OnBalance™
Streamline Your Tax Preparation

Introducing Thomson Reuters
OnBalance Self-Employed

The OnBalance web and mobile app combines the accessibility and security of cloud accounting with easy-to-use dashboards. You can easily track income and expenses, separate your business from personal expenses, improve workflow and simplify tax preparation. You can log in from any device and access all of your data, which updates in real-time. No manual updates. No limitations.

With OnBalance Self-Employed, you can:

• Paperlessly track your business income and expenses and send data safely and securely to your tax advisor who uses Thomson Reuters UltraTax CS

• Manage income and expenses by improving the accuracy of your data to maximize your tax deductions

• Add financial accounts and records, or import your expenses and deposits

• Enter transactions and attach receipts for reference

• Capture and recognize data from receipts, using advanced Optical Character Recognition (OCR) technology to automatically populate the information in the expense transaction and reduce the amount of manual entry

• Categorize and separate personal transactions from business transactions, as well as transactions for multiple businesses

• Get a year-to-date view of your financials by printing or downloading a tax summary report

Track mileage effortlessly
With “always-on” GPS tracking (on GPS-enabled devices) you can automatically track mileage through the mobile app or add trips manually to manage your mileage deductions.

Monitor key metrics
OnBalance Self-Employed gives you instant access to key business metrics to inform your business decisions. Easy-to-use, real-time dashboards provide graphical trends for your business — such as revenue, expenses and profit and loss — as well as income, spending and financial account balances.

Know your data is safe and secure
Thomson Reuters takes your data security needs seriously. With OnBalance Self-Employed, we use high-level technical and staffing security measures — a level of data protection that may be difficult to maintain on your own.

Discover OnBalance
Get started today — download the app from the Google Play or Apple App store.