

## Taxport Add-On Service: Statement Delivery

Simplify, Streamline & Save

When it comes to tax information reporting, the statement delivery process presents some unique challenges. Staff must devote hours to printing forms and stuffing envelopes. If you choose to work with a print and mail house, costs quickly add up and data security may be compromised. You must also consider your clients' needs with regards to this process. Are you spending postage on sending form after form in different envelopes and formats to a single client? Do you have clients who would prefer to access their statements electronically? Can they trust you with their sensitive information?

These concerns can be eliminated with Taxport's simple, secure Statement Delivery service, which works seamlessly with the Taxport product, providing your organization with the flexibility to develop the ideal statement delivery process that meet your needs.

### **Electronic Statements - Secure, Timely, Accurate**

With an electronic delivery option available, Taxport's Statement Delivery service can greatly reduce your overall print and mail costs and time dedicated to print and mail activities. We'll even manage opt-in/opt-out lists and reconcile the list against your print files for you. Your clients can also securely access their important information online. Plus, corrections are reflected online immediately, so clients never have to delay filing due to inaccurate forms.

### **Cost-Effective Paper Statement Delivery**

We recognize printing and mailing paper statements will still be part of the picture for most organizations. That's why, in addition to eStatements, Taxport's Statement Delivery Service includes paper statement delivery. Leveraging Taxport, and our volume negotiated print rates, you can liberate staff from the print and mail burden. We generate print files, filter addresses and ensure timely and compliant delivery, so your staff can focus on core objectives. Additionally, statement house holding ensures that each client only receives one mailing from your organization regardless of how many forms are due, eliminating customer confusion as well as additional costs.

# Statement Delivery



## Enhanced Security

Both forms of our statement delivery improve the security of sensitive client data. Taxport's secure print and mail houses ensure private information stays private by taking measures that prevent double-stuffed envelopes and visible TINs. Should a client choose eStatement delivery, their information will be hosted on secure servers and can only be accessed by the client or an administrator within your organization.

Additionally, both print and electronic statements can be customized to reflect your company branding so clients know their information isn't being released outside of your company.

## What can Statement Delivery do for your organization?

- Minimize costs with reduced print/mail rates and electronic delivery
- Reduce internal burden by letting Taxport Statement Delivery Service handle the entire process
- Improve customer service with householding and eStatement options
- Enhance security with ISO 27001:2005 certification and SSAE-audited data centers

## TEAMS Customers Say

"I love how easy it was not having to send out thousands of 1099 mailings."

— CONVEY CLIENT

## About Sovos Compliance

Convey Compliance, a Sovos Compliance Company

Sovos Compliance delivers technology solutions to help businesses meet the demands of their unique tax, compliance and reporting obligations. The company enables over 4,000 clients to operate with the confidence to efficiently navigate today's dynamic regulatory environment. Sovos utilizes a unique ability to turn knowledge into highly functional, scalable software that seamlessly integrates with a wide-array of applications and information technologies used by businesses today. Sovos Compliance gives clients peace of mind by simplifying tax compliance, providing greater control and visibility, and mitigating compliance risk.

## Contact Us Today

Find out how we can put these solutions to work for you.

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