

Taxnet Pro™

Tax & Estate Planning Centre

How do I set up my OnePass Account and Sign In/Out of Taxnet Pro?

All Taxnet Pro users must set an OnePass account where you create your own username and password.

To set up an OnePass account, select the **Create a new OnePass profile** link located below the Sign In section and then follow the instructions that appear.

Important Note: If you subscribe to other Thomson Reuters products and have already registered an OnePass account, go to the Manage Products section and add your Taxnet Pro registration key to that account. However, if you currently do not have a OnePass account, you must create one in order to sign in to Taxnet Pro.

To sign in to Taxnet Pro:

1. Using a web browser access: taxnetpro.com.
2. Enter your OnePass username and password into the fields provided and select **Sign in**.
3. Select **Save my Username** or **Save my Username and Password** to save your OnePass sign in credentials on your computer. (This is optional but highly recommended.)

To log out of Taxnet Pro, select **Logout** located on the Toolbar.

Accessing Tax & Estate Planning Centre

To access the Tax & Estate Planning Centre page:

1. Select **Centres** from the Menu bar.
2. Select the **Tax & Estate Planning Centre** practice area to use sources and search tools specific to the area of research.

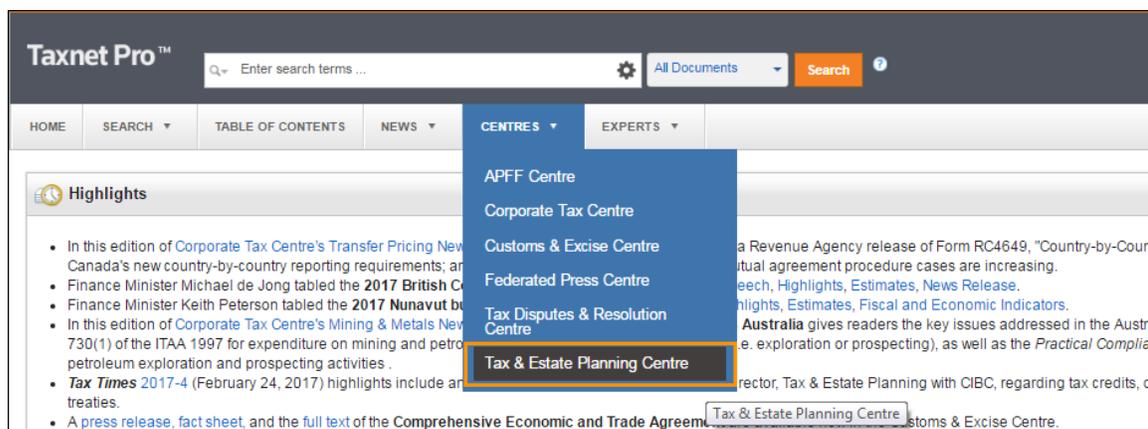


Figure 1: Centres drop-down showing Tax & Estate Planning Centre

Navigating Tax & Estate Planning Centre

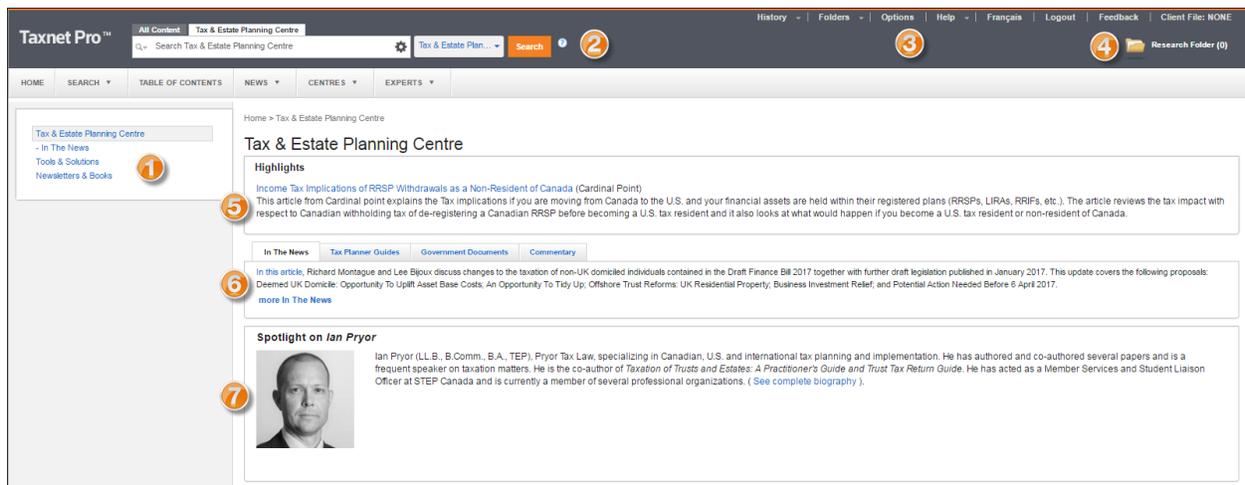


Figure 2: Tax & Estate Planning Centre Home page

- 1 Centre Navigation** Select a link on the left panel to directly access In the News, Tools & Solutions and Newsletters & Books.
