



**Bring more to the table with  
Thomson Reuters Checkpoint®**

THOMSON REUTERS  
**CHECKPOINT™**

**Ensuring you stay in compliance with each new legislative change is crucial, but it's just one part of the value you offer as a professional.**

**But what if you could be even more proactive with your research and less reactive, opening up a new world of revenue opportunities?**

<b>100</b>	<b>99</b>	<b>97</b>
 <b>OF THE TOP 100 U.S. CPA FIRMS</b>	 <b>OF THE FORTUNE 500</b>	 <b>OF THE TOP 100 U.S. LAW FIRMS</b>
<b>TRUST THOMSON REUTERS CHECKPOINT TO HELP THEM MAKE THE RIGHT DECISIONS FOR THEIR BUSINESS.</b>		



**CPA Practice Advisor rated Thomson Reuters Checkpoint 5 stars for the past 13 years in a row.**



**Answer Path**

Winner: 2017 Gold Stevie® Award  
Content Search Technology Solution



**Intuitive Search**

Winner: 2015 People's Choice Stevie® Award  
Favorite New Product



**Intuitive Search**

Winner: 2015 Gold Stevie® Award  
Content Search Technology Solution



**Intuitive Search**

Nominee: 2015 CPA Practice Advisor  
Technology Innovation



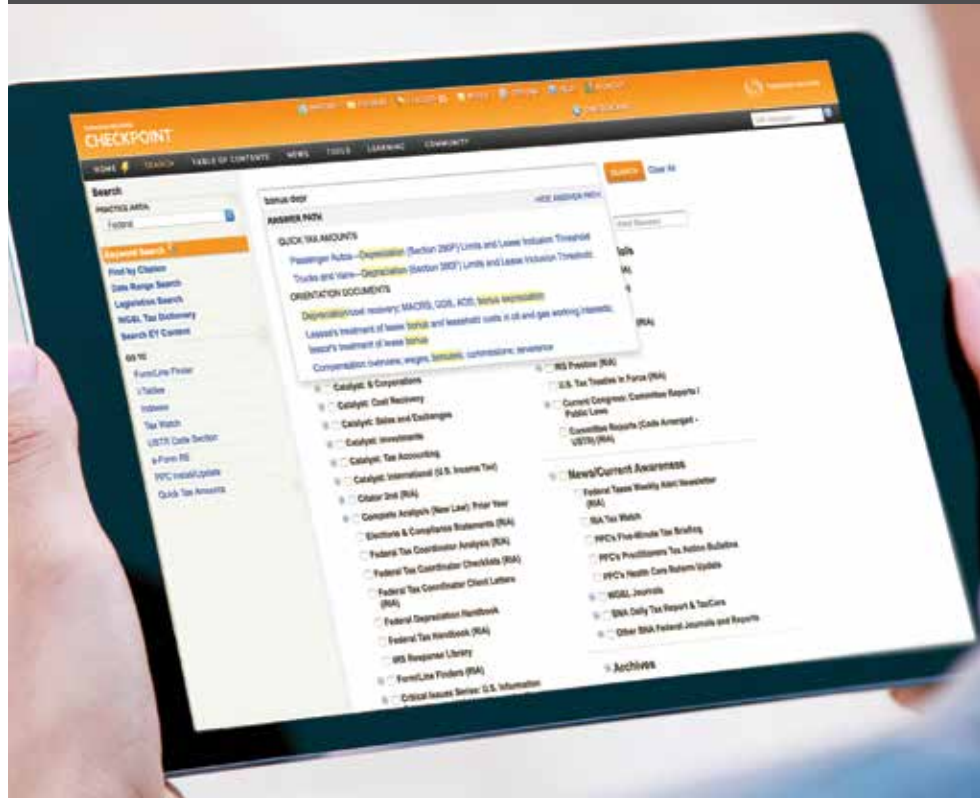
**Intuitive Search**

Finalist: 2015 SIIA CODiE Award  
Best Search Technology Solution



# Move quickly

with intelligent search capabilities and fast navigation options that take you right to the answers you need, whether you're doing a quick look-up or highly specialized research.



