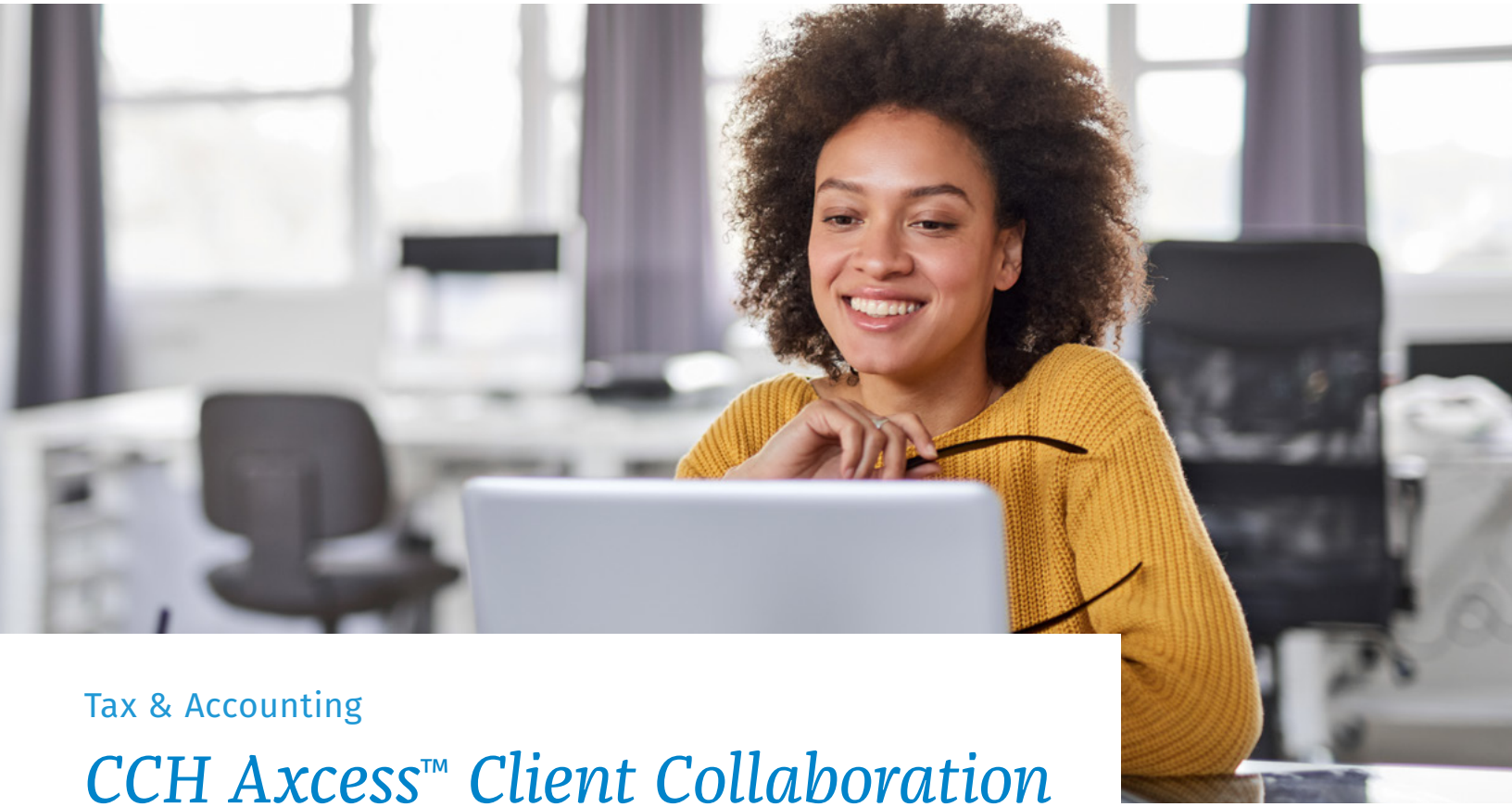


Tax & Accounting

CCH Axcess™ Client Collaboration

A New Digital Collaboration Space

Gathering information from multiple sources, reviewing and signing electronic documents, and keeping track of it all doesn't have to be difficult. True client collaboration is more important than ever before, and we are committed to making it easier and more efficient.

That's why we've implemented a new client collaboration platform, which provides our clients with an interactive experience and keeps them informed and in the know.

