

DT Tax & Accounting

A Thomson Reuters business

**DELIVER RESULTS
THAT MATTER**



the answer company

THOMSON REUTERS®

AGENDA

DT Professional Suite overview

What makes DT Max right for your tax firm?

What is Onvio Firm Management?

- Demonstration

DT PROFESSIONAL SUITE

Software for Accounting Firms and Tax Professionals

- Unparalleled level of workflow integration
- Comprehensive thought leadership offerings and links to expert content and insight power smoother workflows, more informed decisions
- Improved client service and better results for tax and accounting firms of all sizes



TAX COMPLIANCE

DT Max T1, T2, T3 & T5013

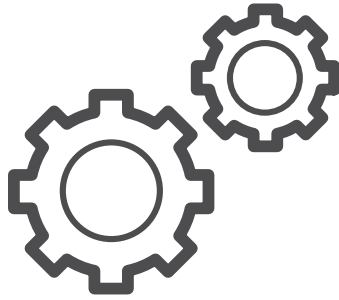
Professional tax software for personal, corporate and trusts

DT Max professional tax preparation software is designed to increase profitability by serving more clients in less time.

DT FormMax

Complete tax forms software for accounting professionals

DT FormMax is intelligent, easy to use tax form software, designed to avoid steps, keystrokes and save time.



FIRM & WORKFLOW MANAGEMENT

Onvio Firm Management

The cloud-based future of tax and accounting software

Onvio is a flexible, web-based platform to manage your workflow and keep your firm, staff and clients connected.

DT Practice

Award-winning comprehensive practice management software

DT Practice combines project and client management tools to ensure you're managing your firm effectively and profitably.

Why DT Max tax software?

- Easy to learn, simple keyword system for intuitive, powerful tax return production, even for non tax professionals
- Ability to easily view prior year tax return information, and much more; in real time – on the same screen
- Access to a customizable, multi-year client database
- Built-in planning module allows you to produce up to 6 completed returns without affecting the actual production tax return

DT Max T1 2019 v22.31 - Demo C:\temp\ - [Data entry #100170 - Portland, Walter]

File Edit View Tools Efile Management Preferences Window Help

Client list Data entry Tax return

2019 PLANNING T1

Portland, Walter
SIN: 500-170-667

Production 2018

Capital-Gains
CapGain-Ded
Cap-Reserves
Reserve-BeginDate
At-Opening
At-YearEnd
Cap-Reserves

Business and rental income

Business
+Business-Id
Year-Open
Year-End
NAICS
Product
Ownership
Account-Number
Schedule-Only
+Business-Address
Street
City
Province
PostCode
Fisc-Period
First-Last
Inactive
Jurisdict
Income
+Vehicle-Exp
Model
Make
Car-Level
Purch-Date
UCC-Open
CCA-Class
Kilometres
Kilometres
+CCA-Class
Description
UCC-Open
+CCA-Class
Description
Purch-Date
UCC-Open
CCA-Type
Business
Rest-Farm-Loss...
EI-Self-Employ
RRSP Deduction (Schedule 7)
Elig-Room
RRSP
T1-OVP
Medical expenses
Charitable donations and gifts

2018
< none >
2018
Carryforwards from 2018
2019 production
Calculated carryforwards to 2020
2020
Spouse
Other client
C/F to stub period/post-bankruptcy
Plan A
Plan B
Plan C
Plan D
Plan E
Plan F
T-slips from CRA
Data entry template

2018
< none >
2018
Carryforwards from 2018
2019 production
Calculated carryforwards to 2020
2020
Spouse
Other client
C/F to stub period/post-bankruptcy
Plan A
Plan B
Plan C
Plan D
Plan E
Plan F
T-slips from CRA
Data entry template

Income	Gross sales, commissions, or fees	\$ 27,800.00	27,800.00
UCC-Open	Purchased vehicle	\$ 9,065.00	12,950.00
UCC-Open	Tools	\$ 1,280.00	1,600.00
UCC-Open	ABC Client List	\$ 43,510.00	45,800.00
RRSP	RRSP/PRPP deduction limit for 2019	\$ 15,405.84	11,501.10

Ready

1 - Demo - Evaluation 10:52 am

DT Max T1 2019 v22.31 - Demo C:\temp\ - [Data entry #100170 - Portland, Walter]

File Edit View Tools Efile Management Preferences Window Help

Client list Data entry Tax return

Portland, Walter
SIN: 900-170-667

Production

Capital gains

- Capital-Gains
- CapGain-Ded
- Cap-Reserves
 - Reserve-Begin-Date: 01-01-2017
 - At-Opening: \$ 100,000.00
 - At-Year-End: \$ 75,000.00