- Search the way you think with the revolutionary Intuitive Search – designed specifically for the specialized needs of tax and accounting professionals, enabling you to instantly filter, rank and deliver search results with unprecedented levels of accuracy and relevance.
- Find trusted answers fast on federal and state individual and business tax topics with Answer Path.
- Move quickly between related documents in context of the document you are viewing with side panel navigation.
- Personalize your home page for quick access to the specific content and search tools you use most frequently.



“Getting the right answer fast is the Holy Grail of tax research, and Thomson Reuters Answer Path is a great new way to do that for questions on federal individual income tax returns.”

— Accounting Today Top New Products for 2017 (Honorable Mention)



“The editorial expertise in Checkpoint is wonderful. You can look at it quickly and get the idea very quickly or delve in more deeply.”

— Tracy Koziel,  
Eby Brown and Company

## Consider all angles

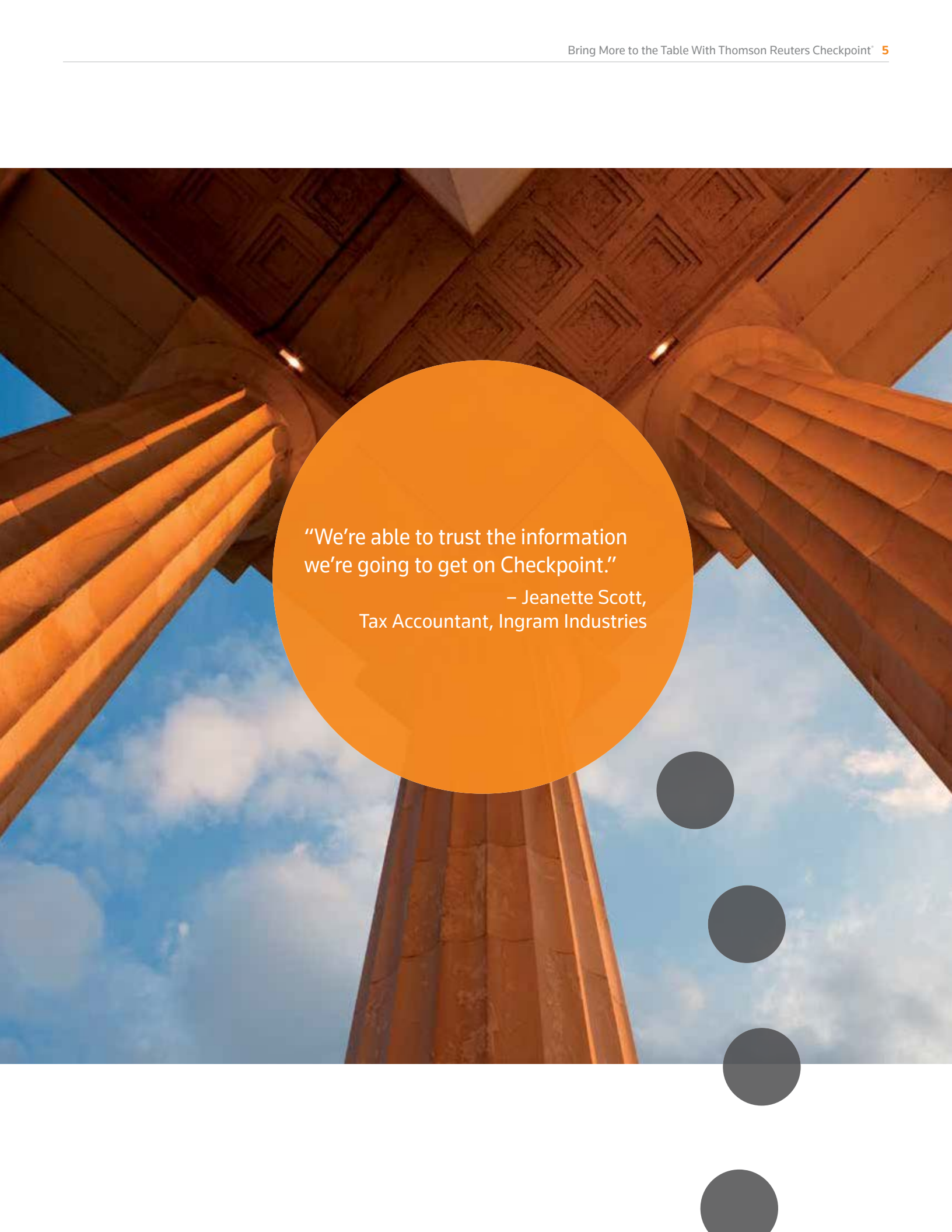
with authoritative, clear and comprehensive guidance from our leading industry experts including PPC®, WG&L®, RIA®, IBFD and Orbitax for tax and accounting professionals, EBIA® for employee benefits professionals and Boskage for global trade professionals.

