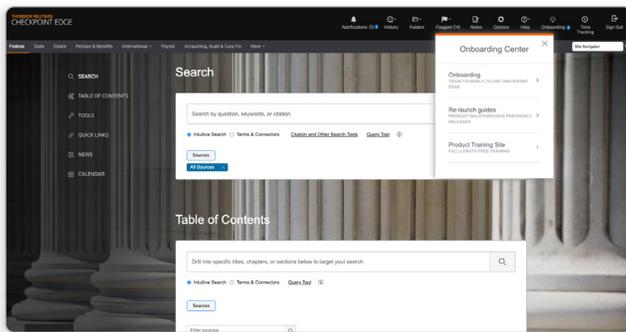


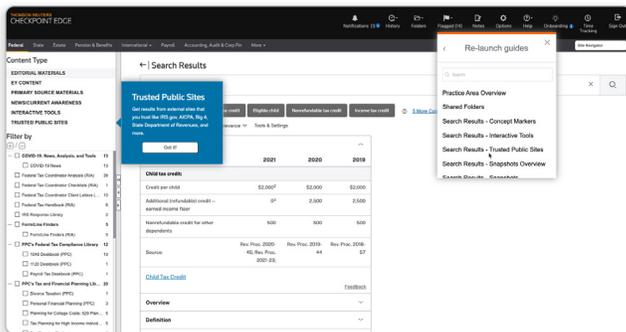
What's new on Checkpoint Edge

2021 key enhancements

Checkpoint® Edge is the most intelligent research platform that tax and accounting professionals rely upon to quickly find answers to their questions and to better understand the most complex issues in the industry. To improve user experience, we continue to enhance Checkpoint Edge to provide best-in-class content and tools to get answers to questions faster.



Enter the onboarding center through the icon in the top-right of the global navigation bar to get started



Click re-launch guides to access walkthroughs of key features previously released such as shared folders or table of contents search

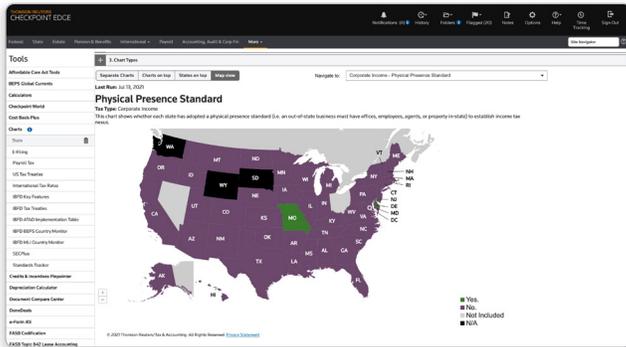
Onboarding Center

The in-product training and onboarding experience has been redesigned in Checkpoint Edge. The new **onboarding center** highlights key platform functionalities and outlines best practices for using Checkpoint Edge via multimedia content, including videos. New users will benefit from being able to quickly acclimate to core user flows and key features, while both new and existing users can ensure they are maximizing the value of their subscription.

- **Onboarding.** View a collection of short videos that highlight key platform functionalities and provide examples on the best practices for using Checkpoint Edge. Users can complete a survey at the end of the video series to offer feedback on the content and what other topics they would like covered.
- **Re-launch guides.** Access guides previously released based on the page you're on in the product that can help a user reacquaint with a feature or functionality.
- **Product training.** Link directly to the tax and accounting professionals learning center that provides instructions on how to register for the Checkpoint Edge full-length free training.

State	Franchise Tax Imposed	Authority	Editorial Reference
AK	No	N/A	15.000
AL	Yes	Ala. Code, §§ 50-5A-22(a)	15.000
AR	Yes	Ark. Const. Art. 10, § 23; Ark. Code Ann. § 26-5-113	15.000
AZ	No	N/A	15.000
CA	Yes	Cal. Rev. & Tax. Code, § 23001	15.000
CO	No	N/A	15.000
CT	Yes	Conn. Gen. Stat. § 36a-70(a)	15.000
DC	Yes	D.C. Code Ann. §§ 1-101, 1-102; D.C. Code Reg. §§ 1-103, 1-104	15.000

Refreshed chart design



New map view

CO	No	N/A	15.000
CT	Yes	Conn. Gen. Stat. § 36a-70(a)	15.000
DC	Yes	D.C. Code Ann. §§ 1-101, 1-102	15.000
DE	Yes	D.C. Code Ann. §§ 1-101, 1-102; Del. Code Ann. § 8102	15.000
FL	Yes	Fla. Stat. § 218.01	15.000
GA	Yes	Ga. Code Ann. §§ 8-8-55	15.000
HI	Yes	Ha. Code Ann. §§ 1-101, 1-102; Ha. Rev. Stat. § 114-1-1	15.000
IA	Yes	Iowa Code §§ 442.8A(1), 442.8B(1)	15.000

Export links to .xlsx files

State Charts and Nexus Assistant

State tax research **'starts in the charts'** with Checkpoint Edge. To save valuable time, tax and accounting professionals begin their research by creating multistate tax comparison charts for quick answers and 1-click access to our State Tax Reporters and/or Checkpoint Catalyst for on-point primary law and editorial explanations. Users will realize even more time savings with this new, modern chart research experience.

