



Brandon Bates, Robby McCollom, Joyce Voyles, Cathy Han, Sydney McCollom, Sally Adreda keeping dry under a newly finished roof during the 2018 TriTech Puerto Rico mission trip.

# TRITECH SOFTWARE NEWSLETTER

It takes the average Premium Pro user an entire year to start using a new feature. *Save time, energy, and effort and start using them now!*

**I have to open each return to check on its status and it's annoying.** See a snapshot of returns on one screen with the Return Status Schedule. Due date, amount due, when a payment was paid, payment type, preparer, reviewer, if there are open audits, if the return can be efiled, when the return was efiled, when the return was amended. [more>>](#)

**I don't know how to efile this state!** Look for the Efile help buttons on returns to take you directly to the help page for that state so you can easily find the filing details you need. [more>>](#)

**Attaching State Business Pages and Schedule T's to every efile return takes forrrreeeevvvver!** You can now automatically attach State Business Pages & Schedule T's to every efile return and mark the attachments as efile attachments all at the same time in one action from the Actions Menu. [more>>](#)

**I have an invoice or special filing I'd like to track in Premium Pro and it's not there.** Add a generic form in Form-Plus any time you like. Have a record of amounts paid and use the software to handle payments. Ex: Illinois Regulation Fee, fraud funds, Massachusetts Operations Assessment, and various state fees or assessments where no form is provided. [more>>](#)



## DATES TO REMEMBER

- 1 **Advisory 2019 : Save the Date**  
June 17-19 in Minneapolis, MN
- 2 **Software Release Dates:**  
FormsPlus: November 15th  
Municipal: November 30th  
Allocator: November 30th  
Premium Tax: December 15th
- 3 **Support Hours:**  
Monday-Friday,  
8:00 AM to 5:00 PM, CT
- 4 **Extended Hours**  
January 2 to March 1, Monday-Friday, 7:30 AM to 6:30 PM, CT  
  
January 19 to March 1:  
Saturday 10:00 AM to 2:00 PM, CT

**I use references on all of my returns to keep track of everything, but I can't add any to my schedules.** Well now you can! Add References to the cells of most schedules. [more>>](#)

## GENE CAPOBIANCO JOINS TRITECH



Gene Capobianco has joined the TriTech Services team. We are very excited to have this industry giant by our sides. Gene has done it all!

He has over 30 years of experience in insurance company state and local taxation and also has significant federal income tax experience. He has served in a variety of industry leadership positions such as Chair of the American Council of Life Insurers State Tax Committee and Chair of the LICONY Tax

Subcommittee. In addition, he is currently a member of the Steering Committee of the National Premium Tax Conference, and has served as a panelist and speaker at numerous industry conferences.

Gene has spent his entire career in the life insurance industry. He began his career as an entry level tax accountant at MetLife and advanced to leadership positions at MetLife, AXA and New York Life, respectively, prior to joining TriTech.



TriTech's mission is to serve the insurance industry with accurate, timely, and comprehensive premium tax software and services while developing lasting relationships with customers and employees, and actively working toward improving our community and world.

## MORE THAN A SOFTWARE AND TAX SERVICES COMPANY

Top: View of cross in Puerto Rico on TriTech mission trip. Right: Tonya Wilson, Karen Sourber, Sally Agreda, Selena Thompson, Angay Ramachandran, Joyce Voyles, Summer Moya ready to spread some Thanksgiving joy via Meals on Wheels.

### Florence and Michael Relief

This year TriTech helped raise funds for two hurricane relief efforts: Florence and Michael. TriTech encouraged employees and clients to donate to the Convoy of Hope, and they matched all donations dollar for dollar.

### Employee Blood Drive

TriTech employees were recently invited to participate in a Carter Blood Care blood drive hosted by Lucas Christian Academy. With the recent hurricanes, blood centers are in dire need to replenish and TriTech employees stepped up to help save a life, help a school, and get comfy all for a good cause.



Some of the TriTech blood donors: Taylor Dang, Selena Thompson, Brandon Bates, Trish Harjes, and Karen Sourber.

### Puerto Rico Mission Trip

In June of this year, a group of TriTech employees set out on an adventure to Puerto Rico with the North American Missions Board (NAMB) in order to help rebuild after the devastation of the 2017 hurricanes.

"The weeks leading up to the mission trip I was excited but nervous. We were down there to help put on house roofs. On one, we had to tear off the old roof and rafters so we could put on new ones. We finished this roof on the third day.

On the fourth day, we started on a second house. It started and stopped raining three times before we called it a day. The next group that came in after us finished the roof.

I also learned that you cannot depend on Sally (Agreda) to protect you from a bat! I got up one night to go to the bathroom and there was this animal on the floor. On the first look it was a shape of a little bat. I asked Sally to come and look at it. Instead, she covered her head and went to sleep. I closed the bathroom door in hopes it would not leave. When I went back in morning and did not find a bat but did find a little frog.

Flying into Puerto Rico looking out the airplane window and seeing all the blue tarps, we wondered what we could do. I had to stop and think we may not be able to help all the people, but we can and did help two families. One family at a time."

--Joyce Voyles



### MEALS ON WHEELS

TriTech has been working with Meals on Wheels for two years and they continue to help serve the community by delivering hot meals to seniors in this community. Employee volunteers donate their lunch hours in order to provide this service during the work day.

"This year Meals on Wheels has been a great joy. We are now delivering two routes in Allen, TX. Recently, the whole office was able to participate by donating items to fill some Fall Harvest boxes with non-perishable food items, stationary and toiletries. A small group delivered those boxes to some elderly folks in McKinney, TX. It was great to see the joy on the recipients faces. One lady who was in her early 90's asked us to bring the box into her kitchen since she walked with a walker she could not carry it. She gave each one of us a hug to express her gratitude and said she was excited to open her "treasure box". We all agreed that this interaction alone was worth all the time spent."

--Selena Thompson



### Training Specials

Exp. 12/15/2018

- 01 FREE New Features & Efile Courses: Learn the basics of E-filing and see what's new in Premium Pro.
- 02 Premium Tax Bundle: Includes 13 Premium Pro Premium Tax courses. \$610 \$199
- 03 Complete Course Bundle: Includes 15 Premium Pro courses for all Products. \$820 \$299

[www.tritechsoft.com/training](http://www.tritechsoft.com/training)