




Income Tax  
Solutions



**Vertex Income Tax takes tax functionality to the next level via general ledger integration, seamless data flow, built-in tax logic, and automated calculation.**



## TURN INCOME TAX INTO A STRATEGIC ADVANTAGE

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Most companies see income tax compliance as a time-consuming and costly obligation. Vertex customers have a different perspective.

They see income tax compliance as a smooth and efficient process that fits seamlessly into their existing workflows. They see it as an opportunity to leverage tax data for new strategic advantages. And, they see it as a way to positively influence the company's bottom line.

This perspective is made possible by Vertex solutions for domestic and international income tax management.

Our powerful, fully-integrated income tax solutions combine expert tax knowledge with the flexibility and scalability that result in optimal ease of use and low total cost of ownership.

Above all, Vertex income tax solutions are the key to building a high-value tax department. One that pursues strategic tax planning in addition to compliance. One that is proactive rather than reactive. And, one that leverages Vertex's vast technological capabilities in order to focus on activities that advance your company's overall mission.

Isn't it time you discovered the Vertex difference?





### IMPROVED ACCURACY WITH LOWER COSTS

Vertex Income Tax solutions help limit your audit exposure through improved accuracy in tax preparation and filing – and through better data management.

In the area of provision, Vertex provides you with the ability to integrate compliance data, manage your accruals, reserves, and provisions to enable better forecasting and streamlined processes.

Vertex Income Tax solutions enable you to control internal costs by automating key compliance processes, and provide you with more time to redirect resources to tax planning, audit activities, and other value-added tasks.

The net result is enhanced performance for your business through more accurate and efficient tax operations.