Redesigned search assistant. Enables users to make chart selections, including up to 5 tax types at one time for state charts and both tax types for nexus assistant, from a single screen and to modify selections at any time — even after charts have been generated.

Refreshed chart design. Delivers a new, crisp, chart view that provides a quick answer, a more prominent update notification, and expanded content with formatted links to primary sources and detailed editorial explanations. A **new "Navigate to" option** allows users to jump to other charts **without scrolling**. Users can modify their display via new **"Display Options"** to view the chart to their liking.

New map view. Offers a bold, color-coded graphical view of chart answers with hover-over access to chart details. This at-a-glance map quickly identifies common or unique state tax approaches and is well-suited for presentations to clients, colleagues, CFOs, boards, etc.

Exports to Excel enhanced with active links. There's no break in workflow now that users can choose to maintain 1-click access to primary sources and editorial explanations after downloading chart data to Excel.

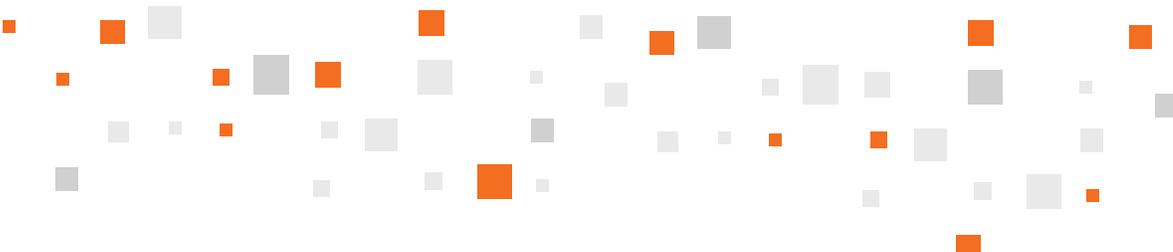
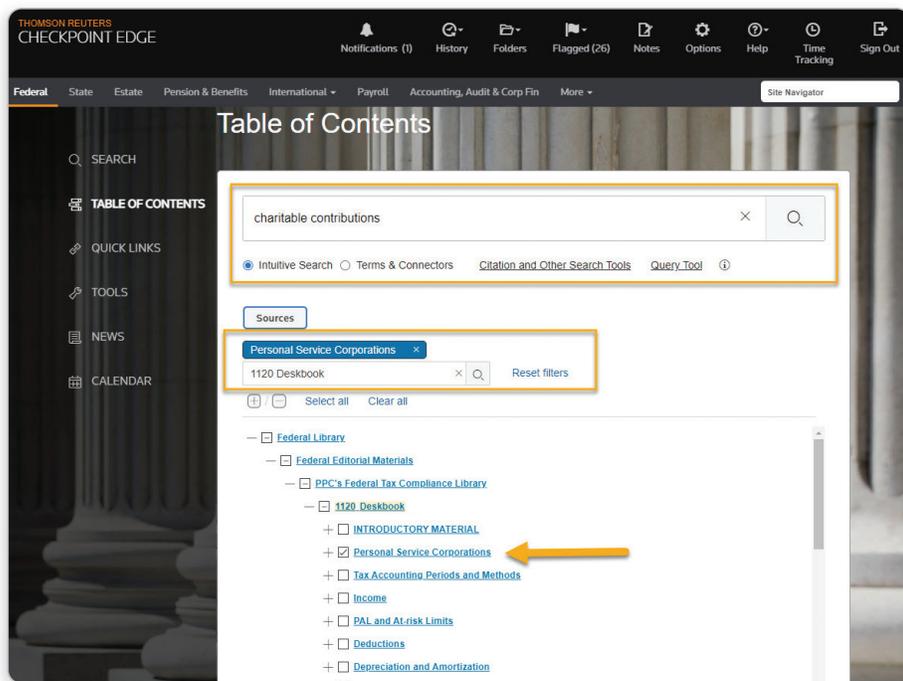


