

THOMSON REUTERS

CHECKPOINT®



REUTERS/JASON LEE

# YOUR UNIQUE RESOURCE FOR ONLINE TAX AND ACCOUNTING INFORMATION

TAX & ACCOUNTING



THOMSON REUTERS™



## THOMSON REUTERS CHECKPOINT IS THE INDUSTRY LEADER FOR ONLINE INFORMATION FOR TAX AND ACCOUNTING PROFESSIONALS

For more than a decade, professionals have been turning to Checkpoint, the revolutionary, easily-searchable online system, to get straight to their answers. Checkpoint blends cutting-edge technology, editorial insight, time saving productivity tools, online learning and news updates with intelligent linking to related content and software. Thousands of tax and accounting professionals rely on Checkpoint every day to understand complex information, make informed decisions and use knowledge more efficiently.

*"Checkpoint is an excellent research service that integrates accounting & auditing, tax, and other content into a single offering that interfaces well with the software offerings from Thomson Reuters as well as Microsoft Office."*

—The CPA Technology Advisor, 2010



REUTERS/ANDRES DE SILVA

# YOU ARE WHAT MAKES CHECKPOINT® UNIQUE

Recognizing the diverse needs of each of our customers is key to the long-standing success of **Thomson Reuters Checkpoint®**. Checkpoint is the intelligent solution that uniquely works the way you do.

# CHECKPOINT DELIVERS

## SUPERIOR CONTENT

Expert editorial analysis from RIA® and guidance from renowned WG&L® authors and PPC® experts are at the very heart of Checkpoint. Add to that insightful analysis from IBFD, EBIA® and others to create the most robust content of any research platform available.

## UNPARALLELED INTEGRATION

Only Checkpoint integrates content from RIA, WG&L, PPC, IBFD, EBIA and BNA with primary sources, including AICPA, SEC, GAAP, FASB, GASB, IASB and more. Plus, Checkpoint provides easy linking to our ONESOURCE™, UltraTax CS™ and e-Form® RS compliance software.

## KEY TOPICS AND PRACTICE AREAS

Every major area of tax and accounting is covered on Checkpoint:

- Federal Tax
- State & Local Tax
- International Tax
- Accounting, Auditing and Corporate Finance
- Estate Planning
- Payroll
- Pension & Benefits

Within each practice area are multiple sub-topics and areas of interest. Visit [yourcheckpoint.thomsonreuters.com](http://yourcheckpoint.thomsonreuters.com) for a complete listing of practice areas and topics.

## ECONOMIC VALUE

We'll help you customize a Checkpoint library or content subscriptions to best meet your budget requirements as well as your research needs. You'll find that Checkpoint has a range of products and services to meet every need, from very large to very small.

## TIMELY ALERTS AND UPDATES

We pride ourselves on being first. The latest legislative changes and updates are updated in your Checkpoint subscription right away, so you can be sure you are always working with the very latest information as soon as it is available.

## FREQUENT INNOVATIONS

In addition to breaking news and legislative updates being incorporated into Checkpoint immediately, regular enhancements are made to Checkpoint each quarter. These enhancements include new content or content updates, platform features or other suggestions you've made on ways to continuously make your research faster and easier.

## PRACTICE AIDS

For tax, accounting and law firms, Checkpoint provides numerous practice aids to enhance relationships and build revenue opportunities.

**Client Letters** – Sample letters help explain to your clients how they are affected by a change in the law. Plus, client letters and analysis are fully integrated on Checkpoint: If there is a relevant letter to the analysis you are reading, you'll be alerted so you can link directly to that letter. Client letters also link back to any related analysis in your subscription.

**Interactive Financial Calculators** – More than 100 helpful calculators provide quick answers for your client's specific situation.

Plus, Checkpoint features Interactive Checklists, Forms and more unique tools for many practice areas.

## FLEXIBILITY

Flexibility is everything to Checkpoint. From customizing your own libraries and content subscriptions, to flexible and intuitive navigation options, to choosing how you want to search and what you want to see on your screen at any time, Checkpoint was designed to meet your unique needs.

Checkpoint has long been the industry leader in online tax and accounting research. Now, Checkpoint is more than just research. With **Checkpoint Tools** and **Checkpoint Learning**, tax and accounting professionals can truly find everything they need to get their jobs done within the Checkpoint family of products.

### CHECKPOINT TOOLS

Stay up-to-date by installing the latest version of Checkpoint Tools. Ensure quality and consistency and perform engagements with maximum productivity and profitability. The most complete set of resources available for specialized industry engagements, Checkpoint Tools work with leading paperless engagement software or alone in Word and Excel. Products cover tax, accounting and auditing and include PPC's SMART Practice Aids, PPC's Practice Aids, PPC's Workpapers, PPC's Interactive Disclosure Libraries and more.