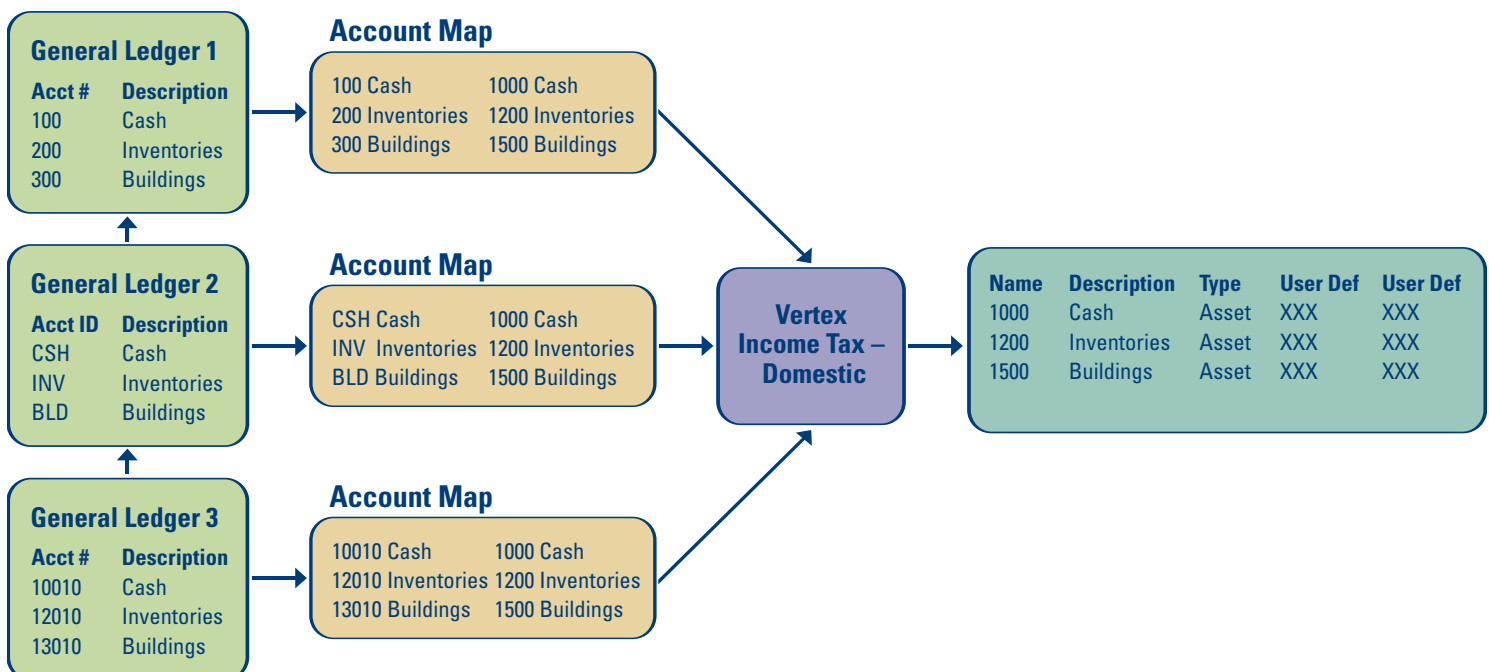
### SERVICE-ORIENTED ARCHITECTURE

Since Vertex Income Tax solutions are built on a service-oriented architecture (SOA), they provide unmatched flexibility and adaptability. For example, you can match the Vertex chart of accounts to your own general ledger accounts. You can customize the navigation for forms and work papers and deploy new capabilities quickly and cost-effectively. And, you can scale your solution to fit your company's environment.

Best of all, SOA allows you to access your Vertex Income Tax solutions anytime, through a secure on-line interface.

SOA is the platform of the future, and Vertex Income Tax solutions deliver it today.

## VERTEX INCOME TAX CHART OF ACCOUNTS



With Vertex Income Tax, customers have complete control over the data mapping process used to create the chart of accounts – you decide where to import data and what level of detail to include.



## VERTEX® INCOME TAX – DOMESTIC

For the most efficient management of your federal and state income tax obligations, choose Vertex Income Tax – Domestic.

This fully automated solution helps streamline your federal and state income tax management processes while reducing the risk of errors.

**Vertex Income Tax functions the way tax professionals think and organize projects – from the way work papers are designed and data flows, to the way workflows are processed and returns are generated.**

With Vertex, you get comprehensive processing of federal and state forms, including forms 1120, 1120F, 1120L, 1120PC, and 1065. But that's just the beginning.

You also get value-added tools that help you automate, link, control, and re-use data more effectively. For example, you can automate multiple external general ledgers into one central tax ledger that can be referenced by multiple entities and returns – making financial data gathering easy and reusable.

In addition, Vertex Income Tax allows you to create and share a single adjustment across numerous entities

and returns to automate book/tax and all types of adjustments. And, you can link adjustments to Microsoft Excel® spreadsheets within Vertex products to keep tax results up-to-date with your work papers. The links are maintained and rolled forward from period to period.

You can also create formulas for automatic adjustments for either single accounts or account groupings.

Throughout the income tax management process, multiple users can access work papers for their respective entities, for optimal productivity.

No domestic income tax solution delivers more capabilities, more convenience, or more value.

### **REPORTING CAPABILITIES**

Vertex also gives you the ability to produce and print system-generated reports that contain your income tax compliance data – including book and apportionment data or jurisdictional detail. As a result, important facts and analyses are always at your fingertips.

### **ADVANCED SECURITY**

To ensure the security of your vital tax data, Vertex Income Tax – Domestic provides role-based security and authentication tools that let you control access to your data and the manner in which it is used. This includes audit logging that allows you to monitor the activities that are performed during the return preparation process.

**E-FILE READY**

To help you meet the latest federal and state mandates, Vertex is an IRS approved e-file transmitter that provides complete, modernized e-file capabilities.

Vertex makes it easy for you to generate and review a paperless return through importing/aggregating, formatting, validating, and transmitting capabilities.