- Gain a well-rounded understanding of the issue you are researching with practical guidance and real-life examples as well as expert viewpoints on developing areas of the law.
- Quickly clarify or support your conclusions using embedded top line and side line links to related Checkpoint documents.
- Go directly from a code subsection to paragraph-specific analysis in our WG&L treatises (regularly cited by the courts, including the U.S. Supreme Court).

### Topics covered in Checkpoint include:

- Federal Tax
- State and Local Tax
- International Tax
- Business Tax
- Individual Tax
- Tax Planning
- Audit and Accounting
- Corporate Finance
- International Trade
- Estate Planning
- Payroll
- Pension and Benefits





“We’re able to trust the information  
we’re going to get on Checkpoint.”

– Jeanette Scott,  
Tax Accountant, Ingram Industries





“The rave feedback that we’ve gotten from our staff on the quality of the product, the ease of getting information, the ease of research ... it’s just a tremendous change from where we were prior to moving over to Checkpoint.”

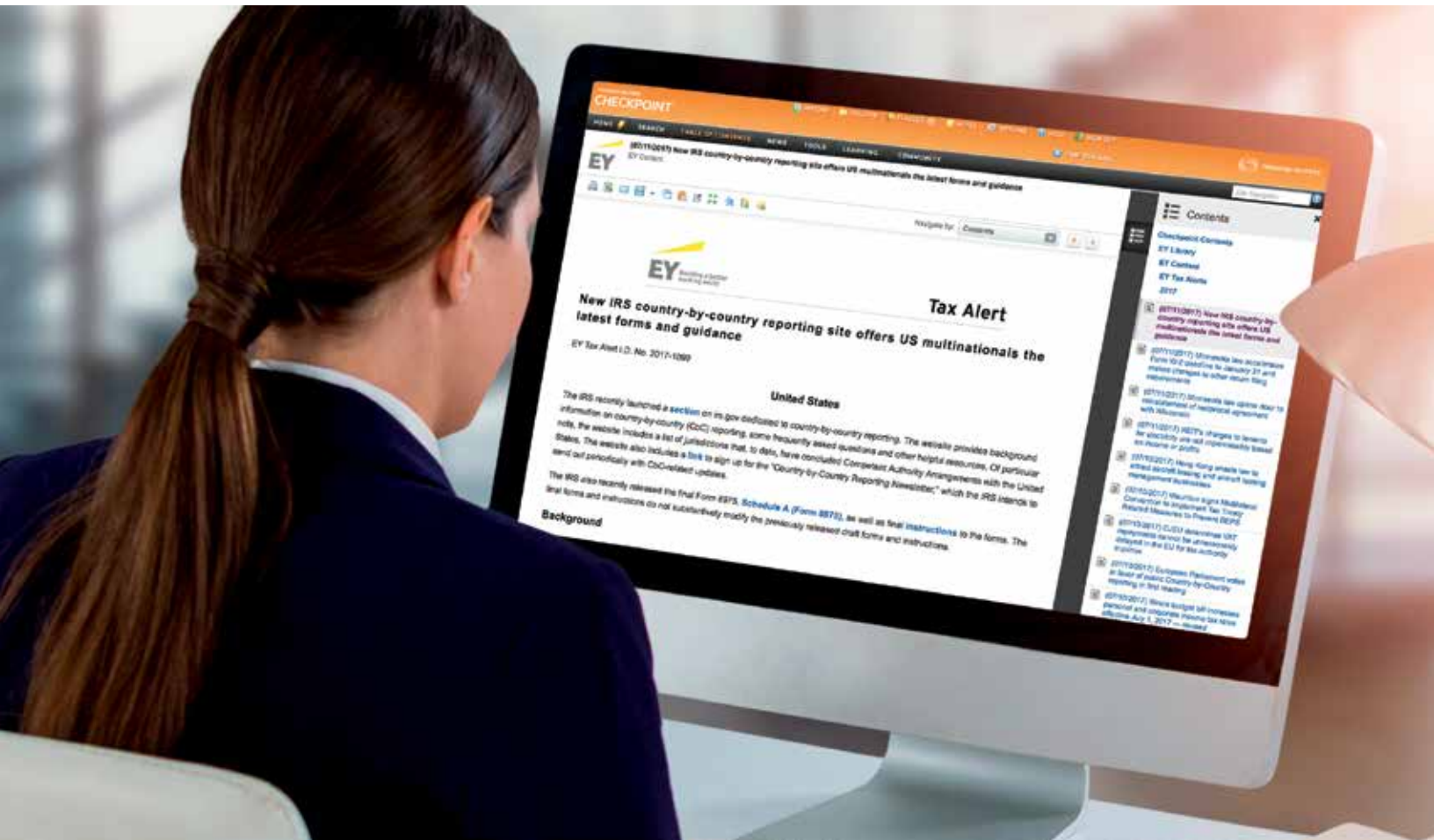
– Dennis Sherrin, Managing Partner, Hartmann, Blackmon and Kilgore



