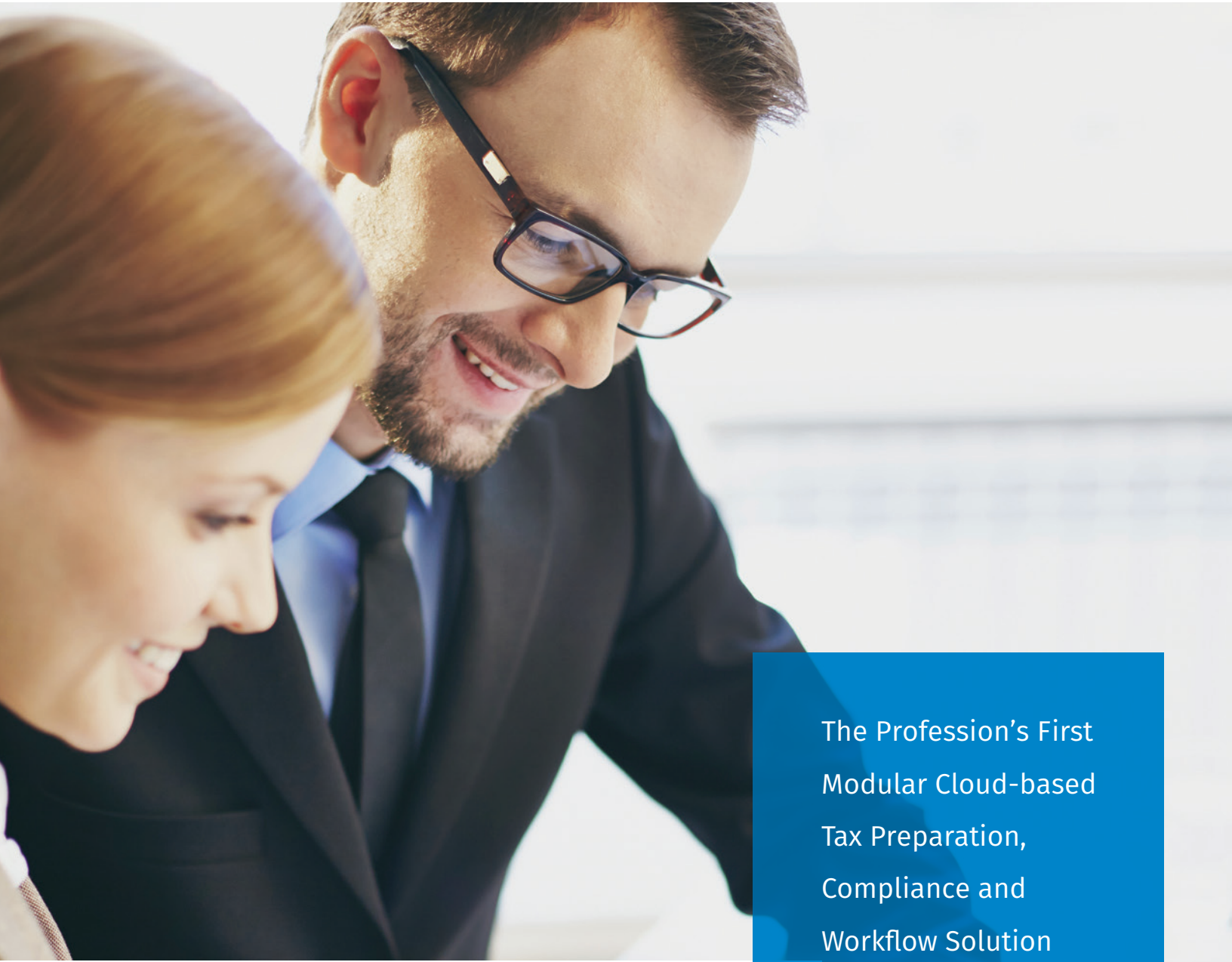




Wolters Kluwer

When you have to be right



The Profession's First
Modular Cloud-based
Tax Preparation,
Compliance and
Workflow Solution

Tax & Accounting

*CCH Axcess™ —
At the Center of a
Firm in Motion*



The Power to Grow, Manage and Protect Firms in Motion

The pace of today's progressive firm is rapid. It's no longer just about completing client work, but about managing the overall business — including building client relationships, enhancing service offerings, standardizing processes, staying current on ever-changing regulations and the myriad of other operational tasks that keep firms in a constant state of positive motion. Successful firms understand that staying in motion is key to growth and prosperity — and that only the most advanced technology delivers the power necessary to keep firms not only moving ... but moving forward.

At the center of a well-run firm is the *right* technology — technology that fuels firm **growth**, supports effective firm **management** and **protects** the firm's reputation. That's CCH Access — the award-winning tax and accounting first modular cloud-based tax preparation, compliance and workflow solution that can be tailored to meet the needs of any firm. From a single solution, you can:

- Accelerate **growth** by providing tech-savvy services that build positive client relationships and lead to higher-billable work and the ability to attract new business.
- Enhance firm **management** by standardizing workflow processes, elevating efficiency firmwide and simplifying data management.
- **Protect** your reputation by remaining current and compliant with regulations and offering heightened security to safeguard sensitive client data.

