



ONESOURCE® TRUST TAX

Reduce Your Risk of Noncompliance

NO MORE WORRIES

Compliance is more critical than ever. With ONESOURCE Trust Tax, nothing falls through the cracks

We keep you in compliance with our document and workflow solutions, trust tax software and services, and complex investment tax reporting.

Alleviate the burden of labor-intensive processes. And help ensure accuracy, timeliness, and adherence to regulations. Our complex investment tax reporting portfolio includes:

- 1099 Information Reporting for Agency/Custody/Retirement type accounts, Wash Sales, Income Reallocation, and WHFITs, OIDs, REMICs and UITs.
- Form 1041 for Trusts & Estate
- Form 5227 – Charitable Accounts
- Form 990/990-PF – Exempt Organizations & Private Foundations
- Form 1042s – NRA reporting

Compliance isn't an option. Let ONESOURCE Trust Tax solutions help make it a constant.

To learn more, visit onesource.thomsonreuters.com/trust-tax, or call 800-872-1041, then press 3.