Providing the Experience You Wanted

Today, working with clients means more than providing a tax return. To win your loyalty, we need to understand what you want.

Our clients want ease and security when they communicate with us. They want an easy log-in to secure software that provides robust functionality, like the ability to walk them through the process, to access their documents 24/7, upload and download files — and to see their project's status too.

A New Level of Client Service

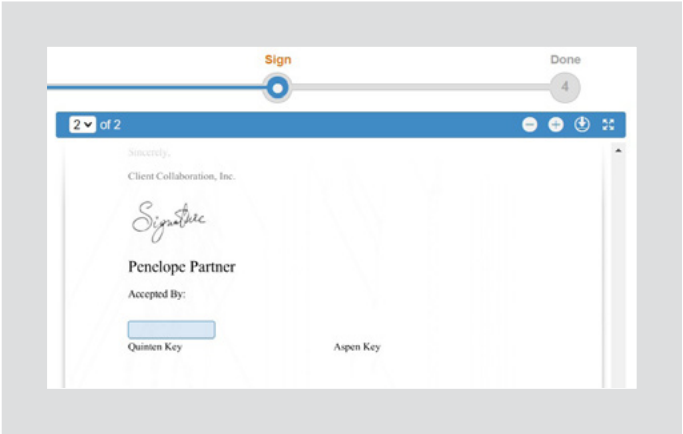
As a future-focused firm, we utilize technology to enable 24/7 on-demand client service, so you can take advantage of the convenience offered by digital communications. Our state-of-the-art new client collaboration tool offers convenient, efficient service and technology. The new client collaboration hub is an online place where you can:

- Complete a personalized tax questionnaire
- Upload or import important documents
- Notify us that you have provided all requested information
- Ask questions
- Review and sign your tax return

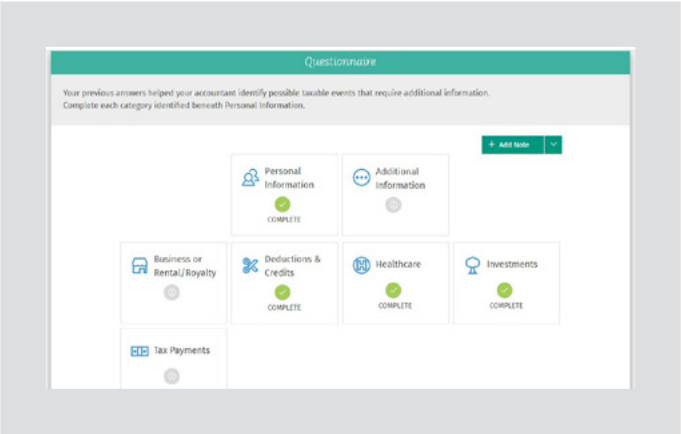
A central hub for communication and collaboration helps us improve your client experience by guiding you through the tax return process efficiently from beginning to end.

Get started in three simple steps

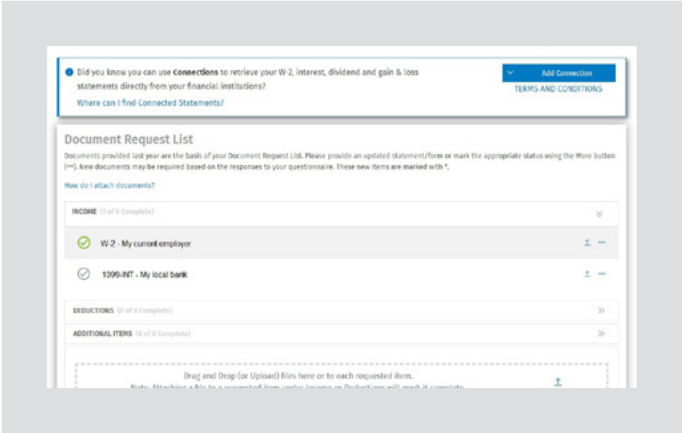
After you sign in to the Client Collaboration hub, you can get started in three simple steps:



1. Sign the engagement letter: Begin the process by signing the engagement letter using secure eSign technology.



2. Fill out your personalized questionnaire: Review your personal information and answer a short set of questions to help us better understand your needs this year.



3. Complete the document request list: Upload your tax documents or import the data directly from your financial institutions.

For More Information
EngageTax.WoltersKluwer.com/GetStarted 800-739-9998