CCH Access provides firms in motion with on-demand technology that supports mobile delivery of services, real-time collaboration with clients, an end-to-end digital tax workflow and places current regulatory guidance at your fingertips.

"...the game changer in terms of workflow for accounting firms."

— AccountingWEB

"[Wolters Kluwer] just redefined the standard of cloud products. It will fundamentally change the way professionals practice."

— The Progressive Accountant

Technology is no longer just a remedy to replace manual processes, but rather it supports firmwide management. With the power to maximize firmwide efficiency and support clients with 24/7, always-on service, CCH Access redefines how firms operate.

Grow

Building Relationships to Fuel Growth

Firms require technology to meet the heightened expectations of today's clients, who want access to their documents and data at any time and from any device. They also want real-time response and the ability to collaborate with their trusted advisor online at their convenience. CCH Access provides the foundation for firms to offer this level of service. The solution's advanced services platform opens the door to strengthening existing client relationships and attracting new prospects by:

- **Elevating Communication**
Always-on status supports responsive and proactive client service.
- **Supporting a Collaborative Working Relationship**
A cloud-based client service platform enables you to work in real time *with* your clients, not just *for* them.
- **Accelerating Delivery of Work and Offering Valuable Add-On Service**
Powerful, fully integrated tools allow you to complete more client work in less time and with fewer resources. This means faster delivery and response for clients. This also frees you to offer higher-value planning and advisory work.



"Efficiency gains allow us to re-invest in our firm, grow our practice and be true advisors to our clients."

— Brett Mills, CPA,
Partner, McCarthy, Rose & Mills, LLP,
Frisco, Texas



Manage

Streamlining Processes for Effective Firmwide Management

Firm leaders can't begin to provide advanced client services until they first develop a highly efficient internal system to deliver services effectively. CCH Access simplifies firm processes by offering a completely integrated software solution that operates on top of a single, centralized database. This means that data seamlessly flows between applications, eliminating manual data entry at any point. Elevating efficiency of firm processes to unprecedented levels is possible with CCH Access — allowing firms to:

- **Take Control of Workflow**

Adopting a completely cloud-based, integrated solution puts you in control of defining your firm's processes — both internally and with clients. Online collaboration means you set the schedule for client work ... no more waiting on the client to deliver CDs or paper files. You also have the ability to standardize internal workflows so that all work is processed consistently — no matter which staff member is handling it.

- **Keep Projects Moving**

Sophisticated practice management functionality enables you to monitor project status at a glance, create custom reports and map processes for firmwide consistency.

- **Manage All Data and Documents with Ease**

Supporting a completely electronic workflow, documents are stored digitally and are logically organized within a central repository, making it fast and easy to access files and fulfill client requests.



“One of the biggest advantages to CCH Access being in the cloud is having everything right at your fingertips.”

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

“Collectively, [the CCH Access modules] pretty much amount to the backbone of an entire tax practice.”

— Accounting Today

Protect

Managing Risk to Protect Your Firm's Reputation

You are so much more to your clients than just a tax preparer. You are their trusted advisor — promising pinpoint accuracy in tax work and offering sound, informed advice throughout the year to keep clients on a healthy financial course. As such, you require powerful software to keep current on changing tax laws and maintain compliance across the board. You are also responsible for keeping sensitive client data safe. CCH Access puts world-class tax guidance at your fingertips and supports you with sophisticated security features to protect your clients' information and your reputation. Protect your firm and mitigate risk by:

- **Staying Informed**

Wolters Kluwer tax guidance offers the profession's most reliable and current U.S. and international tax and accounting rules and regulatory information, news and analysis to keep you and your staff informed and educated — mitigating risk and protecting your reputation.

- **Ensuring Accuracy**

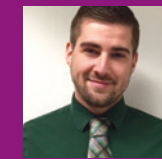
Offering the profession's premier diagnostic system, errors and inconsistencies are automatically flagged before e-filing, so you can be confident that your work is accurate and compliant.

- **Safeguarding Client Data**

Sophisticated encryption and password protection offers the highest level of security when exchanging sensitive information with clients. CCH Access offers built-in security that allows firms to comply with data privacy laws while giving clients peace of mind that their private data will not be compromised.

“Revolutionary ... the common client database is the holy grail of the accounting profession — putting data in one place, one time, and it's everywhere you need it to be.”

