

YEAR-END CHECKLIST



Tax season is right around the corner and we'd like to help you prepare with everything you might need for a smooth workflow. Here's a list of training and tools that you may want to consider for your firm as you get ready for year-end and beyond.

Network seats

- Additional network seats**
Review the number of concurrent users you'll have accessing your software on the network at the same time and add additional seats if needed.

Training & consulting

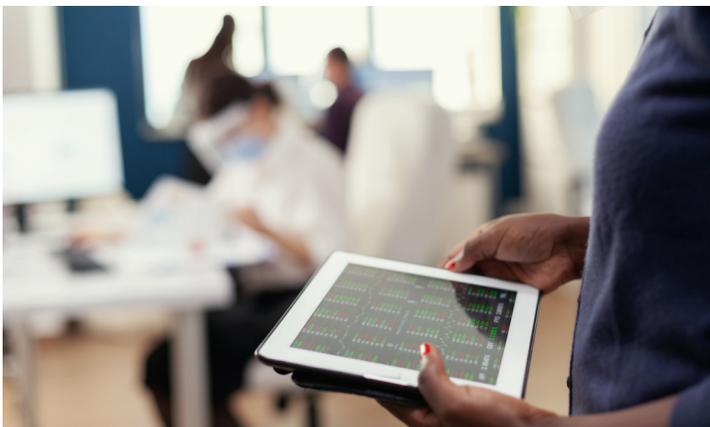
- Year-end update & productivity training for Thomson Reuters® UltraTax CS, Cloud Audit Suite, and more**
Get an in-depth look at the latest software enhancements and see how to improve productivity with your Thomson Reuters tools and content software. Learn more and register at tax.thomsonreuters.com/YearEnd.
- New staffing training**
Are you onboarding new staff to ramp up for tax season? Get them up to speed quickly with our training classes. Learn more and register at tax.thomsonreuters.com/en/accounting-solutions/c/year-end-training.
- Thomson Reuters Practice Forward**
Practice Forward provides proven methodology, guidance, and content solutions that accounting firms need to implement advisory-centered client relationships. This results in accounting firms getting paid for the value they provide and enables even better client service. With Practice Forward's robust library of content, up to 10 hours of personalized consulting and ongoing community support, you have the shortcut you need to a healthier business and more balanced life. Learn more at tax.thomsonreuters.com/practice-forward.
- Consulting opportunities**
Looking to improve the overall workflow processes in your firm? Or maybe you'd like some help with best practices for optimizing your software? If so, our consulting options could be the perfect fit. Learn more about these offerings at tax.thomsonreuters.com/CSConsulting.

Tax workflow

- UltraTax CS add-on tools**
Year-end is a great time to evaluate your current workflow and see if there are any additional tools that could help make your tax season a little easier. Here are a few additional products that you may want to consider:
 - [SurePrep](#): End-to-end tax workflow automation solutions for tax preparers and accountants.
 - [Ledgible CryptoTax Pro](#): Cryptocurrency tax reporting software that streamlines the compliance workflow process.
 - [SafeSend Returns](#): Tax return assembly and delivery automation for individual and entity returns, with a superior client experience.
 - UltraTax CS Client Organizer: Save time with data collection by having your clients complete their tax info online using a customizable questionnaire that imports seamlessly into UltraTax CS.
 - [Thomson Reuters GoFileRoom](#): Cloud-based electronic document management software, simplify your workflow with powerful data sharing, paperless processing, and online convenience to help you achieve a more productive and profitable practice.
 - [Thomson Reuters Planner CS](#): Help your clients review their tax strategies and plan for whatever new tax law changes that might pass.
 - [Thomson Reuters Fixed Assets CS](#): Simplify asset and inventory management with this comprehensive, yet easy-to-use tool that shares data directly with UltraTax CS. Fixed Asset CS is always rapidly updated for any tax law changes that might pass.
 - [eSignature](#): Easily gather signatures from your clients online whenever and from wherever it's convenient.

Did you know? With UltraTax CS data mining capabilities you can quickly and easily identify which of your clients maybe impacted by any tax law changes.

