

# Personal Tax and Corporation Tax



Information  
Fee Protection  
**Software**  
Magazines  
Professional Development

...clear thinking



# Meeting today's challenges

How can you satisfy your clients' ever-rising expectations? How can you attract and retain the best staff? How can you provide services that add value to client relationships? How can you make sure that the advice you give is always correct, timely and up to date? How can you do all this and still increase practice profitability?

**Today's professional practices face many challenges. CCH tax software helps you meet them all.**

## Legislation

Tax laws change regularly. Sometimes they change radically. Clients expect appropriate and up to date guidance at all times. By building the tax rules into the software, and by providing regular updates as part of a comprehensive support package, we make sure that the calculations you perform and the advice you give are always in line with the latest legislation.

## Staff

Your highly trained staff don't want to waste time on routine tasks and repetitive data entry. They'd rather be engaged in more challenging work, building their experience, extending their knowledge... and earning more money for the practice. Designed by tax professionals with the end user always in mind, our software eliminates or automates routine tasks and frees staff to perform more profitable work.

## Reliability

You have to be able to rely on your software supplier just as you rely on your own staff. CCH has an enviable record of product functionality, delivery, service and support; for example, we were the first company in Ireland to enable the electronic filing of both personal and corporate tax returns.

## Services

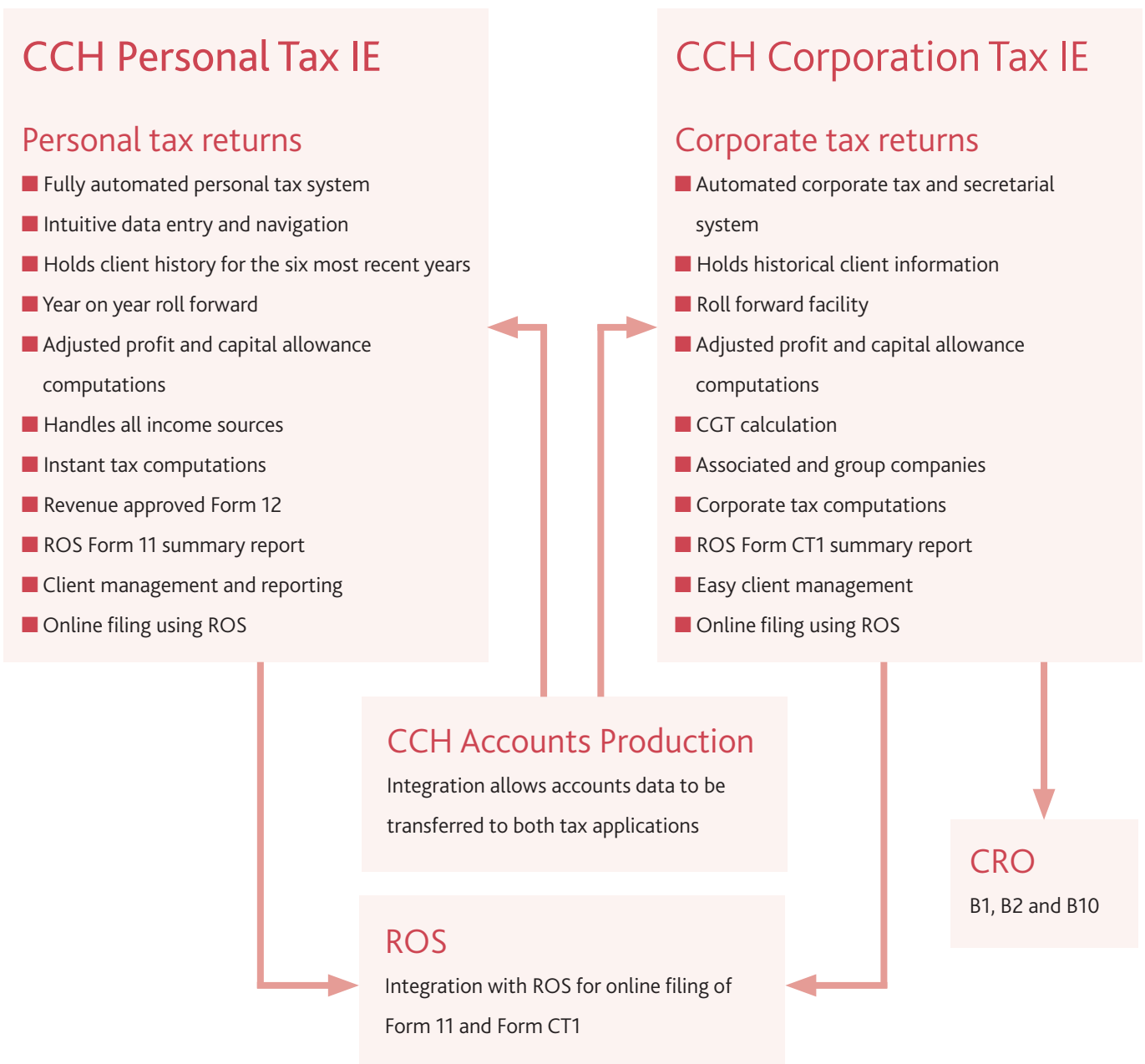
Clients expect more than ever before. Your largest clients want tax, pension and investment advice based on complex 'What-If?' scenarios. They expect to be able to communicate via email. They need to know that your advice takes account of the latest tax planning opportunities. At the same time, smaller clients turn to professional advisors for basic tax compliance work. These clients expect good service at a reasonable cost and only the best tax software will allow you to deliver this profitably.

