

# VERTEX® INITIAL TAXABILITY AND PROCESS REVIEW

## CUSTOMER REVIEWS

“Vertex Consulting significantly helped improve JM Family’s tax compliance processes. Their representatives were professional and well-informed, and their in-depth understanding of both tax and technology were great contributors to making this a successful partnership. They delivered what they promised on time and on budget.”

– Monique Calhoun, Tax Systems Manager  
JM Family Enterprises, Inc.

“Vertex Consulting helped us measurably improve sales and use tax processes, compliance time, and accuracy. Working with our Tax and Information Management people, they developed custom utilities to extract and manage tax data from our systems. This enabled us to cut our returns preparation time in half, and identify substantial dollars in credits that our old processes and systems did not capture.”

– Deborah Ohlinger, Senior Tax Analyst  
Johnson & Johnson Health Care

## OPTIMIZE YOUR TAX PROCESSES WITH AN ASSESSMENT BY VERTEX Initial Taxability and Process Review

Checking on the health of your compliance processes has never been more important. In today's business environment, increased tax process efficiency and effectiveness can add value to your organization's bottom line, and keep you compliant with increased regulatory requirements. If you have always wanted to evaluate your tax processes but thought that time and financial resources were not available to do a full assessment, why not examine the benefits of working with Vertex to conduct an Initial Taxability and Process Review?

Vertex can help you initiate an assessment of your current tax processes. The goal is to help you determine the appropriate course of action to effect improvements, which will raise the value of your tax department while reducing your company's audit exposure. This introductory Taxability and Process Review can be conducted in as little time as two to three days, and can help to identify specific areas for achievable improvement.



*After completing your Initial Taxability and Process Review, your tax department will be well on the way to becoming a High Value Tax Department, focused on strategic issues that can improve your tax processes.*



WE'RE CONTINUALLY EXPANDING OUR SOLUTIONS WITHIN AND ACROSS ALL LINES OF TAX.

Income Tax · Sales Tax · Consumer Use Tax · Value Added Tax · Communications Tax · Payroll Tax

## With This Initial Review, You Will Receive

- A high level assessment of your taxability decision making processes
- A review of your business operations and how they impact nexus
- A review of your documentation processes to support audits and regulatory requirements
- An analysis of the effectiveness of your exemption certificate management process
- A review of your use tax compliance process and possible improvements
- An overview of process improvement possibilities and existing gaps

Vertex Consulting also provides access to a solid foundation of practical knowledge gained through extensive customer feedback and interaction that helps you make informed choices.

## A Blueprint for Achieving Many Benefits

With Vertex Consulting and an Initial Taxability and Process Review, your department will be taking the first steps towards becoming a High Value Tax Department, focused on strategic tax issues and not the minutiae of everyday processes.

- **Spend less time on compliance activities** and focus on value-added activities such as analysis, review, and planning
- **Improve and streamline the audit process** and defend and settle audits quicker
- **Automate processes and reduce paper flow** and spend more time on diminishing your company's overall tax burden
- **Increase compliance accuracy and efficiency** by designing an integrated tax management strategy
- **Examine your principal business activities** to proactively reduce exposure and identify areas of nexus you may have missed
- **Increase the value of your tax department** in your organization by applying and implementing innovations

## Vertex Consulting

Vertex Service Solutions are built on 25 years of leadership, experience, and a singular focus on tax technology. These traits have allowed Vertex to optimize tax processes to help you realize significant tax savings.

Improving your tax operations is our number one priority. Vertex Consulting can show you how to change your department from being a cost center to one focusing on more value-added activities. To help achieve your goals, Vertex performs technology assessments, prepares requirements definitions, and creates a cost/benefit and gap analysis. Vertex Consulting is available to act as the project manager for your tax and technology initiatives and can develop detailed project plans designed to meet your business' requirements.

**To learn more on how an Initial Taxability and Process Review by Vertex can benefit you, call Mike Guelker at 941.342.3826 or email [vc@vertexinc.com](mailto:vc@vertexinc.com).**

### A Proven Provider

*For businesses that want more effective tax technology solutions, Vertex provides a comprehensive suite of software and consulting services for income tax, sales tax, and consumer use tax that combine Vertex's 25 years of tax technology experience with a fresh approach to tax consulting. Unlike public accounting and audit firms, Vertex is focused exclusively on offering tax technology solutions that are not in conflict with the restrictions of Sarbanes-Oxley.*

## OUR CONSULTING CLIENTS INCLUDE:

- ADP
- AutoNation Inc.
- Bausch & Lomb
- Bed Bath and Beyond
- Canon
- Coldwater Creek
- Convergys
- Dell Financial Services
- DuPont
- Emerson Power Transmission Corp
- FedEx Kinko's
- Fujitsu Network Communications
- GE
- Green Mountain Coffee Roaster
- Hilton Hotel Corporation
- J & J Healthcare
- Kendall Jackson Winery
- Lennox International
- Lockheed Martin
- Lowe's
- Mitsubishi Chemical
- Motorola
- Nestlé
- Nissan
- Oreck Corporation
- PepsiAmericas
- Proctor & Gamble
- Rolls Royce Energy Systems
- Sara Lee
- Shell Oil
- The McGraw-Hill Companies
- Tiffany and Company
- Time Warner
- Unisys Corporation
- Waste Management
- Xerox

### Vertex Inc.

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