- 2 Quick Search** Use Quick Search to search the entire Tax & Estate Planning Centre or limit the search to a specific content type from the Tax & Estate Planning Centre drop-down list.
- 3 Toolbar** Access your research history, documents saved to your folders and various preferences set in Options. You can also access online help, switch to the French interface and logout of the service
- 4 Active Folder** Access your Active Folder.
- 5 Highlights** Select a link in the Highlights section to review the important news items of the day. Select an icon to further view a practice area.
- 6 In the News** Select a link in the In the News section to stay up-to-date on important tax developments. Select **more In the News** for a complete listing.
- 7 Spotlight** Read about an author who has written for our newsletter or commentary area with full biographical information.

How do I search Tax & Estate Planning Centre content?

1. Enter your Boolean query into the Quick Search box at the top of the page. *Alternatively*, select the Query Builder icon (⚙️) to retrieve a search template.



Figure 3: Quick Search box

Tax & Estate
Planning Centre
drop-down list

2. Select **Search**.

TIP: To limit the search to a practice area, select it from the Tax & Estate Planning Centre drop-down list.

How do I navigate my results list?

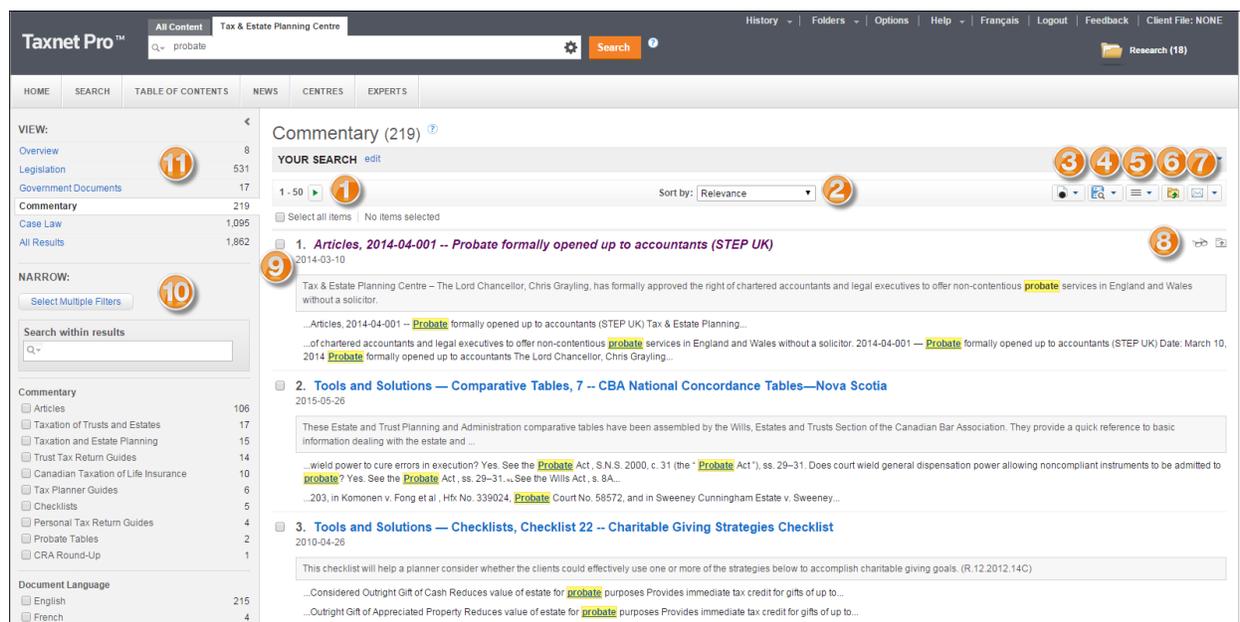


Figure 4: Results list

- 1 **Next/Previous Page** Navigate to your results list pages.
- 2 **Sort by** Re-sort your results list. (Relevance, Table of Contents or Reverse Chronological).
- 3 **Show All Documents** Switch between displaying all documents or only those that are included in your subscription
- 4 **Save Searches** Save this search to auto-run again.
- 5 **View Detail** Select from three levels of document details to display

