



Vertex® Tax Software Training

Get the Most Out of Your Investment with Onsite and Online Courses

You've made the decision to invest in a Vertex Tax solution. Now is the time to enroll your team in Vertex Training and make sure you are getting the most out of that investment.

Vertex offers a full range of onsite and online training programs presented by industry leading instructors that will maximize the potential of your Vertex Tax solution.

Expert Instruction

Vertex training is provided by full-time field service consultants who are Certified Public Accountants and/or hold Master of Tax degrees. Each consultant has extensive hands-on experience with Vertex software and tax technology.

All courses are approved with the National Association of State Boards of Accountancy (NASBA), allowing participants to continue with their professional development.

Training for New Users

For new clients or new users, Vertex offers two types of training programs:

- **Standardized training:** Our instructors provide standardized course materials that utilize your own data or a pre-populated database. Using your own data allows you to apply Vertex software functionality to your organization's actual tax return data.

- **Customized training:** Through our customized training programs, Vertex training specialists will adapt their course materials and training agenda to your requirements. This can include the use of examples that are tailored to your business operations.

Standard and customized training are both available onsite or online.

Training is essential to productivity. In fact, research shows that employees who receive formal training are up to 230% more productive than those who don't.*

Training for Experienced Users

As tax laws and software capabilities change, Vertex "refresher" training can help your experienced employees keep pace.

Our instructors will provide timely and comprehensive guidance on new regulations, new software features, and how your organization can remain in compliance. In addition, they can help your key employees sharpen their skills in familiar and unfamiliar areas of your tax processes.

A Diverse Curriculum

The Vertex Training curriculum covers all major Vertex solutions and tax management topics, including:

- **Income Tax - Domestic Core Functionality**
Learn basic navigation of the program including setting up clients, entities, and obligations using your own data. Also covered are the print manager and custom template manager.
- **Federal Compliance: Corporate and Partnership**
Focus on building federal data using program features common to both corporations and partnerships, such as working with detail statements, cost of goods sold, tax basis balance sheet, property disposition, depreciation and amortization, and Schedule M-3. In addition, individual sessions will explore specific task detail presented for corporations and partnerships.
- **State Compliance: Corporate and Partnership**
Build state-level data within the program, from federal data to multi-state data to state-specific detail. You will cover division use within a structure as well as the combined return.
- **Electronic Filing**
Examine how to create and transmit federal and state returns, the required preparation and e-filing tasks and how to access return status and acknowledgements.
- **Provision**
Examine the basic process and workflow logic of the program from recording data to generating reports that help analyze the data. In addition, you will discuss performing interim period rollups and rollovers, annual rollovers, as well as reconciliation and true up. This series includes a specific session for state provision.
- **Tax Calendar**
Learn the basic setup of the program, navigation of the calendar, working with obligations and conducting queries.
- **Income Tax Reporter and Analyst**
Discover how to extract data from the Vertex Income Tax– Domestic database and generate both system-provided and custom reports from that data.

- **International Compliance**

Learn the basic program and workflow logic, as well as specific program functionalities necessary to complete Forms 1118 and 5471.

Process Optimization Services

In addition to training, Vertex consultants can review your key tax management processes to ensure that they are operating at optimal efficiency. By doing so, they can help you maximize the return on your software investment.

About Vertex Inc.

With nearly 30 years of experience, Vertex Inc. is the leading provider of advanced tax technology solutions, delivering products and process management services to customers worldwide.

Vertex solutions help companies streamline tax compliance processes and leverage information to discover new strategic tax savings. And, they enhance decision information across every major line of business tax, including income, sales, consumer use, value added, communications, and payroll. To serve its customers, Vertex works in partnership with the world's leading providers of ERP software and related services.

Founded in 1978, Vertex is a privately held company that employs over 600 professionals at its headquarters in the U.S. (Berwyn, PA) and Europe (London), and its offices in Atlanta, Dallas, Phoenix, Sarasota, and Washington, DC.

Boost Productivity and Employee Satisfaction

To learn how Vertex Training can help your staff work more productively, please call **800.355.3500**, or visit **vertexinc.com**.

*Source: Return on Investment in Training: Research Readings, Andrew Smith, Editor, ©2001 Australian National Training Authority