

# services

State returns, municipal filings, and policy allocations headline our comprehensive premium tax service solution. Powered by our own Premium Pro technology and a dedicated team of tax experts, our mission is to offer quality tax preparation services to insurance professionals in a highly secure environment. Expand your team with ours today.

## KEY FEATURES



### PREMIUM TAX SERVICES

Prep, Review and Full-Service Processing for annual and estimated premium tax returns for all states and U.S. Territories.



### MUNICIPAL TAX SERVICES

Prep, Review, and Full-Service Processing for municipal premium tax returns for over 4,000 towns and cities.



### ALLOCATION SERVICES

Our services team processes your policy data utilizing our advanced mapping technology to allocate premiums accurately and determine each tax jurisdiction in which an address is located based on policyholder address and geographic boundaries.

## CONNECT WITH US



(800) 380-6407



support@tritechsoft.com



www.tritechsoft.com



## CO-SOURCING TRANSPARENCY

As we partner with you, our web-based client calendaring system allows you to monitor the status and progress of each return. So, while we prepare and review the returns, you are always in control and receive real time progress reports.

## PERSONALIZED SERVICE

Each member of our services team is committed to personalized service with the goal of meeting your needs in an efficient and timely manner. We are here to serve!

## FULL SERVICE PROCESSING OPTION

We make sure every state and municipality is paid accurately and on time. TriTech also handles electronic funds transfer (EFTs) and generate an ACH NACHA file to give to your bank to initiate ACH Credit transactions.



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## BENEFITS

### TIME AND COST SAVINGS

Tax return preparation co-sourcing increases the time you have available to devote to tax planning and decreases time spent addressing data entry and form filing duties.

### EXPANDED RESOURCES

Extend your team with our tax preparation staff which consists of experienced professionals and CPAs. In addition, they are well versed on retaliatory calculations, qualified premiums, and guaranty funds, as well as municipal taxes and premium allocation.

### MINIMIZED RISK

Powered by TriTech Premium Pro software, Our services team provides dedicated experience with up-to-date knowledge and training on the tax industry to accurately and efficiently meet your tax processing needs and reduce your tax compliance risks.

POWERED BY TRITECH PREMIUM+ EXPERTS