# Meeting all your compliance needs

Individually, the CCH tax and accounting applications offer unrivalled functionality. Working together, they form an unbeatable combination, meeting all your compliance needs.

For example, both tax applications automate the extraction of data from the accounts and populate the relevant pages on Form 11 and Form CT1. Integration with ROS allows single or multiple returns to be filed online, giving immediate time savings.

When you spend less time on compliance work, you can spend more time with your clients. Efficiency is boosted and practice profitability is improved. It's a win-win situation for you and your clients.



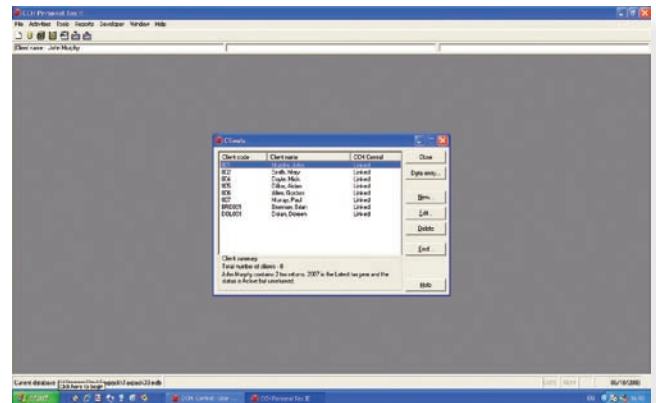
# CCH Personal Tax IE

CCH Personal Tax IE is Ireland's leading professional personal tax compliance software. Over 1,100 users rely on the software and it's estimated that over 100,000 individual personal tax returns are prepared and filed annually using CCH Personal Tax IE.

## Ease of use

CCH Personal Tax IE has been designed to be as easy as possible to use, whilst incorporating a high degree of functionality and flexibility. It includes many features that provide accountants and tax professionals with everyday assistance covering the broadest spectrum of needs, without sacrificing ease of use.

CCH Personal Tax IE ensures timely and accurate submission of your clients' returns. Practical assistance is given to ensure that you do not overlook a client's Notice of Preliminary Tax and, having received the client's tax information, that the return is processed speedily and thoroughly before the filing deadline for the following tax year. Client data is quickly and easily entered using fast data entry features.



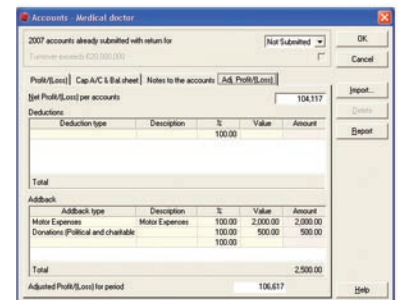
*To maximise your productivity, screens are designed for simplicity and ease of use*

## Accounts extract data

The accounts extract data, required for completing an individual's Form 11, can either be input manually or imported directly from CCH Accounts Production using the data import feature.