- 6 **Save to Folder** Save documents to the Taxnet Pro folder.
- 7 **Delivery Method** Print, email or download documents. The default option is the option last chosen
- 8 **Document Icons** Eyeglasses indicate document was viewed within the last 30 days for this Client File. Folder icon indicated document was saved to a folder
- 9 **Document Title** Purple title indicates the document was viewed within the last 24 hours. Select the title to retrieve the full text. Select the document checkbox to print, email, and download or to save multiple documents to the folder at one time.
- 10 **Narrow section** Select from a number of customized filters to narrow your search.
- 11 **View section** Select a content type to view.

How do I access Tax & Estate Planning Centre from the Table of Contents?

1. Select **Table of Contents** from the Main menu.
2. Select the arrow next to the Tax & Estate Planning Centre heading to expand the directory listing.



Figure 5: Table of Contents

3. Continue expanding the headings by selecting the arrows until you locate the document you want.
4. Select the link to retrieve the document.

How do I access checklists?

1. Select the **Tools and Solutions** link located in the Navigation pane on the left side of the Tax & Estate Planning Centre home page or through the Table of Contents by choosing Tax & Estate Planning Centre, Tools and Solution and Checklist.
2. Select the checklist you want to retrieve located in the Checklists – Selected section. If the checklist you want is not listed here, select **more Tools and Solutions** to retrieve the complete list or from the Table of Contents select the Checklist list by clicking on the blue link.

3. Select the document link located in the right frame.

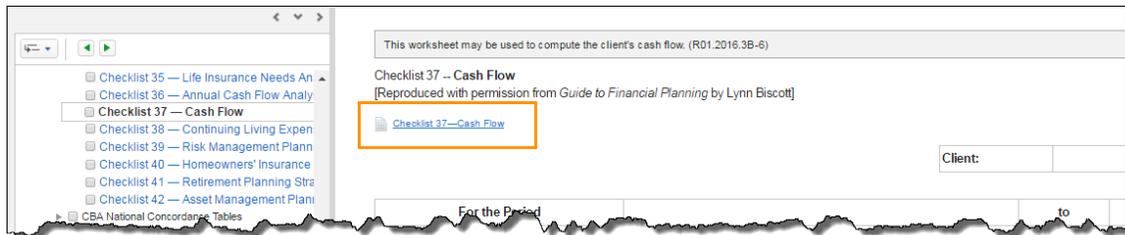


Figure 6: Checklist showing document link

4. If using IE, a window appears providing you with the option to open or save the file. In Google Chrome, select the download document window located in the lower left corner of your screen to open the document.
5. The checklist opens in MSWord or Excel. Complete the checklist within its given application and remember to save it.

Note: The Will Preparation checklist is a static document and therefore cannot be electronically completed.

How do I access the Tax Planner Guides?

1. Select the **Tax Planner Guides** tab located on the Tax & Estate Planning Centre home page or through the Table of Contents by choosing Tax & Estate Planning Centre, Analysis/Commentary and Tax Planner Guides.
2. If the topic you want to review is featured, simply select its link; otherwise, select **more Guides** to access the Tax Planner Guides Table of Contents. Topics include Business Succession, Principal Residence Exemption, Powers of Attorney, U.S. Vacation Properties, Personal Insurance Needs.
3. Select a link to retrieve the document.

How do I access articles by area of interest?

1. Select the **Commentary** tab on the Tax & Estate Planning Centre home page and then select **more Commentary** or through the Table of Contents by choosing Tax & Estate Planning Centre, Analysis/Commentary and Articles.
2. Select the arrow next to the Analysis/Commentary heading to expand this heading.
3. Select the arrow next to Articles. Continue expanding headings until you see the document you want.
4. Select the link for the article you want to review.

How do I access the National Probate Fee Chart?

