

Tax & Accounting

The Many Faces of CCH Solutions

Inspired by One
Common Goal —
Success



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Inspired by Success and Integration

Challenges to better serve clients, effectively manage the business and mitigate risk are at the center of a future-ready firm. Wolters Kluwer is helping thousands of customers tackle these challenges, giving them an edge on the competition and a way to be more profitable.

The anytime access and five integrated modules of CCH Axcess™ — CCH Axcess™ Tax, CCH Axcess™ Document, CCH Axcess™ Portal, CCH Axcess™ Practice, and CCH Axcess™ Workstream — as well as the integration with other Wolters Kluwer solutions such as CCH® IntelliConnect®, CCH® IntelliConnect Browser Search, CCH® ProSystem fx® Engagement and CCH® ProSystem fx® Scan with AutoFlow Technology, yield workflow efficiencies and happier clients for our customers. This is evident in the stories shared throughout the following pages and by visiting [CCHGroup.com/Faces](https://www.cchgroup.com/faces) today.

As tax and accounting professionals ourselves, we know the value of dollars and cents, but the real measure of our achievement lies in the satisfaction of our customers. Thank you for your feedback and your continued business — we'll keep doing all we can to meet and exceed your expectations.

— Wolters Kluwer Staff



Grow



“I would definitely recommend CCH Axxess to other CPA firms.”

Curtis P. Patalano, CPA

Owner, Curtis P. Patalano, CPA, LLC, Franklin, Massachusetts

“I’m very happy with our recent decision to switch to CCH Axxess from another software vendor, especially with regard to the CCH Axxess Document module. CCH Axxess has an extremely user friendly interface, was easy to install, updates are automatic and non-intrusive and the mobile app makes me even more efficient and productive on the road. I now wow my clients by answering their tax questions wherever I am.

Here’s an example: Some of my clients and I serve on the board of directors at a local bank, and we are able to use time before and after meetings to chat about business. Being able to access their tax returns and other documents right on my mobile phone through CCH Axxess impresses them, and also gives me the opportunity to reassure these clients that their personal information is safe thanks to the solution’s advanced encryption methods. Effectively concluding business in this manner gives me a lot more free time when I’m back at my desk. At the office, accessing files is now a simple matter of logging into CCH Axxess. So when a client calls, we can service them immediately. By virtually eliminating the need for administrative staff to file, then search for and retrieve client files before we can help a client, we’re saving countless hours of administrative time and simultaneously making every billable hour more productive.”



“Having access to the most recent tax data on the fly is immeasurable.”

Jonalyn Sullivan, CPA, MST

Principal and Co-Founder, Sullivan and Gannon, LLC, Chelmsford, Massachusetts

“I would recommend CCH Axcess to my colleagues. We are very satisfied with our decision to go with CCH Axcess, partly thanks to the easy installation process and easy updates. The updates are automatic and do not interfere with our work. We never have to worry if we’re using the most up to date tax release in the heat of busy season. We can now respond to client inquiries and finalize returns without having to plan ahead if we’re going to be out of the office.

CCH Axcess is hands down the best product on the market from a technical perspective. It puts everything in the right place in regards to how you actually fill out a tax form. Because of its technical superiority, the software can handle harder tax returns. Other companies’ software doesn’t say, ‘hey that doesn’t smell right,’ where CCH Axcess does.”



“If it’s easy to use and easy to learn, that’s a huge thing for firms of any size.”

Walter J. Kero, CPA-ABV

President, Kero, Byington and Associates, Missoula, Montana

“I recently transitioned from a 100+ employee firm with a fully supported IT department to a small office of four. As a result, I needed to get more done with fewer people and resources. I knew the key was finding a reliable tax software designed to support our fast-paced, highly efficient and tight workflow model. The solution was CCH Axcess Tax.

Our team benefited from the ease of entry, increased calculation speed, quick update process and user friendly interface. I appreciated the awesome support team, ease of conversion, level of client data security, information accuracy and overall program reliability. Our clients have high expectations and CCH Axcess Tax allowed us to exceed those expectations in an enjoyable and profitable manner. Based upon our experience, I highly recommend CCH Axcess Tax for any firm, including CCH® ProSystem fx® Tax users. I have no plans to revert to wasting time installing programs, fighting with networks and playing techie.”



Nancy Ekrem, CPA

Principal, Dewar Meeks + Ekrem PC, Edmonds, Washington

“The preparers are flying through their work. [CCH Axxess] Workstream has really helped us keep track of projects in real time. Our administrative staff spends much less time storing the finished product and figuring out where a project is in process. Before CCH Axxess, we did a lot of administrative work to keep our system strong, like weekly updates to the tax software. Something would always go wrong, and that slowed everybody down, wasted my time and made me crazy. I’m so thankful we don’t have to deal with that anymore.

The transition to the cloud was really a no brainer for us. We could have more flexibility; we would save time in computer maintenance and reduce our need for server infrastructure. I saw that as a win/win/win! We save time, we save money and we don’t have to deal with administrative stuff. CCH Axxess provides technology that allows us to stay in this marketplace and be prepared for the next marketplace. Wolters Kluwer has been a fantastic partner.”



Christopher M. Salisbury, CPA/PFS, CFP, CSEPP

Partner, Smith+Salisbury, PLLC, Charlotte, North Carolina

“Our process is much quicker as far as turnaround time with returns getting done faster. All these pieces together increased billing and lowered AR results, and we can deliver returns and invoices through CCH Axxess Portal quickly. Our being able to grow the firm has been all about using efficiencies in the technology through Wolters Kluwer software.

That 22 percent [growth rate] is a result of more revenue streams, not from charging more per hour or per return. Take that across 1,100 files. Even if it’s only five minutes per client for eliminating the import of tax information and the electronic shuffling around from folder to folder, that quickly adds up. In just one year, that alone paid for the software just on the physical supplies and postage, not including the time-savings for our staff. The numbers don’t lie. I think these growth rates would motivate anyone. Additionally, it removes the monotony of tasks, and the paper or digital shuffling, which improves satisfaction with work.”