## Reduce uncertainty and risk

through the depth and detail of Checkpoint content integration. Checkpoint connects related analysis so you can gauge how various industry experts view an issue from a range of vantage points, such as tax, assurance and financial reporting. Links to primary law sources are at the most granular level needed to quickly read and cite controlling authorities.

- Eliminate the need to piece together tax law changes in order to obtain a current understanding of federal or state law. The topically-arranged Checkpoint Federal Tax Coordinator, code-arranged Checkpoint U.S. Tax Reporter and our comprehensive State Reporters quickly incorporate law changes into the analysis using “in-place supplementation.”
- See the relationship between cases and rulings, as well as later citations, with Checkpoint Premium State Tax Citator and Checkpoint Citator 2nd - enhanced with editorial evaluations and judicial histories including “overruled by” legislation.
- Quickly go to the relevant discussion in the full text of a federal tax case or IRS ruling using the editorial enhancements – including prior histories for cases, cautions for rulings, numbered headnotes by issue and links to all referenced source material.
- Go from the Internal Revenue Code directly to analysis of recent legislation that impacted a code section using the New Law link, and see pending legislation via Checkpoint Bill Tracker.



## Anticipate changes

and stay current with the latest law developments through daily news, alerts and legislative highlights delivered directly to your inbox, including a range of personalization options to tailor your choice of coverage to your specific needs.

- Stay on top of law developments on topics of interest to you with customizable daily news, including RIA Daily Updates, EY Tax Alerts and more.
- Receive alerts whenever a court case, IRC subsection, IRS ruling or reporting standard from FASB, GASB, IASB, SEC, AICPA or PCAOB is cited, superseded or affected by a new development using Checkpoint Trackers.
- Learn what developments mean for you and your clients with expert views that go beyond the headlines to provide guidance on what to do and the tools to get it done.
- Monitor current developments and get notifications of legislative, regulatory or judicial changes within a specified date range with Checkpoint Income Tax Developments Wizard.





"I would recommend Checkpoint (Credits and Incentives) Pinpointer to other accounting firms no matter what the size, large or small, because it is the quick way to identify potential benefits for your clients."

— Shawndel Rose, Manager of State and Local Tax at RubinBrown LLP

## Turn knowledge into action

using tools, calculators and an extensive range of "Create-a-Chart" comparison tables that turn otherwise time-consuming research into easy to achieve outcomes.