## Adjusted profit and capital allowance computations

Adjusted profit and capital allowance computations are easily prepared and printed. Tedious time-consuming manual or spreadsheet computations are eliminated. CCH Personal Tax IE provides accurate and professionally prepared computations which will enhance your clients' perception of your firm.



*Adjusted profit computations can be produced in minutes and data can be rolled forward from year to year, creating even more time savings*

## Income tax computations

Within seconds, CCH Personal Tax IE can deliver accurate and clearly presented income tax computations, a very useful facility when investigating 'What If?' scenarios. A drill down facility ensures maximum time saving and efficiency when reviewing the computation. Tax computations can be printed, saved as Adobe Acrobat PDF files or exported to Microsoft Excel for comprehensive analysis.

## Income tax returns

A Form 11 tax return summary can be produced. This document shows all sources of income, allowances etc that are included on the official tax return form and transmitted to the Revenue via the ROS system. It can be printed off for verification and signature by your client and retained on file.

If you are filing a Form 12 tax return, a Revenue approved facsimile form can be printed off or saved as a PDF file. This can save your tax department valuable time on the laborious task of completing these returns by hand, allowing you to concentrate on the provision of value added services such as tax planning and consultancy.

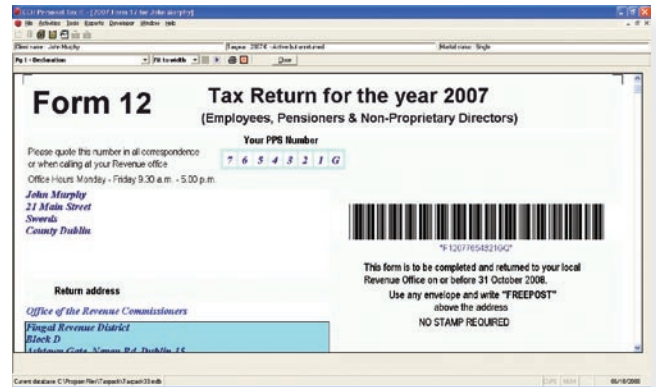
## Online filing

CCH Personal Tax IE integrates with ROS by allowing a file containing all the data for the return to be saved and then uploaded to the ROS system. This allows you to benefit from the data stored in the CCH Personal Tax IE database whilst fully exploiting the advantages of online filing.

## Management and control

The monitoring facilities available in CCH Personal Tax IE reduce the risk of missing deadlines for filing client tax returns or preliminary tax. It's possible to produce an instant summary showing cases that have been actioned and whether returns have been filed, allowing you to alert clients or staff where necessary. Lists can also be produced, sorted by income, so that you can identify those high net worth individuals to whom value added consultancy or financial services could be targeted.

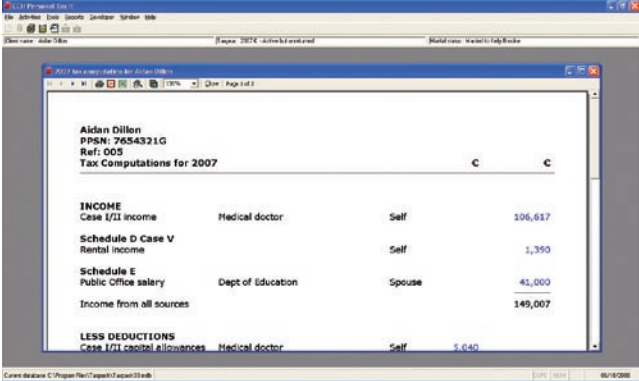
Client data can easily be copied from year to year while permanent information, such as a client's date of birth and family situation, are stored in the CCH Personal Tax IE database. This is very useful when cross-selling your practice's services.



