



TRUST TAX

Web Delivery

PROVIDE IMMEDIATE CLIENT ACCESS TO TAX DOCUMENTS

Keeping up with client requests for copies of tax documents during tax season can be time consuming for account administrators and support staff. With Web Delivery from Thomson Reuters ONESOURCE™ Trust Tax, these hassles are eliminated. Web Delivery allows clients to access tax documents 24/7 without calling your support team.

This optional service provides account holders and beneficiaries with immediate online access to 1099s, K-1s, grantor and agency letters, and tax information statements through your institution's secure website.

SECURE AND EFFICIENT DELIVERY

Account holders access tax information using your institution's client-facing website. To use the service, log on with a password-protected user ID.

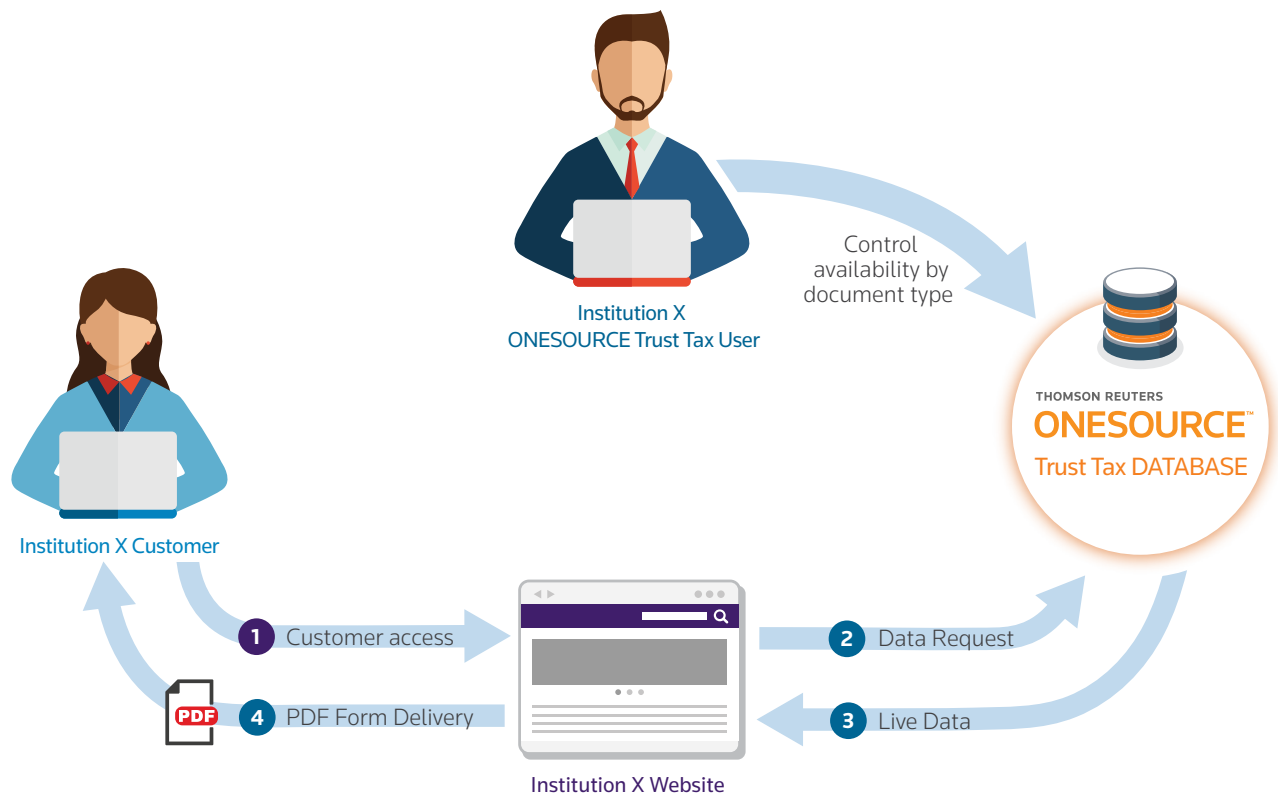
Links from your secure website enable clients to access tax documents for each account. They'll see a summary of available documents and can select and download to their computer for viewing, printing and saving.

BENEFITS OF WEB DELIVERY

- + Extends your established online relationship with your clients
- + Reduces support activity during your busy compliance season
- + Provides clients faster access to up to date tax information
- + Saves time and cost of printing and delivering paper copies
- + Ensures secure and efficient electronic delivery

TAX DOCUMENTS AVAILABLE THROUGH WEB DELIVERY

- + Form 1099
- + Schedule K-1
- + Form 5498
- + Form 1098
- + Form 1042-S
- + Grantor Letter
- + Agency Letter
- + Tax Information Statement



HOW IT WORKS

Using our web delivery service, access to tax forms is completed using the client's current log on along with the authentication capabilities and security validation of your institution's website. You control the user website, messages to account holders and the tax documents that can be accessed.

Clients do not have direct access to ONESOURCE Trust Tax, they simply see a link on your website enabling them to retrieve copies of their tax documents.

RETRIEVING DOCUMENTS

Through ONESOURCE Trust Tax, you set the milestone indicating when each tax document type is available for retrieval by account holders.

When a client logs in and accesses a unique icon or link, your institution's website will access Web Delivery with special credentials. ONESOURCE Trust Tax returns a list of available documents for the client identified by type of document and date created. The data is converted into a PDF-formatted document and returned to your institution's website for display. To ensure privacy, and to eliminate the risk of identity theft, every document is fully encrypted.

Web Delivery is completely transparent. To retrieve documents, account holders simply log onto your website, click on an icon and download their tax information forms to their own computers to review, print, or save.

For more information, or to purchase this optional feature, contact your client services manager today.

CONTACT US TODAY



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