

Expand into sales and use tax compliance with CCH® SureTax® Returns

Datasheet



GROW YOUR BUSINESS WITH SALES AND USE TAX COMPLIANCE OFFERING

Recent trends indicate the customer desire for accounting firms to offer a more holistic approach to serving clients. Whether looking to bring in new clients or wanting to keep the base satisfied, offering a one-stop shop for all your client accounting needs is a winning strategy that is here to stay.

Wolters Kluwer provides you with the unique flexibility of choosing a sales and use tax compliance model that works best for you, be it fully outsourced sales and use tax returns, or using our technology and your talent, or, in between these two options, saving time on filing and remittance. By diversifying your portfolio into sales and use tax compliance, coupled with the accounting firm's special pricing, you will be able to provide a holistic approach, improve your customer experience and increase your bottom line.

With CCH® SureTax® Returns offering, your sales and use tax clients will thank you for...

- Saving their staff's time and optimizing efficiency
- Improving calculation accuracy and effortlessly creating an audit trail
- Freeing up time and resources for higher-level department goals
- Retaining valuable talent in-house by balancing their workload

"CCH SureTax Returns cut our 2-3 week manual filing process down to about 4 days."

Sandy Harris, CPA
MTM Recognition

WHAT SETS CCH® SURETAX® RETURNS APART?

Subscription models

that let you choose what works best for your company.

- **Standard Returns**
[technology]
- **File & Remit***
[technology + filing + remittance]
- **Fully Outsourced***
[technology + data points validation + filing + remittance]

Interactive form fields

that save time allowing you to focus on higher level goals

Need to adjust values on the form?
No need to spend valuable time correcting the calculation, simply edit the amount and all other related fields will recalculate the values accordingly.

Up-to-date forms / formats

that make it easy to file and remit

Our tax experts and technology teams make sure the forms are always relevant and filing-compliant.

Forms are updated on a monthly basis.

Seamless Integration

that can improve your clients' tax determination accuracy

CCH SureTax, the end-to-end reliable sales tax software, allows your clients to stay on top of tax legislation changes, collect taxes precisely, and automatically populate return documents - all within one platform.

“Using CCH SureTax Returns allows the employees in our tax department to be productive in areas that would normally be used in filing sales tax returns. I am sure the products also allow us to perform the duties in the tax department without hiring additional employees.

We file in all jurisdictions throughout the United States. Some states require very extensive location-based filing. This translates, in our case, into 150 – 250 page returns in some states. We simply would not have the manpower to map data to the returns not to mention e-filing the returns.

Our company is approaching 1,000,000 transactions a month. The ability CCH SureTax give us to map this data into returns automatically is crucial to our job functions. I would recommend CCH's products and services to other sales and use tax professionals.”

Kirk Worthen,
Tax Accountant,
Scentsy

Expand into sales and use tax compliance with CCH® SureTax® Returns Datasheet

SUBSCRIPTION OPTION DETAILS

Compliance Activities/ Solution Features	Standard Returns	File & Remit	Fully Outsourced
Client notifies Wolters Kluwer that transaction data is final for the month			■
Wolters Kluwer Managed Services Team generates returns from client data			■
Client initiates returns generation (can be scheduled to run automatically from CCH SureTax if desired)	■	■	
System produces “submission-ready” returns*	■	■	■
Client reviews returns and verifies accuracy	■	■	■
Client files and remits payments to jurisdictions	■		
Client manages filing deadlines	■		
Wolters Kluwer files and remits payments to jurisdictions on client's behalf		■	■
A dedicated Account Manager serves as single-point of contact for returns			■
A dedicated Account Manager tracks credit carry-forwards and manages			■
Process deadlines	none	Returns must be in the “reconciled” status by 5 PM EST on the 13th day of the month	The client delivers data by 5 PM EST on the 5th day of the month Returns must be approved by the client by 12 PM EST on the 13th day of the month*

*Wolters Kluwer Team prepares and delivers returns for clients' approval by 12 PM EST on the 11th day of the month
This includes rejected returns. Rejections are an option but fall outside the guaranteed timely file/remit unless all revisions and approvals are met by the 13th.

Special pricing for accounting firms is available. Contact us to find out more at CCH-SalesCorporateTeam@wolterskluwer.com, or 800-739-9998, Option 1.

About Wolters Kluwer

Wolters Kluwer (WKL) is a global leader in professional information, software solutions, and services for the healthcare; tax and accounting; governance, risk and compliance; and legal and regulatory sectors. We help our customers make critical decisions every day by providing expert solutions that combine deep domain knowledge with technology and services. Wolters Kluwer reported 2021 annual revenues of €4.8 billion. The group serves customers in over 180 countries, maintains operations in over 40 countries, and employs approximately 19,800 people worldwide. The company is headquartered in Alphen aan den Rijn, the Netherlands. Wolters Kluwer shares are listed on Euronext Amsterdam (WKL) and are included in the AEX and Euronext 100 indices. Wolters Kluwer has a sponsored Level 1 American Depositary Receipt (ADR) program. The ADRs are traded on the over-the-counter market in the U.S. (WTKWY).