

**Expand your services,
widen your reach.**

Capture more opportunities and grow your CPA firm
with a unique set of tools from Thomson Reuters.

Special combination pricing available.

The right set of tools for the task: Grow your CPA firm with a powerful three-part solution.

1. Checkpoint Catalyst: Expert Generalist

Connect with the expertise you need.

Get trusted answers on even the most complicated tax issues and business transactions with **Thomson Reuters Checkpoint Catalyst: Expert Generalist**. With this collection of frequently encountered business tax topics, you can see the full context of your answer with expert guidance that integrates relevant federal, state and U.S. international implications in one place, along with embedded charts, diagrams, interactive tools and new law developments directly in context of the analysis.

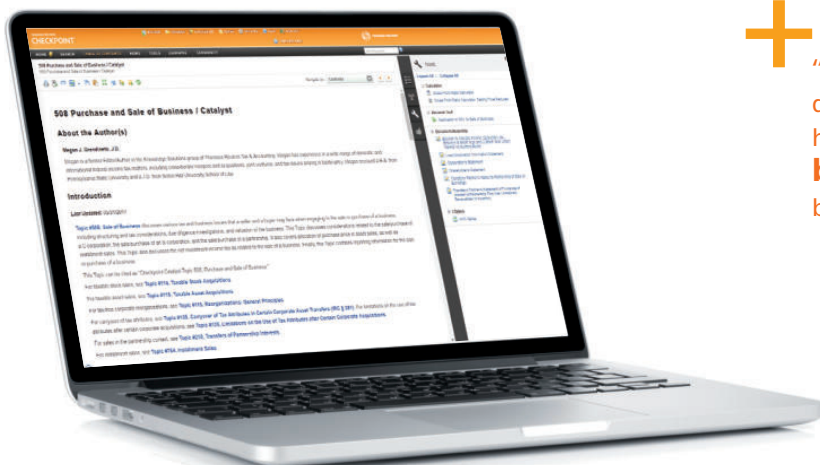
It's an ideal solution for expanding your CPA firm's services on business tax planning and transactional work specific to:

- S corporations, partnerships and limited liability companies
- Tax accounting
- Cost recovery
- Sales and exchanges
- Investments

Rather than referring clients elsewhere, you can do more in-house. The advisory resources in Checkpoint Catalyst make it easy for you to deliver services clients need at any stage of their business tax planning. You can:

- Structure the purchase or sale of a business by explaining the tax consequences to both buyer and seller
- Structure a tax-free like-kind exchange of property
- Take advantage of the complex rules under Code Sec. 179 for expensing business property
- Navigate the complex passive activity loss rules that limit loss deductions with respect to passive activities such as certain real estate activities
- Master the tax nuts and bolts of operating in partnership form, including contributions, allocations, distributions and terminations, as well as transactions between partner and partnership
- Advise on the tax advantages of using S corporations

With the latest advisory resources on hand, you can quickly make sense of unfamiliar areas of tax practice, delivering exceptional value for current and prospective clients.



"We'll look at a transaction or just a question that a taxpayer or a client has, and **we find ourselves branching out in other areas** because of Checkpoint Catalyst."

— Kym Anderson
CPA, CVA, CGMA
Jones & Company

- **Take your tax research to the next level.** Streamline your workflow and be better positioned for revenue-generating activities, such as helping your client plan a purchase or sale of a business. You and your staff will save time and gain instant expertise with all relevant information pulled together in one topic and interactive tools embedded within the pertinent discussion.



2. Checkpoint Learning

Keep your staff up to speed.

To provide a wider range of services to clients, your staff needs to stay current on evolving regulations and best practices. You need a learning solution that can train your new hires and expand the capabilities of your team. Create and manage a complete curriculum tailored to your firm's learning needs with **Checkpoint Learning** — a first-of-its-kind CPE dashboard and learning management solution.


- Streamline the learning process for your staff and cut costs with more than 640 online and downloadable courses, as well as hundreds of webinars, seminars and conferences.
- Dive deep into the details of late-breaking regulations and developments.
- Accommodate any schedule or learning style with live learning, online webinars, video learning and more.
- Easily track progress and CPE compliance for state board of accountancy requirements and professional designations.
- Develop your staff and reduce turnover risk, guiding each team member to the next level in their career.

Expand your staff's knowledge and skill sets, work better with clients and better see opportunities to grow business with training from Checkpoint Learning. Ensure your staff is among the first to understand new and proposed regulations so you can capitalize on new revenue streams more quickly and adapt faster to the changing needs of your clients.

Learning Topics

Our courses, webinars and seminars cover a range of topics for meeting CPE requirements and professional certifications, achieving professional growth and expanding your firm's expertise to cover new services for your clients.

- Accounting and auditing
- Consulting services
- Ethics
- Management
- Personal development
- Specialized knowledge and applications
- Taxation
- Technology
- Yellow Book



Firms that give employees opportunities to learn and grow experience less turnover. Studies show 23% of employees leave because of a lack of development opportunities and training.

Source: National Research Business Institute

3. Checkpoint Marketing for Firms Social Media Solutions

Get prospective clients in the door faster.