### CHECKPOINT LEARNING

Gain the knowledge you need, make certification compliance a snap, improve retention and develop your staff, all with the Checkpoint Learning platform.

Now you can improve job performance with links right from Checkpoint research to related CPE courses. Choose from a large selection of courses to build the solution that best suits the needs of your business, firm or agency.

Administrators can select and assign CPE courses, set up reminders and prompts for employees, and easily manage in-house programs. You'll be able to centralize CPE

compliance monitoring and course completion results to save time and simplify the record-keeping and reporting process.

Checkpoint Learning courses include interactive and print-based self-study from MicroMash, PASS Online, and PPC—plus, now you will find Gear Up and AuditWatch live events and webinars available for purchase and compliance tracking directly through Checkpoint Learning. And new Subscription Packages provide a single-price option for learners to incorporate seminar, webinar, online and self-study courses alongside a robust CPE tracking service. Bring all your CPE and training together, with Checkpoint Learning!

RESEARCH EFFICIENCY

# DESIGNED TO MAKE YOUR TAX AND ACCOUNTING RESEARCH EASIER, FASTER AND MORE ACCURATE

Checkpoint optimizes your research with these key platform features

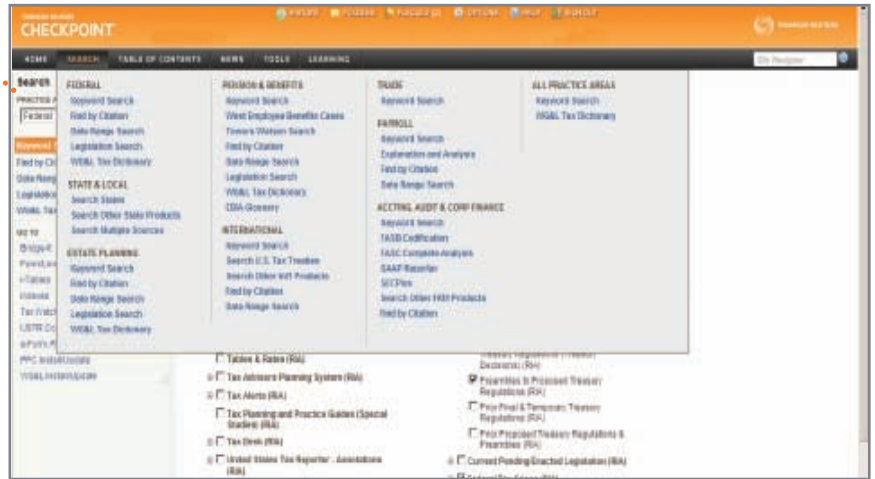
## SEARCH ON YOUR OWN TERMS

With Checkpoint, you can search by:

- Practice Area
- Keyword
- Code, Cases, Rulings, Primary Source
- IRS Publications
- SEC Filings
- Accounting Standards and Regulations
- Editorial Materials
- WG&L Treatises

Perform your keyword searches by using Terms & Connectors to search by specific words or phrases, or try the popular Natural Language search method, which uses regular language phrasing (such as "Can computer software be depreciated?" ) to simplify your search.

Within each search parameter, search "All" or just select certain materials to further narrow your results.

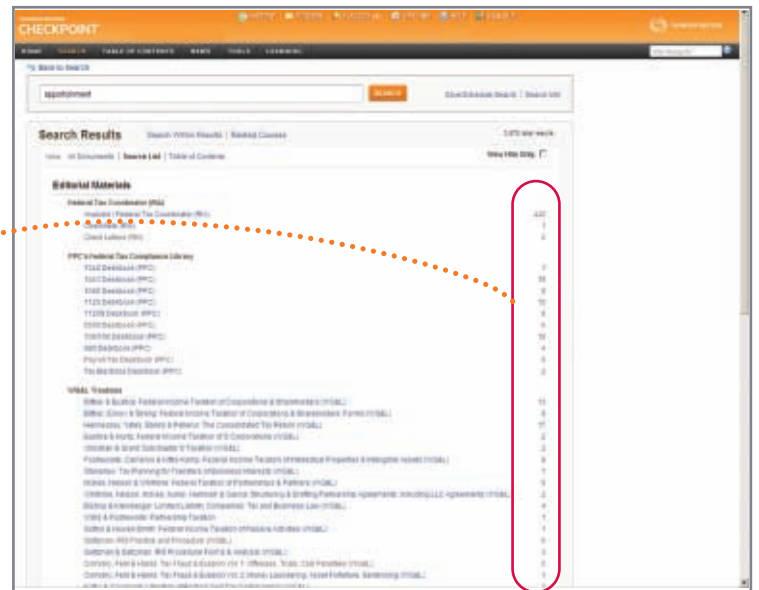


## SEARCH RESULTS BY SOURCE LIST

Your search results come back with sources highlighted and linked, and delineated between editorial materials and primary source, as well as other source types.

