

> Tax  
Write-Up  
Engagement  
Document  
Profit Driver  
Fixed Assets  
Practice  
Practice Driver  
Site Builder  
Outsource  
Planning  
Trial Balance

## Revolutionize the way you collect your clients' tax data, process their tax returns, and promote your firm's services!



**Tax Notebook**, our online tax organizer, delivers expanded levels of convenience and technology that will improve your interaction with existing clients and help you reach potential new ones. With Tax Notebook, you eliminate the administrative and mailing costs associated with paper tax organizers, and instead enjoy the secure transfer of data with your clients via the Internet.

Tax Notebook is a dynamic web application – not just a static electronic copy of the paper organizer – which means the program can automatically adapt to your client's changing tax situation. For example, if a client has a new rental property, the system will automatically provide input to capture all of the new information.

The following are just a few of the many benefits Tax Notebook offers your firm:

- > Import Tax Notebook data seamlessly into **ProSystem fx Tax** and save hours of data entry time.
- > Drive clients to your website where they'll quickly learn the full scope of services offered by your firm.
- > Enhance your professional image with a fully customized Tax Notebook, complete with a personalized Welcome Page that includes your firm name and logo.
- > Populate Tax Notebook with last year's Pro Forma information, quickly and accurately.
- > Monitor and quickly track the status of each client's Tax Notebook through the powerful status system included within Tax Notebook Toolkit.
- > Marketing materials (postcards, flyers, sample letter and email text) are available to help you promote Tax Notebook to your clients.
- > Provides for import of W-2 data from a variety of payroll providers.
- > Import 1099B data from Gainskeeper®Pro™.

**Tax Notebook - Microsoft Internet Explorer**

**taxNotebook™** Personal Employment Deductions Real Estate Investments Retirement Foreign Miscellaneous

Taxpayer | Spouse | Address | Personal Profile | Dependents

**Taxpayer Information**

First name and initial: John O Last name: Taxpayer Date of birth: 06/09/1954

Occupation: Manager Social Security Number: 400-00-4567

Select your filing status: Married filing a joint return

**General Questions**

Will you be claiming any of the following on your tax return?

1) Qualifying dependents  Yes  No

2) Persons qualifying for child care credit  Yes  No

3) Persons qualifying for earned income credit  Yes  No

Are you permanently and totally disabled?  Yes  No

Do you wish to contribute to the Presidential Election Campaign Fund?  Yes  No

Are you claimed as a dependent of another?  Yes  No

Are you considered legally blind per IRS regulations?  Yes  No

If you are due a refund, would you like to have the refund deposited directly into one of your bank accounts?  Yes  No

Check if page is complete

Logout and Save | Print Tax Notebook | Send Tax Notebook to

Proprietary Info | Notebook Requirements

**JONES & JONES**  
CERTIFIED PUBLIC ACCOUNTANTS  
Jones & Jones, CPAs  
1234 Main Street  
Suite 100  
Anytown, CA 90000  
(310) 555-1234  
(310) 555-1236 FAX

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**Additional Comments**

Tax Notebook guides your clients through a streamlined tax interview.

*“Each year I learn more of the capabilities that Tax Notebook has to offer. That translates into more efficient return preparation, saving time, and reducing tax season stress”.*

– David Marrone  
Financial Synergy, Inc.  
Champaign, IL



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## THE TAX NOTEBOOK PROCESS IS AS EASY AS...

- 1 Using any PC with Internet access, your clients conveniently access their personalized Tax Notebook directly from a link on your firm's website and are guided through a streamlined tax interview.
- 2 Use the powerful online status system to track your clients' progress so you know exactly when their Tax Notebooks are complete.
- 3 Review completed Tax Notebooks online, and then download the information to your local system for seamless integration into ProSystem fx Tax.

## TAX NOTEBOOK TOOLKIT HANDLES ALL ADMINISTRATIVE TASKS

The Tax Notebook Toolkit is used to completely customize your clients' Tax Notebooks to meet the professional standards of your firm, and even create notebooks that mirror the specific tax situations of each client.

- > **Customize Tax Notebooks** - Determine what firm information appears on the Tax Notebooks your clients access, including your company name, address, and logo.
- > **Create Tax Notebooks** - Modify the Personal Profile, Checklist, and Welcome Page so the notebooks reflect each client's, or group of clients', specific tax situation (e.g. retired, foreign, etc.). After the Pro Formas are created, upload Pro Forma data into the Tax Notebooks, either one client at a time or all clients at once.
- > **Track Tax Notebooks** - A powerful status system allows you to track each client's Tax Notebook progress which is reported as 'Unopened', 'In Progress', or 'Completed'. Once a notebook is completed, your staff can review the data entered by your clients either online or via printed reports.
- > **Download and Integrate Data into ProSystem fx Tax** - Import the Tax Notebook data you collect into our powerful tax module and simplify the process of creating returns.
- > **Control Staff Access** - The Toolkit allows you to control exactly who on your staff accesses each Tax Notebook. The same security levels you established in ProSystem fx Tax can be used, or you can easily create new users within the Tax Notebook Toolkit.

The screenshot shows the 'Create Tax Notebooks for Existing Clients' page. The 'GFX Return Status' dropdown menu is highlighted with a red circle and labeled 'Calendar:'. Below the table, there is a 'Create Notebooks' button and a 'Global tx' dropdown menu. The 'GFX Return Status' dropdown menu is currently set to 'Not Yet Created'.

The Tax Notebook Toolkit allows you to create and track all Tax Notebooks.

## TAX NOTEBOOK SECURITY

Understanding the importance and confidentiality of your information, CCH Tax and Accounting has built thorough security measures into the entire Tax Notebook process. From SSL technology, data back-up and redundancy steps to unique passwords and logins for each client, the integrity of information is always secure and private. Complete security and privacy information can be found on our website at [Tax.CCHGroup.com](http://Tax.CCHGroup.com).



CCH Tax and Accounting  
21250 Hawthorne Blvd.  
Torrance, CA 90503  
1-800-PFX-9998  
Tax.CCHGroup.com

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