

ONESOURCE™ TRUST TAX

1099 Solutions



REDUCE EFFORT AND ENHANCE RESULTS

Generating, managing, correcting and printing 1099s creates a difficult process with extensive, manual work. The ability to react to regulatory changes and produce accurate 1099s without considerable effort presents a challenge for many trust organizations.

For these reasons, trust operation departments and trust administrators need a solution that reduces the burden and daily management of this labor intensive, year-end process while mitigating risk to ensure clients receive quality results.

Using time-tested, proven methods and leading-edge technology, ONESOURCE Trust Tax offers the optimum solution that produces an accurate, complete 1099 package for your recipients, including:

- Ability to rely on our experts to determine qualified and non-qualified dividends.
- Automated collection and use of mutual fund factors to ensure clients' work is complete and accurate (including calculations to determine state income tax exemptions).
- Complete 1099 service prepared by fiduciary experts, with optional detailed client tax information letters.
- IRS e-filing.
- Browser-based software allowing you to see what we see, review preparation statuses, and print copies of completed forms and letters.
- Improved workflow, with 75% of the work completed throughout the calendar year (not in a short processing window after year-end).

ONESOURCE Trust Tax, from Thomson Reuters, is the most comprehensive trust tax solution in the industry. To minimize your efforts, reduce risks and ensure compliance, consider our proven solution.

To find out if 1099 processing from ONESOURCE Trust Tax is a good fit for your organization, contact us:

888.706.1041, ext. 18778 | onesource.thomsonreuters.com/trusttax

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