CS Professional Suite®

2020 Price List

Tax
UltraTax CS®
Fixed Assets CS®
Planner CS®
ToolBox CS®

Document Management
FileCabinet CS®

Accounting & Auditing
Accounting CS®
Workpapers CS™

Payroll
Accounting CS Payroll

Firm & Workflow Management
Practice CS®

Client Portals
NetClient CS®

Cloud Computing
Virtual Office CS®
SaaS (Software as a Service) for CS Professional Suite

Website Design
Web Builder CS®

Mobile Apps
Mobile CS®

tax.tr.com/cs
Thank you for considering the Thomson Reuters CS Professional Suite family of products and services.

CS Professional Suite offers the most comprehensive line of integrated products and services available to the profession. Designed to maximize productivity, each program is not only strong individually, but offers immense power through integration and advanced workflow features. Because data transfers seamlessly between products, redundant data entry is eliminated and one-time — even zero-time — data entry becomes a reality. Integration to this degree can exponentially increase the productivity and profitability within your firm.

Our focus is on serving the tax and accounting profession and has been for decades. With more than 60 CPAs on staff, we build software for accountants, written by accountants, to offer solutions that “think” the way you do.

The comprehensive line of products in CS Professional Suite comes with a money-back guarantee. We stand behind all our products and we put our guarantee in writing. If you are not completely satisfied with any product, you may return it within the guarantee period for a refund.

NOTE: Prices effective April 16, 2020 and are subject to change. Special pricing may be available for combination purchases.
## Tax Products

### UltraTax CS Federal, State, and Local Products

<table>
<thead>
<tr>
<th>Product</th>
<th>Price</th>
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<tbody>
<tr>
<td>UltraTax/1040 (Includes Organizer)</td>
<td>$3,545</td>
</tr>
<tr>
<td>UltraTax/1120 (Includes S&amp;C)</td>
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<td>BNA Bridge</td>
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</table>

*The posting and retrieval fees for 1040 and Business Web-Based Client Organizers are included with NetClient CS. Firms not licensed for NetClient CS can choose to use the Web-Based Client Organizers on a per-client basis.

- UltraTax CS Business Organizer $1 to post and $3 to retrieve
- UltraTax/1040 Client Organizer $1 to post and $3 to retrieve

### UltraTax CS Networks

#### UltraTax CS Local Area Network Module
(Includes 4 users) $980

Additional bundles of 4 users $375

#### UltraTax CS Server-Based Computing Module
(Includes 4 users) $1,720

Additional bundles of 4 users $930

### Standard Electronic Filing

Thomson Reuters is committed to developing electronic filing for business products as soon as state taxing agencies permit. You can find the status of business electronic filing availability for all states [here](#). Please note that standard electronic filing is subject to per-return transmission fees.

**Unlimited 1040 Electronic Filing Module** $1,905

Includes federal and state(s). (No per-transmission fees charged for 1040 e-filing)

**Unlimited Business Electronic Filing Module** $1,905

Includes federal and state(s). (No per-transmission fees charged for 1120, 1065, 1041, 990, 5500, or Heavy Vehicle Use Tax e-filing)

### Per-Return Electronic Filing

- **1040 federal and state** $11 per return
- **Other entities federal and state** $16 per return
- **FBAR (1040 return)** $11 per 1040 return
- **FBAR (non 1040 return)** $16 per non-1040 return

(Extensions, FinCEN Form T14 (FBAR), and amended/superseding returns are separate transmissions.)

### eSignature

Electronic signature (eSignature) capabilities are available for engagement letters, consent forms, bank account verification worksheets, FinCEN Form T14a and 1040 IRS Form 8878/8879. A $1 fee will apply to document packages successfully eSigned that do not contain an 8878/8879; a $5 fee will apply to document packages that contain a successful KBA (Knowledge-Based Authentication) signed Form 8878/8879.

Note: Document packages include any documents sent in a single eSignature transmission. Fees are only assessed upon successful completion of eSignature. Spousal eSignature is included as part of a single package transmission. Check your state’s rules to verify whether federal eSignatures are accepted. There will be no extra charge for states with their own eSignature form, if processed with Form 8878/8879.