- Find available credits and incentives for a specific location and review the complete details to understand eligibility with Checkpoint Credits and Incentives Pinpointer.
- Quickly analyze a nexus profile based on activities in a specific state with Checkpoint Nexus Assistant.
- Easily access thousands of state-by-state comparison Create-a-Charts and review essential information at a glance.
- Apply your knowledge to a particular situation using client letters, worksheets, checklists, elections, roadmaps and organizers.
- Make confident international tax planning and compliance decisions using reliable and current information backed by a network of international tax experts.



Credits and Incentives Pinpointer

Winner: 2016 Gold Stevie® Award

New Product or Service



“We find that when we use Checkpoint we have more confidence in the work that we’re doing. It’s a lot of protection for both the client and the firm.”

— Andrew Pavloff,  
Knack, Pavloff & Company, LLP, P.C.



# Comply with confidence

to the IRS, State Departments of Revenue, AICPA, SEC, PCAOB, GAAP, IFRS and other agency rules, regulations and standards, using practice-proven guidance and tools.



**Checkpoint® State Clear Comply**  
**Winner: 2017 Stevie® Award**  
 New Product or Service of the Year –  
 Business Information



**Checkpoint® State Clear Comply**  
**Winner: 2017 Bronze Stevie® Award**  
 Business-to-Business Products

- Bridge the gap between interpreting the tax law and reporting real-life client transactions with PPC Tax Deskbooks, the gold standard in tax return guidance for over 25 years.
- Make quick work of responding to IRS taxpayer notices by inputting a notice or form number in the IRS Response Library to access step-by-step work plans and response documents.
- Easily identify non-resident withholding requirements, nexus flow-up issues from lower tiered entities and ensure your multi-tier entities are in compliance – even those in multiple states – with Checkpoint State Clear Comply.
- Accelerate your compliance work with direct line-by-line integration between Checkpoint guidance and Thomson Reuters tax compliance and workflow software solutions, including Thomson Reuters UltraTax CS®.



**“Checkpoint Catalyst** should be a tool in every tax professional’s research toolkit and, more often than not, the starting place for their research. I can find information faster, so I’m spending a lot less time looking for relevant content and a lot more time reading the material.”

— Elijah Farrell,  
Worldwide Transfer Pricing Leader, Apple, Inc.



**Checkpoint Catalyst**  
**Winner: 2015 Bronze Stevie® Award**  
 Content — Solution for Integrating  
 Content into Workflow