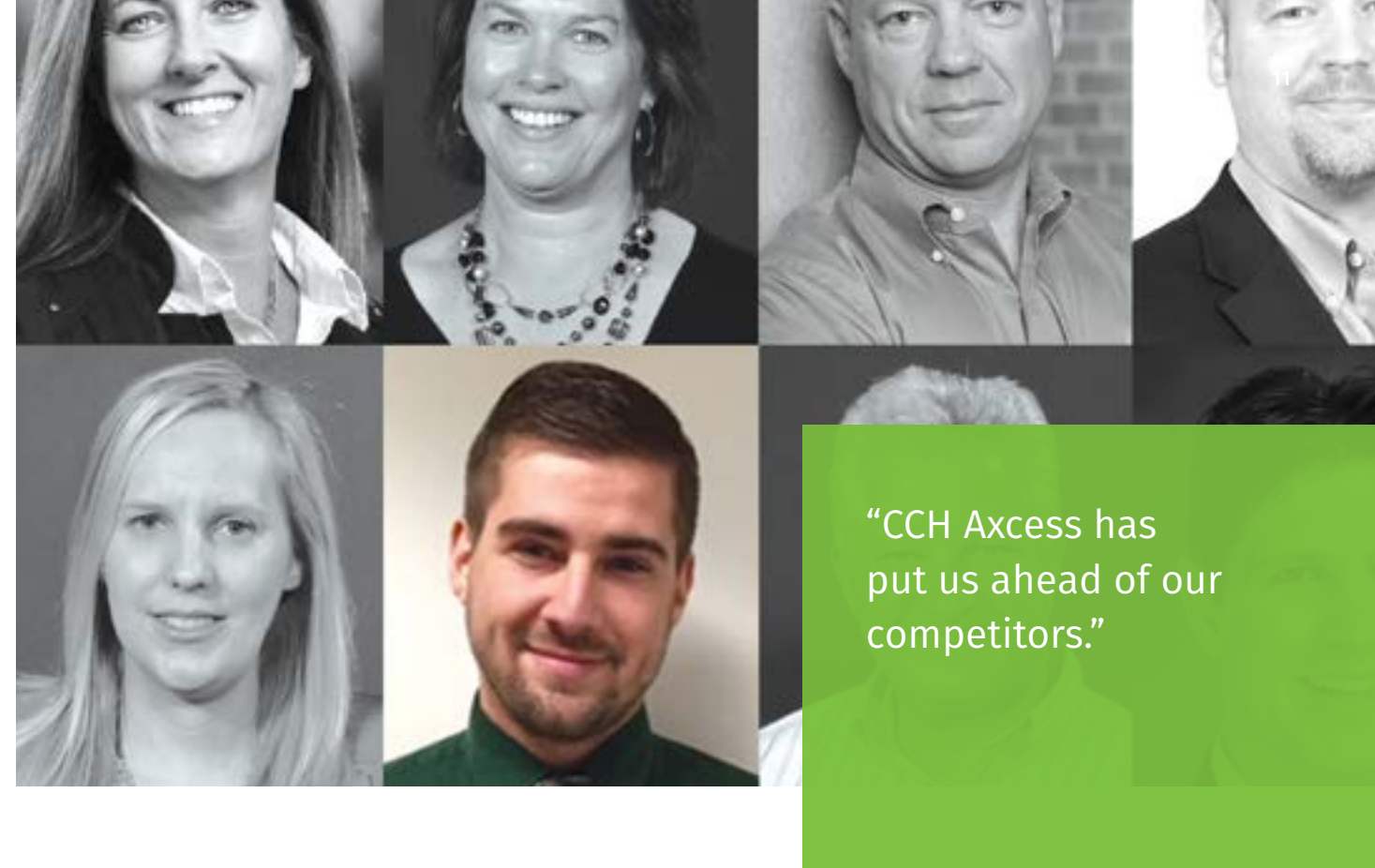


Brett Mills, CPA

Partner, McCarthy, Rose & Mills, LLP, Dallas, Texas

“CCH Axxess Workstream is huge. It has the ability to transform a firm, so this implementation should not be taken lightly. It requires a champion, someone with the authority and leadership skills to obtain buy-in from the entire firm. We feel that these software solutions from Wolters Kluwer have made us more efficient, more productive and have allowed us to do more work in less time.

We turned to Wolters Kluwer because other companies were stagnant, and we could see the positive things Wolters Kluwer was doing. Efficiency gains allow us to re-invest in our firm, grow our practice and be true advisors to our clients.”



Andrew Stepp

Operations Manager, Thomas St John Group, Los Angeles, California

“We can turn over a project with all support documents, which is unique to Wolters Kluwer. That’s a huge time saver that’s hard to quantify. CCH Axxess Workstream helps us with the way we set up projects and the way work moves through our systems. Our client-facing team creates the project. Our production team goes into the drawer [electronic file folder in the cloud], picks up the projects, looks at the budget and due dates, and assigns it to the right department and people. It’s a very seamless process.

If we have a client who is international (a lot are) and they are in Los Angeles, we can print the documents there that we need for a client meeting. Likewise, if a client is in the U.K. for a week, staff members there can print the documents they need. With the cloud, we don’t have hard copies sitting in one place. That was a wow moment and demonstrated the huge value Wolters Kluwer has brought to the service we can provide to our clients.”