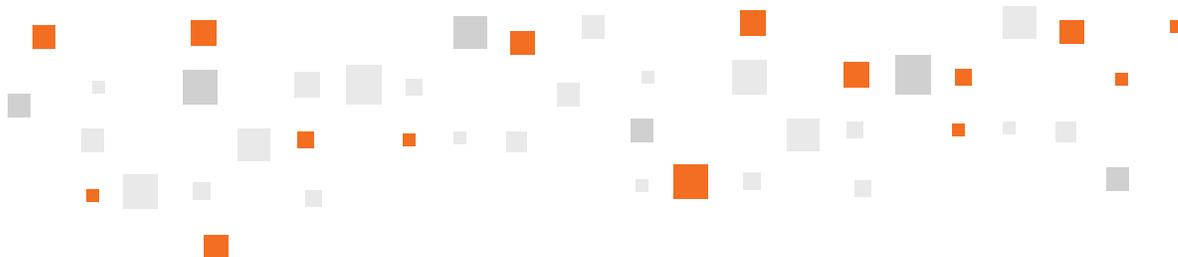
Table of contents

Checkpoint Edge now includes the newly designed **table of contents** providing users the combined ability to browse and search content sets by practice area in one simple experience.

- **Advanced granular search.** Pre-filter your search to exactly what you seek by drilling down into the table of contents manually or through the new 'filter sources' functionality found in the search box.
- **Front-end filtering and intuitiveness.** Conveniently remain on the same page to search specific information including titles, sections, and chapters using the 'filter sources' functionality.
- **Aerial view of available content.** Easily see what titles and content are relevant based on your filter query and navigate to the available sources of information.
- **Speed of search and use.** 'Filter sources' provides quick visibility and access to specific titles and content, saving you time.



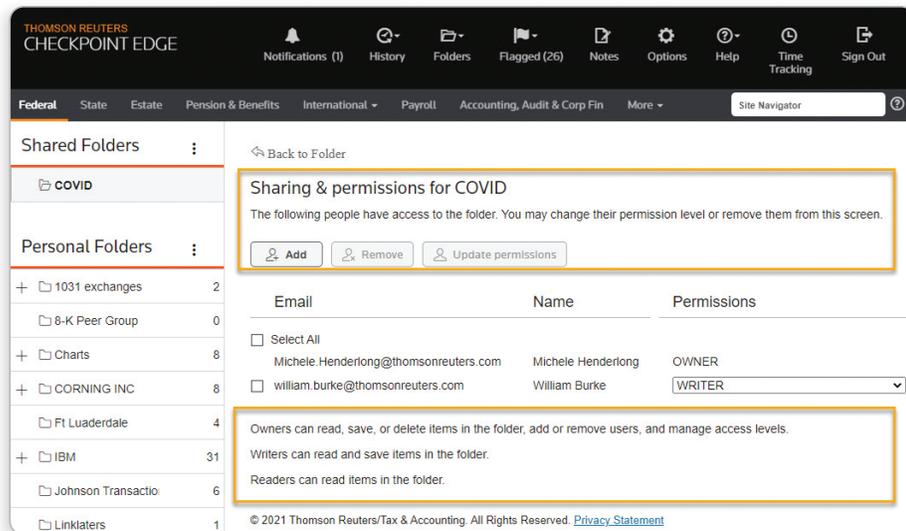
Checkpoint Edge makes it easy to pre-filter your sources and quickly centralize a specific title, section, or other segment to run your search, displaying results for just the selected source.



Shared folders

Take your folder system in Checkpoint Edge to a new level with **shared folders**. Users who save and organize their own research documents in personal folders are now able to share documents at the account level with others who have access to Checkpoint Edge.

- **Build knowledge base within your team.** Create a system of expert documents to keep your team aware of new law, developments, regulations, or any other information to help firm proficiency.
- **Support remote work collaboration.** Users can share relevant documents within your account so that information is readily accessible, and teams can stay in-sync.
- **Team collaboration with notes.** Users can have a fluid conversation with other users within a folder that include visual indicators when there are unread messages or notes added by other folder members.
- **Promote firm and team confidence.** A shared folder system offers users the ability to store their research and repository of project documents for review by seasoned users who can provide feedback, helping to build research skills.
- **Improve efficiency and accuracy.** Sharing documents provides an intelligent and organized in-application catalog system that your account users can access and collaborate on. This replaces the use of email or print, which don't offer central organization and can lead to documents being misplaced or unverified.
- **Ability to copy documents.** Users have the functionality to copy documents into other folders, saving the step of 'moving' the item.
- **Save and view different document types.** Other documents such as interactive decision tools, checklists, worksheets, calculators, and charts can be stored in shared folders.



Creating shared folders offers the ability to add other Checkpoint Edge account users and grant specific access levels to read, save, or delete items of a folder.

Learn more at tax.tr.com/checkpoint/edge

Contact us today at **800-431-9025** to set up a demo to see these new enhancements or sign up for a free trial.

