

## *Income Tax Services*

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### **Turbo Tax from First Foundaion**

First Foundation Bank clients have access to the convenience and security of Turbo Tax's proven tax software directly from the First Foundation secure Private Access Online Banking website. Benefits for taxpayers who prepare their own returns include:

- Integrating their tax return preparation with the myriad of other financial services offered to First Foundation clients.
- Straightforward and secure method of reporting and importing required information.
- Question-and-answer format that prompts taxpayers to be alert for a wide range of deductions.
- Filing their federal and multiple state returns electronically.
- A "no cost" tax preparation software option.
- Small business owners and individuals with more complex returns are able to purchase Deluxe, Premier and Home & Business versions online.

Using Turbo Tax at First Foundation is easy. Much of the data required to be entered can be seamlessly imported from widely used Quicken and QuickBooks accounting software programs. Taxpayers who previously used their home version of Turbo Tax last year are able to import important carryover transactions information from previous years.

Each client's records are secure and accessible only to them. All client tax information is stored on a firewall-protected server accessed only through a user name and password established by the client. First Foundation will not have access to clients' tax return data.

The application is compatible with both Windows and Macintosh operating systems.