**Checkpoint Catalyst**  
**Nominee: 2015 CPA Practice Advisor**  
 Tax and Accounting Technology Innovation



**Checkpoint Catalyst**  
**Finalist: 2015 SIIA CODiE Award**  
 Best Legal Information Solution

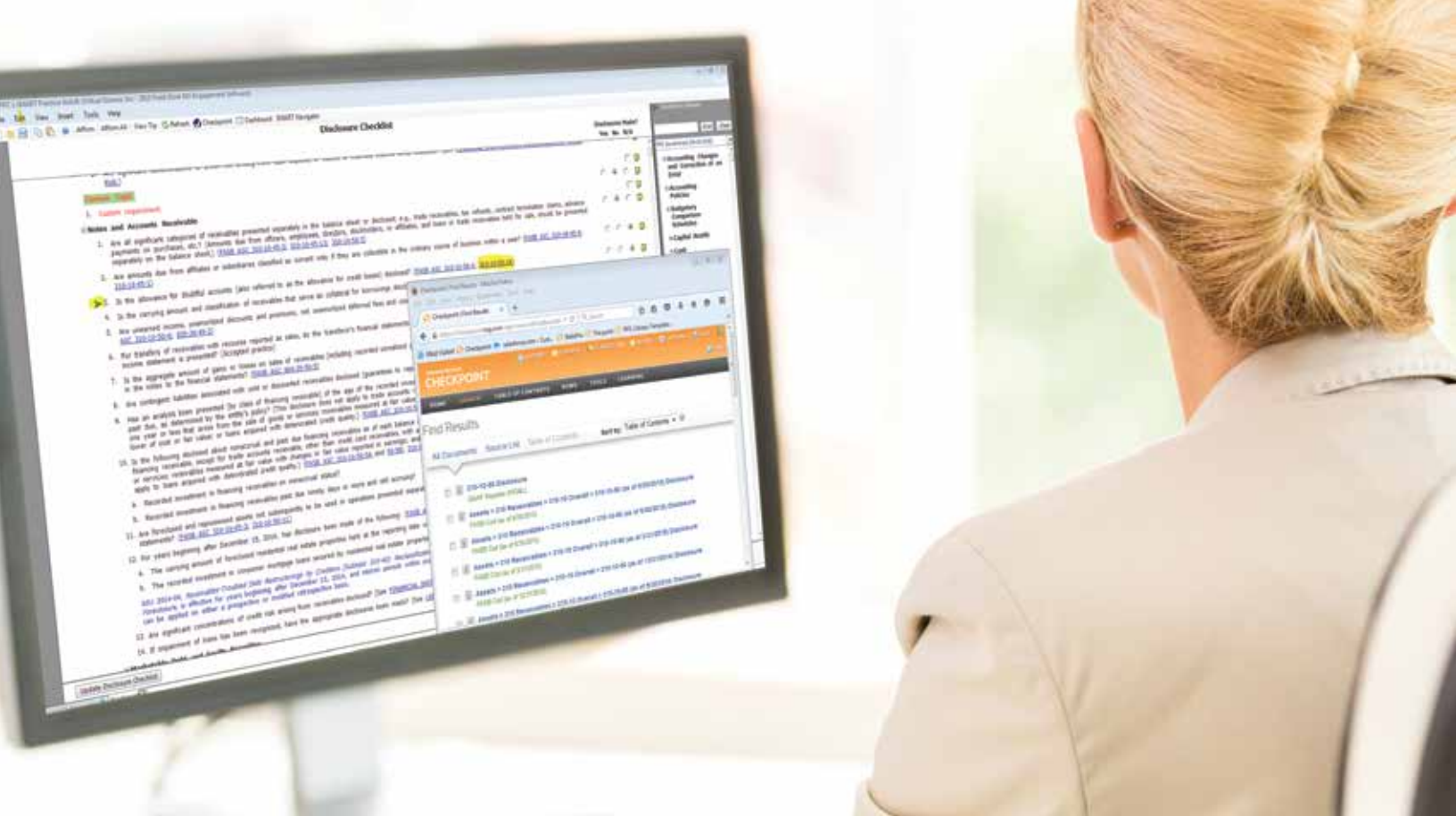


# Resolve complex tax issues

affecting business-related transactions using Thomson Reuters Checkpoint Catalyst™. Save time and reduce the likelihood that something important will be missed with expert guidance on federal, state and U.S. international tax implications.

- Get to outcomes faster with Checkpoint Catalyst. Benefit from a unique research workflow on business-related transactions that brings together expert guidance, tools, diagrams and new developments in one easy to use view.
- Eliminate the need to check multiple resources with federal, state and U.S. international implications covered directly within the same Checkpoint Catalyst topic.
- Cut through complexity and gain a well-rounded understanding of an issue with links to additional expert perspectives from related WG&L treatises and journals.





# Conduct audits efficiently

Increase accuracy and simplify your audit process from start to finish with Checkpoint Engage, the only fully integrated online audit solution.

- Save even more time on engagements with everything all in one place. Checkpoint Engage integrates seamlessly with Thomson Reuters AdvanceFlow®.
- Take advantage of unmatched flexibility for a risk-based audit approach scalable for any size engagement.
- Easily share information and coordinate multi-location audits without version control issues.
- Enhance your firm's security and control of sensitive data.

“With Checkpoint Engage, the biggest advantage is its full integration with AdvanceFlow. We are able to fill out documents online in real time – all stored in the cloud. We never have to worry about losing data. Plus it automatically rolls over, so when we go to do next year's work, the information is already there. That could save us 30 – 35% of the time in our planning stage.”

– Abba Blum, Vice President, MN Blum, LLC



**Checkpoint Engage**  
**Winner: 2017 Bronze Stevie® Award**  
 New Product or Service of the Year  
 Content – Solution for Integrating  
 Content into the Workflow



**Checkpoint Engage**  
**Winner: 2017 Bronze Stevie® Award**  
 Business-to-Business Products



**Checkpoint SMART Audit Suite**  
**CPA Practice Advisor**  
 Readers #1 Choice for Audit Engagement Tools  
 Six Years in a Row (2011 – 2016)





“Checkpoint from Thomson Reuters offers accounting firms an easily navigated product that contains numerous tools that are designed to simplify searches and provide the best results.”

