

A typical **first year** with UltraTax CS in these seven steps



1

Purchase
UltraTax CS



2

Meet your Customer
Success Specialist



3

Complete your customized
online Setup Guide



4

Attend training
(online, in-person,
or on-demand)



5

Attend SYNERGY



6

Go through your
first tax season
using UltraTax CS



7

Renew UltraTax CS
and evaluate other
CS Professional Suite
applications