Manage



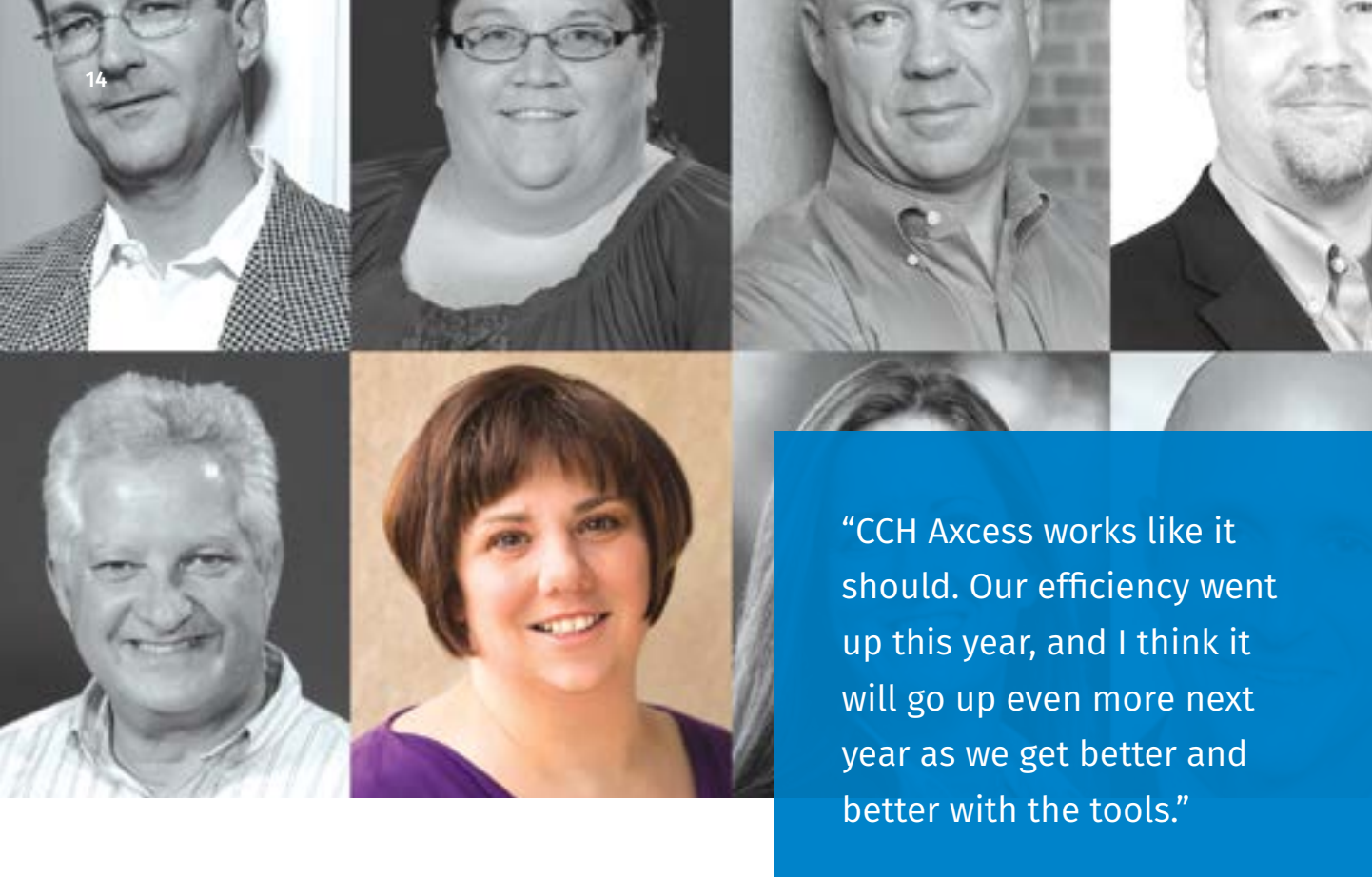
“We love how the Portal, Document and Tax modules integrate and move data seamlessly.”

Michael Alexander, CPA

Managing Partner, Kolbrenner & Alexander, Greenwich, Connecticut

“I would highly recommend CCH Axxess to others considering it. We’ve used CCH Axxess for over two years now and, overall, we are very pleased with the increased efficiencies and productivity its helped our firm reach. In the era of ‘it is hard to raise prices,’ using CCH Axxess is keeping me even with my profit margins thanks to more streamlined processes. We love how the CCH Axxess Portal, CCH Axxess Document and CCH Axxess Tax modules integrate and move data seamlessly. The solution’s speed and performance are good, and the user-friendly interface makes it easy to learn.

We are huge believers in the integrity and security of the cloud, and cloud-based solutions like CCH Axxess make it extremely convenient to work from anywhere. In fact, I’ve worked from overseas for most of the past year and my productivity was close to 100% regardless of my location thanks to CCH Axxess. Plus, I thoroughly enjoy not having to manually update the program every Sunday like we did prior to implementing. And, an additional bonus is that by promoting a truly mobile employee concept like this at our firm, we are attracting younger professionals who want to work this way, too.”



“CCH Axxess works like it should. Our efficiency went up this year, and I think it will go up even more next year as we get better and better with the tools.”

Jody Padar, CPA, MST

CEO & Principal, New Vision CPA Group, Mount Prospect, Illinois

“When I first started using the cloud, people thought I was one of those crazy disrupters. When new clients sign on with us today, they know part of our expectation is that they’ll work with us in the cloud. They won’t have the option of continuing in their old ways. That’s our philosophy. The UltraTax CS® cloud product was confining. We were spending too much time getting in and out of the cloud in our everyday work. As we grew, we needed more sophisticated tools, so our option was to go to a private cloud or find a new solution.

Being able to go from CCH ProSystem fx Scan right into CCH Axxess Document was a huge timesaver for us. Having it jump into the cloud was really nice! CCH Axxess Workstream gives me the insights I need to be on top of everything that is happening in my firm and to manage my people better. I know where things stand and can see if anyone may need more direction or help. I can see instantly how to help them move their files along without having to open the returns.”



“CCH Axxess Tax has streamlined our firm operations for the better.”

Sean Rogstad, CPA

Shareholder, Ubelhart, Rogstad & Associates, P.C., Chantilly, Virginia

“We are very pleased with CCH Axxess Tax. We find it really convenient in that we never have to update the tax application; it’s done for us automatically via the cloud by Wolters Kluwer. What’s also great is that as long as we have an Internet connection, we have access to our files and data, and we can work 24/7, anywhere, anytime. In this day and age, everyone wants to go to the cloud, while having peace of mind knowing that their information is secure. We’re no different, and it puts us at ease knowing that Wolters Kluwer is handling all the data security because we trust them as a business partner.

That trust allows us to openly share the data security measures involved with our clients, and doing so reinforces their decision to go with us for their tax prep and compliance needs. In fact, it’s something we use as a talking point, because one of my former employers had a break-in where servers and hardware were stolen. Ever since, I’ve believed that having data stored in a secure data center — rather than on-site — is a positive thing. I also like the fact that CCH Axxess Tax prompts me to change my password after a set number of months as that reinforces the fact that security is taken seriously and is reviewed often. CCH Axxess Tax also offers us the flexibility we need to turn a profit and expand our operations if needed. For example, the package we’re using gives us access to up to 500 returns, and helps us run reports to see what’s coming due, in preparation or review, waiting on e-file forms or ready for approval and sign-off.”



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“I would strongly recommend CCH Axxess to other CPA firms.”

James McNeeley, CPA

Principal, Maner Costerisan, Lansing, Michigan

“Our firm recently implemented CCH Axxess, and we are very happy with that decision. The installation process is very easy. Updates are automatic and not intrusive. It is very user-friendly and intuitive, and we are quite happy with speed and performance. Additionally, the mobile app is great when you are out of the office and need to respond to a client’s email or if you need to share with a client information you didn’t to bring to a meeting. I recently met with a client for lunch just to discuss current year operations and overall business performance. During the meeting the client had specific questions about his prior year tax returns and I was able to pull them up immediately with the mobile app.

