



Tax & Accounting

Ready for What's Next

Go Beyond Compliance
with CCH Axcess™

A man in a dark suit and tie is looking intently at a tablet he is holding. The background is a dark, futuristic scene with glowing blue light effects, including bokeh and digital patterns. Overlaid on the image are various digital elements: a bar chart in the upper right, a line graph in the lower right, and a network diagram in the center right. The overall aesthetic is high-tech and professional.

On the Forefront of Tax & Accounting Technology

CCH Axcess software offers the most complete cloud-based accounting firm technology, enabling firms to configure a system that is just right for their current and future needs.

With more than 10 years in the market, CCH Axcess provides professional accounting firms with innovative, expert solutions developed side-by-side with our customers.



Choose a Solution That's Just Right for Your Firm

For Now and Into the Future

You don't have to choose between a reliable solution built on inefficient old technology or taking a gamble on something new and untested. CCH Axcess software has been used by accounting firms of all sizes since 2013. The modular cloud-based design provides the right level of features for your firm now, with room to grow in the future.



Achieve Your Competitive Advantage

Create room for higher-value engagements by taking the hassle out of all firm engagements.



Create a More Modern Firm Experience

At the center of a future-ready firm is a centralized platform.



Make More Time for What Matters

Get more done in less time, so you and your staff are less stressed.



Manage Complexity with Comprehensive Tools

Reduce errors and identify problems earlier in the process.



Enable Integration and Collaborations

Bridge gaps in your processes by integrating and automating throughout the firm.



Exceed Client and Staff Expectations

Improve client and staff satisfaction with modern technology, available when and where they need it.



Expand Your Firm's Potential

Accelerate innovation and increase efficiency with a system designed to scale with your firm's growth.

Achieve Your Competitive Advantage

Create Room for More Higher-Value Engagements

Comprehensive accounting, audit and tax compliance features are built on a centralized system to help firms elevate their client relationships and solve staffing challenges. The scalable design enables greater efficiency and convenience across the entire firm.

Take the Hassle out of Tax Compliance

Improve staff engagement and, ultimately, client satisfaction with a digital tax workflow powered by CCH Xcess software. CCH Xcess Tax is a cloud-based tax compliance and preparation system built on CCH Xcess common data and services. That includes intelligent diagnostics, practical review tools and other advanced features that save time and ensure accuracy.

Integration with other CCH Xcess platform modules repetitive, manual tasks and makes everyone in the firm more efficient.

Deliver More Efficient, Higher Quality Audits and Improved Peer Reviews

CCH Xcess accounting and audit solutions include technology for a complete end-to-end audit workflow for all types of engagements. The integrated audit approach and knowledge-based audit methodology emphasize professional judgement and minimize error-prone manual tasks.

Leverage an approach that supports a data-driven audit and collaborative client experience for increased efficiency, improved audit quality and increased revenue growth.

“Even after adding two full time staff, we’ve had close to a 29% increase in the top line while making the transition to better work/life balance. So we’re not working as much, and we are still able to enjoy a 14% increase in profit margin with lower overhead percentage.”

