



ONESOURCE™ TRUST TAX

Services



Used by over 500 trust organizations nationwide, ONESOURCE Trust Tax services, from Thomson Reuters provides a custom-tailored process that brings you consistent service, unsurpassed quality, and increased tax return accuracy — all at reduced costs and enhanced value for your organization.



A NAME YOU CAN DEPEND ON

ONESOURCE Trust Tax is a part of the nation's largest provider of managed tax services. We combine the experience and knowledge of fiduciary tax experts with a proven methodology that leverages technology and tax research information. The result? You get a premier tax compliance service that ensures you receive a complete, accurate, and timely solution. In fact, over 90% of the top 100 accounting firms and each of the Big Four depend on us for tax research and services.

Take advantage of the leader

ONESOURCE Trust Tax delivers tax preparation services to trust institutions across the country, preparing returns for over 200,000 trust accounts. All of our tax accountants are full-time professionals who average 16 years of fiduciary tax preparation experience. This depth of knowledge enables us to identify situations requiring further analysis, discuss them with you, and ultimately make the proper decision for your fiduciary tax needs.

Mitigate fiduciary tax risk

Be assured that your data is secure and will remain confidential. Thomson Reuters has over 40 years of experience managing client data. We use sophisticated back-up technology, advanced security systems, and have a disaster recovery program that provides full data replication and recovery.

We also offer a complete, accurate solution that generates, manages, corrects, and prints 1099s. This premier service translates into total value for your clients and includes:

- Automated collection and use of mutual fund factors
- Expert determination of qualified/nonqualified dividends
- Professional-looking, custom tax letters

Customized services keep you in the loop

ONESOURCE Trust Tax is more than just a "preparer" of tax returns. We partner with you to achieve a comprehensive solution. With expert advice on tax treatments, suggestions for alternatives on tax actions, and the ability to find and correct trust accounting problems, we're your single-source provider for software, services/preparation, and research.

Your one-on-one relationship begins with a dedicated ONESOURCE Trust Tax, tax manager who leads your tax fulfillment team. We will create your individualized plan and ensure meaningful, frequent communication throughout the year. Then we follow a clearly defined set of standards, deliverables, and processing timelines.

Stay abreast of the process at every step with the Administrator's Workstation. It provides you with a centralized environment for all aspects of your tax preparation. You get real-time tax information in an easy-to-use format, so you save time and effort with instant access to tax letters, federal and state computations, and more. You can even view, print, or email tax returns and documents as needed.

Reduce your tax costs

We enable you to save time and provide the best return on your investment. By partnering with us, you eliminate last-minute processing during tax season and save fiduciary tax costs by up to 40%. We keep you on budget with:

- A tax preparation process tailored to your unique needs.
- A clear up-front cost structure with tax research available.
- Reduced personnel staffing and training costs.
- Better management of future tax processing costs.
- Capability to use your capital funds for other corporate initiatives.

Depend on the leader in fiduciary tax services to eliminate these burdens to give you security and peace of mind. Contact us today to see how ONESOURCE Trust Tax can save you time and money.

ONESOURCE CORPORATE SOLUTIONS

Workflow - Software - Services - Consulting - Data Management - Research

ONESOURCE INCOME TAX

Domestic & International
Federal & State Compliance
1099 Reporting
FAS 109
FIN 48
Fixed Assets
Global Tax Planning
Provision
Transfer Pricing

ONESOURCE PROPERTY TAX

Commercial Real Estate
Complex Property Tax
Property Tax Compliance

ONESOURCE

WorkFlow Manager
Calendar
Data Exchange
Entity Manager

ONESOURCE SALES & USE TAX

Business License Management
Corporate Registered Agent
Sales & Use Tax Compliance
Telecom Regulatory Compliance
Exemption Certificate Management
Tax Rate Subscription

ONESOURCE TRUST TAX

Trust Tax Services
Trust Tax Software
Trust 1099 Solutions
Estate & Trust Administration
Estate Planner
Court Accounting

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