

BNA Tax Management Content on Checkpoint®

BNA Information and Expert Analysis, including the indexes, is integrated throughout the Checkpoint platform. BNA offers the guidance of the world's leading tax authorities across a broad range of federal, state, estate, and foreign taxation topics. BNA also provides the kind of expert news coverage that keeps you confidently abreast of every tax development, and complements the Analysis and news services on Checkpoint. Begin research on the Checkpoint Home Page by hovering over the **Search** tab



NEW! BNA's **Sales and Use Tax Chart Builder** and **BNA Insights and Commentary** are now available on the Checkpoint platform.

Locate Information Using BNA Indexes

BNA Indexes are compiled by a dedicated legal staff of subject specialists. The indexes are an excellent resource for quickly locating relevant information by topic or code section and linking to related Checkpoint information.

1. Hover over Search and select a topic area.
2. Click Indexes in the left hand frame.
3. Expand to BNA Federal Indexes.
4. Expand TM US Income Portfolio Keyword Index.
5. Select a topic, e.g. Abandonment.
6. Links lead to the full text discussion.

Search News & Developments

To Search, click **Search** and select the BNA publications to be searched.

Sign-up for E-mail Highlights

To Sign-up for E-mail Highlights:
 Click **Options** on the top toolbar.
 Click **News** and select the BNA pubs.
 For E-mail delivery options, click **Print/Export/Email**.
 Click **Save and close** at the bottom of the screen.

Locate a Specific Portfolio and Working Papers

Specific Portfolio

1. Hover over **Table of Contents**.
2. Select **BNA Portfolios**.
3. Enter a Portfolio Number, or Browse to locate the specific Portfolio.
4. Click **Go**.

Portfolio contents are displayed (see below). Drill down each section to browse.

BNA Portfolios

Go to Portfolio by Number

US Income Portfolios
Portfolio Number: 389 Browse Portfolios

Estate, Gifts and Trusts Portfolios
Portfolio Number: Browse Portfolios

State Tax Portfolios
Portfolio Number: Browse Portfolios

Sales & Use Tax Portfolios
Portfolio Number: Browse Portfolios

Display Level: 1, 2, 3

Checkpoint Contents

- Federal Library
- Federal Editorial Materials
- BNA Federal Tax Library
- TM U.S. Income Portfolios (BNA)
- Compensation Planning
- Portfolio 389: Medical Plans

Working Papers

The list of working papers in each portfolio displays at the end of the portfolio listing.

Locate BNA Client or Development Letters

1. Hover over **Table of Contents**.
2. Click **Browse**.
3. Click **Federal Library | Federal Editorial Materials**.
4. Expand to **BNA Federal Tax Library | TM Client Development or Explanatory Letters (BNA)**.

Checkpoint Contents

- Tax News
- Federal Library
 - Federal Editorial Materials
 - Federal Taxes Weekly Alert Newsletter
 - Corporate Tax Insights
 - Federal Indexes
 - BNA Federal Tax Library
 - TM U.S. Income Portfolios (BNA)
 - TM U.S. Tax Overview (BNA)
 - TM Insights and Commentary: Federal and Foreign Tax
 - TM Compensation Planning Journal (BNA)
 - TM Real Estate Journal (BNA)
 - TM Memorandum (BNA)
 - TM Weekly Report (BNA)
 - TM Client Development Letters (BNA)**
 - TM Client Explanatory Letters (BNA)

Locate the Sales and Use Tax Chart Builder

1. Hover over **Tools**.
 2. Under State Tax Chart Builders (BNA), select **Sales & Use Tax**.
- Follow the screens to create the chart.

TOOLS LEARNING

- CALCULATORS
 - General
 - STATE TAX CHART BUILDERS (BNA)**
 - Sales & Use Tax

Locate BNA Publications

To locate other BNA Publications included in your subscription, click **Table of Contents** and using the + signs, drill down to find your publication.

Find **TM Insights and Commentaries** under **Federal Library | Federal Editorial Materials | BNA Federal Tax Library**.

TABLE OF CONTENTS NEWS TOOLS LEARNING

SEARCH Clear All

Terms & Connectors Natural Language Thesaurus/Query Tool

Display Level: 1, 2, 3

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- Tax News
- Federal Library**
- Pension & Benefits Library
- Estate Planning Library

For COMPLIMENTARY Research Help or Training, call BNA Training and Product Support at 800-372-1033, option 5 (8:30 AM - 7:00 PM ET)