Business and rental income

- Business
 - Business-Id: 12125 - Business
 - Year-Open: 01-01-2019
 - Year-End: 31-12-2019
 - NAICS: 238210 Electrical Contractors and Other Wiring Installation ...
 - Product: Electrical
 - Ownership: Sole proprietorship
 - Account-Number: 123456789RT0001
 - Schedule-Only: No
 - Business-Address: Enter the address
 - Street: 1234 myStreet
 - City: myCity
 - Province: Ontario
 - PostCode: K1A 1M1
 - Fisc-Period: Fiscal year-end already based on calendar year
 - First-Last: Neither first nor last year of operation
 - Inactive: Active
 - Jurisdic: Ontario
 - Income: Gross sales, commissions, or fees \$ 27,800.00
 - Vehicle-Exp: Purchased vehicle
 - Model: Edge
 - Make: Ford
 - Car-Level: Business expense
 - Purch-Date: 15-02-2006
 - UCC-Open: \$ 9,065.00
 - CCA-Class: Class 10 - 30%
 - Kilometres: Kilometres travelled for busi... #19000
 - Kilometres: Total kilometres travelled #10000
 - CCA-Class: Class 8 - 20%
 - Description: Tools
 - UCC-Open: \$ 1,280.00
 - CCA-Class: Class 14.1 - 5% (after December 31, 2016)
 - Description: ABC Client List
 - Purch-Date: 01-01-2017
 - UCC-Open: \$ 43,510.00
 - CCA-Type: Business level (enter full amts - 100%)
- Rest-Farm-Loss...
- EI-Self-Employ
- RRSP Deduction (Schedule 7)
 - RRSP: Room & limit
 - Elig-Room: RRSP/PRPP deduction limit for 2019 \$ 15,405.84
 - RRSP

Ready

2019 PLANNING T1

< none >

2018

Carryforwards from 2018

2019 production

Calculated carryforwards to 2020

2020

Spouse

Other client

C/F to stub period/post-bankruptcy

Plan A

Plan B

Plan C

Plan D

Plan E

Plan F

T-slips from CRA

Data entry template

- 1 - Demo - Evaluation 10:52 am

DT Max T1 2019 v22.31 - Demo C:\templ\ - [Data entry #100170 - Portland, Walter]

File Edit View Tools Ejfile Management Preferences Window Help

Client list Data entry Tax return Production

Portland, Walter
SIN: 500-170-667

Production

Capital gains

Capital Gains

CapGain-Bed

Cap-Reserves

Reserve-BeginDate

AT-Opening

AT-YearEnd

Cap-Reserves

Business and rental income

Business

Business-Id

Year-Open

Year-End

NAICS

Product

Ownership

Account-Number

Schedule-Only

Business-Address

Street

City

Province

PostCode

Fisc-Period

First-Last

Inactive

Jurisdic

Income

Vehicle-Exp

Model

Make

Car-Level

Purch-Date

UCC-Open

CCA-Class

Kilometres

CCA-Class

Description

UCC-Open

CCA-Class

Description

Purch-Date

UCC-Open

CCA-Type

Business

Rest-Farm-Loss...

EI-Self-Employ

RRSP Deduction (Schedule 7)

RRSP

EligRoom

RRSP

Ready

2019 PLANNING T1

CRA T-slip information retrieval

Use this dialogue to retrieve T-slip information for the selected client(s) from the CRA web service.

Once the CRA information is retrieved, it can be displayed on the right-hand side again at any time by re-selecting "T-slips from CRA" in the right-hand side display.

Note: Inactive clients are not included.

You are about to be redirected to a secure Canada Revenue Agency (CRA) service that allows authorized representatives to request the electronic delivery of available tax information to the software to complete portions of an individual's current and prior year tax return.

To use this service you must have a CRA or Sign-In partner credential and a valid T1013 for online access on file with the CRA for your client.

As per the CRA Terms and Conditions of Use, you are required to ensure that all applicable fields contained on the tax return that you will file with the CRA are completed, and that the information provided is true and accurate.

