



CCH[®] Access[™] Tax for Financial Service Providers

DIFFERENTIATE YOUR FIRM'S OFFERINGS WITH TAX AUTOMATION

CCH[®] Access[™] Tax is a cloud-based professional tax software designed to automate income tax return preparation by providing users with up-to-date forms, advanced functionality, customization, a user-friendly interface, and tools for collaboration.

Trusted by 90 of Accounting Today's Top 100 Firms, CCH Access Tax serves as a single source of truth for income tax and supports various return types, including individual, fiduciary, and corporate.

HOW FINANCIAL SERVICE COMPANIES BENEFIT FROM CCH[®] ACCESS[™] TAX

CCH Access Tax is proven to be an effective tax tool not only for public accounting firms but also for companies that provide tax returns as supplementary services and looking to ...

Expand your clients' services with competitive tax offerings

- Get a competitive advantage by bringing tax on board and having a "one-stop-shop" for clients.
- Improve the quality of primary financial services by getting a full picture of clients' financial health and business opportunities.
- Have greater control over clients' tax returns.
- Reduce costs on tax function by boosting teams' productivity.

Increase team efficiency

- Save staff's time and optimize their efficiency.
- Relocate the freed time and resources to bring in more business without hiring additional personnel.
- Retain valuable talent in-house by balancing their workload and providing a flexible work environment.

Companies that already take advantage of CCH Access Tax

Wealth Management
Trust Companies
Family Offices
Capital Management
Financial Planning
Retirement Planning
Real Estate Planning
Banks
Legal Offices
and more.

WHAT SETS CCH[®] ACCESS[™] TAX APART?

Efficiency and improved collaboration

Streamlined tax preparation saves valuable time and significantly reduces errors: automation brings 99% accuracy. On-screen reviews and user notes functionality expedite return approval.

Expertise trusted by professionals for years

Our solution was built by tax practitioners and reflects all state and federal law changes. It has been trusted by leading CPA firms for its expertise and functionality for over a decade, making this tool widely known to tax professionals.

End-to-end operations and open integration

An end-to-end experience can fully eliminate the need for a 3rd party vendor. CCH Access is an open integration platform that allows to integrate tax into other systems used by the company to create a unified experience.

“With CCH Access, we’re able to highlight client tax information, pull the data out, and make sure that it’s now fully integrated with the rest of our platform, which helps us serve our clients better.”

Jonathan Meeker, CPA
Tax Planning Specialist
Hantz Group

CCH® ACCESS™ TAX FEATURES FOR A BETTER USER EXPERIENCE

- **Intuitive interface**
that works with the user to allow for a quick learning curve and ease of use.
- **Customized views**
streamline the preparation of the returns.
- **Expedited on-screen reviews**
offer tick marks, preparer notes, and other tools to speed up the process.
- **Dynamic preparer notes**
allow users to collaborate with an array of note types.
- **Robust diagnostics**
allows users to timely address the issues by launching flagged returns in one click with the conflict field displayed.
- **Templates for professional correspondence**
can be edited in Microsoft® Word and saved to libraries.

Addressing Common Challenges

Constant tax legislation changes:

The constant changing of federal and state laws lead to tax practitioners spending their valuable time on research to do their job right. With CCH Access, updates are automatic, forms are relevant, and product guides, support, and research tools, such as CCH® AnswerConnect, are available at a single right-click.

The labor shortage in accounting:

The lack of accounting graduates and the high percentage of resignations have significantly contributed to the turnover rate of accounting professionals, that has doubled in recent years. Hiring cannot keep pace with resignations: companies are forced to juggle existing resources to meet deadlines. Wolters Kluwer solutions can help you close the gap by offering high-impact automation or XpitaX® Tax Preparation Outsourcing.

Tax function as a cost center:

Paying taxes is often less of an issue than paying for compliance. The tax function is often considered as a cost center that does not directly bring revenue. Tax automation enables companies to reduce tax compliance costs by saving time and money.

Other CCH® Access™ Modules to Improve Your Team’s Productivity

Document

A feature-rich document management solution that electronically organizes and stores all types of client documents and firm communications.

Workstream

A comprehensive solution that allows users to stay on top of all specific services or deliverables for each client moving through the company, including due dates, statuses, work steps, budgets, etc.

Workflow

A browser-based solution that provides key workflow functionality across multiple areas within a company.

Financial Prep

The award-winning cloud-based trial balance solution that allows you to instantly produce accurate balances for preparing business tax returns.

iQ

Predictive intelligence helps track tax legislation changes and gather insights to grow tax advisory services.

Portal

A secure online space that allows you to conveniently send and receive client files quickly and securely.

Client Collaboration

A secure, unified collaboration hub for users and their clients to manage all tax workflows.

Solutions That Seamlessly Integrate with the CCH® Access™ Platform

CCH® AnswerConnect | CCH® ProSystem fx® Scan and Autoflow Technology
CCH® ProSystem fx® PDFlyer | CCH® ProSystem fx® Fixed Assets