- Want to learn more about these integrated tools?**
Visit our website at tax.thomsonreuters.com/en/accounting-solutions/tax-software or contact your sales representative at 800-968-8900.



If you are new to UltraTax CS, don't forget the IRS E-File application summary! As you know, IRS e-filing guidelines require preparers to be an authorized e-file provider in order to e-file returns.

To be prepared for the upcoming tax season, if you haven't already, you'll need to provide us with a copy of the IRS e-file application summary from your e-services account.

Source document and workpaper management

- Source document management with 1040SCAN and SPbinder**
Source documents can be painful to manage which is why Thomson Reuters has partnered with SurePrep to automate workpaper preparation and eliminate data entry. Learn more at [thomsonreuters.com/sureprep](https://tax.thomsonreuters.com/sureprep).
- Cryptocurrency management with Ledgible**
Save time and build confidence managing your clients' cryptocurrency activity while positioning your firm for new planning and advisory service opportunities with Ledgible. Learn more at [thomsonreuters.com/ledgible](https://tax.thomsonreuters.com/ledgible).
- Workpaper management with Thomson Reuters Workpapers CS**
With the online collaboration in Workpapers CS, it's never been easier to manage documents and data from a variety of sources — and the built-in trial balance capabilities and reporting tools make tax workflow a breeze. Learn more at tax.thomsonreuters.com/WorkpapersCS.

Tax research, guidance, and learning

- Checkpoint Edge**
Checkpoint® Edge is an advanced research tool for tax and accounting professionals that uses artificial intelligence, cognitive computing, and machine learning to provide quick and trustworthy information. Spend less time searching, and more time with your clients. Learn more at tax.thomsonreuters.com/en/checkpoint/edge.

Secure online services for your clients

- Thomson Reuters Netclient CS Client portals**
Take your tax services to a whole new level with the ability to securely share financial documents, tax returns, client software and more online with your clients at any time. Learn more at tax.thomsonreuters.com/NetClient-CS.

For more information about Checkpoint Edge, please contact your salesrepresentative or call 800-431-9025

Working in the cloud

- Virtual Office CS**
If you're faced with having to upgrade your servers or other hardware this year, you may want to consider a move to our proven Virtual Office CS cloud computing that can help eliminate IT hassles. Learn more at: tax.thomsonreuters.com/VirtualOfficeCS.

Important: If you have more than one EFIN number associated with your account, we'll need an IRS e-file application summary for each EFIN number. Please email the summaries to EFINCertificate@thomsonreuters.com, and don't forget to include your Firm ID in the subject line.

You can find more information on how to generate the summary at tax.thomsonreuters.com/Find-EFIN.

Payroll services

- Additional payroll clients for Thomson Reuters Accounting CS Payroll**
If you process live payroll in your firm, now's a good time to add any additional payroll clients/bundles you might need.
- E-filing 940/941 forms**
If you e-file payroll forms, you might want to look at our unlimited 940/941 e-filing pricing options to see if you can take advantage of cost savings. To see if you're at the breakeven point, simply follow these steps:
 - Log in to the My Account section of our website
 - Select My Orders & Payments
 - Select PRP/ELF Report
 - Select the Breakeven Report

Practice management

- Additional timekeepers and modules**
If you're using Practice CS for firm management, year-end is a good time to verify if any additional timekeepers are needed. It's also a good time to see if your firm might want to take advantage of additional functionality with these modules (if not already owned):
 - [Project Management](#): Use dashboards to monitor every detail of your firm's projects in real time.
 - [Client Management](#): Collaborate and view real-time client activity from a single location.
 - [Staff Management](#): Manage staff, benefits, targets, and schedules from a single location.

Learn more at tax.thomsonreuters.com/PracticeCS.

Support

- Unlimited support model available for purchase**
We offer a monthly subscription fee option, instead of pay-as-you-go, which many firms find beneficial for worry-free cost planning. Talk to your representative today to learn more at **800-968-8900**.
 - [Thomson Reuters Community](#) exclusively for our customers: Connect with other tax and accounting professionals in a secure, online space to talk about your practice, understand legislation, and debate technologies and trends. Skip support queues by getting help from peers and experts.