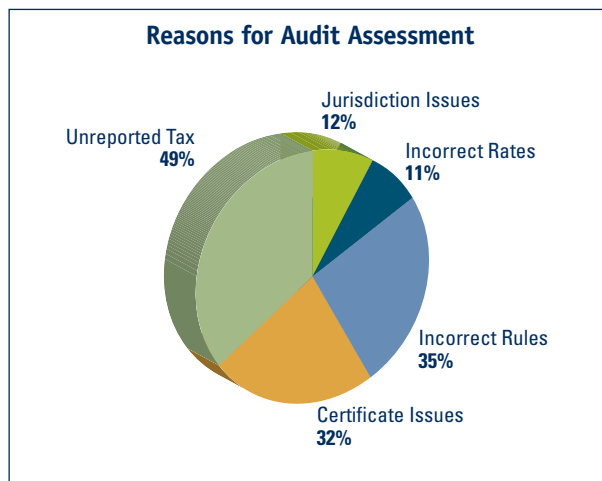


# Vertex® Tax Process Optimization

## Reduce Your Audit Exposure

Eliminating surprises is a key tax department goal. However, faced with challenges such as increasing workloads, complicated tax rules, and frequent staff turnover, today's tax professionals have little time to reassess tax obligations and adapt to recent business and regulatory changes. This leaves many organizations at risk for audit assessments. Only with a complete understanding of tax compliance obligations can you anticipate material weaknesses, make corrections, and reduce your audit liabilities.



Source: Vertex Market Research

## Gain Confidence in Your Tax Calculation System

Vertex Tax Process Optimization begins by helping you better understand your company's tax situation. We then work with you to optimally configure your tax calculation system to deliver greater accuracy and help reduce your audit assessments. Complementing your team's time and

knowledge, our expert consultants proactively evaluate your tax environment, review your processes, and provide detailed recommendations for improvement – enabling you to focus on more strategic planning tasks.

Even with an automated system in place, tax specialists must make critical decisions about tax application and then justify and document those choices. Vertex Tax Process Optimization is proven to help tax professionals like you address your toughest tax challenges. With more than 20 years of tax and technology experience, our team of consultants offers a range of services – from small reviews to complete system assessments – all designed to address your tax department's specific needs:

### The *Vertex Taxability Study* provides greater confidence in the correct applications of tax by:

- Documenting the taxability of products and services across all relevant jurisdictions
- Providing statutory references supporting these taxability positions for future audit support
- Helping to ensure proper tax calculations

### The *Vertex Nexus Review* helps reduce the risk of unexpected tax assessments by:

- Examining business activities in each jurisdiction to properly assess current sales and use tax registration and filing obligations
- Comparing activities against applicable state laws and regulations to determine filing requirements/nexus with each state
- Enabling you to proactively register for sales tax collection in all appropriate jurisdictions
- Identifying areas that require self-assessment of use tax

**The *Vertex Process Review* can help minimize your risk and ensure proper tax reporting by:**

- Conducting a high level assessment of your sales tax processes and taxability decision-making
- Assessing your environment to develop an understanding of existing best practices
- Reviewing how technology is being used within your department
- Evaluating the effectiveness of internal staff and third-party providers
- Identifying issues, analyzing fundamental drivers, and providing recommendations

## Additional Tax Services

Vertex offers other valuable tax process services that can help improve the efficiency of your tax systems:

- **Reverse Sales and Use Tax Audits** – Identifies and quantifies any overpayment of sales and use taxes, and gathers the documentation you need to seek tax refunds and credits
- **Vertex O Series® Mapping** – Ensures proper categorization of products and services within Vertex O Series solutions for accurate tax calculations
- **Voluntary Disclosures** – Helps you voluntarily disclose newly discovered obligations while working to minimize the impact of past oversights
- **Sales and Use Tax Overview Reports** – Illustrates key tax information with state-by-state reports that detail registration requirements, report and payment due dates, electronic funds transfer requirements, and more

## Clients Include:

- Ahold
- Anspach
- BT Americas
- Burberry
- Carastar Industries
- Hormel Foods
- Toyota Financial Services
- Vera Bradley

“ Vertex really helped us understand how business operations affect tax responsibilities. ”

- Kathy Morelock, CPA, CMI, retired Fortune 500 Sales Tax Director, and current sales tax industry consultant

Partnering with Vertex means you'll get access to the largest tax technology user base in the country – our 10,000+ customer companies. Through our consultants, you'll learn how companies just like yours are managing the same issues you face.

## A Proven Provider

For businesses that want more effective technology solutions, Vertex provides a comprehensive suite of software and services for both direct and indirect taxes backed by more than 30 years of experience.

As the leading provider of corporate enterprise tax solutions, Vertex offers innovative products and services to help companies worldwide streamline their tax compliance processes. With Vertex, you have a trusted partner for discovering new strategic savings across every major line of business tax including income, sales, consumer use, value added, communications, and payroll.

Vertex Consulting Services provides a fresh approach to consulting services with an array of offerings to manage all of your tax needs, including Tax System Implementation, Tax Process Optimization, and Tax Data Management Services.

For more information about Vertex Tax Process Optimization Services, please contact Pat Pelino, leader of the Tax Process Optimization Consulting Group, at [484.595.5998](tel:484.595.5998) or [pat.pelino@vertexinc.com](mailto:pat.pelino@vertexinc.com)

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