Christopher M. Salisbury, CPA/PFS, CFP, SCEP
Partner
Smith & Salisbury, PLLC

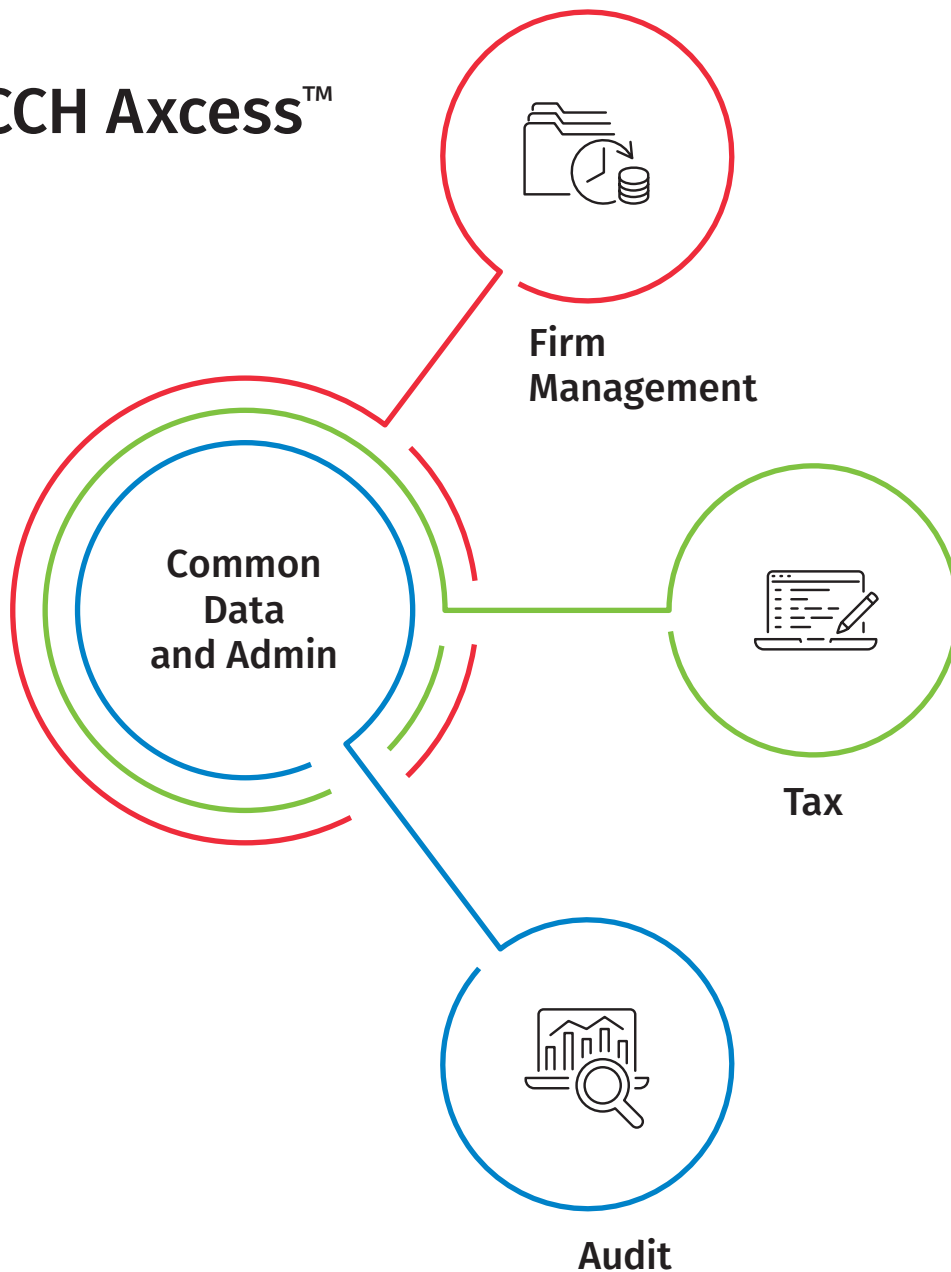
Create a More Modern Firm Experience

Manage Workflow and Maximize Productivity

CCH Axxess firm management solutions support clear visibility into the business of the firm. Rather than simply replacing manual processes with digital ones, firms can build a future-ready technology backbone supporting increased productivity and firm growth in every department.

Through integration and automation, CCH Axxess firm management solutions can streamline areas such as staffing, document management, time and billing, reporting, marketing, workflow and project tracking.

CCH Axxess™





Make More Time for What Matters

Get More Work Done with Less Time and Stress

“Everyone really likes the increase in speed, the ability to work seamlessly as a team on the same documents, and also being able to open the same documents on multiple screens while being in different parts of a form.”

Mona Dickerson
National Assurance Director
CohnReznick LLP

Reduce the time your firm spends on basic compliance work so you can grow more value-added parts of your business.

