

## ProSystem *fx* Document from CCH Is:

# “The Last Piece of the Puzzle” for Maxwell, Locke & Ritter, LLP

(RIVERWOODS, ILL., September 19, 2006) – Maxwell Locke & Ritter LLP, the largest locally owned and managed firm in the greater Austin, Texas area, has chosen ProSystem *fx* Document from CCH, a Wolters Kluwer business, to manage the ever-growing mass of electronic documents in their busy practice. CCH is a leading provider of tax and accounting information, software and services ([CCHGroup.com](http://CCHGroup.com)).

Maxwell began to switch from paper to electronic documents five years ago, according to Stuart Cook, Maxwell, Locke & Ritter Network Administrator. “We started by scanning documents used for tax returns, and as the years went by we engaged in process analysis, nibbling away at the use of paper throughout our workflows,” said Cook.

But having fewer documents on paper didn’t mean that documents were necessarily better managed. It became evident that general-purpose file management tools were not adequate. A true document management system was a necessity. “We knew we needed document management, the same way that when you’re going down the road in an automobile, you know that you need brakes,” Cook said. “True document management was the last piece of the puzzle.”

### ProSystem *fx* Document: The Best Way to Pull Everything Together

The firm’s experience with electronic documents led them to look for specific capabilities in a document management system. “We were concerned with security, mainly from the point of view of accidental deletion or dragging something to the wrong folder. Another big concern was document retention. We needed something that could automate the whole process so that documents would be retained for appropriate periods and then purged appropriately,” Cook said.

In evaluating various possibilities, the firm first decided that they wanted an in-house system. Another concern that emerged was the ease of integrating document management with their existing software. After a series of demonstrations, question-and-answer sessions and examination of references, a committee of end-users chose CCH’s ProSystem *fx* Document. “Each person on the committee had their own reasons for choosing ProSystem *fx* Document, but one common theme was that they felt it was the best way to pull everything we had together,” Cook noted.

The firm also decided to add ProSystem *fx* Scan to their suite. “Our tax people, especially, were taken with the way that Scan worked with Document,” Cook said.

The quality of their relationship with CCH also came into play in the firm’s decision. “If you have a good relationship, as we do with CCH, it just makes sense to keep it and build on it,” Cook observed. “Our aim is to strategically partner with our customers,” said Stuart Gill, CCH product manager. “We’ll be there as Maxwell implements ProSystem *fx* Document to make sure they achieve their goals.”

#### About Maxwell Locke & Ritter LLP

Maxwell Locke & Ritter LLP is an accounting, tax and consulting firm that helps dynamic companies and people achieve their dreams. It is comprised of fourteen partners with an average total of over twenty years of experience in all facets of business, personal financial planning and tax matters. It has a total complement of over 65 people, making it one of the largest firms in the Austin, Texas market overall and the largest locally owned and managed firm in the Greater Austin Area.

#### About CCH, a Wolters Kluwer business

CCH, a Wolters Kluwer business ([CCHGroup.com](http://CCHGroup.com)) is a leading provider of tax, audit and accounting information, software and services. It has served tax, accounting and business professionals and their clients since 1913. Among its market-leading products are The ProSystem *fx*® Office, CCH® Tax Research Network™, Accounting Research Manager® and the U.S. Master Tax Guide®. CCH is based in Riverwoods, Ill.

Wolters Kluwer is a leading multinational publisher and information services company. The company’s core markets are spread across the health, corporate services, finance, tax, accounting, law, regulatory and education sectors. Wolters Kluwer has annual revenues (2005) of €3.4 billion, employs approximately 18,400 people worldwide and maintains operations across Europe, North America and Asia Pacific. Wolters Kluwer is headquartered in Amsterdam, the Netherlands. Its shares are quoted on the Euronext Amsterdam (WKL) and are included in the AEX and Euronext 100 indices. For more information, see [www.wolterskluwer.com](http://www.wolterskluwer.com).