It looked like I had been prepared for the question all along! More of our staff are beginning to have alternative work schedules that require them to be out of the office or work from remote locations. CCH Axxess has made that process much easier. There’s no doubt that questions arise all the time especially when our staff is preparing an extreme volume of tax returns. With the integration between CCH Axxess and CCH IntelliConnect Browser Search, the staff can immediately find an answer by clicking on CCH IntelliConnect Browser Search from the CCH Axxess Dashboard. Just like that, they instantly have the answer and can then continue completing the return.”



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“CCH Axxess Document ... has completely changed the way we do things.”

Matt Svendsen, CPA, MST

Vice President - Business and Investment Holdings, Pohlad Companies, Minneapolis, Minnesota

“CCH Axxess has been a very helpful tool for our family of businesses, because it allows us to access our documents and files whenever and wherever they’re needed. If something is needed at a certain time, everyone and anyone can get to that document — not just me. It’s also helping us work more efficiently. For example, routine tasks, like the reconciliation of monthly bank statements, are now being finished faster than ever before — something we recognized after just a few months of using the software.

CCH Axxess Document helps us the most, because it has completely changed the way we do things. By using it on a day-to-day basis, I’ve noticed that the firm’s administrative personnel have become much more efficient and are able to take on more responsibilities. Furthermore, before we implemented CCH Axxess Document, multiple times a day someone would come into my office looking for a file. Now that doesn’t happen. And with the mobile app, everything is right at our fingertips. If you need anything on any one of the businesses, it’s right there for us.

We use CCH Axxess Workstream mainly for the tracking of due dates, budgeting and tax files. It’s especially helpful because it lets us link all related project files together, so when I go looking for information, all pertinent files are together in one place. All told, CCH Axxess has been a real time saver.”

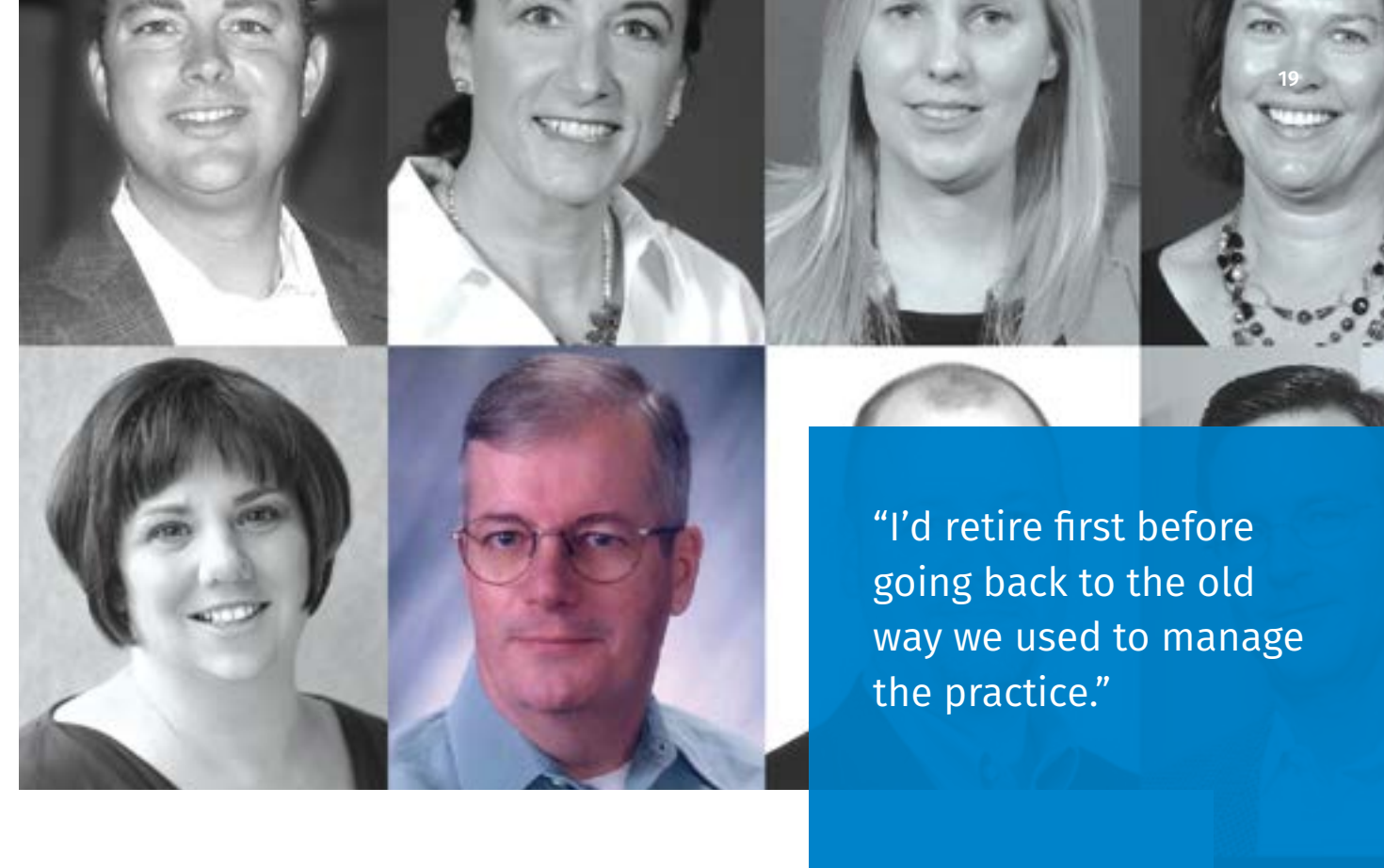


Suzanne LoBiondo, CPA

Founder and Partner, C&L Tax and Accounting Services, LLP, Merrick, New York

“When you are a small firm, your clients kind of expect you to be able to do it all. One of the biggest advantages to CCH Axcess being in the cloud is having everything right at your fingertips. If a client calls with a question, you do not have to go looking for files. From basically anywhere, you can call the client back and be able to look up something for them from their file. I think we are definitely giving better client service with CCH Axcess.

CCH Axcess enables us to handle any type of client. We can offer big firm experience at a smaller firm price, because we came from a big firm. So, we have the expertise to handle more sophisticated work. However, you have to have the right software in place to do that, and CCH Axcess gives us the technology to help clients with complex needs.”



Bill Gaines, CPA

Principal, Gaines & Company, Inc., Zachary, Louisiana

“Our office had reached the point where we needed to connect more fully, move toward a paperless environment and improve efficiencies. Having been with Wolters Kluwer for over 20 years, we were excited to hear about CCH Axcess and couldn’t wait to try it out. Compared to our process before, using CCH Axcess is like night and day. CCH Axcess saves us time to the tune of around two hours a day, which means we can either serve more clients or head home at a reasonable hour.