*When reviewing your client's tax returns on screen, data can be entered or amended by drilling down into any field*

## Making life simple

CCH Personal Tax IE has been Ireland's market leading personal tax software for many years, and we've been improving it continually during this time. Take data entry as an example: this has a major impact on ease of use, which is why we've made sure that CCH Personal Tax IE provides simple, fast and error free data entry.



The screenshot displays a tax computation report for 2007 for Aidan Dillon. The report is titled '2007 Tax Computations for Aidan Dillon' and includes the following information:

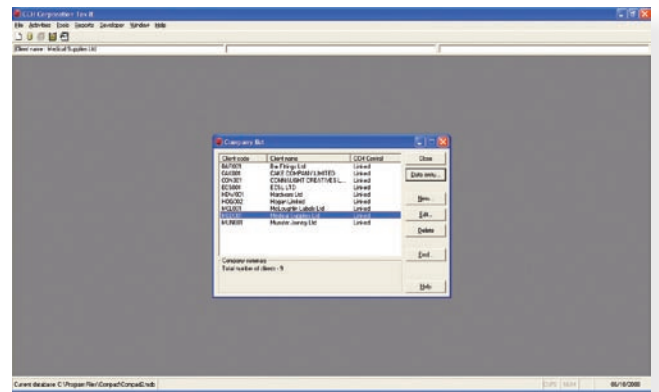
Aidan Dillon  
PPSN: 7554321G  
Ref: 005  
Tax Computations for 2007

|                              |                      |                   | C       | C |
|------------------------------|----------------------|-------------------|---------|---|
| <b>INCOME</b>                |                      |                   |         |   |
| Case I/II income             | Medical doctor       | Self              | 106,617 |   |
| Schedule D Case V            |                      | Self              | 1,390   |   |
| Schedule E                   | Public Office salary | Dept of Education | 43,000  |   |
| Income from all sources      |                      |                   | 149,007 |   |
| <b>LESS DEDUCTIONS</b>       |                      |                   |         |   |
| Case I/II capital allowances | Medical doctor       | Self              | 5,640   |   |

*Clear and accurate reports will help you project your practice's professionalism*

# CCH Corporation Tax IE

CCH Corporation Tax IE is a time saving and cost effective solution for corporate tax management. It handles corporation tax computations and returns – all of the compliance requirements of your corporate clients – and also includes essential company secretarial facilities.



*Your corporate clients' tax data can be input speedily and securely*

## Ease of use

The software combines ease of use with a high degree of functionality, making the key functions of data collection and computation as simple and quick as possible. This combination not only maximises the productivity of employees working on corporation tax clients, but also ensures an immediate return on your investment in the software.

## Importing accounts data

CCH Corporation Tax IE includes an import facility enabling the import of accounts extract data from CCH Accounts Production. Close integration with accounts (and personal tax) has obvious benefits in terms of reducing costs and potential errors associated with re-keying this critical data.

## Corporation tax computations

As the Irish corporation tax regime grows ever more complex, the preparation of computations threatens to consume ever more of your valuable chargeable time. CCH Corporation Tax IE produces corporation tax computations in seconds and provides accurate and professionally prepared computations which will enhance your clients' perception of your firm.

## Form CT1 tax return summary document

A Form CT1 tax return summary document can be produced. This summary shows all sources of income, allowances etc that are included on the official tax return form and transmitted to the Revenue via the ROS system. It can be printed off for verification and signature by the company directors and retained on file.

The summary document produced by CCH Corporation Tax IE may include a number of supplementary pages. For example where there are a large number of shareholders, details of the first four will appear in the main part of the document with the remainder (up to 100 allowed by ROS) printed on supplementary pages.

Both computations and return summary can also be saved as an Adobe Acrobat PDF file for archiving or distributing to clients. The clear and professional looking printed form will portray your firm in the best possible light to your clients.

## Online filing

CCH Corporation Tax IE was the first corporation tax software product in Ireland to feature integration with the ROS online filing system. Online filing from CCH Corporation Tax IE is a seamless and intuitive process.

The data required for the return is saved in a separate file, which complies with the Revenue format and specifications; the user then simply logs onto the Revenue Online Service website and uploads this file. This procedure is instant and secure and your data is preserved within the CCH Corporation Tax IE database.