### UltraTax CS Per-Return Pricing (PRP) Options and Preparer Block Override Fees

UltraTax CS users with one full federal license may purchase a $320 PRP license for access to all other UltraTax CS federal and state products on a PRP basis.

For UltraTax CS users who own an unlimited license and want to change or blank out the Preparer Block the PRP fees below apply.

<table>
<thead>
<tr>
<th>Form</th>
<th>Federal</th>
<th>State/Local</th>
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<tr>
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<td>706 &amp; 709 A</td>
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</table>

Heavy Vehicle Use Tax = $39

Federal 1120 Consolidated = $65

Note: • A $2 per-return surcharge will apply to PRP codes registered manually (by phone or fax).
• PRP fees apply to the current year and all prior years.

### NetClient CS Portals

NetClient CS Portals $227 per month

(Includes up to 1,000 base portals with Web Organizer, tax return presentation, and much more. A one-time $850 NetFirm C2 setup fee applies.)
# Tax Products

## UltraTax CS Federal, State and Local Products

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## UltraTax CS State and Local Products Key

\(^{\Delta}\) UltraTax/990 Property Tax: CA, GA, IN, KY, MD, MI and WI

\(^706\) UltraTax/706 CA, CT, DE, IL, ME, MD, MN = $385; MA, NJ, NY, OR, PA, RI = $490

\(^990\) UltraTax/709 CT = $385

\(^990\) UltraTax/990 AZ, CA, CT, GA, IL, IN, KS, MA, MD, MI, MN, NY, SC, VA = $490

\(^{c}\) Includes 1120 consolidated/combined

\(^{S}\) S consolidated

\(^{S&C}\) Includes 1120 S&C consolidated/combined

\(^{\U}\) Unitary Return

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**CS Professional Suite Price List** Tax Products
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**the answer company™**

THOMSON REUTERS®
Tax Products

Fixed Assets CS, Planner CS, ToolBox CS, and Source Document Processing

**Fixed Assets CS**
- Fixed Assets CS: $2010
- Local Area Network Module (Includes 4 users): $400
- Additional bundles of 4 users: $400
- Fixed Assets CS Server-Based Computing Module (Includes 4 users): $595
- Additional bundles of 4 users: $595
- Fixed Assets CS Inventory Module: $655

**Technical Support**

**Annual Contract**
- 1st Product (per year): $840
- Additional Product (per year): $456

**Monthly Contract**
- 1st Product (per month): $70
- Additional Product (per month): $38

**Hourly**
- 10 Minute Increments: $27

**Planner CS**
- Planner CS Federal (Purchased Annually): $1055
- Planner CS — One State (Purchased Annually): $325
- Planner CS — All States plus D.C. (Purchased Annually): $475

**ToolBox CS**
- ToolBox CS: $385

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Document Management

**FileCabinet CS**

- **FileCabinet CS** .................................................. $2,520
- **Local Area Network Module** (Includes 4 users) .... $440
  Additional bundles of 4 users ................................ $345
- **FileCabinet CS Server-Based Computing Module**
  (Includes 4 users) .................................................. $890
  Additional bundles of 4 users ................................ $700

**Source Document Processing**
(Works with Workpapers CS and FileCabinet CS)

- **Individual Clients** .............................................. $10 per client, per year
- **Unlimited Clients** .............................................. $2,115 per year

**Technical Support**

- **Annual Contract**
  1st Product (per year) ........................................ $840
  Additional Product (per year) .............................. $456

- **Monthly Contract**
  1st Product (per month) ....................................... $70
  Additional Product (per month) ........................... $38

- **Hourly** .......................................................... $162
  **10 Minute Increments** ..................................... $27

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CS Professional Suite Price List Document Management
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## Accounting and Auditing

### Accounting CS and Accounting CS Payroll Products

**Accounting CS Products**

- **Accounting CS** *(Includes Accounting CS Payroll Compliance)* $3,545
- **Accounting CS Payroll** *(20 Clients)* $2,700
  
  (Accounting CS Payroll Compliance required if not already licensed for Accounting CS. Includes the capability to process payroll for 20 clients. Additional clients are available in groups of 5.)