I have a remote office about 20 miles away, and CCH Axcess allows me to keep those two offices connected — something I wouldn’t able to do without the cloud. It doesn’t matter where I am — I can be anywhere in the country and still have immediate access to all of my information at any time. Making the move to CCH Axcess was the right decision for us.”



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“I went to CCH Axxess because I wanted a tax product that is first in its class.”

Kevin Krueger, CPA

Founder, Krueger & Associates, P.A., Tampa, Florida

“I like only going to one place — the client dashboard. People move, especially in Florida. It is a very fluid society. It is really nice to go to one place and make one change. You know that the next time you open that tax return or anything related to that client, the change is going to be there. Once you use CCH Axxess modules together and see the synergy that they create, you are not going to look back. I joke that if I pulled into my parking lot one day and someone said they took away all of my CCH Axxess products, I would probably just get back in my truck and drive home.

Five years ago, there was no possible way to do these things outside the office. If I got a question on a Thursday, I would have had to wait until the following Monday to answer it. With CCH Axxess, I can already have it done. It’s off the desk. I do not have to worry about it. More important, you get your client answers. That’s really what they are after.

Regarding Research...

With CCH IntelliConnect Browser Search I can now do in one step what used to take many, plus I don’t have to take the extra steps to log into CCH IntelliConnect since CCH IntelliConnect Browser Search takes me right to the answer I need.”



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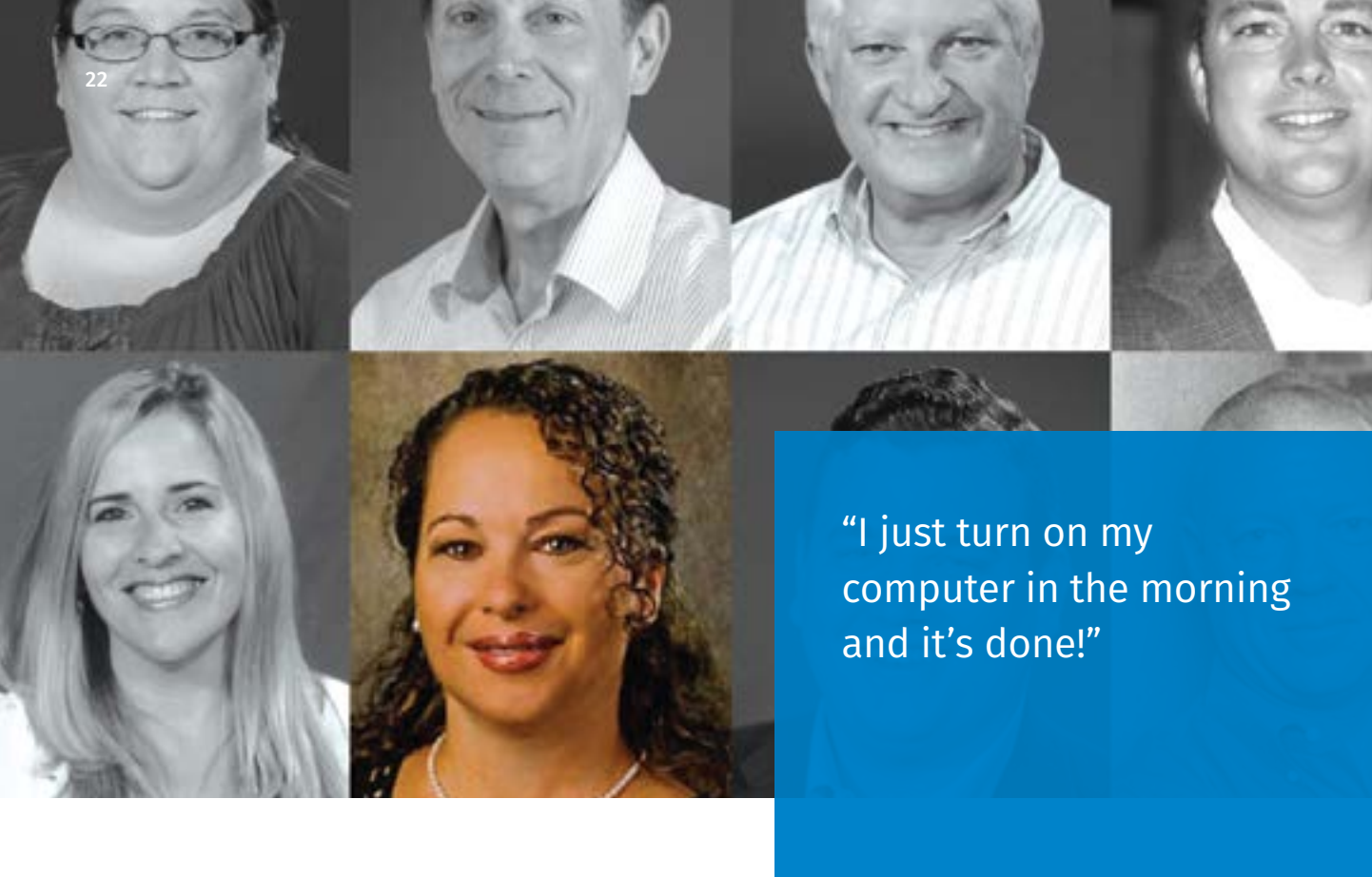
“Anybody in the firm has quick and easy access to any document at any time.”

Sam Armour, CPA, CVA

Partner, Armour Vickerman, PLLC, Tumwater, Washington

“We have hundreds of boxes of client paperwork. Looking long term, we didn’t want to spend thousands of dollars in storage fees over the life of our firm. There are different degrees of going paperless that make sense for one firm over another. We wanted an environment that begins when the paperwork comes in the door, so that when we’re doing the work, it’s paperless.

We just felt that going paperless would give us that competitive edge, plus it’s the way the industry is going. All of the big four are paperless. The national firms are paperless. It’s just a matter of time before that trickles down to the local firms. The digital files are stored in [CCH Axxess] Document, a Cloud solution for file storage and retrieval. We can also access files when we’re out of the office. We all love being paperless. We’re excited to push it to the next level and get more and more clients on Portal so that eventually, our deliverables will be through [CCH Axxess] Portal, and we’ll be closer to our 100% paperless goal.”



Toni Anne Rucker, CPA

Owner, Toni Anne Rucker, CPA, PLLC, Raleigh, North Carolina

“I love the program. It’s very easy to navigate and very user friendly. To me, it’s the Cadillac — it’s the best of the best. [CCH Axxess Tax] helps me present a tax return to my clients that is accurate and professional.

