

HubSync Workpapers

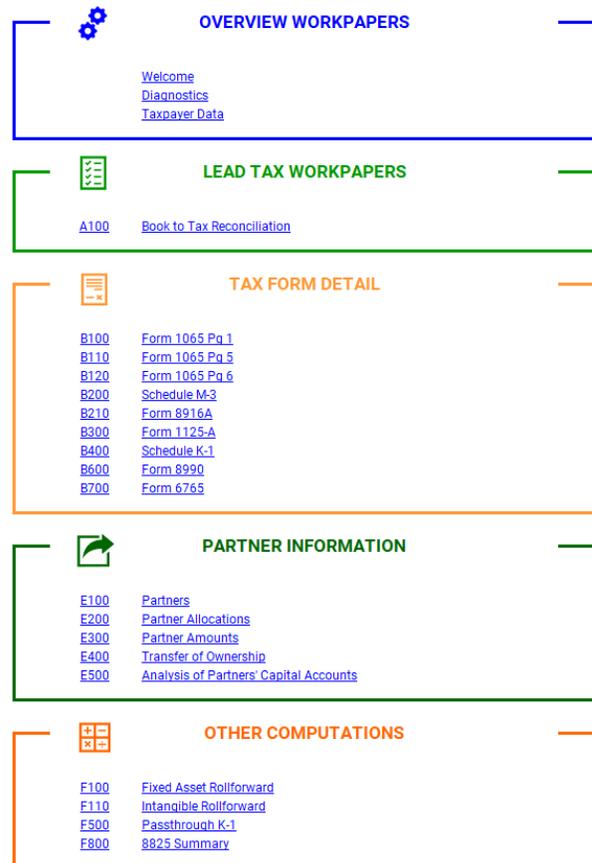
HubSync's Tax Return Workpaper provides a common platform that brings together components essential to prepare and file a complete tax return. Our automated engine performs key tax calculations for complete and accurate tax return filing. High level benefits include:

- ⚡ Elimination of manual data entry
- ⚡ A 360-degree view of the return without opening the tax preparation software
- ⚡ Flexible designs allow for the preparation of returns with varying complexity
- ⚡ One-touch, seamless integration with CCH Access & Thomson Reuters GoRS/OIT
- ⚡ Multi-level sign-off capabilities by level, sheet, and line
- ⚡ Embedded Review Note functionality with the ability to purge notes
- ⚡ Standardized training across your firm
- ⚡ Significant ROI and time savings

HubSync Workpapers have quickly become Best in Class

HubSync's flexible workpaper design is available for all return complexities. Super charged teams use one common platform to standardize their compliance process as well as training for colocated teams.

Further, all workpapers support multiuser sign-off functionality, by line-level, by sheet, as well as overall workpaper sign-off and tick mark options to reduce redundancies and create tracking organization.



Why ever go back to single-use, excel workpapers with zero integration into CCH Access or GoRS?

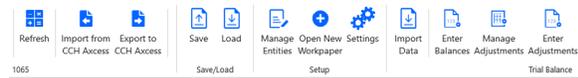
HubSync. Your end-to-end tax delivery solution.



Unique Features

HubSync's standardization across workpapers sets us apart from all other tax preparation platforms. We offer engagement teams an end-to end tax return processing solution for numerous return types.

Custom Ribbons



Streamlined Tax Account Mapping Process with AI

Our Trial Balance application leverages intelligent algorithms and machine learning models to deliver an enhanced user experience through Description Mapping.

- ⚡ Auto-map trial balance accounts to tax export codes based on account descriptions.
- ⚡ Self-learning AI continuously improves the accuracy of trial balance mapping over time.

Review

Integrated ribbon add-in is available as needed for Review Note functionality. Review Notes serve as a direct cell-level commentary option between Workpaper users. Review Notes can be resolved on an individual basis and disposed of from the Workpaper at any time, during the preparation process.

Live Return Preview

HubSync's preview feature provides a live "simulation" of the end filing product. Our Workpapers consolidate the details and apply calculations to generate a high-level preview of the return.

Dynamic Ribbon

HubSync's embedded ribbon connects dynamically with each workpaper platform to run complex calculations, relative to each type of tax, throughout its workbook.

- ⚡ Automatically deploy updates to Trial Balance and Workpapers on the user's machine via the ribbon
- ⚡ One-time setup of Chart of Accounts (COAs), mappings, and adjustments across entities belonging to a client. accuracy of trial balance mapping over time.
- ⚡ Multi-entity trial balance capability
- ⚡ Common UI for adding adjustments of all types (Book, Tax Reclass, Permanent, and Temporary)
- ⚡ Integrated supporting adjustment calculation worksheets with drag-and-drop capability.
- ⚡ Book-to-tax reconciliation computations
- ⚡ Working Trial Balance displays CY Book Balance, Adjustments, and Tax Adjusted Balance
- ⚡ Quickly create consolidated 1120 workpaper.
- ⚡ Partner Allocations
- ⚡ Optional review note feature
- ⚡ Single click integration with tax filing software

Integration with Tax Filing Software

All Workpapers are equipped with built-in singleclick integrations to tax filing software solutions. Validations are enforced to support accurate transmission of data and ease of error diagnosis.

Import to workpapers:

- ⚡ Sync with existing or prior year return detail
- ⚡ Seamless transition for first time users

Export from workpapers:

- ⚡ Satisfy annual filings
- ⚡ Correct and update misaligned external data