

# PREMIUM PRO<sup>®</sup> FormsPlus Software



PREMIUM Pro FormsPlus eliminates wasted time spent searching for a wide array of state required filings. It places them at your fingertips in a single, easy to use software package. *Simplify the time consuming task of finding and completing additional forms for insurance tax and annual statement filings.*

Experience a better way to file with the PREMIUM Pro FormsPlus software.

## FormsPlus Software

FormsPlus organizes your forms on a state by state basis, allowing you to easily track and maintain up-to-date filings for all of your companies. You enter repetitive, general data only once into a single form. This information flows to all filings, and the forms pull relevant data from the Premium tax module.

With increasing demands on insurance companies, FormsPlus is a vital tool for complying with required tax filings and regulations. Currently, there are more than 1,000 forms available, and around 2,000 users enjoying them. The continual

growth of FormsPlus proves it is a useful tool for addressing your company's needs for jurisdictional compliance.

FormsPlus compliments the existing Premium Tax software by providing insurance and premium tax related forms and required annual statement filings in one location. The software is designed exclusively for Property & Casualty, Life, Health, HMO, Risk Retention, and Title Insurance Companies. FormsPlus is a user-driven product which means you dictate which forms we offer in the software.

“With increasing demands on insurance companies, FormsPlus is a vital tool for complying with required tax filings and regulations.”

## Key Features

- More than 1,000 forms and growing
- Source in data from the premium tax module (Schedule T, State Business Pages)
- Fully integrates with the Tax Calendar
- Eliminate time and effort locating forms
- Eliminate repetitive data entry
- Web online filing assistant transfers data from the software to the states’ online filing systems and stores login information securely
- Payment requests with check, ACH credit, credit card, EFT export capabilities
- Print to paper or PDF
- Non-Paper filings link to agency websites for electronic forms
- Typewriter feature allows the user to add custom text to a form by typing directly on the return
- Provides return instructions, preparer notes and electronic storage for attachments
- Filing Information Schedule provides payee, contact information, mailing & physical addresses, postmark, EFT and due date information in one consolidated schedule
- Online Filing Assistant wizard, email form buttons, and export to spreadsheet functionality assist in submitting electronic and digital filings



*FormsPlus includes forms for all 50 states and U.S. territories and Canada allowing you to keep up with your tax filings as well as shorten filing time by placing various premium tax related forms in one easy to use software program. Forms include, but are not limited to, annual statement checklists, workers’ compensation, UCAA (NAIC), fee, and reporting forms.*

## FormsPlus Supports

- All 50 US States + D.C.
- Canada
- Bahamas
- Guam
- NAIC (UCAA)
- Northern Mariana Islands
- Puerto Rico
- Virgin Islands
- Life
- Health
- Property and Casualty
- Title
- RRG
- Risk
- Surplus
- Worker’s Compensation
- Annual Statement Checklists
- Fee Returns
- Reporting Forms
- Statutory Filings
- Certificates of Compliance
- HIPPA Reports
- Applications for Renewal
- Plus 100’s More