One of my goals when I started my own practice was that I wanted to use the latest and greatest technology to keep up with the younger generation coming out of college and to keep myself updated with the latest IT. [CCH Axxess] Document is an excellent software for me because I don’t have to worry about performing a backup on my end. I’m not in charge of that — Wolters Kluwer is.”



David Rook, CPA

Chief Operating Officer of Assurance and Advisory, Weaver, Houston, Texas

“We wanted to take what we saw as the best audit products and approach available on the market, and then use that Integrated Audit Approach to drive efficiencies. I think we’ve achieved that. Now we’re building the list, not merely doing a list. Also, when a risk area is identified, CCH ProSystem fx Knowledge Coach alerts the auditor if the procedure is not properly linked to the risk. That helps us ensure we stay focused on the right areas and do an adequate amount of work.

We were interested in the integrated approach of the audit software actually being embedded within CCH ProSystem fx Engagement because it makes the process incredibly efficient. I like how the product links between the risk assessment and audit programs and also updates changes throughout all affected workpapers. From a firm leadership perspective, I felt confident that we could produce more efficient and effective audits than before.”



Protect



“Our clients love the fact that the auditors can test documents, review leases and contracts, all through Portal access.”

Ryan Hagan, CFE, CPA

Nonprofit Audit & Accounting Advisor, Altruic Advisors, PLLC, Broomfield, Colorado

“We’re very happy with our investment in CCH Xcess because it makes it really easy for me, our staff and our clients to find, share, transfer and keep track of documents. We cater to nonprofit organizations who have a fiduciary responsibility to safeguard these documents. The CCH Xcess solution offers us the security, flexibility and scalability to fit our many needs, and keep us extremely organized. Since data security is a very big concern for us and for our clients, we don’t want our clients attaching sensitive files to emails and sending them to us via the Web. Rather, we strongly encourage them to send us their information via upload to CCH Xcess Portal, and they really seem to embrace and appreciate the way the technology makes it easy to do so.

CCH Xcess also helps streamline our internal processes by simplifying our accounting clients’ audit fieldwork. For example, we make sure all of our auditors have access to CCH Xcess Portal so that they can use it at any time during the audit. We have found that this significantly reduces time in the field which, in turn, allows our clients’ staff to be more productive. And if we encounter any problems, Wolters Kluwer Tech Support has been really top-notch when it comes to supporting our organization.”

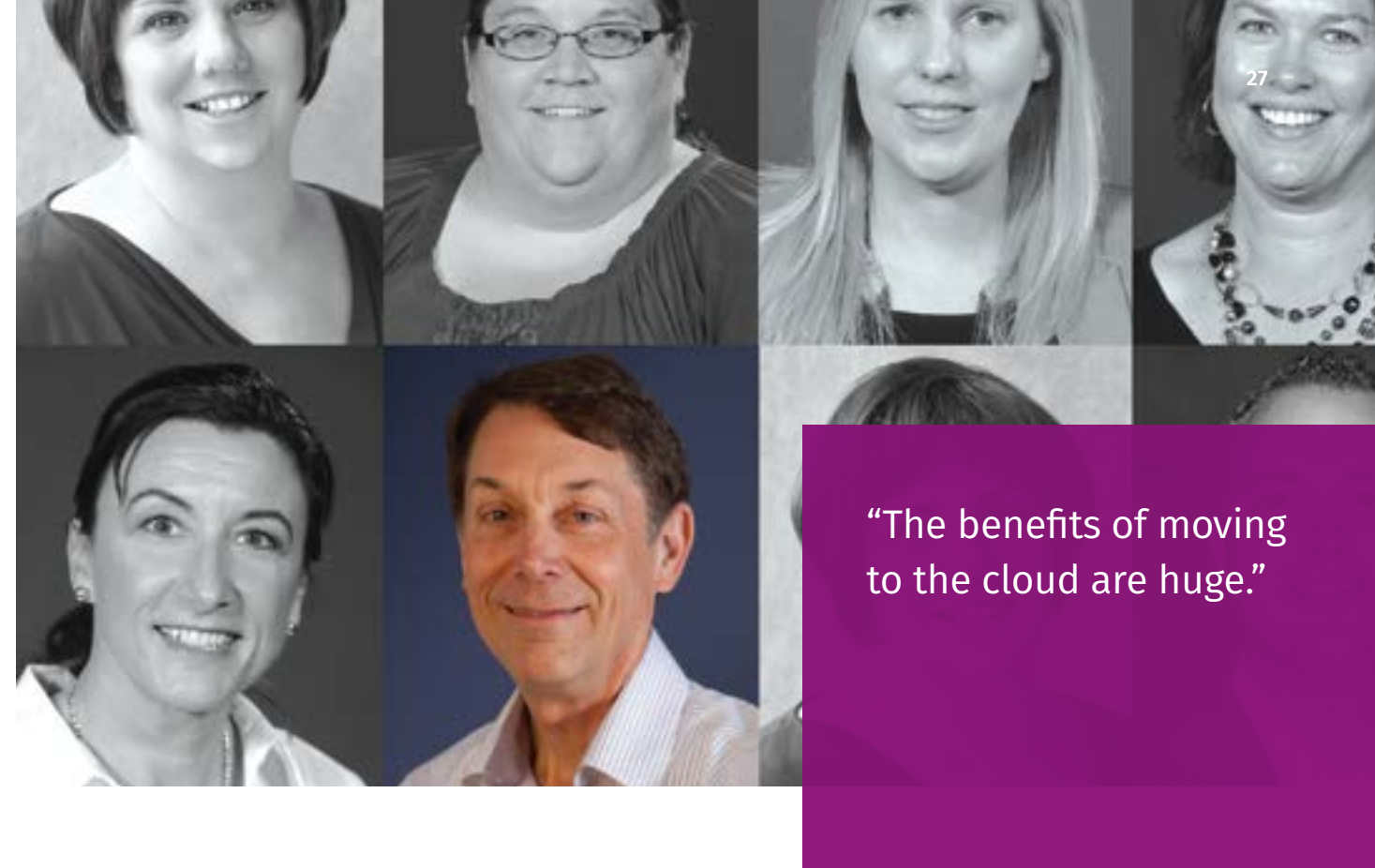


Kim Fichera, CPA

Founder, Fichera & Company, CPAs, Carlsbad, California

“CCH Axcess has provided my practice with huge efficiencies that save me time, eliminate hassles and give me peace of mind. CCH Axcess Document saves a ton of time by eliminating the need to go into paper files and file cabinets. I really couldn't imagine not using it because the cloud-based version provides me with access to everything I need from my home. The CCH Axcess Portal module enhances our reputation with clients and they end up thinking that we're bigger than we are. Portal makes me look cutting edge, like their bank and their financial advisor, because they can get to their tax returns and financial statements faster, easier and securely.

