



OnBalance™

Help Your Self-Employed Clients Streamline Tax Preparation

Introducing Thomson Reuters OnBalance Self-Employed

The Thomson Reuters OnBalance web and mobile app combines the accessibility and security of cloud accounting with easy-to-use dashboards, so your self-employed clients can easily track income and expenses and securely send their data to you. Integration with UltraTax CS® improves workflow and simplifies tax preparation. Your clients can log in from any device and access all their data, which updates in real time. No manual updates. No limitations.

With OnBalance Self-Employed, your clients can:

Work seamlessly with you as their trusted tax advisor

Upon invitation to use the mobile app, your clients will automatically be connected with you so that you can import their data at any time to UltraTax CS. The integration with UltraTax CS is seamless, so there is no bridge or additional application needed to gather data. Their data simply appears in their Schedule C, making for easy tax preparation.

Manage income and expenses

OnBalance Self-Employed helps your clients keep track of their business income and expenses paperlessly. Clients no longer need to gather paper records and deliver them to your office. Instead, they can use the app to:

- 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 their financials by printing or downloading a tax summary report



Track mileage effortlessly

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

Monitor key metrics

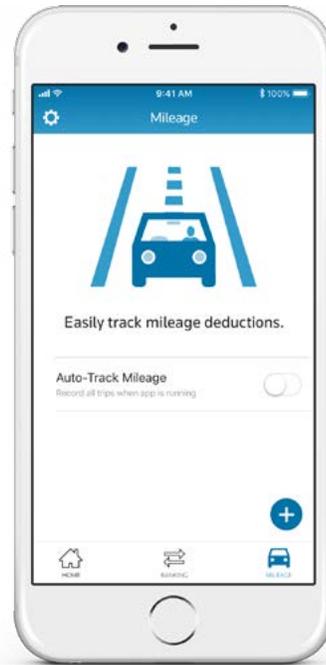
Your clients will have instant access to key business metrics to make more informed decisions. Real-time dashboards provide graphical trends for their business — such as turnover, expenses and profit and loss — as well as income, spending and financial account balances. The dashboards are easy to use so your clients can quickly find the information they need, when they need it.

Know their data is safe and secure

Thomson Reuters takes your clients’ data security needs seriously. With OnBalance Self-Employed, we use high-level technical staffing security measures — a level of data protection that may be difficult for your clients to maintain on their own.

Give your clients an advantage with OnBalance

Offering your clients a solution that will improve their efficiency solidifies your position as a trusted tax advisor who focuses on your clients’ needs. And by maintaining a virtual presence with your clients, you stay on pace with new tax and accounting technology that bolsters your clients’ businesses.



Learn more

For more information, visit
tax.tr.com/cs-professional-suite/onbalance

To register for an account, visit
onbalance.tr.com