From client comments and reviews to the quality of your firm's posts and interaction with followers, your social media activity can have a big impact on your firm's success. **Checkpoint Marketing for Firms Social Media Solutions** makes it easy to take your social strategy to the next level with:

- Engaging content written by tax and accounting experts, including articles about proposed and newly passed legislation, weekly briefs, federal tax posts, infographics, FAQs and fun facts
- A user-friendly, multi-channel publishing platform
- Strategy support to help you define your key performance indicators and reach your goals
- Performance metrics and analytics to monitor your firm's reputation, track engagement with your content, access trending topics and more

Having a solid social media strategy and tools in place ensures clients can more easily find and engage with you early on, when they first start looking for a provider. And when tax and accounting laws and standards change, you can proactively advise your social followers on what those changes mean to them, tying your posts to your firm's high-value services.



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2017 Accounting Today
Top New Product

2017 Gold Stevie® Award:
New Product or Service of the Year —
Content Marketing

2017 People's Choice Stevie Award —
Content Marketing

2017 CODiE Award Finalist

80%

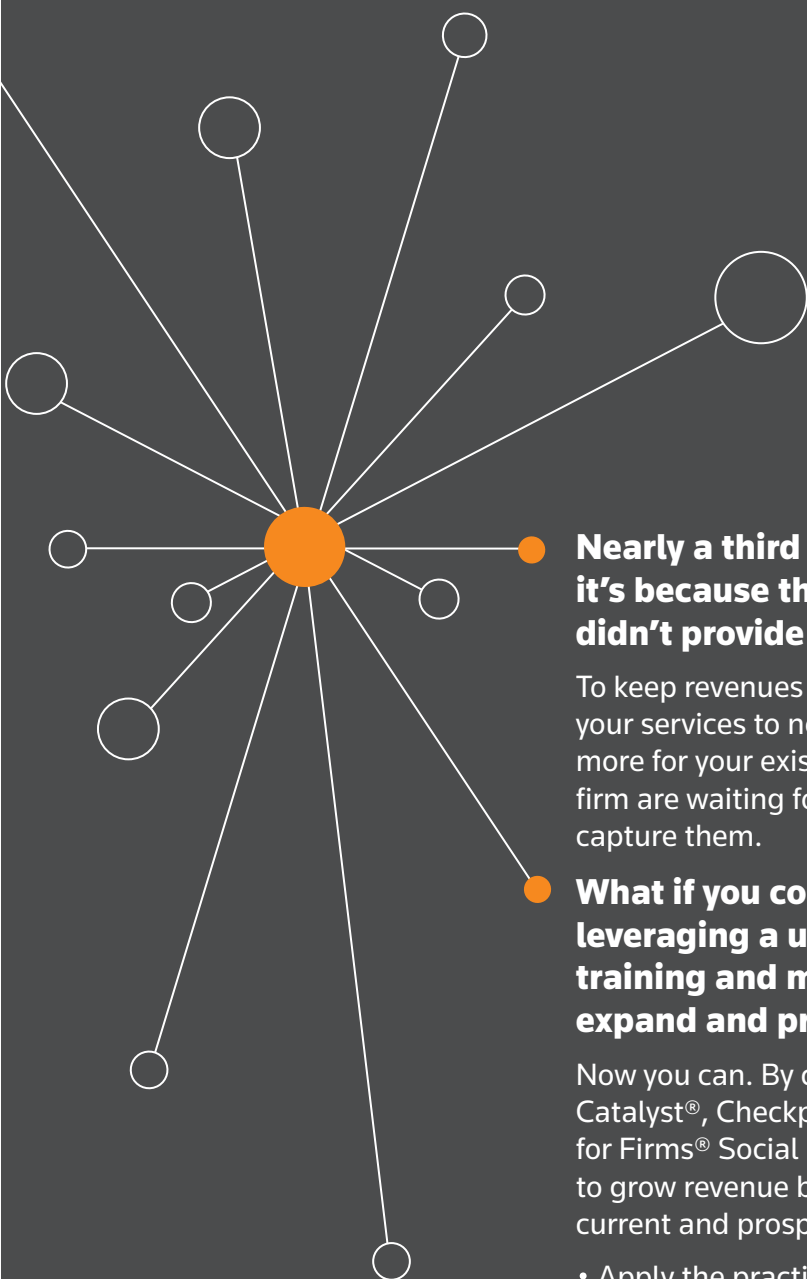
of potential professional
services clients use social
media to research firms.

Source: CPA Trendlines, Aug. 2015



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Nearly a third of clients who leave CPA firms say it's because they outgrew the firm or the firm didn't provide the services they needed.

To keep revenues growing at your firm, you need to diversify your services to not only attract new clients, but also deliver more for your existing clients. New opportunities for your firm are waiting for you now — if you have the tools to capture them.

What if you could generate new revenue by leveraging a unique combination of expertise, training and marketing tools to efficiently expand and promote your services?

Now you can. By combining Thomson Reuters Checkpoint Catalyst®, Checkpoint Learning® and Checkpoint Marketing for Firms® Social Media Solutions, you can position your firm to grow revenue by offering a broader range of services to current and prospective clients.

- Apply the practical transaction-based research tools in Checkpoint Catalyst to successfully handle projects across a wide array of business transactions.
- Deploy Checkpoint Learning to prepare your staff to provide additional services — and improve staff engagement and retention in the process.
- Use Checkpoint Marketing for Firms Social Media Solutions to make sure current and prospective customers are aware of your expanded capabilities.



Thomson Reuters

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Thomson Reuters Checkpoint

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