1. Select the **Tools and Solutions** link in the Navigation pane located on the left side of the Tax & Estate Planning Centre home page or through the Table of Contents by choosing Tax & Estate Planning Centre, Tools and Solution and Probate Tables.
2. Select the **Canadian Probate Taxes** link located in the Canadian Probate Taxes section.

-
3. If using IE, a window appears providing you with the option to open or save the file. In Google Chrome, select the download document window located in the lower left corner of your screen to open the Canadian Probate Taxes chart.
 4. Scroll through the chart or use **Ctrl+F** to search by keyword.

How do I calculate a Provincial Probate Fee for my jurisdiction?

1. Select the **Tools and Solutions** link in the Navigation pane located on the left side of the Tax & Estate Planning Centre home page.
2. Select the jurisdiction you want from the Provincial Probate Fees Calculators section to retrieve the calculator template
3. Enter the estate value, and other information as required into the appropriate fields on the template.
4. Select **Calculate**.

The calculation appears in a new window along with a summary note. You may print or restart a new calculation. Select the **x** button in the upper-right corner to close this window and return to Taxnet Pro.

How do I stay current on specific areas of law impacting tax and estate planning?

Tax Planner Guides: Tax Planner Guides are concise summaries of areas of law impacting estate planning and gives tax planners a good understanding of issues outside their area of expertise. Tax Planner Guides are accessible from a tab on the Tax & Estate Planning Centre home page or from the Table of Contents.

Newsletters:

BorderCrossings – Michael Pereira and Pinaki Gandhi of KPMG LLP (editors). This publication will focus on cross-border personal tax issues, including foreign and domestic employment assignments, personal tax immigration and emigration issues, with a particular emphasis on U.S. connections such as cross-border ownership of real property, U.S. citizens in Canada and U.S. estate tax and gift tax concerns impacting Canadian residents.

Tax & Wealth Management – Martin Rochweg and David Chodikoff of Miller Thomson and Hellen Kerr of Thomson Reuters (editors). This periodical was developed as a resource for private business owners interested in keeping their wealth intact. It will address myriad topics, including personal and corporate tax planning, executive compensation, buying and selling a business, and succession planning. The publication will also help readers stay current with relevant legislative changes.

The most recent *Newsletters* are accessible from within the **Commentary** tab on the Tax & Estate Planning Centre home page or from the Table of Contents. For an archive of all issues please select on the *Tax & Estate Planning Centre* area within the Table of Contents and then select *Newsletters*.

Commentary: Search Catherine Brown's *Taxation and Estate Planning*, a recognized leading work, to get in-depth analysis in areas such as taxation in the year of death, will planning, gifts and trusts and taxation of the estate, testamentary trusts and beneficiaries. Search *Taxation of Trusts and Estates* by Grace Chow and Ian Pryor. The book is written with the view to providing lawyers, accountants, trust administrators and trust officers with a resource text addressing the income tax issues presented by personal trusts as well as detailed assistance in the completion of the T3 Trust Information and Income Tax Return. *Canadian Taxation of Life Insurance*, by Florence Marino and John Natale, provides the tax consequences of life insurance in estate and business planning, especially helpful for

tax professionals who are relatively new to this practice area. *Commentary* is accessible from its tab on the Home page.

Articles: The Commentary section features tax and estate planning articles written by leading experts and organized by topic.

In the News: Provides bulletin-board style summaries of all recent legislative, case law and government document updates affecting the practice, with links to the full text document. *In the News* is accessible from the Tax & Estate Planning Centre home page. To view the archive of past summaries, please select **more in the News** within the Tax & Estate Planning Centre home page.

Highlights: Highlights features a daily/weekly “*Hot Topic*” selected by the editors as being of particular interest to practitioners. *Highlights* is available on the Tax & Estate Planning Centre home page.

TaxNews: TaxNews comes with the Tax & Estate Planning Centre (relevant for those who do not subscribe to another Taxnet Pro library) and provides access to recent tax developments in the areas of federal income tax and significant announcements. Set up your TaxNews email notification through Options.

How do I search tax estate planning and other content at the same time?

1. Select the **All Content** tab located above the Quick Search box located at the top of the page.
2. Enter your Boolean query into the Quick Search box at the top of the page. *Alternatively*, select the Query Builder icon (⚙️) to retrieve a search template.



Figure 7: Quick Search box

3. Select **Search**.

How do I find the CBA National Concordance tables?