- **Additional Payroll Clients** *(5-Client Bundles)* $310
- **Accounting CS Payroll Compliance** *(Must be purchased annually. Included with Accounting CS, required for standalone Accounting CS Payroll.)* $960

**Transmission Fees for 940/941 Electronic Filing**

- **Federal and State** $9 per return

**940/941 Unlimited Electronic Filing Module** *(Purchased Annually)* $1,850

- **Workpapers CS** *(Includes 4 users)* $1,710
  
  Additional bundles of 4 users $635

- **Local Area Network Modules** *(Includes 4 users)* $1,890
  
  Additional bundles of 4 users $750

- **Server-Based Computing Module** *(Includes 4 users)* $2,865
  
  Additional bundles of 4 users $1,135

**Technical Support**

**Annual Contract**

- 1st Product (per year) $840
  
  Additional Product (per year) $456

**Monthly Contract**

- 1st Product (per month) $70
  
  Additional Product (per month) $38

- Hourly $162
  
  10 Minute Increments $27
Firm & Workflow Management

Practice CS

Practice CS Products

- **Practice CS** (Includes 5 Timekeepers) ................................................. $2,980
- **Additional Timekeepers** (In groups of 5) ................................................. $1,810
- **Project Management** ................................................................................ $1,720
- **Client Management** ................................................................................ $810
- **Staff Management** ................................................................................... $1,380
- **Local Area Network Module** ................................................................... $1,435
- **Server-Based Computing Module** ........................................................... $2,065

**Mobile CS**
Exclusively for tax and accounting professionals — Mobile CS gives you on-the-go access to important Practice CS data to extend the reach of CS Professional Suite products from your desktop to your Apple® iPhone®, iPad®, iPod® touch, and Android™ devices. Mobile CS offers Practice CS content, such as client and staff data, as well as key firm data such as WIP and AR.

**Monthly Fee:** .................................................................................. $5 per staff, per month

**Technical Support**

**Annual Contract**

1st Product (per year) ............................................................... $840
Additional Product (per year) ...................................................... $456

**Monthly Contract**

1st Product (per month) .............................................................. $70
Additional Product (per month) .................................................. $38

**Hourly** ......................................................................................... $162
10 Minute Increments ................................................................. $27
Client Portals

NetClient CS

NetFirm CS

With the purchase of NetFirm CS, your firm will receive one free on-demand training class for NetStaff CS or NetClient CS. This training is available to the entire firm for six months from the date of purchase.

One-time setup fee for NetFirm CS $850

NetStaff CS
NetStaff CS portals are included with your NetFirm CS fee. Includes File Exchange, Links, Staff Availability, Stock Quotes, Document Presentation, and News modules.

Space Allocation
Space allocation is managed in an aggregate manner for all of NetFirm CS.

We allocate 500 MB of space for each NetClient CS portal created, as well as 500 MB of space for each NetStaff CS portal that does not have access to applications through SaaS or Virtual Office CS.

If your firm also owns Virtual Office CS or SaaS, each NetStaff CS portal that has access to Virtual Office CS or SaaS adds 4 GB of storage space to the aggregate.

Additional data storage used above these limits will be assessed a $7 per GB charge per month.

NetClient CS

Base Portal Monthly Fee
(Includes up to 1,000 NetClient CS base portals) $227

Additional modules are priced per month and include:

Virtual Client Office
• Client Accounting Options
With Client Access, you have the ability to collaborate online with clients in real time using a single database. The following client accounting options are available:
  • Accounting CS (ACS) Client Access $17 per portal
    - ACS Client Check Writing $14 per company
    - ACS Client Payroll (includes Check Writing and Payroll) $24 per company
    - ACS Client Accounting (includes Check Writing, AR, and AP) $21 per company
    - ACS Full Service Bundle (includes Check Writing, AP, AR, and Payroll) $30 per company
  • Virtual Office QuickBooks® powered by Right Networks® $67 per portal
• Firm-Hosted Client Access $17 per portal

Additional Options
• Client FileCabinet CS (Web-Hosted) $34 per portal
• Microsoft® Office® for NetClient CS $39 per portal

Remote Payroll Services $15 per portal

Account Aggregation $12 per portal

Employee Self-Service $12 per company

To use Employee Self-Service, you must be licensed for Accounting CS Payroll Compliance (with Accounting CS and/or Accounting CS Payroll). Includes ability to access check stubs, earnings history, W-2s, W-4s, and My Time Entry (must be licensed for NetFirm CS).

