

PREMIUM PRO[®]

Premium Tax Software



Process your annual and estimated premium tax returns for all states and U.S. Territories. PREMIUM Pro is specifically designed to calculate premium and retaliatory taxes for Property & Casualty, Life, Risk Retention, Title, and HMO companies. *Choose from hosted software as a service, network, or standalone installation options.*

DATA ENTRY

- Import Data from your Annual Statement for State Business Pages, Schedule T, and Ocean Marine
- Seamlessly integrates with PREMIUM Pro Municipal Tax
- Auto transfer key data from year to year (company information, prepayments, and GFA credits)
- Centralized data entry schedules for premiums, dividends, prepayments, adjustments and other miscellaneous items
- Tooltips and hyperlink drilldown (click on a value to be taken to the source of the calculation)

CALC AND REVIEW

- Immediate calculations and adjustments
- Automatically calculate retaliatory taxes based on your state of filing's premiums and your state of domicile's tax laws
- Choose official retaliatory return or custom worksheet for easy calculation of retaliatory taxes
- One click access to prior year returns and estimates while preparing current year filings

THE POWER TO CONTROL

- Choose state specific calculation methods and general display settings
- State options (dividends, finance and service charges)
- Lock and unlock completed returns
- Adjust tax rates and fees for all taxing jurisdictions using rate and fee schedules
- Access to multiple tax years at once
- Return attachments: organize documentation, create custom folders, rollover from prior year, global access
- Prepare amended returns while retaining access to the original
- Provide enhanced security by assigning access controls for specific users and companies

MANAGEMENT REPORTS

- Analyze taxes, fees, credits, and effective tax rates on a state-by-state basis
- Check requests with export capabilities
- Track manual changes made to state returns
- Reporting capabilities across multiple companies
- Audit reports and alerts

“PREMIUM Pro simplifies the preparation and processing of tax returns by providing an efficient and comprehensive software package.”

Premium Pro: Software Overview

Unlimited tab views allow you to simultaneously view multiple returns and schedules

Dockable Interface provides a flexible and customized workspace

Tree-View enables you to quickly and easily navigate between returns and schedules

Immediate access to state filing information, tax return instructions, preparer notes, release notes, attachments, and return audits

Extensive supporting features and comment and markup review tools such as sticky notes, typewriter, drawing tools, stamps and references

Viewing multiple windows allows you to compare filing returns, annual statement data, other schedules, and retaliatory calculations at the same time

Changes automatically flow from schedules to the returns accordingly

Return audits provide an easy way to view important items that may need to be addressed before processing and completing a return

TAX PLANNING

- Compare current and prior tax return changes
- Important notes and state specifications
- Credit, tax, and fee updates
- Set return and preparer status
- Workflow: assign returns, custom references/links to external files, set actions that automatically occur after you perform specific tasks

SPECIAL FEATURES

- Enter preparer notes and state specific comments
- Automatic updates and extended support
- Help file including state return instructions

SPECIAL FEATURES Cont.

- Print to PDF capabilities to support a paperless environment
- Web e-file assistant transfers data from the software to the states' online filing systems and stores login information securely
- Electronic filing capabilities directly from the software for 28 states with submission confirmation emails
- Comment and markup tools: typewriter, drawing tools, sticky notes, stamps and references
- Multi-company print wizard
- Fully integrated tax calendar
- Ability to export due dates into MS Outlook
- Reminders for upcoming filings upon logging into the software