

Tracker® PRO Owner Claims Portal™

Reuniting Owners with Their
Unclaimed Property is Infinitely Easier

The Owner Claims Portal module of our industry-leading Tracker PRO software program increases positive due diligence responses and streamlines the entire unclaimed property due diligence process from end to end. An easy-to-use, secure online interface makes it infinitely easier and faster to reunite owners with their unclaimed property and reduce escheatment.

Centralization

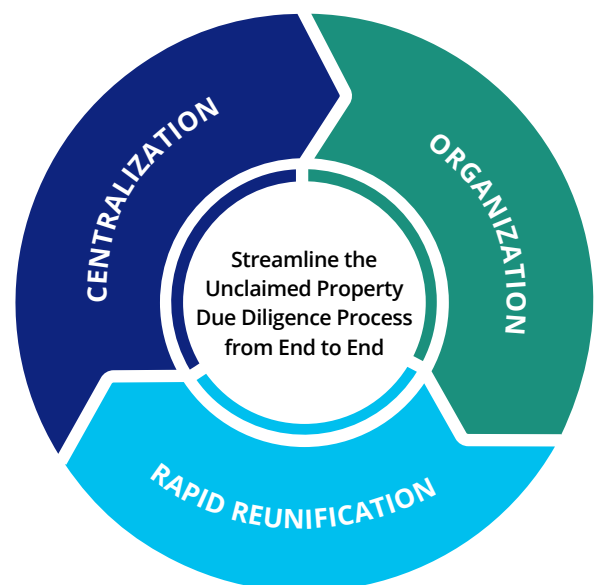
The Owner Claims Portal is a dashboard that centralizes and organizes due diligence communication, documentation, and tasks. Due diligence is made simple, and performance of steps such as populating files with owner-supplied contact information, verifying owner identity, confirming owner payment information, and logging communications can be done in one convenient and secure location.

Organization

In conjunction with Tracker PRO's automated mailing capabilities, the portal saves time otherwise spent mailing letters, opening envelopes, scanning documents, and updating records. Online claim forms and uploaded documents are captured and automatically posted by the Owner Claims Portal within Tracker PRO for holders to review, track, validate, and add to workflows. Best yet, the Owner Claims Portal is flexible—multiple reviewers can track and manage every step of the process.

Rapid Reunification

The Owner Claims Portal's flexibility extends to unclaimed property owners. Owners can use their smartphones to simply take a photo of their identity documentation like passports or driver's licenses, making verification a breeze. Owners can even access the portal from their mobile phones for on-demand claims status updates.



Take Complete Control of the Claims Process



Customize the Owner Claims Portal with your corporate logo and branding



Provide owners with the choice of check or direct deposit payment options



Generate and send personalized and secure URLs to asset owners in mailed due diligence letters



Assign multiple reviewers to each claim and provide visibility to claim status, allowing reviewers to collaborate and communicate with each other



Collect updated contact information from asset owners as they begin the claims process in the portal



Reduce redundant efforts with live updates that track claim status and record activities



Add custom identity verification requirements and specify different document needs for different claimant types



Reduce repeated follow-up contacts with owners who can view claim status on-demand or via mobile phone or computer

Take a closer look at Tracker PRO and the Owner Claims Portal with a **tax.com**™ team member.