Technical Support

Annual Contract
1st Product $840
Additional Product $456

Monthly Contract
1st Product $70
Additional Product $38

Hourly $162
10 Minute Increments $27

1 Virtual Office Quickbooks® powered by Right Networks® is no longer available as of Aug 31, 2020

CS Professional Suite Price List Client Portals
tax.tr.com/cs
**Cloud Computing**

**SaaS (Software as a Service) for CS Professional Suite**

**NetFirm CS**

**Space Allocation**
Space allocation is managed in an aggregate manner for all of NetFirm CS.

We allocate 4 GB of space for each NetStaff CS portal that has access to SaaS, as well as 500 MB of space for each NetStaff CS portal that does not have access to applications through SaaS.

If your firm also owns NetClient CS, each NetClient CS portal created adds 500 MB of space to the aggregate.

Additional data storage used above these limits will be assessed a $7 per GB charge per month.

**SaaS**
We offer a standard start-up package to move your firm to SaaS for CS Professional Suite.

**Standard - $1,850**
- Setup and configuration of your firm and applications in our secure data centers
- Web Services transition program including walkthrough of data migration and setup, and firm administrator procedural instructions and overview
Cloud Computing

SaaS (Software as a Service) for CS Professional Suite

Profile pricing is based on the SaaS profiles that you choose for your firm:

<table>
<thead>
<tr>
<th>Profile</th>
<th>Monthly Fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full Service</td>
<td>$681</td>
</tr>
<tr>
<td>Tax</td>
<td>$579</td>
</tr>
<tr>
<td>Accounting</td>
<td>$445</td>
</tr>
<tr>
<td>Admin</td>
<td>$327</td>
</tr>
</tbody>
</table>

Minimum $681 per firm, per month, any combination of activated profiles.
(Does not require a Full Service profile.)

Multiple User Discount:

<table>
<thead>
<tr>
<th>Profiles</th>
<th>Discount</th>
</tr>
</thead>
<tbody>
<tr>
<td>2 - 4</td>
<td>8% off</td>
</tr>
<tr>
<td>5 - 8</td>
<td>18% off</td>
</tr>
<tr>
<td>9 - 12</td>
<td>25% off</td>
</tr>
<tr>
<td>13+</td>
<td>35% off</td>
</tr>
</tbody>
</table>

The multiple user discount is applied to the total monthly fee.
For example, 1 Full Service + 1 Tax = ($681 + $579) less 8% = $1,159.20

<table>
<thead>
<tr>
<th>SaaS Profiles of Use</th>
<th>Full Service</th>
<th>Tax</th>
<th>Accounting</th>
<th>Admin</th>
</tr>
</thead>
<tbody>
<tr>
<td>UltraTax CS (Includes PRP &amp; ELF fees)</td>
<td>✓, 4, 5</td>
<td>✓, 4, 5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accounting CS</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Accounting CS Payroll</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Workpapers CS 1</td>
<td>✓3</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Fixed Assets CS</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Planner CS</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>ToolBox CS</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Practice CS</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>FileCabinet CS 1</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Microsoft Office w/Exchange2</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>

1 Workpapers CS is accessible via the Full Service and Accounting profiles in the Accounting CS program.

2 Mobile phone synchronization is included for any phone that supports Exchange ActiveSync (such as iPhone and Android devices.)