Client SIN information

Portland, Walter	Member 6
<input checked="" type="checkbox"/> 500-170-667	<input type="checkbox"/>
Portland, Jeanne	Member 7
<input checked="" type="checkbox"/> 500-171-665	<input type="checkbox"/>
Portland, Nadine	Member 8
<input checked="" type="checkbox"/> 500-172-663	<input type="checkbox"/>
Portland, Stacey	Member 9
<input checked="" type="checkbox"/> 500-173-661	<input type="checkbox"/>
Member 5	Member 10
<input type="checkbox"/>	<input type="checkbox"/>

Retrieve information

Cancel Help

10:52 am

DT Max T1 2019 v22.31 - Demo C:\temp\ - [Data entry #100170 - Portland, Walter]

File Edit View Tools Efile Management Preferences Window Help

Client list Data entry Tax return Production 2018

2019 PLANNING T1

Portland, Walter
SIN: 500-170-667

Year-End 01-12-2019
238210 Electrical Contractors and Other Wiring Installation...
Product Electrical %100
Ownership Sole proprietorship
Account Number 123456789RT0001
Schedule-Only No
+Business-Address Enter the address
Street 1234 myStreet
City myCity
Province Ontario
PostCode K1A 1M1
Fiscal year-end already based on calendar year
First-Last Neither first nor last year of operation
Inactive Active
Jurisdict Ontario
Income Gross sales, commissions, or fees \$ 27,800.00
+Vehicle-Exp Purchased vehicle
Model Edge
Make Ford
Car-Level Business expense
Purch-Date 15-02-2006
CCA-Class Class 10 - 30%
Kilometres Kilometres travelled for business
Kilometres Total kilometres travelled
+CCA-Class Class 8 - 20%
Description Tools
UCC-Open
+CCA-Class Class 14.1 - 5% (after December 31, 2016)
Description ABC Client List
Purch-Date 01-01-2017
UCC-Open
CCA-Type Business level (enter full amounts - 100%)
Business level (enter full amounts - 100%)
Rest-Farm-Loss...
EI-Self-Employ
RRSP Deduction (Schedule 7)
RRSP Room & limit
Elig-Room RRSP/FRPP deduction
RRSP
T1-OVP
Medical expenses
Charitable donations and gifts
Donations
Donations-CF
Ontario-Fund
Ontario-Fund
Provincial tax and credits
ProvCredit Ontario
LabSponsCont-CF Shares acquired with
Apprentice-Train
Cooperative-Educ
Provincial property tax credit
Historical information
Income.bus: Gross income of business and d

Fisc-Period	Fiscal year-end already based on calendar year		
First-Last	Neither first nor last year of operation		
Inactive	Active		
Jurisdict	Ontario	%100	100
Income	Gross sales, commissions, or fees	\$ 27,800.00	27,800.00
+Vehicle-Exp	Purchased vehicle		
Model	Edge		
Make	Ford		
Car-Level	Business expense		
Purch-Date	15-02-2006		
UCC-Open		\$ 9,065.00	12,950.00 ^
CCA-Class	Class 10 - 30%		
Kilometres	Kilometres travelled for business	#9000	9000
Kilometres	Total kilometres travelled	#10000	10000
+CCA-Class	Class 8 - 20%		
Description	Tools		
UCC-Open		\$ 1,280.00	1,600.00 ^
+CCA-Class	Class 14.1 - 5% (after December 31, 2016)		
Description	ABC Client List		
Purch-Date	01-01-2017		
UCC-Open		\$ 43,510.00 ^	45,800.00
CCA-Type	Business level (enter full amounts - 100%)		

Why DT Max tax software?