- On-demand collaboration tools create value for clients and reduce friction between the client and firm.
- Automating data ingestion and data entry shifts focus away from collecting and entering data.
- Advanced technologies leverage firm data to provide insights into client opportunities and firm performance.
- More efficient workflows automate repetitive tasks, eliminating administrative hassles and smoothing the transitions from one step to the next.

Manage Complexity with Comprehensive Tools

Reduce Errors and Identify Problems Earlier in the Process

While staffing challenges are increasingly common, legislative change and regulatory complexity have only increased.

Firms need tools that help them manage complexity, so they can reduce risk and produce quality work. CCH Axcess expert solutions help firms manage even the most complex work.

- Common information like client data, security settings and firm set-up is all in one place so you only have to enter it once.
- Intelligent diagnostics, practical review tools and other advanced features incl. reporting, help firms identify risk and stay in compliance with fast-changing legislation and regulatory guidance.
- Seamless integration between CCH Axcess modules minimizes data entry and reduces the risk of human error.



Enable Integration and Collaboration

Bridge Gaps in Your Processes

Improve efficiency in your processes while building cohesiveness throughout the firm. CCH Axcess software provides a single source of truth for firm data and a multi-dimensional view of firm performance.

- Centralized data bridges the gap between teams and departments, ensuring everyone is working with the most recent information.
- Integration between solutions helps smooth the transition between tasks and processes, reducing miscommunication and delays.
- Centralized technology for projects, documents and billing/invoicing helps firms enhance client service by providing visibility into all components of the client relationship.



Meet Client and Staff Expectations

Improve Client and Staff Satisfaction with a Modern Firm Experience

Create a more modern firm experience for clients and staff with CCH Axxess cloud-based workflows.

Anywhere/anytime access enhances work/life balance and provides staff with the flexibility they are looking for.

- With better visibility into all components of the client relationship, firms can provide a better client experience.
- Integrated workflow solutions help firms enhance the client experience by being more responsive during busy season and throughout the year.
- Standardized, efficient workflows help staff understand what needs to be done and when, reducing confusion and improving engagement and autonomy.

“Very few firms of our size that service our type of clients have a suite as comprehensive as we do, and I think that allows us to provide our clients with a better product.”

Todd Raymond, CPA
Partner
Henry, Raymond & Thompson, LLC



Expand Your Firm's Potential

The CCH Axcess System Scales with Your Firm's Growth

Build a more modern firm experience for your clients and staff.

The CCH Axcess Open Integration Platform enables accounting firms and third-party software partners to create applications that connect with CCH Axcess data. Using APIs, firms can accelerate innovation, improve efficiency and enhance overall client service.

- Automate many of the most time-consuming tasks in the tax, audit and firm management workflows.
- Import data into internal systems to eliminate duplicate data entry and automate manual processes.
- Move data seamlessly from the source and between applications.

Accelerate Innovation, Improve Efficiency and Enhance Overall Client Service

We are continuously strengthening our relationships with 3rd party technology vendors to accelerate innovation that benefits our customers.

The CCH Axcess Marketplace makes it easier for firms to find additional partner solutions that integrate with their systems. Extending our strategy of an open platform gives firms more opportunities to add value to their system.

Implementation, Training and Support You Can Rely On

At Wolters Kluwer, it's important to us that you make the most out of your software investment and are as prepared as possible for years of success.

Our onboarding specialists and professional trainers will walk you through every step of implementation for no additional charge — with no implementation fees or surprise charges for extended support.