## Management and control

The simple but powerful features in CCH Corporation Tax IE ensure that tax and secretarial deadlines are not missed. It's possible to produce an instant summary showing which cases have been worked on and which forms have or have not been submitted. Client data can be easily copied from year to year and permanent information on group structures, shareholdings and directorships are effectively stored in one place. By using a common database for both tax and secretarial functions, further time savings are achieved.

The screenshot shows the 'Form CT1 Tax Return Summary 2007' window. The title bar indicates it is for 'Medical Supplies Ltd'. The main content area is titled 'COMPANY DETAILS' and includes the following information:

- Company name: Medical Supplies Ltd
- Tax Reference Number: 1234567F
- Accounting Period: From 01/01/2007 To 31/12/2007
- Indicate (B) if there are changes (not already notified to Revenue) under the following headings. If so, enter the new details below.  Nature of Trade, Business or Activity
- Registered office address: [Empty field]
- Business address: [Empty field]
- Indicate (B) if the accounting period has changed since the last CT1 was filed.
- Indicate (B) if the company is a close company, and enter the following:
  - Details of the beneficial ownership (%) of the issued shares and loan stock (including debentures) during the accounting period
  - Table with columns: Name, PPS number, Address, Shares, Loan Stock
  - Row 1: Address Dblinn, 1234567F, [Empty], 100.00

*CCH's unrivalled reputation for client service ensures facsimile returns are updated regularly, keeping you in control of your compliance obligations*

## Company Secretarial

CCH Corporation Tax IE acts as a register of shares and participators. It will record details of directors and of their other interests. CRO approved facsimile forms B1, B2 and B10 can easily be printed from the information already held in CCH Corporation Tax IE. This leaves your secretarial department with more time to concentrate on higher value services such as company or group re-structuring.

The screenshot shows the 'Companies Registration Office' interface for an 'Annual Return' form B1. The title bar indicates it is for 'Medical Supplies Ltd'. The main content area includes the following information:

- Annual Return
- Sections 125, 127, 128 Companies Act 1963
- Section 7 Companies (Shareholders) Act 1986
- Section 26 Electoral Act 1997
- Sections 43, 44 Companies (Amendment)(No. 2) Act 1999
- Section 249A Companies Act 1990 (inserted by section 107 Company Law Enforcement Act 2001)
- Companies Act 1990 (Form and Content of Documents)
- Delivered to the Registry Registrars 2002
- Company number: [Empty field]
- Company name: Medical Supplies Ltd
- Company type: [Empty field]
- Return made up to: Day 31, Month 12, Year 2007
- Tick box if bond is attached:
- Company number: [Empty field]
- Company name: Medical Supplies Ltd
- Company type: [Empty field]
- Return made up to: Day 31, Month 12, Year 2007
- If the return is made up to a date earlier than the existing ARD, do you wish to retain the anniversary of the existing ARD for next year?  YES  NO

*Company secretarial returns are automated and can be viewed on screen and printed for filing with the CRO*

## Training, help and support

Full training is available for all CCH products at your own premises. We also provide a telephone and online support service, which is widely acknowledged within the profession as second to none.