In fact, every time we turn someone onto Portal, we get fewer phone calls, which translates into increased efficiencies and a more professional image for the firm. Using Document and Portal in tandem allows me to respond quickly to clients, and people love that. The technologies also eliminate stress because it reduces non-billable time spent doing administrative things, which can be a hassle. I also like having my client information in the cloud and in a secure data center rather than on servers that are kept in the office. CCH Axcess is a game-changer in that regard, because the thought of servers crashing or being stolen used to keep me up at night. Not to mention that there's also more efficiency managing the data and moving the data between apps when it's in the cloud.”



Jake Jacobs, CPA

Principal, McDonald Jacobs, Portland, Oregon

“I am aware of firms that have had to deal with a tornado, hurricane or super storm, and when they were in the cloud, the firm survived. And when they didn't have cloud-based software, the firm had significant challenges. We wanted to get into the cloud for business recovery and continuity.

Instead of being out of commission with servers down, we are able keep working. That's invaluable. Additionally, the convenience of staff members being instantly productive from anywhere is revolutionary. If a client needs a tax return again, and we can put it on CCH Axcess Portal for their convenience, that's good customer service. It's convenient and more efficient.”



Jim Bourke, CPA, CITP, CFF, CGMA

Partner, Withum, Silver Spring, Maryland

“Many things affected our decision to go to CCH ProSystem fx Knowledge Coach. We looked at the changes in our profession and how competitive it is. You have to be living in a box to not realize that when you’re out there preparing audited financial statements, it is highly competitive. Pricing on audits and on reviews are all over the place. So we asked, ‘What can we do differently?’ We wanted to make sure we covered the standards. We wanted to make sure that we did what we needed and were expected to do. And at the same time, we wanted to be competitive and more profitable. We realized that the checklist approach to audit work is not the most efficient or productive way to go through the audit.

Standards don’t say that you have to use checklists. Knowledge Coach is a different process; it’s not checklist based. Are the standards covered? Absolutely! This is a peer review year for us. The Knowledge Coach solution and KBA titles have gone through and passed the AICPA peer review process. All of the standards are covered.”



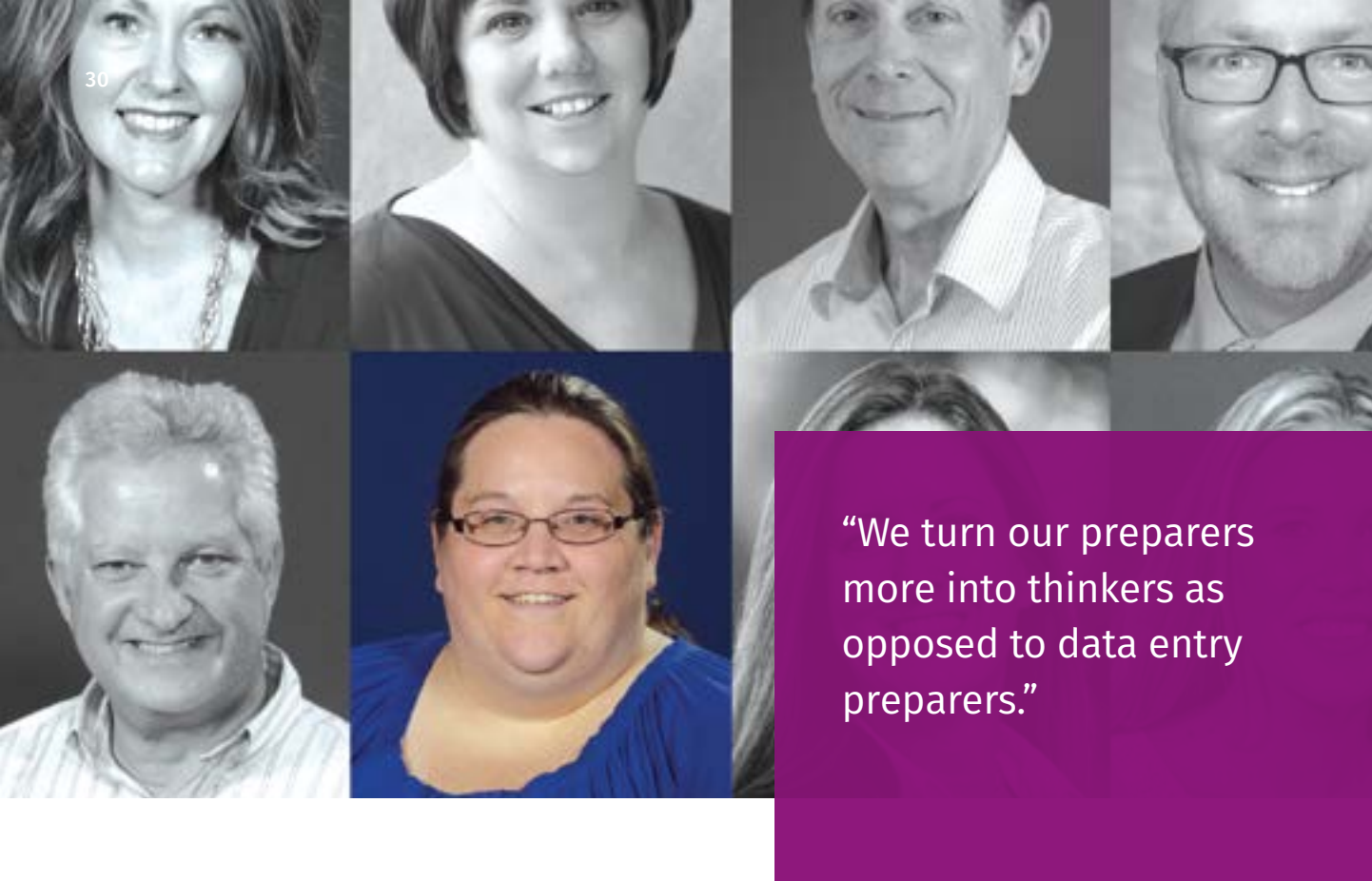
Brian Gottschalk, CPA

Tax Partner, GellerRagans, Orlando, Florida

“CCH ProSystem fx Scan cuts down on the time needed to situate and organize files, likely saving 15 percent or more on every single tax return. Scan also makes reviewing returns faster because everything is in order, highlighted, tick-marked and referenced. On the tax side, CCH ProSystem fx Engagement reduces time spent recreating spreadsheets for a time savings of somewhere between 20 to 40 percent per return. This is especially true when we have information that’s populated year-to-year. If adjustments to a return are needed, the changes to financial data that we enter into CCH ProSystem fx Engagement automatically updates in CCH ProSystem fx Tax, which means that we don’t have to do extensive rework. Ultimately, it helps us retain clients because of the prompt level of service we can provide.