1. Select the **Tools and Solutions** link in the Navigation pane located on the left side of the Tax & Estate Planning Centre home page or through the Table of Contents by choosing Tax & Estate Planning Centre, Tools and Solution and CBA National Concordance tables.
2. Select the jurisdiction for the table you want from the CBA National Concordance Tables section.

How do I access the T3 Trust Information Tax Return?

1. Select the **Table of Contents** tab located on the Main menu.
2. Select the **arrow** next to the Tax & Estate Planning Centre heading.
3. Select the **arrow** next to Government Forms.
4. Select the **arrow** next to the T3 heading.
5. Select the T3 form you want to retrieve.

How do I find non-tax case law and legislation?

1. Select **Search** from the Main menu and then select **Tax & Estate Planning Centre**.
2. Enter your search terms into the fields provided.
3. Select the order in which you'd like to see your results.
4. Restrict your search to a specific content-type(s) and then select **Search**.

How do I print, email or download or save on Taxnet Pro?

Select the Delivery Method drop-down arrow located on the results list or on the document page and then choose your option. Follow the instructions that appear. **Note:** The last option you selected becomes your default delivery method.

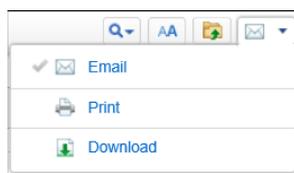


Figure 8: Delivery Method

How can I track my research?

A research history is automatically created when you sign on to Taxnet Pro and is saved when you end your research session. The trail displays all searches conducted and documents viewed. They are retained for one year after they are saved. You may print, email or download any trail.

Access your most recently viewed documents and searches by pointing to the History tab at the top of any page **OR** select the tab to retrieve your complete history from the past 12 months. How do I print, email or download or save on Taxnet Pro?

Select the Delivery Method drop-down arrow located on the results list or on the document page and then choose your option. Follow the instructions that appear. **Note:** The last option you selected becomes your default delivery method.

Folders

Taxnet Pro helps you organize and manage your research by storing your documents and text snippets into folders.

[Saving to a Folder](#)

To save the document you are viewing into a folder, select the **Save to Folder** icon () on the document toolbar. Select the folder in which you want to save the document and select **Save**. You may drag and drop items into your Active folder at any time.

To save documents from a result list, select the checkboxes next to the documents you want to save and select the **Save to Folder** icon. Select the folder where you want to save the documents and select **Save**.

To save selected text (snippets) into your active folder, highlight the text you want to save and choose *Save to...* from the pop-up menu.

To view documents and snippets you have saved into your active folder, select your active folder. To view documents/snippets saved into another folder, select **Folders** at the top of any page and then select the name of the folder containing the documents.

Changing and Creating New Folders

To create a new folder, do one of the following:

- Select **Folders** at the top of any page. The Folders page is displayed. Select **New**. The New Folder dialog box is displayed. Enter the name of the folder into the *Folder Name* text box, select a location for the new folder, and select **OK**.
- While viewing a document or a results list, select the **Save to Folder** icon, and then select **New Folder**. Enter the name of the folder into the *Folder Name* text box, select a location for the folder, and select **OK**.

The active folder is the folder that is displayed on the right side of the Toolbar.

To change the active folder, select the active folder and then select the **Change Folder** icon (). The Change Folder dialog box is displayed. Select the folder you want and then select **OK**.

Where can I find help?

- **Product Support:** Included with your subscription.
 - Call: 1-800-387-5164 or 416-609-3800 (Toronto).
 - **Technical:**
 - Email: TechSupport.LegalTaxCanada@tr.com
 - Weekdays: 7:00 am – 9:00 pm (ET)
 - Weekends and Ontario holidays: 7:30 am – 8:00 pm (ET)
 - **Research:**
 - Email: ResearchSupport.LegalTaxCanada@tr.com
 - Weekdays: 8:30 am – 5:00 pm (ET), excluding holidays
 - **OnePass and Log in Issues:** 24/7
- Select the **Learn it** option from the **Help** link located at the top of any Taxnet Pro page to access Quick Reference Cards and video tutorials or select **Contact Us** for information on how to contact our Product Support team. *Alternatively*, visit the [Customer Learning Centre](http://learning.thomsonreuters.ca) (learning.thomsonreuters.ca) to access these same resources as well as sign up for a live public webinar facilitated by a Certified Professional Learning Consultant.