3 Source Document Processing (SDP) is available for $10 per client, per year or $2,115 for an unlimited license.

4 Electronic signature (eSignature) capabilities are available for engagement letters, consent forms, 1040 IRS Form 8878/8879, along with business engagement letters and consent forms, bank account verification worksheets, and FinCEN Form 114a. A $1 per-document/package fee applies to each successfully eSigned engagement letter, consent form, verification worksheet, and FinCEN Form 114a. A $5 per-document/package fee applies to each successful KBA (Knowledge-Based Authentication) signed Form 8878/8879.

5 1040 and Business Web-Based Organizers are included with NetClient CS. If you do not have NetClient CS, the following per-client fees apply: $1 posting and $3 retrieval fees apply for the 1040 Organizer and a $1 posting fee applies for the Business Organizer.
**Cloud Computing**

**Virtual Office CS**

**NetFirm CS**
NetFirm CS provides administrative capabilities for NetClient CS client portals and NetStaff CS staff portals. NetFirm CS is required for administering NetStaff CS and NetClient CS (including Virtual Office CS for CS Professional Suite, Employee Self-Service and Mobile CS).

With the purchase of NetFirm CS, your firm will receive one free on-demand training class for NetStaff CS or NetClient CS. This training is available to the entire firm for six months from the date of purchase.

One-time setup fee for NetFirm CS $850

**NetStaff CS**
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If your firm also owns NetClient CS, each NetClient CS portal created adds 500 MB of space to the aggregate.

Additional data storage used above these limits will be assessed a $7 per GB charge per month.

**Virtual Office CS**
Select from one of three options:

1. **CS Professional Suite applications only** $130 per portal, per month
(Standard license fees apply to products.)

2. **Microsoft Office without CS Professional Suite** $136 per portal, per month

3. **CS Professional Suite applications and Microsoft Office** $158 per portal, per month
(Standard license fees apply to products.)

**Microsoft Exchange** (with ActiveSync) $13 per portal, per month

**Additional Storage Space** $7 per GB

**Storage Space for Archived Data** $17 per 10 GB, per month

**Hosted QuickBooks® powered by Right Networks®** $67 per portal

**Technical Support**

**Annual Contract**
1st Product (per year) $840
Additional Product (per year) $456

**Monthly Contract**
1st Product (per month) $70
Additional Product (per month) $38

**Hourly** $162
10 Minute Increments $27

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1 Hosted Quickbooks® powered by Right Networks® is no longer available as of August 31, 2020.

**CS Professional Suite Price List**

[tax.tr.com/cs](http://tax.tr.com/cs)
Website Design

Web Builder CS

Web Builder CS will help you create and maintain a professional, custom website for your business. Choose a standard template and add some personal touches, or work with one of our design experts to create a unique website that matches your brand personality. Either way, with Web Builder CS you can have a professional web presence that helps you serve existing clients and attract new ones.

Website Hosting ................................................................. $70 per month

Includes:
• Five 100 MB email accounts
• Automated monthly newsletters
• Client portals
• The ability to accept online payments
• Contact page and appointment request tool
• Referral submission form
• Financial calculators
• Ability to implement Search Engine Optimization (SEO)
• Access to visitor statistics with integration through your Google Analytics™ account
• Blog with social media integration

Choose Your Website Design

Standard Template .......................................................... Free
Choose from dozens of pre-designed templates made specifically for accountants.

Enhanced Template .......................................................... $500
Choose from our dozens of pre-designed templates made specifically for accountants and work with our design team to upgrade it by choosing your own font type, color scheme, and homepage main image.

Custom Design ............................................................... $1,590
Work with our design team to create a custom-designed website that reflects the unique personality of your business.

Custom Design with Animation ........................................... $2,650
Work with our design team to create a unique website for your firm and add some eye-catching animation.

Additional Services

Custom Logo Design ......................................................... $875

Domain Registration (gTLD extensions such as .com, .net, and .org) $35 per year*

Premium Domain Registration (ngTLD/nTLD extensions such as .tax and .accountants) $60 per year*

Email Hosting

Additional Email Account .................. $3.5 / 100 MB per account, per month
Additional Storage .................. $3.5 / 250 MB per account, per month

*If registered with Web Builder CS

CS Professional Suite Price List Website Design
tax.tr.com/cs