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Tracker[®] PRO End-to-End Solution for Unclaimed Property Compliance

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Managing the complexities of unclaimed property compliance is a difficult task that can create exposure for your organization if not done correctly. Each jurisdiction promulgates its own dormancy periods, due diligence requirements, aggregate thresholds, and reporting formats. It can be tedious and time consuming to comply with these tracking and reporting obligations. Moreover, state audits to measure compliance often go back years and result in significant assessments.

Tracker PRO provides a turn-key solution for managing the complexities of unclaimed property compliance, data security, reporting, and owner claims. It's a one-stop shop for all your unclaimed property needs. Our industry-leading software is used by more than 4,000 property holders—more than any other competing system in the industry today. Developed by experienced practitioners, this software helps you stay current with updated regulations and state reporting format changes as they occur.

Tracker PRO automates unclaimed property compliance with unparalleled functionality, creating efficiencies that save your organization time and money. Contact the *tax.com* team to learn how you can start leveraging this valuable tool for all your unclaimed property compliance needs.

Key Features and Benefits of Tracker PRO

- ▶ Available for on-premise or hosted deployments
- ▶ Highly customizable due diligence and courtesy letter templates
- ▶ Ability to add attachments to property and owner records
- ▶ Automated exemption analysis to minimize unclaimed property burden
- ▶ Team of experts who work directly with the states to ensure comprehensive coverage
- ▶ Flexible data import routines to get you up and running quickly
- ▶ Frontline technical support available by telephone, email, online, and chat
- ▶ Owner claims portal to facilitate claim filing, document uploads, and follow up
- ▶ Secure online interface to capture claimant data and authentication documents for streamlined workflow
- ▶ State reporting portal to facilitate report submission

SOFTWARE BUILT by PRACTITIONERS for PRACTITIONERS

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