

THOMSON REUTERS

CHECKPOINT™



Checkpoint Compliance Packages for UltraTax CS®

The Best Tax Compliance Tools Just Got Better

Checkpoint Compliance Packages for UltraTax CS® bring together a unique collection of Thomson Reuters Checkpoint® compliance tools that work with your UltraTax CS tax preparation software to help you turn answers into action. With this set of practical tools, your research won't pull you away from the core returns. That's because only Checkpoint research tools are integrated with UltraTax CS software.

Checkpoint Compliance Package Includes:

PPC's 1040, 1065 and 1120S Deskbooks
— Now With Interactive Practice Aids*

Using a unique "key issue" approach that blends practical guidance with illustrative examples and workable solutions for even the most difficult tax return preparation issues, PPC's Deskbooks bridge the gap between interpreting the tax law and reporting real-life client transactions, so you can cut through your compliance workload with confidence. Each Deskbook provides complete and easy-to-understand answers with interactive practice aids (such as worksheets, checklists, elections, statements and more) delivered in context to help you save hours of completion and review time.

Checkpoint
Compliance Package
\$550

Checkpoint
Compliance Package
Plus IRS
Response Library
\$750

Annual subscription price
(one user). A savings of
over 50% vs. list price



the answer company™
THOMSON REUTERS®

Plus you'll also get:

RIA Federal Tax Handbook

This essential reference provides easily accessible and practical answers to critical tax issues, including detailed coverage of the latest tax legislation, current tax rates and advice on which forms to use to report transactions. The handy "What's New on Form 1040" reference tool provides concise explanations of recent developments affecting Form 1040 preparation.

Answer Path

Answer Path will help you find trusted answers in Checkpoint faster by providing a shortcut to commonly searched federal tax topics. As you start to type keywords, Answer Path will show Quick Tax Amounts and Orientation Documents. Quick Tax Amounts offer immediate and reliable answers to straightforward questions such as "what's the standard mileage rate?" or "what's the maximum adoption credit allowed?" Orientation Documents help you get up-to-speed on unfamiliar tax topics related to preparing and filing Federal individual income tax returns by providing a plain English snapshot of a topic with links to the applicable Code Section(s), and guide you to more detailed coverage in your subscription when you need to go further.

Form/Line Finders

Link directly from UltraTax CS form screens to line-by-line explanations of common forms (and schedules) for individual, partnership, corporate, estate, trust, gift, tax-exempt organization and employee benefit plan returns.

PPC's Five-Minute Tax Briefings

These quick-read summaries of tax developments are designed to keep you in the know in five minutes or less.

Primary Law

Access the primary sources you need and use the most during compliance work (including the Internal Revenue Code, IRS/Treasury Regulations and IRS Publications), tightly integrated with relevant analysis and guidance through top-line and side-line links that allow you to move effortlessly between related documents

Checkpoint Compliance Package with Checkpoint IRS Response Library

All of the compliance tools included in the core package plus IRS Response Library

With a rise in IRS audit activity and tax-related identity theft, successfully filing your clients' tax returns may just be the start. Make quick work of IRS taxpayer notices with the IRS Response Library. Quickly search by notice number and respond to the IRS and clients using a variety of tools, including scripts and response documents. The IRS Issues section includes a topical listing of commonly encountered IRS issues/engagements, broken down into individuals and businesses/payroll. Chapters are grouped together by common topic with an introduction, issue overview, practice overview, workplan and list of documents and resources. The step-by-step workplan displays detailed instructions, practice tips and examples of necessary documents and forms. The IRS Response Library features expanded coverage of tax-related identity theft and a new chapter on the Affordable Care Act.

*Interactive Practice Aids will be available in mid-December and will automatically be added to active subscriptions.

Visit tax.tr.com/checkpoint

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



the answer company™
THOMSON REUTERS®