



TRENDS AND BEST PRACTICES IN TAX REPORTING



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DALBAR'S TRENDS & BEST PRACTICES IN TAX REPORTING

It has been said that there are only two sure things in life, and one of them is taxes. Almost all Americans have to file their taxes by April 15th and for many of them it will be a confusing, intimidating and frustrating experience. The tax reporting experience, of which no one is fond, does however represent the opportunity for financial services firms to provide a superior standard of care in the support they provide to clients.

DALBAR'S Trends & Best Practices in Tax Reporting will help financial services firms achieve a superior standard of care by improving the effectiveness of the information that is provided to investors to prepare tax returns. Tax Reporting includes the tax forms (1099-DIV, 1099-B/Cost Basis), tax guides and/or any brochures that accompany the tax forms and any supplemental materials that may be included.

Benefits

This report guides firms in producing tax reporting that is best-in-class, ultimately helping to:

- Determine if the tax reporting and supporting material meet client needs and expectations
- Reduce expenses, such as tax related spikes in call center activity
- Identify features that your firm may want to consider incorporating
- Make the case internally to redesign or update the tax statement and supporting material
- Promote your superior standard of care if applicable

Deliverables

A comprehensive report that includes:

- Industry Trends & Best Practices: overview of industry leading practices and emerging trends in the design and content of tax statements and supporting materials.
- Overview of Industry Leading Practices
- A full description and breakdown of the criteria used to evaluate tax information
- Access to images of industry best practices

An optional Gap Analysis of your firm's tax reporting:

- Detailed assessment of a firm's tax reporting, identifying specific areas for improvement and providing examples of best practices for those areas
- A half-hour consultation with DALBAR communication experts



Cost

The Trends & Best Practices in Tax Reporting Report is \$5,950.

A Gap Analysis of your firm's tax reporting is \$3,500.

Please use the link below to order the Trends & Best Practices in Tax Reporting and/or a Gap Analysis of your firm's tax reporting:

<https://www.secure.dalbar.com/research.dalbar/public/orderstudy.aspx?study=TAXRPT>

Questions

For any questions, please contact Brooke Halloran at 617.624.7273 or bhalloran@dalbar.com