

DATA CONVERSION FORM

2024 GoSystem Tax

Use this form to schedule your appointment to submit your 2023 tax data for conversion to 2024 GoSystem® Tax.

Today's date: _____ Contact name at your office: _____
Firm name: _____ Account #: _____
Address: _____
City/State/ZIP: _____
Email address: _____
Phone: _____ Fax: _____

Software product from which you are converting:

ProSystem fx _____ CCH Axcess _____ Lacerte _____ ProSeries _____ UltraTax CS _____

Please indicate the number of clients you plan to convert.

1040_ _____ 1120_ _____ 1120S_ _____ 1065_ _____ 1041_ _____
990_ _____ (ProSystem fx & CCH Axcess only)

Preparing your data

Tax Defaults for both the year you will be converting from and rolling to must be setup, opened, and then closed before conversions can occur. Please Make sure this is completed before requesting a conversion.

Please read the "Tax Software Conversions" section in your *User Reference Guide – Preparing for Tax Season 2024* for instructions on backing up or copying your client data files to the Secure Data Exchange.

Transmitting your data

Once you have completed this form, log in to your case management dashboard and submit a support ticket with the form added as an attachment. If you need help accessing the Case Management Dashboard, please reference the following guide:

<https://cs.thomsonreuters.com/ua/Case%20Management%20Dashboard%20Walkthrough/index.html>

Upon receipt of this form, a support representative will contact you to set up your conversion appointment and personal Secure Data Exchange portal for data transmission.

Agreement

I have read and understand the conversion procedures and capabilities. I hereby release and agree to indemnify Thomson Reuters from all liability and damages relating to conversion, storage, and transmittal of my client data files that I submit for this conversion process. I agree to review my client data after the conversion process, and I agree to assume full responsibility for the completeness and accuracy of all converted client data. I agree that in no event shall Thomson Reuters be liable to me or any third party for indirect, special, or consequential damages, including but not limited to lost profits, business interruption, or loss of business data arising out of any aspect of the conversion process, and I hereby release and agree to indemnify and hold harmless Thomson Reuters from any such claims.

Signature _____ Date: _____