields.”
- 3 Preview the plan and review the results on screen. Then, print the entire plan or just one page.
- 4 View plan data by year or alternative.
- 5 Switch from federal to state modules in just one mouse click.
- 6 Customize your plans by rearranging or hiding columns.



WELCOME SERVICES PROGRAM FOR ULTRATAX CS

Help for a Smooth and Effortless Start

Our program is designed to give new users special care and attention during the transition to UltraTax CS—no matter what tax product you’re moving from. The program offers assistance, concrete action steps that thousands of new users have proven to be successful and access to an array of related resources, including:

- A dedicated team of sales representatives
- Specialized data conversion assistance
- Getting started help
- Training and tutorial guidance options
- And more

“I had a lot of reservations about switching over to UltraTax CS after using another software provider for over 20 years.

Now that I have used UltraTax CS for the last five years, I have only one regret...that I didn’t make the switch earlier.”

—W. Dana Lavelle, OH

COMPREHENSIVE AND ACCURATE CLIENT DATA CONVERSION

It’s Easy to Step Up to the Powerful Advantages of UltraTax CS

When you choose UltraTax CS, you’ll also get all the assistance necessary to make a smooth transition to your new software. High-quality, comprehensive data conversion services are available to convert client data from more than a dozen tax software programs to UltraTax CS.

- UltraTax CS converts data from the following systems: Drake®, Intuit® Lacerte®, Intuit ProSeries®, Orrtax, ProSystem fx, ATX™, TaxSimple®, TaxWise® and TaxWorks.
- We let you know what data can and cannot convert in advance, in writing—so there are no surprises.
- Our experienced staff has converted client data for approximately 10 million returns.

ANSWERS AT YOUR FINGERTIPS It's Easy in UltraTax CS

Just press **F1** to access general help about the active window or dialog.

PROMPT, COURTEOUS AND KNOWLEDGEABLE PRODUCT SUPPORT

Our professionally trained support staff of specialists will answer your questions with expertise. All of our support staff are based in the United States.

As an UltraTax CS user, you will receive:

- **FREE U.S.-based telephone support** with toll-free access.
- **Weekday support** hours from 9 a.m. to 8 p.m. Eastern Time and extended hours and weekend support during tax season.
- **Email support** for fast and convenient answers to your questions.
- **24-hour fax capabilities** for questions and suggestions.
- **Access to Community**—a private social network specifically for tax and accounting professionals.
- **Access to our Help & How-To Center** for convenient answers to your support questions via the Internet.

"UltraTax CS has made our work-life balance easier in our firm by allowing us to be more productive in the time that we are in the office.

Our relationship with support has been very good and they are very helpful. They are able to assess any problems we have, help us through it and get us back working again which, at the end of the day, is what we truly need."

– Greg Smith, IN

HELP & HOW-TO CENTER

[24/7 Searchable Product Support Via the Internet](#)

Here you'll find one-stop access to everything you need like information on new features, tips for increasing productivity or troubleshooting issues, content you previously accessed in the Knowledgebase and much, much more. Plus this resource offers a more powerful "smart" Google™-based search function to target your searches more precisely.

You can access the Help & How-To Center from within UltraTax CS, by pressing CTRL+Y, by choosing Help > Help & How-To or by clicking the Help button on the UltraTax CS toolbar and entering a search term in the field provided.

You can also access the Help & How-To Center from our website by visiting CS.ThomsonReuters.com/Help or by selecting the Support tab.

[Additional Features for Finding Information](#)

In addition to a standard search, the Help & How-To Center includes the following features:

- **Browse subjects**—Click the Browse Subjects button to view a list of subject categories about UltraTax CS. Click a subject to view a list of topics related to that subject.
- **Index**—Click the Index button to view an alphabetical list of keywords related to UltraTax CS. Click a keyword to view the associated topic.
- **Search options**—Click the Search Options button to open a page where you can perform the following searches:
 - **Search for information on all applications at once**—Widen your search to include content from the rest of our website by clicking the Search Tax.ThomsonReuters.com option.
 - **Search for information on a specific application**—Use the Select an application field to choose an application, enter your search terms and press ENTER.
 - **Focus your search by category**—Select an application, mark the appropriate category checkboxes, enter your search terms and press ENTER.



COMPREHENSIVE TRAINING AND CONSULTING OPTIONS

Make the Most of Your Software Investment and Maximize Firm Productivity

The CS Professional Suite offers an extensive selection of services that can help you get more out of your software investment, including:

STANDARD TRAINING

Our standard training is a great way to bring new staff up to speed, let experienced staff revisit specific topics and/or supplement custom training or consulting. Standard training options include On-Demand, Web, Classroom and Seasonal training.