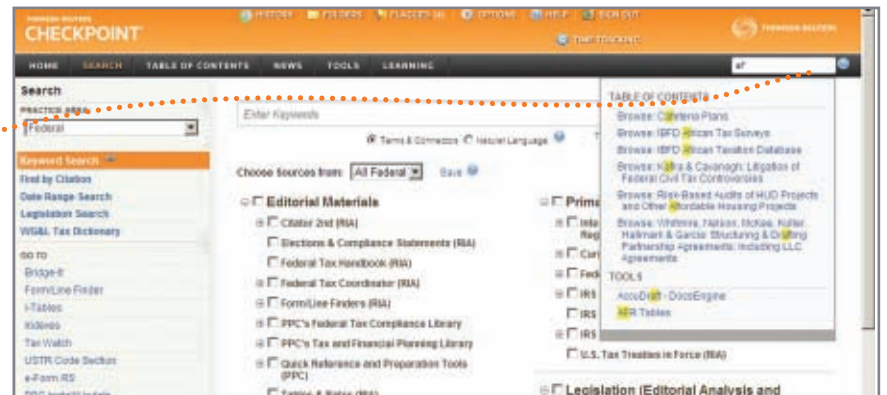
Each listing shows exactly how many documents from your search were found within that source.

Simply click on the link shown to see those documents.



## SITE NAVIGATOR

Quickly locate the titles and features you need in your research with the new Site Navigator.



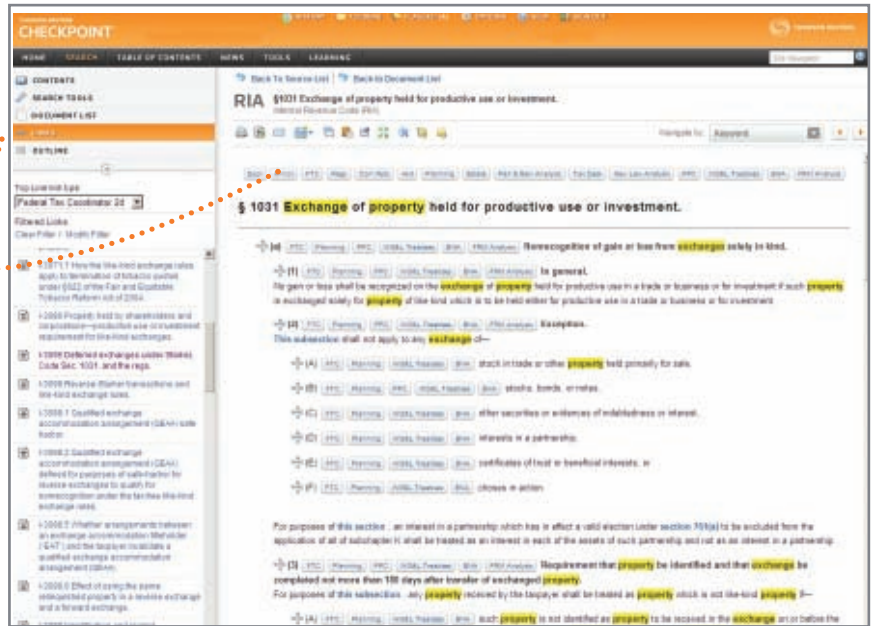
## RESEARCH EFFICIENCY

### TOP LINE AND SIDE LINE LINKS

**Top Line Links** take you directly to source materials and analysis in your subscription related to your search. Pinpoint your search results even further with targeted **Side Line Links**.

### DOCUMENT LIST

No need to worry about getting lost while you are searching **Document List**, since this highlights the document you're currently viewing as well as your search terms. One click brings you back to your initial search results.

