



ONESOURCE™ TRUST & ESTATE ADMINISTRATION

Court Accounting and Tax Preparation Services



ONESOURCE TRUST & ESTATE ADMINISTRATION

- Superior Customer Service
- Proven Formats
- Confidentiality
- Accuracy
- Knowledge

These are the reasons law firms, banks and accounting firms look to Thomson Reuters for preparation of their fiduciary tax and accounting matters. Accountings and fiduciary tax returns can be tedious and time-consuming to prepare. By outsourcing your extra work to us, your staff will be able to focus their time on more profitable, less time-consuming tasks.

The Experience You Need

With more than 30 years experience, ONESOURCE Trust & Estate Administration is the leading provider of court accounting and tax preparation services in the country. Maintaining this industry standard is what our trust and estate specialists focus on. Plus, we have the technology to complete your accountings and tax returns efficiently and cost-effectively.

Fiduciary tax and accounting is the foundation of our business, and we want you to be as confident in our abilities as you are in your own people. ONESOURCE Trust & Estate Administration can handle all of your fiduciary and court accounting needs, such as:

- Formal or informal accountings for either annual or event-driven matters
- Wide array of state specific accounting formats
- Preparation of Guardianship and Conservatorship accountings nationwide
- Services for the completion of 706, 1041, and 709 tax returns, as well as various state estate and state fiduciary matters
- Additional preparation of returns for 990 and 990 PF (for non-profit organizations and charitable institutions)

Customer service is key.

A Proven Process

Our years of experience with trust and estate administration have enabled us to develop a process that makes the preparation of court accountings and fiduciary tax returns as efficient as possible. As a client of Thomson Reuters, you will be working with experienced trust and estate specialists to prepare your various matters. Our open lines of communication ensure that any questions you may have are answered in a timely manner throughout the preparation process.

We work directly with you to identify and resolve any discrepancies that might turn up during the preparation process. All accounts receive a comprehensive review from one of our senior specialists to ensure accuracy. We establish standards and timeliness with each client prior to beginning any work, and we pride ourselves on meeting those goals.

Our state specific accounting formats have been approved by the various state legislatures, and our National Standard format is accepted by courts nationwide. These formats have helped set the standards in the fiduciary accounting industry.

All preparation matters are kept secure and confidential. None of your information is ever released to the market and all completed accountings and/or tax returns, along with all original data, are returned directly to you - our client.

THE ONESOURCE TRUST & ESTATE ADMINISTRATION ADVANTAGE

Quality... Timeliness... Cost Effectiveness... Professionalism.

If these are important to you, then ONESOURCE Trust & Estate Administration is your solution. By shifting the burden of court accounting and tax preparation to Thomson Reuters, you will be able to eliminate tedious data entry, realize more accurate and timely accountings and tax returns and reduce overhead and other costs.

Our advanced technology will enable you to better compete in the market. You will be able to reassign staff to more profitable, less time-consuming tasks, enabling you to concentrate on the services that make your organization more successful, while improving your bottom line.

Thomson Reuters is the largest and most experienced provider of court accounting and tax preparation solutions in the country, helping to ensure that law firms, banks and accounting firms achieve their compliance and strategic business goals.

When you need help producing a trust or estate accounting, or fiduciary tax return, the ONESOURCE Trust & Estate Administration team can prepare these matters for you. Our experienced and highly-trained trust and estate accounting and tax specialists focus on critical information, interpret and manipulate complicated data and troubleshoot complex problems.

Through automation, we simplify and standardize the court accounting and tax preparation process. The shared common platform and superior data management of our technology saves time and effort.

Choosing ONESOURCE Trust & Estate Administration for your court accounting and tax preparation can greatly improve your business processes, freeing up valuable resources for other revenue generating business.

For more detailed information about our services, please contact our Sales department at 800-331-2533 and choose "Option 1" from the menu.



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FIN 48
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Property Tax Compliance
Unclaimed Property

ONESOURCE

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Telecom Regulatory Compliance
Exemption Certificate Management
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Trust Tax Software
Trust 1099 Solutions
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