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ONESOURCE™

TRUST TAX

THE ADMINISTRATOR WORKSTATION ADVANTAGE FOR TRUST ADMINISTRATORS

Take control over the tax process and improve client communications with Administrator Workstation, available only from Thomson Reuters ONESOURCE Trust Tax.

The Administrator Workstation gives trust administrators visibility into the tax process by providing up-to-the-minute access to tax information. Administrators are better equipped to respond to client questions and requests for tax forms and information. Minimizing tax department interruptions during the busy tax season makes tax preparers more productive and trust administrators are free to better serve their clients.

Tax departments control the configuration and setup of the Administrator Workstation from within ONESOURCE Trust Tax, including access to status information and the ability to print K-1s, 1099s, and tax information letters. With no software to install or maintenance issues, hardware expenditures are eliminated. The web-based environment offers an efficient way for trust administrators from any location to stay connected with immediate access to the latest tax information.

IMPROVE INTERNAL COMMUNICATION

The Administrator Workstation delivers more efficient communication by linking tax departments to trust administrators. The tax department does not have to spend hours generating reports or updating secondary databases with status information for administrators.

Using custom registers, the tax department can request from administrators the necessary information to complete an accurate tax return, like a missing social security number, the correct cost basis for a posted sale, or confirmation that transaction coding is accurate. Administrators simply log on, review the request, and submit the necessary response, without making a single phone call, writing an email or submitting a fax.

MORE RESPONSIVE TO CLIENTS

When a client calls, administrators can access the status of their returns, review completed returns, tax letters and other reports while communicating with the client. The administrator immediately reviews the information and responds saving valuable time and providing exceptional customer service.

BETTER PLANNING

When the tax department completes a return or estimate, the federal and state computations are available so the administrator can assist clients with tax planning, or raise cash for tax payments.

Timely notification and better planning translates into savings for your clients.

REVIEW AND PRINT ON DEMAND

Administrators can review completed returns online before mailing and print copies of reports, tax forms or K-1s on-demand to satisfy client requests. Trust information and customized management reports are available to view and print whenever needed.

- Simplified web browser interface
- Available 24/7
- No additional software, controls or applets to install
- Administrators have read access to ONESOURCE Trust Tax detail, summaries, account, beneficiary and status information
- View and print tax returns, tax letter and tax worksheets
- Configuration and setup is controlled through ONESOURCE Trust Tax and tax department
- Tax department can customize tracking information and user rights unique to your organization

Contact information:
1.800.865.5257

tax.thomsonreuters.com/trust-tax

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