**Reduce time
spent training and
finding staff**

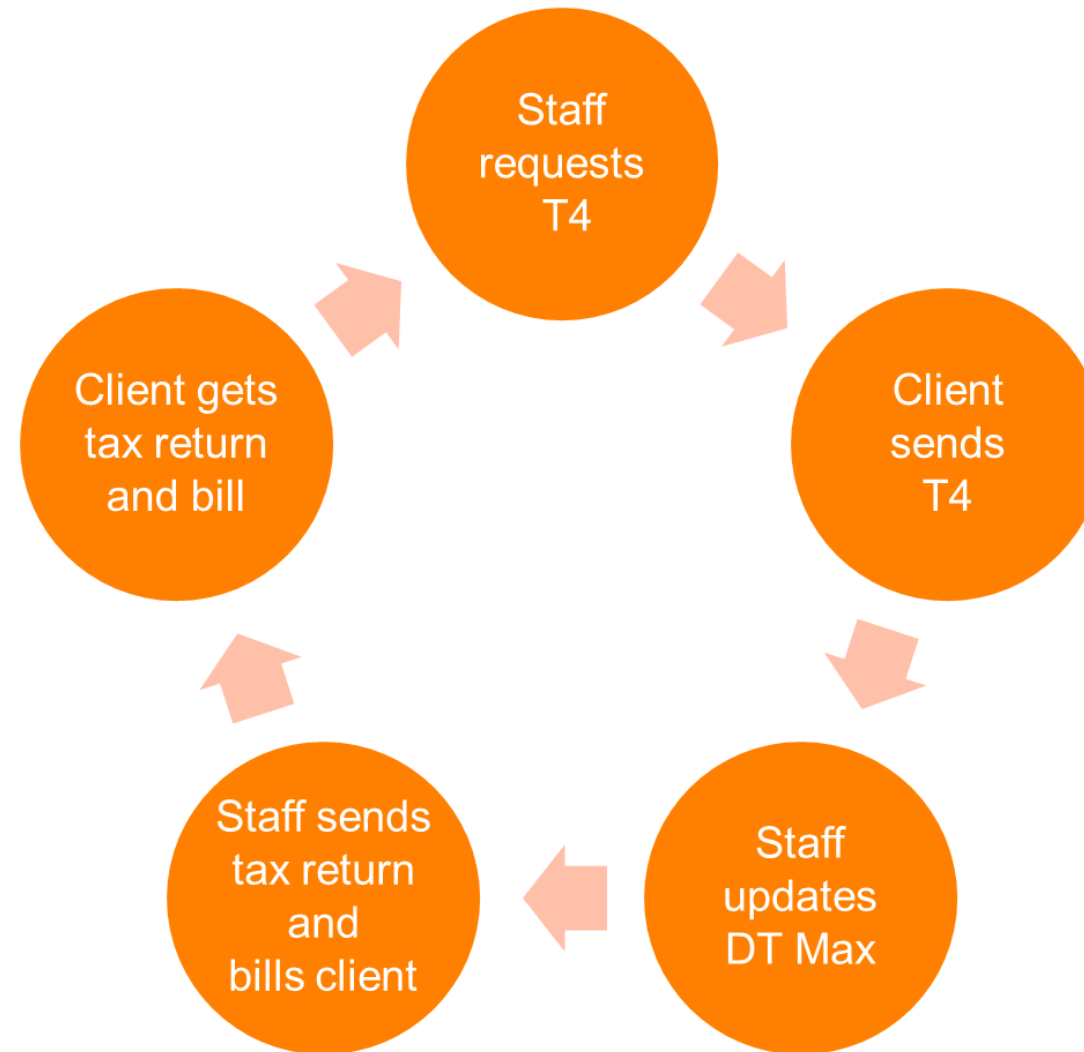


**Save time
and
prepare
more
returns**



**Offer more
than
just tax
preparation**

Why DT Max Software – Easy to manage Workflow



DID YOU KNOW?

30

Minutes per day

75% of firms feel their staff waste at least 30 minutes per day searching for information or duplicating work.²



5% 6%



Firms that use data to guide their decision making are an average 5% more productive and 6% more profitable than their competition.¹

Nearly 2 out of 3

64%

Of small businesses have invoices that have gone unpaid for at least 60 days.³



the answer company™

THOMSON REUTERS®

ONVIO FIRM MANAGEMENT

Discover our online software for accountants



THOMSON REUTERS
ONVIO™



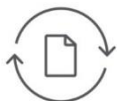
**Work anytime,
anywhere**



**Share data
seamlessly**



**Make it
easy**



**Streamline your
workflow with clients**



**Grow at
your pace**



**Keep it
convenient**



the answer company™

THOMSON REUTERS®

Onvio Firm Management includes

What you get with Thomson Reuters cloud-based accounting firm management software

- Document management
- Client collaboration
- Time and billing
- Project Management
- Ability to work anytime, anywhere
- Secure document-sharing
- Consistent and intuitive interface

SAVE UP TO 50% OFF

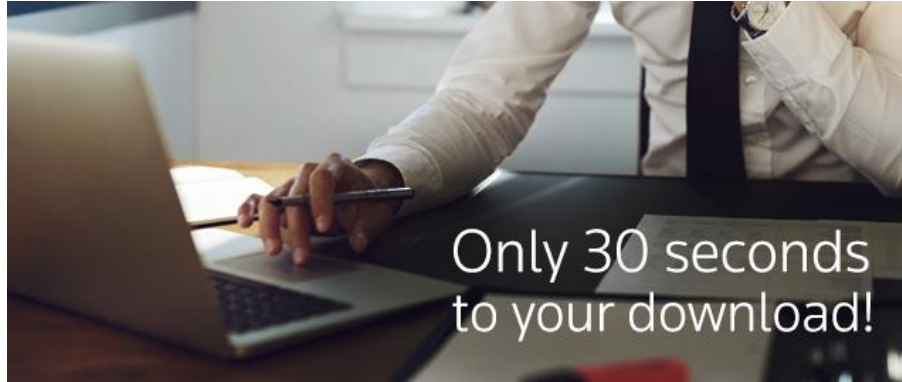
Thomson Reuters powerful tax and practice
management solutions



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NEXT STEPS...



Try any DT Max tax
software product
absolutely free.

For additional information or
to schedule a personalized demo
call us at 1-866-653-8629 or visit
thomsonreuters.ca/en/dtpro

THANK YOU!