Having an easy way to look at tax regulations helps our younger tax associates. Wolters Kluwer breaks down the information, in clear-cut language, making it easier to understand.

Ultimately the biggest benefit of Wolters Kluwer’s software solutions is the accuracy. We do not have to worry about checking and double-checking every little thing. We trust what’s being done by the software. I would not have the same level of trust in other companies as I have in Wolters Kluwer.”



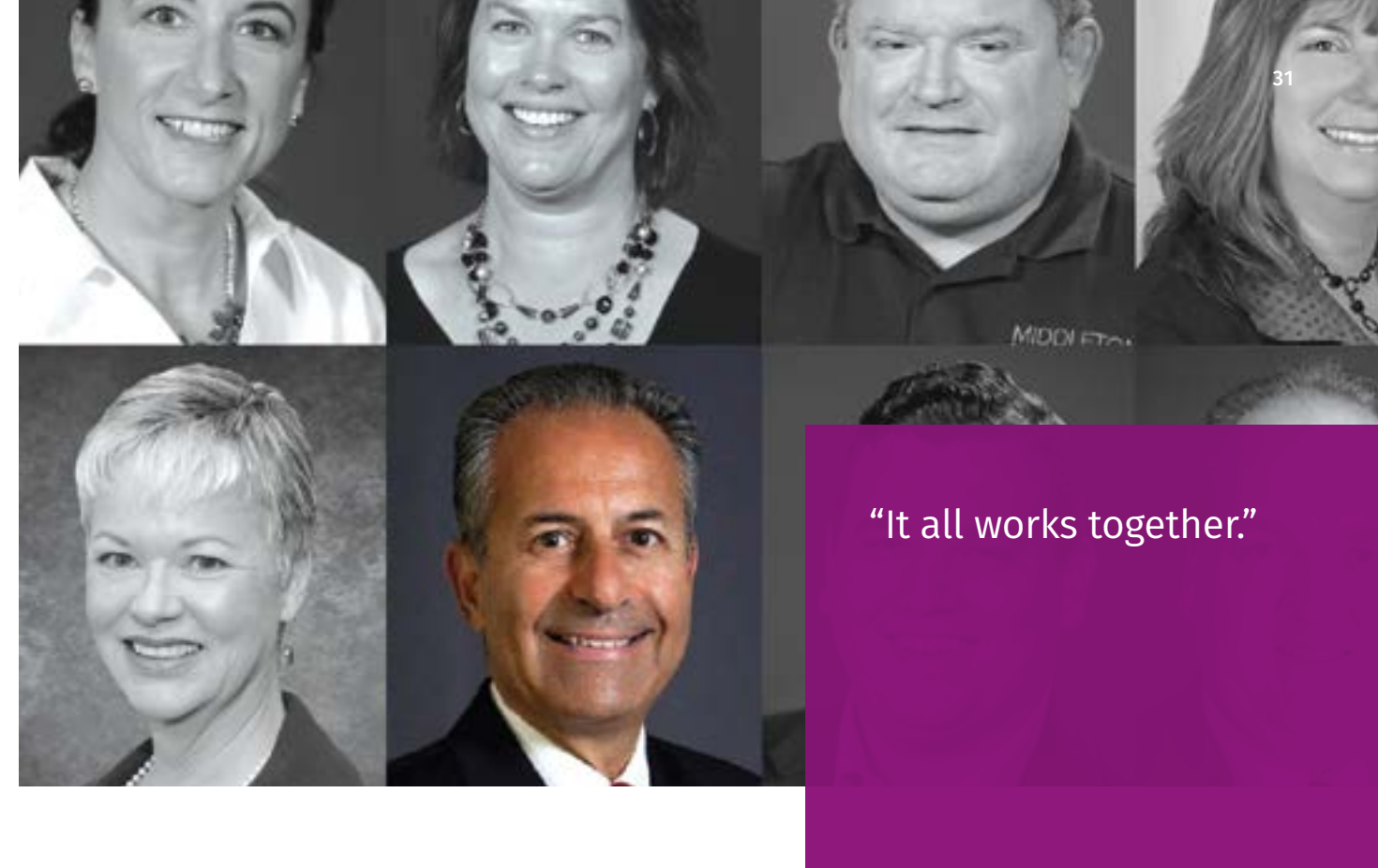
“We turn our preparers more into thinkers as opposed to data entry preparers.”

Kristen Simpson, CPA

Tax Partner, Carr, Riggs & Ingram, LLC, Houston, Texas

“We utilize [CCH] ProSystem fx Tax, [CCH] ProSystem fx Engagement and [CCH] ProSystem fx Scan [with] AutoFlow Technology. What we like the most about them is how they integrate in with the tax software.

Wolters Kluwer software products allow us to provide better client service. They free up our staff’s time to be able to either focus on tax planning advantages or interact more with clients as opposed to just looking at the tax programs. We can train on more complex issues sooner because they’re not focused on just how to get the stuff in the tax software.”



“It all works together.”

Joe Sachetta, CPA/PFS, CFP, MBA, MST

Partner, Sachetta & Callahan, LLC, Boston, Massachusetts

“I have been doing this for 35 years, and I can’t even imagine operating today the way we did when I started and how we would make any money. We are so much more efficient now, and every year even more so because of the technology. It’s mind-boggling. From CCH Axxess Tax, we can print to CCH Axxess Document, send the invoice to CCH Axxess Practice, e-file the tax return and upload the client copy to CCH Axxess Portal.

The reliability and accuracy that Wolters Kluwer’s automation features deliver are better than possible when humans input raw data. I know it’s faster. I would think it’s more than five minutes faster per return — and we did 2,200 tax returns last season, so you’re talking about a lot of time. And, for a return with brokerage statements, the automation can save an hour or more for each one. That means that we can do more work without adding staff members (and in fact reducing the need for temporary staff), and that makes for higher profits. Wolters Kluwer’s cutting-edge technology sets us apart. Our clients and potential clients know that we’re operating our practice in an efficient and effective way. This translates into better service and lower fees.”

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