KPMG

Trust tax services

Expect more

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Trustworthy tax preparation and more

Managing fiduciary tax in today's highly complex economic and regulatory environment is about more than compliance. Fiduciary tax teams must continually demonstrate their ability to add value. Successful teams align with the overall strategy of the front office to manage risk and reduce the overall cost of compliance.

For more than 30 years, fiduciaries and financial institutions have relied on KPMG to help meet these challenges and deliver quality services. Our Trust Tax practice functions as an extension of your organization. We bring value through efficient and cost-effective tax compliance services and access to the latest technology—delivering insights like never before.

Our team of highly qualified tax professionals can also support your front office when advising on tax-efficient trust, estate, and gift planning strategies. We help your clients preserve wealth to support their families and causes for years to come.

Benefits of working with KPMG

We understand the importance of providing exceptional client services and the additional pressure tax season puts on officers and administrators. Our approach is designed to reduce the burden by structuring a delivery model that provides:

- **Innovative technology** that centralizes the tax compliance process and provides real-time insight into your filings. We drive efficiency in the compliance process through automation, saving your time and helping ensure accurate returns are delivered timely.
- A **robust governance framework** that includes regular two-way communication between your team and KPMG throughout the year. That helps resolve monthly data issues and quickly moves accounts through the preparation process during tax season.
- Peace of mind knowing the true cost of compliance before the tax year starts. Through a **fixed-fee pricing** model that includes all routine services and technology licenses, we simplify billing and eliminate surprise charges at the end of the year.

Tax compliance services

- ✔ Trusts and estate (1041)
- ✔ Charitable trust (5227)
- ✔ Private foundations (990PF)
- ✔ Gift tax (709)
- ✔ Estate and Generation skipping transfer tax (706)
- ✔ Agency/custody information reporting (1099)
- ✔ IRAs (1099R, 990T)
- ✔ Individuals (1040)
- ✔ Non-resident alien reporting (1042S)

Adding value to you and your clients

We are passionate about bringing value beyond the fees for our services. Our clients benefit from the following complimentary services:

KPMG technology (Trust Tax Engine)

Processing services

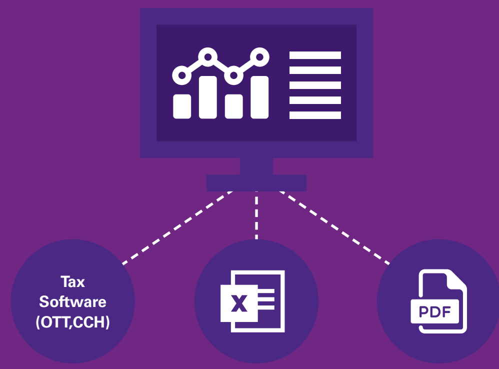
Beneficiary hotline

Industry-specific training

KPMG Trust Tax Engine

The KPMG Trust Tax Engine (TTE) streamlines key aspects of the tax compliance lifecycle and provides your trust tax liaisons, trust officers, and administrators enhanced visibility into the compliance process and access to all tax deliverables.

Designed in collaboration with clients and engagement teams, TTE puts key tax compliance information at your fingertips. Interactive dashboards allow users to quickly navigate to account-level detail and PDF copies of tax returns and tax letters. Integrated with ONESOURCE Trust Tax and other tax compliance software, TTE brings all your tax information to a centralized platform.



Interactive dashboards	**Quickly view the tax filing status of all accounts through visual dashboards that can be easily filtered to customized views.**
Account detail and tax filings	**Drill down into account-level detail and download PDF copies of tax deliverables for the current and prior tax year.**
Information request management	**Manage information requests for all accounts through integrated workflow and upload requested documents directly in TTE.**
Tax notice tracking	**Track the status of all federal and state tax notices and access PDF copies of the notice and the resolution.**
Hotline insights	**Gain insight into the voice of your client through the beneficiary hotline tracking dashboard.**
Advanced reporting	**Create customized reports to track all tax deliverables, cash requirements, refunds, and more.**

Our people

At KPMG, we strive to build and maintain a high-performance culture. We have a deep bench of U.S.-based professionals who are motivated by an environment that cultivates professional excellence and personal development in many ways.

Passionate, collaborative, and committed to your business success, KPMG Tax professionals work with you to learn about your organization, understand your goals, and uncover unexpected opportunities. Our vast network of tax specialists, including more than 200 professionals in our Washington National Tax practice, have the experience, tools, and knowledge to tackle your toughest tax issues.

Contact us

For more information about KPMG Trust Tax Services, contact one of the following professionals.

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