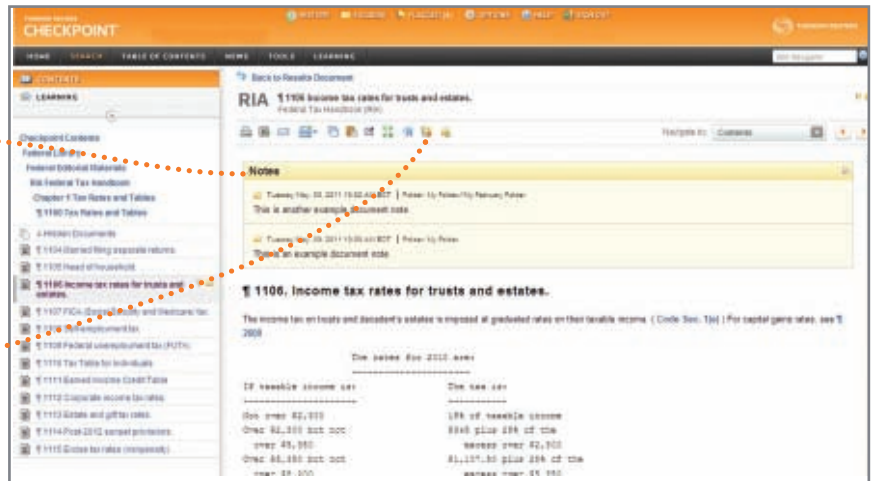


### ANNOTATE A DOCUMENT

Create notes directly into your research, choose whether you want to view them (or not), and print them out later for reference. Notes are time/date stamped and listed in chronological order to keep your work organized.

### FLAG A DOCUMENT

Easily add links to your frequently-accessed content (just like bookmarking a favorite in your Web browser). Even flag several documents to easily print them as a group, all at once.



### STAY CONNECTED

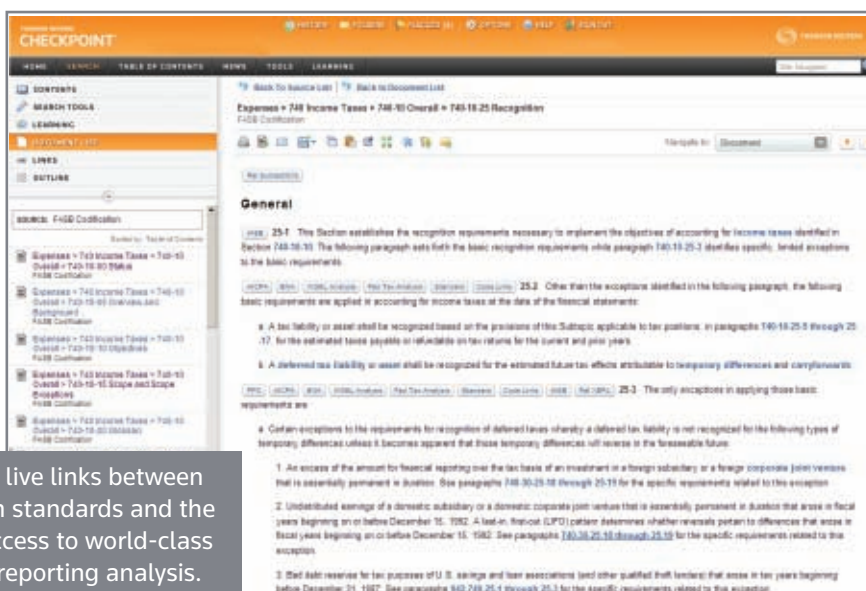
Keep up with your tax and accounting research on the go with Checkpoint for your Apple iPad®.



# KEY CHECKPOINT FEATURES FOR SPECIFIC PRACTICE AREAS

Quickly access the information you need on topics, including Federal, State & Local and International Tax as well as Estate Planning, Payroll, Pension & Benefits, Accounting, Auditing and Corporate Finance:

- **CompareIt** – Allows you to link from a tax concept in one state to the same concept in another state. Also link from Federal to State, State to Federal or across multiple countries.
- **Bill Tracker** – Easily see if there is pending legislation that will amend the Code Section or State Statute pertaining to your search topic.
- **Citation Tracker** – Get notified when a ruling or case is cited by a subsequent case or has been changed by a subsequent ruling.
- **Internal Revenue Code Linking** – Link from the Code directly to the Code history. Link from any subsection directly to any Federal Tax Coordinator, Tax Advisors Planning System, Pension analysis, Estate Planning analysis or WG&L treatise that references the subsection.
- **Prior Regulations Databases from Current Regulations** – Link to Prior Regs and back again to Current Regs. This isn't a traditional archive that only shows how a Reg appeared at the end of the year; it includes all the changes made to the Reg throughout the year.
- **BNA News and Reports** – Get instant access to BNA Daily Tax RealTime™ Update, Daily Tax Report, Int'l Tax Monitor, State Survey Charts, Portfolios and more.
- **Create-a-Chart** – Get immediate access to the most up-to-date tax and accounting information through these interactive comparison charts featuring links to the controlling authority and detailed explanation paragraphs. Create and compare:
  - State & Local Taxes
  - e-Filing for Individual, Partnership or Corporate Returns
  - International Tax rates
  - U.S. Tax Treaties
  - SECPlus Financial Fundamentals
  - Payroll Taxes
- **State Search Wizard** – Reduces the complexity of multiple state searches. Search multiple states by specific tax types and tax documents in a single search.
- **StateNet Legislation** – Provides full text of approved and pending legislation, status of pending legislation and legislative calendars.
- **StateNet Regulations** – Provides full text of adopted and proposed regulations and status of pending regulations.
- **Sales and Use Tax Rate Look-up** – Easily retrieve more than 41,000 sales and use tax rates from more than 6,500 U.S. jurisdictions by ZIP plus 4, city or county. All new or updated rates are quickly displayed by jurisdiction with the exclusive Summary of Updated Rates feature.
- **International Treaties Database** – Includes thousands of international treaties. The International Wizard feature enables quick and easy sorting of these treaties.
- **International Experts** – Get integrated guidance and analysis from IBFD and WorldTrade Executive, and timesaving software from the experts at Orbitax.
- **Accounting, Auditing & Corporate Finance Linking** – Link to primary source materials, related authoritative pronouncements, sample disclosures model language and more.
- **FASB Accounting Standards Codification Cross-Linking** – An enhanced cross-reference table allows you to identify where pre-Codification standards reside in the Codification, so you can access both the old and new standards directly from the table.
- **SECPlus** – Fast access to SEC filings integrated and linked with expert analytical and related primary source material.
- **Interactive Checklists** – State-of-the-art interactive checklists provide you with practical tools to assist in the exacting process of financial reporting and disclosure.
- **News Updates** – RIA's Daily Updates, Accounting & Compliance Alert, TaxWatch, IBFD's Daily Tax News Service and many others deliver the latest developments in specific areas.
- **Estate Planning Treatises** – Exclusive access to more than 20 outstanding WG&L Estate Planning treatises, plus primary source material, analysis, newsletters and much more.



Only Checkpoint provides live links between the FASB pre-Codification standards and the Codification, as well as access to world-class accounting and financial reporting analysis.

### GET AHEAD WITH CHECKPOINT

Checkpoint comes complete with a comprehensive training and support program to ensure you get the most out of your subscription.

Visit <http://support.rg.thomsonreuters.com/training> to see the latest Checkpoint training available. Choose from online courses, webinars, regional seminars, and more.

### FOR MORE INFORMATION

Call to learn more or schedule a FREE 30-day Checkpoint trial:

800.950.1216, or visit [yourcheckpoint.thomsonreuters.com](http://yourcheckpoint.thomsonreuters.com)

Or find your Account Manager at [ria.thomsonreuters.com/relocator](http://ria.thomsonreuters.com/relocator)

### About Thomson Reuters

Thomson Reuters is the world's leading source of intelligent information for businesses and professionals. We combine industry expertise with innovative technology to deliver critical information to leading decision makers in the financial, legal, tax and accounting, healthcare and science and media markets, powered by the world's most trusted news organization. With headquarters in New York and major operations in London and Eagan, Minnesota, Thomson Reuters employs more than 55,000 people and operates in more than 100 countries. For more information, go to <http://thomsonreuters.com>.

The Tax & Accounting business of Thomson Reuters is the leading provider of technology and information solutions, as well as integrated tax compliance software and services to accounting, tax and corporate finance professionals in accounting firms, corporations, law firms and government. Headquartered in Dallas, Tax & Accounting has major operations in New York, Ann Arbor (Michigan), London, Sydney, and Toronto, and offices in nine countries. For more information, go to [http://thomsonreuters.com/products\\_services/taxacct/](http://thomsonreuters.com/products_services/taxacct/).

*100 of the Top 100 U.S. CPA Firms*

*95 of the Fortune 100 Corporations*

*94 of the Top 100 U.S. Law Firms*

*All rely on Checkpoint® for their tax and accounting research*

*"I really like the layout of the site – the icons and colors highlight frequently used areas. I also like the arrangement of the results – I can now browse through them quickly and easily."*

*–Jennifer L., Tax Librarian*

#### New York

195 Broadway  
New York, NY  
10007

#### Contact Us

Sales 800.950.1216  
Support 800.431.9025

[yourcheckpoint.thomsonreuters.com](http://yourcheckpoint.thomsonreuters.com)