— CPA Practice Advisor,  
2016 Review of Tax Research Systems



## Enrich your expertise

and maintain your CPA continuing education requirements with access to the market-leading library of Checkpoint Learning courses and subscription packages. Choose from specialized industry topics, practice management, soft skills, technology and additional categories in self-directed or instructor-led options to suit your learning style and schedule.

- Achieve your professional learning and development goals with Checkpoint Learning, a unique combination of live learning, webinars and online self-study options covering a broad range of CPE-accredited topics.
- Open up new consulting and revenue-generating services with specialist expertise gained from the Health Care Reform or Forensic Accounting Certificate Programs.
- Equip your staff with the competencies they need to provide high value tax work for your organization using the specially-designed Tax Research and Tax Fundamentals Certificate Programs.
- Utilize customized in-house training and consulting programs and services that teach efficiency while improving work quality.



“My favorite feature has to be the attachment tool for external certificates. This has helped us to become more organized while saving time (and expense) by keeping all CPE history in one location.”

— Tamara Carr-Granstrom, Training Coordinator

# Maximize your firm's influence

with Social Media Solutions from Thomson Reuters Checkpoint Marketing for Firms. Social media has changed the way buyers search for professional service firms. Today's conversations, research and decisions occur online. In order to succeed, your brand must be strong online as well as offline. Social media is no longer optional.



From client comments and reviews to the quality of your firm's posts and interaction with followers, your social media activity can have a significant impact on your firm's revenue potential and client retention goals.

Social Media Solutions helps enhance your social media strategy by equipping you with a market-leading social media platform, relevant and timely content posts, training resources, best practice aids and comprehensive metrics to analyze and track your results. Mix and match the solutions that best meet your needs.

- Monitor your firm's reputation, gather analytics, publish easily to all of your social media accounts and more with the **Social Media Manager**.
- Inform your clients of the latest tax legislation in terms they can understand with **Emerging Tax and Regulation Alerts**.
- Share timely tax developments as they unfold with **Social Media Federal Tax Posts**.
- Publish entertaining, yet informative, tax and accounting trivia and tips with Infographics and Fun Facts, designed exclusively for accountants.



**Checkpoint Marketing  
Social Media Solutions**  
2017 Accounting Today  
Top New Product — Marketing Tools

Top New Product — Marketing Tools



**Checkpoint Marketing  
Social Media Solutions**  
Winner: 2017 Gold Stevie® Award  
New Product or Service of the Year —  
Content Marketing Solution



**Checkpoint Marketing  
Social Media Solutions**  
Winner: 2017 People's Choice  
Stevie® Award  
Favorite New Product

**//CODiE//**  
2017 SIIA CODiE FINALIST

**Checkpoint Marketing  
Social Media Solutions**  
Finalist: 2017 SIIA CODiE Award  
Best Content Marketing Solution

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## Thomson Reuters®

Thomson Reuters is the world's leading source of news and information for professional markets. Our customers rely on us to deliver the intelligence, technology and expertise they need to find trusted answers. The business has operated in more than 100 countries for more than 100 years. Thomson Reuters shares are listed on the Toronto and New York Stock Exchanges (symbol: TRI).

For more information, visit [tr.com](http://tr.com).

## Thomson Reuters Checkpoint®

Thomson Reuters Checkpoint® tackles market disruption through integrated research, editorial insight, productivity tools, online learning and news updates along with intelligent links to related content and software. It is relied on by hundreds of thousands of tax and accounting professionals and counts among its customers 97 of the Top 100 U.S. law firms, 99 of the Fortune 100 companies and all of the top 100 U.S. CPA firms.

For more information, visit [tax.tr.com/checkpoint](http://tax.tr.com/checkpoint).

Visit [tax.tr.com/checkpoint](http://tax.tr.com/checkpoint)

The intelligence, technology  
and human expertise you need  
to find trusted answers.



the answer company™  
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