— CPA Practice Advisor



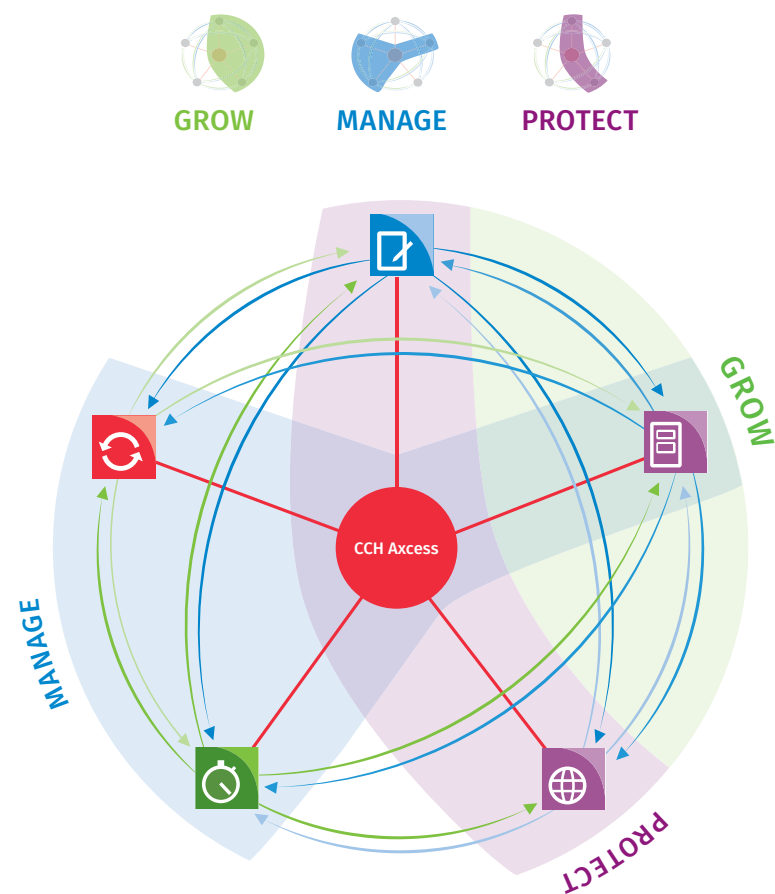
“CCH Access has put us ahead of our competitors. In terms of productivity and efficiency, we have saved thousands of hours of time.”

— Andrew Stepp,
Operations Manager, Thomas St John Group,
Los Angeles, California

The CCH Access Modules

CCH Access is the ideal solution for today's firm — providing the power to grow, manage and protect your business. The system's integrated core offers a single point of access to handle all tasks associated with the tax process — from return preparation and compliance to file storage and practice management.

Consider each integrated module within CCH Access:



CCH Access™ Tax

Represents the heart of a streamlined, digital tax process — supporting ease of tax preparation with thousands of automatically calculating forms and schedules for federal, state, county and city entities; robust diagnostics; and a state-of-the-art electronic filing system.



CCH Access™ Document

Offers a feature-rich document management solution to electronically organize and store client source documents, achieving a true digital work environment.



CCH Access™ Portal

Provides a secure online space where clients have 24/7 access to their financial documents and the ability to collaborate with firm staff in real-time, at any time.



CCH Access™ Practice

Provides a full-scale practice management system to monitor staff time, produce invoices and handle all aspects of managing firm operations with ease.



CCH Access™ Workstream

Offers a full-featured project management solution designed to streamline administrative tasks, such as tracking due dates, identifying key milestones and monitoring project status.

Awards and Recognition

- 2015 CPA Practice Advisor 5 Star Review
- 2014 Accounting Today's List of Top New Products
- 2013 Quality Award in the Tax Technology Category from K2 Enterprises
- 2013 CPA Practice Advisor Tax & Accounting Technology Innovation Award

CCH Access Testimonials



"I recently transitioned from a 100+ employee firm to a small office of four ... I needed to get more done with fewer people and resources. The key was finding a reliable tax software. The solution was CCH Access Tax."

— Walter J. Kero, CPA-ABV, President, Kero, Byington and Associates, Missoula, Montana

"We are very satisfied with our decision to go with CCH Access, partly thanks to the easy installation process and easy updates ... Having access to the most recent tax data on the fly is immeasurable."

— Jonalyn Sullivan, Member, Sullivan and Gannon, LLC, Chelmsford, Massachusetts



"Our firm recently implemented CCH Access, and we are very happy with that decision. The installation process is very easy. Updates are automatic and not intrusive ... I would strongly recommend CCH Access to other CPA firms."

— James McNeeley, CPA, Principal, Maner Costerisan, Lansing, Michigan

"I knew immediately that CCH Access was where my firm was going to need to be. An open integration platform was huge for the future — a game changer."

— Jody Padar, CPA, MST, CEO & Principal, New Vision CPA Group, Mount Prospect, Illinois



"If a client needs a tax return again, and we can put it on CCH Access Portal for their convenience, that's good customer service. It's convenient and more efficient."

— Tyee Carr, Principal, McDonald Jacobs, Portland, Oregon

"Once you use CCH Access Tax, Document, Portal, Workstream and Practice together and see the synergy they create, you are not going to look back."

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



"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 Access Portal quickly."

— Christopher M. Salisbury, CPA/PFS, CFP, CSEP, Partner, Smith+Salisbury, PLLC, Charlotte, North Carolina

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Please visit CCHGroup.com/Axcess
for more information.