CUSTOM TRAINING

We offer affordable custom training services that can be tailored to your firm's specific needs. Custom training is taught by our professional instructors and can be delivered either via web training or onsite in a classroom setting.

CONSULTING SERVICES

Our trained consulting professionals can analyze your firm's workflow processes, provide best practices and help you develop a successful implementation and rollout strategy for your CS Professional Suite software.

PROFESSIONAL SERVICES

Put the expertise of our software application consultants and IT experts to work for your firm. Our team can customize applications and data to do exactly what you need, create customized reports, migrate and convert data and even build utilities and tools that can assist your firm with application integration and other technology needs.

ANNUAL SYNERGY CONFERENCE

At our SYNERGY Conference, we offer training at all levels of expertise in a variety of formats, including hands-on, lecture-style and informative roundtable discussions. For more details, visit our website:

[Tax.ThomsonReuters.com/CS-SYNERGY](https://tax.thomsonreuters.com/CS-SYNERGY). Professional accreditation is available.

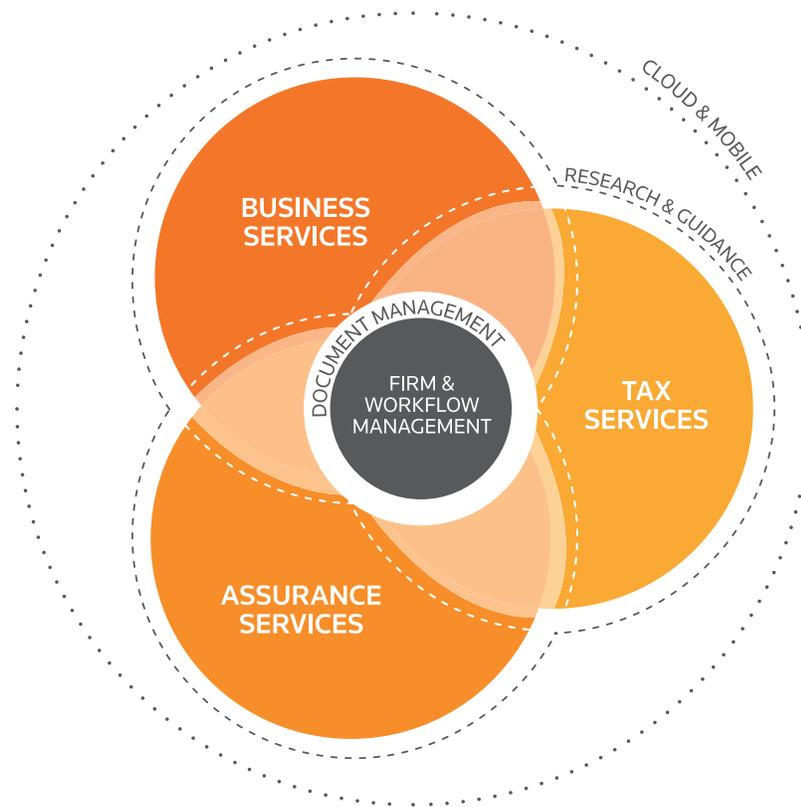
For more information on training and consulting or to register for courses, visit

[Tax.ThomsonReuters.com/CSTrainingConsulting](https://tax.thomsonreuters.com/CSTrainingConsulting), email us at **CS.Sales@ThomsonReuters.com** or call **800.968.8900**.

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INTEGRATED SOLUTIONS

CS PROFESSIONAL SUITE®



- BUSINESS SERVICES**
 - Accounting CS®
 - Accounting CS Client Access
 - Accounting CS Payroll
 - myPay Solutions®

- TAX SERVICES**
 - Fixed Assets CS®
 - GoSystem® Tax RS
 - Planner CS®
 - ToolBox CS®
 - UltraTax CS®
 - Workpapers CS™

- ASSURANCE SERVICES**
 - AdvanceFlow®
 - Workpapers CS

- DOCUMENT MANAGEMENT**
 - FileCabinet CS®
 - GoFileRoom®

- FIRM & WORKFLOW MANAGEMENT**
 - FirmFlow™
 - Practice CS®

- CLOUD & MOBILE**
 - CLOUD**
 - NetClient CS®
 - SaaS for the CS Professional Suite
 - Virtual Office CS®
 - Web Builder CS®

- MOBILE APPS**
 - Mobile CS®
 - myPay Solutions
 - NetClient CS®

- RESEARCH & GUIDANCE**
 - Thomson Reuters Checkpoint®

800.968.8900
 Tax.TR.com/CS
 CS.Sales@ThomsonReuters.com