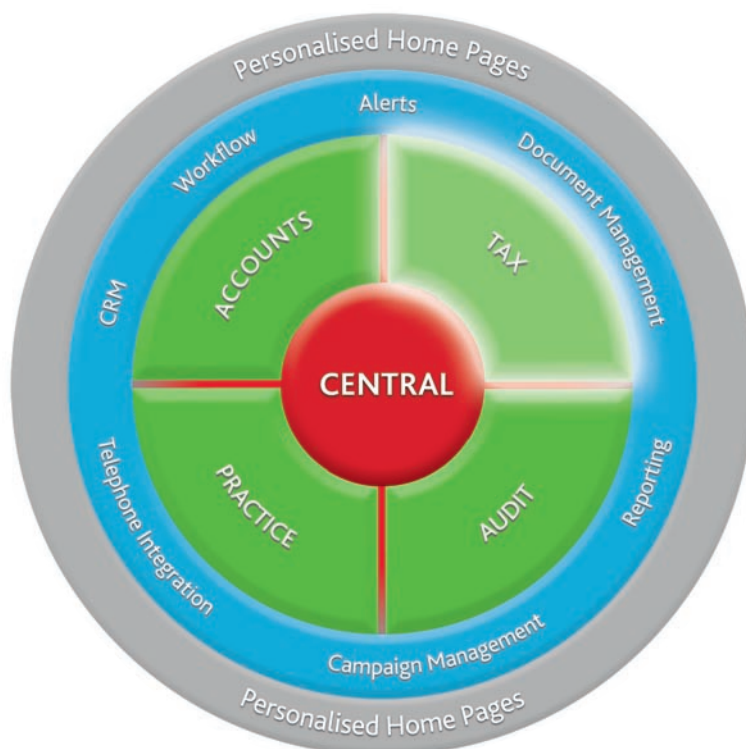


## Putting integrated data to work

CCH Central integrates applications in the CCH ProSystem Suite to create something that's much more than the sum of its parts.

Its intuitive interface makes it easy for everyone – even occasional users – to use. A single point of entry means less time setting up and maintaining client data, and fewer errors.

Personalised “home pages” collect data from across the Suite and bring the information together on a single screen. You and your staff get the complete client picture all the time, without having to swap between individual programs.



Not only is data shared across the Suite, but so are core functions, such as workflow, reporting and alerts.

### Cross-application reporting

Even non-technical users can construct comprehensive reports using information drawn from multiple CCH applications, simply by dragging and dropping fields. Cross-application reporting unlocks the information you already hold within the practice.

### Monitor key information

Overdue information or impending deadlines – whatever you need to monitor, the software can keep an eye on it so you don't have to. Alerts can be sent by email to any number of individuals within, or outside, the practice.

### Make your marketing count

Any significant piece of information about your clients or prospects – including relationships between them – can be captured, used for your marketing campaigns and reported on.

## About CCH

CCH enjoys a unique position within the tax and accounting communities, having provided them with first class business solutions for more than 100 years. In April 2008 Wolters Kluwer established CCH in Ireland by acquiring MYOB Ireland. CCH now services more than 3,000 professional firms of all sizes across Ireland and the UK, from sole practitioners to most of the top 100 accounting practices.

A wide variety of products and services are available – from software, professional development programmes and fee protection services to training and consultancy, reference books, CDs and online information.

Whether you're looking to build client relationships, improve your firm's profitability, develop new revenue streams or reinvigorate your business processes, CCH have solutions that can help.

## The CCH ProSystem Suite

### Central

The core products within the CCH ProSystem Suite work within CCH Central.

CCH Central provides a single point of entry for data, and enables cross-product reporting and data mining. Personalised home pages allow individuals to bring together all the information they need on a single screen.

### Practice Management

CCH Practice Management helps partners and practice managers organise staff resources and maximise chargeable time. The software supports multiple offices and remote data entry and enquiry for staff working offsite.

### Document Management

CCH Document Management stores and manages the full range of documents used by an accounting practice, giving 24/7 remote access to client files. Sophisticated search options and integration with Microsoft Outlook make it easy to find and use any item of client correspondence.

### Audit Automation

CCH Audit Automation automates the process of conducting an audit, minimising risk, enforcing standards and reducing costs. Paperless working allows tasks to be divided easily between staff.

### Tax

Through market-leading tax applications, CCH provides an integrated solution to tax administration and planning for individuals and companies, together with a company secretarial function.

■ CCH Personal Tax IE    ■ CCH Corporation Tax IE

### Accounts Production

CCH Accounts Production turns raw accounting data into finished statutory accounts quickly and cost effectively. Regularly updated accounts formats are available for a wide range of entities, including sole traders, partnerships and limited companies.

## Want to know more?

For more information about CCH Personal Tax IE, CCH Corporation Tax IE or any of the other CCH products and services:

- Call us on 01 460 4718
- Send an email to [info@wolterskluwer.ie](mailto:info@wolterskluwer.ie)
- Visit [www.ie.cch.com](http://www.ie.cch.com)