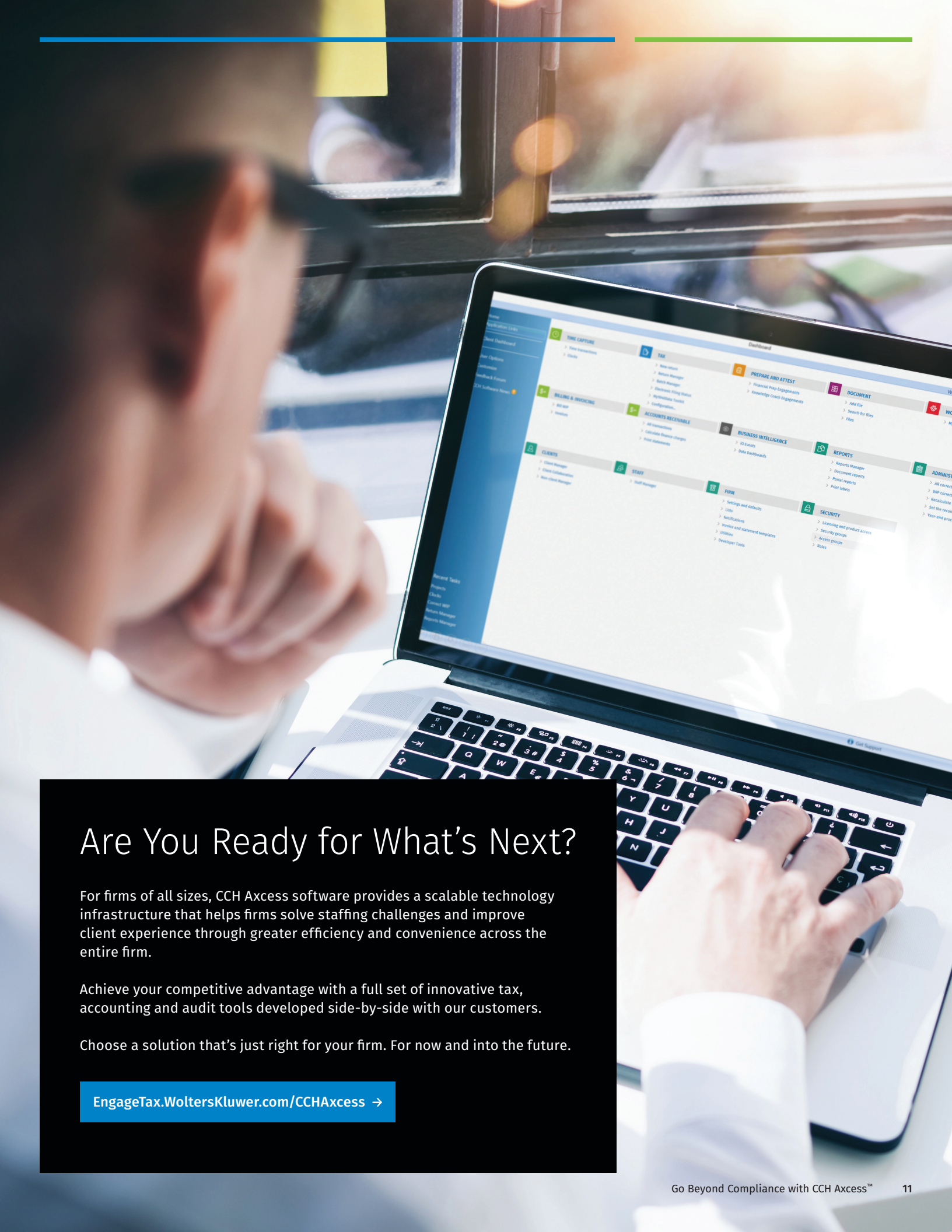
**of Accounting Today's
Top 100 Firms**



**of Accounting Today's
Top 20 Fastest
Growing Firms**

Trusted by 15 of Accounting Today's 20 Fastest Growing Firms and 94 of the Top 100, CCH Axcess is the engine that powers the industry's top performers.

Stay one step ahead. Our solution architects and industry experts work with thousands of firms every year and are eager to pass that knowledge on to you.



Are You Ready for What's Next?

For firms of all sizes, CCH Axcess software provides a scalable technology infrastructure that helps firms solve staffing challenges and improve client experience through greater efficiency and convenience across the entire firm.

Achieve your competitive advantage with a full set of innovative tax, accounting and audit tools developed side-by-side with our customers.

Choose a solution that's just right for your firm. For now and into the future.

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