



## TRUST TAX

### OFX Delivery

In an era of information overload, organizations struggle to provide complete and accurate tax information to their customers as quickly as possible.

Thomson Reuters ONESOURCE™ Trust Tax offers an OFX data delivery solution that allows financial institutions to data-stream important tax information to their customers in a secure, easy and efficient manner.

#### PROVIDE IMMEDIATE CLIENT ACCESS TO 1099 DATA

Your customers can now import 1099/1098 tax information generated on ONESOURCE Trust Tax directly into Intuit TurboTax. Whether you want a Thomson Reuters hosted solution or you have an OFX server and choose to host, your customers can retrieve their 1099 and 1098 tax information from ONESOURCE Trust Tax using TurboTax's import feature.

This service provides recipients immediate access to 1099s and 1098s through a secure request directly from TurboTax.

#### SECURE AND EFFICIENT DELIVERY

Recipients access their tax information using your company's preferred authentication method. ONESOURCE Trust Tax can accommodate static or dynamic authentication.

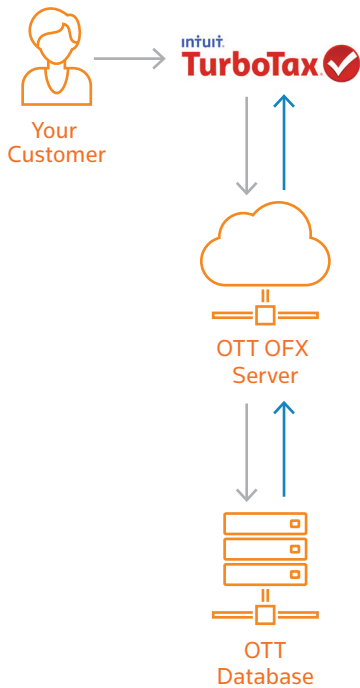
#### BENEFITS OF OFX DELIVERY

- + Extends your established online relationship with your customers
- + Reduces support activity during your busy compliance season
- + Provides customers faster access to up-to-date tax information
- + Ensures secure and accurate electronic delivery of tax information

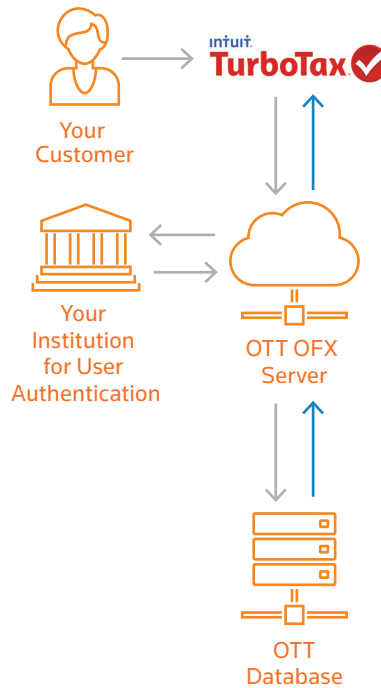
#### TAX DOCUMENTS AVAILABLE THROUGH OFX DELIVERY

- + 1098
- + 1099-B
- + 1099-DIV
- + 1099-INT
- + 1099-MISC
- + 1099-OID
- + 1099-R

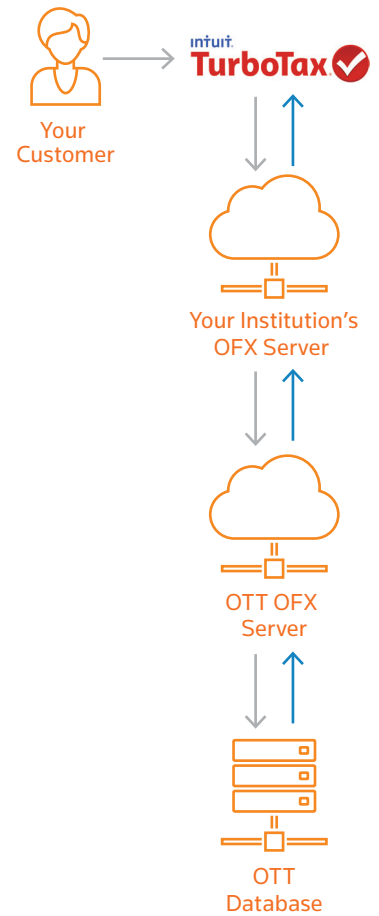
### OTT HOSTED OFX SERVER Static Authentication



### OTT HOSTED OFX SERVER Dynamic Authentication



### INSTITUTION HOSTED OFX SERVER






## RETRIEVING DOCUMENTS

Through ONESOURCE Trust Tax, you can set the milestone indicating when each account's tax data is available for import by account holders.

When your customers log into TurboTax and request the import of tax information that is processed and stored in ONESOURCE Trust Tax, they are required to enter authentication credentials that your company has designed with Intuit. The authentication allows Intuit to connect to either your OFX server or the Thomson Reuters server depending upon who is hosting. If authenticated, the available list of forms available for import is displayed. The actual 1099/1098 data is stored in a secure Thomson Reuters data center.

For more information, or to purchase this optional feature, contact your Client Services Manager today.

#### CONTACT US TODAY

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