



FIS TAX REPORTING MANAGER

FORMERLY COMPLIANCE PLUS

The Enterprise-wide Tax Information Reporting Service for U.S. Broker-dealers, Banks and Trust Companies

In an ever-changing landscape, financial services firms need to reduce risk, be compliant and survive the year-end tax season with a satisfied and well-informed customer base.

FIS® Tax Reporting Manager (formerly Compliance Plus) is a comprehensive, enterprise-wide tax reporting service that turns your year-end tax reporting burden into a user-friendly, year-round process. A web-based solution for U.S. broker-dealers, banks and trust companies, more than 350 financial institutions rely on Tax Reporting Manager to produce comprehensive payee tax documents and periodic

filings with the IRS and other government tax authorities while employing robust data validations to minimize errors and account holder inquiries.

Tax Reporting Manager provides a single view of process status and data availability across its services, a robust correction management system, coordination with cost basis systems and data feeds for third-party tax preparation software packages using the OFX industry standard. Plus, you can choose from printed or hosted statements and a variety of delivery options – including e-delivery – to reduce your expenses further.



IMPROVE YOUR CUSTOMERS' EXPERIENCE

Deliver accurate and timely payee statements to your customers, generate investor tax summaries and supplemental schedules to facilitate tax return preparation and customize statements to provide clarity.



REDUCE YOUR RISK

Minimize your exposure with real-time account summaries, a bulk adjustment tool that facilitates grooming transaction data, filtering tools to narrow searches and enable research, and real-time processing dashboards.



IMPROVE EFFICIENCIES AND CONTROL COSTS

Enhance productivity with exception-based reporting and year-round daily processing. Annual tax form updates by FIS eliminate IT and project management costs as well as the future expense of adapting for new regulatory and industry initiatives.

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STREAMLINE YOUR WORKFLOW

Produce all payee tax statements, supporting details and schedules with real-time previews throughout the year.

ENJOY FULL TRANSPARENCY

Offer online tools for fully transparent, up-to-date views and year-round data processing and validation grooming.

COORDINATE YOUR PROCESSES

Coordinate with print, document hosting and fiduciary reporting vendors.


REDUCE YOUR CORRECTIONS


Hold back individual statements awaiting completion using multi-tiered delivery scheduling to maximize the number of correct originals and minimize corrections.

Power your tax information reporting.

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FIS

**ADVANCING THE WAY THE WORLD
PAYS, BANKS AND INVESTS™**