With Vertex Income Tax – Domestic, e-filing is as easy as:

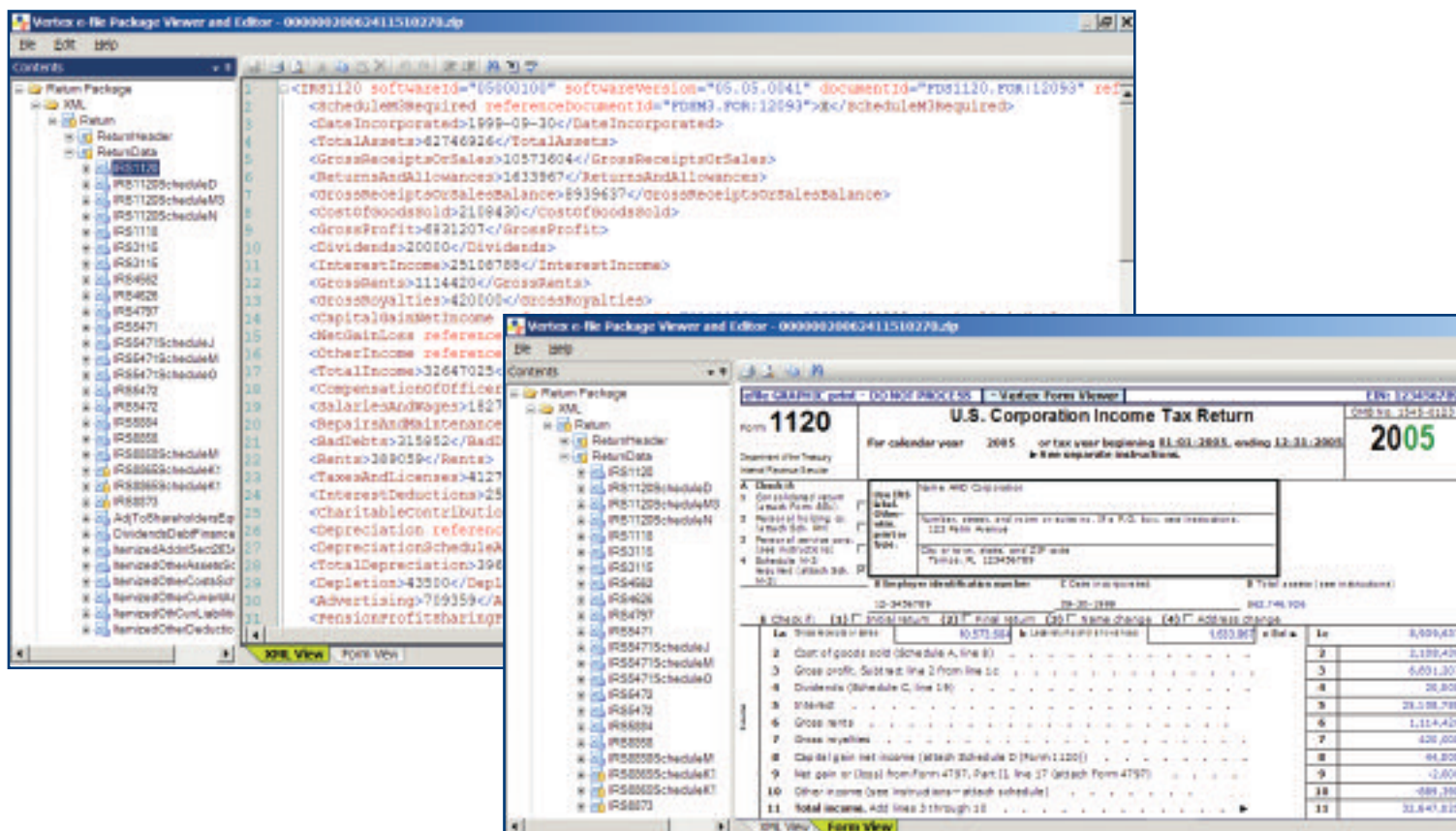
- **One-Step Process:** Vertex has built e-file into the overall compliance process. So all you do is click one button to prepare a complete electronic file for review.

- **Trouble-free Validation:** At any time, you can drill down to source data to easily correct and clear format validations.

- **Hassle-free Compliance:** With Vertex, the content you review is what the IRS will receive – it's as simple as that.

In addition, we support your e-file efforts through online informational resources, e-file transmission testing, a customer support hotline, and customized assistance and expertise from Vertex Consulting.

**VERTEX E-FILE PACKAGE VIEWER AND EDITOR**



The Vertex Package Viewer and Editor allows you to toggle between XML format and form view with the click of your mouse so that you can review the content that the IRS receives.



# VERTEX® INCOME TAX – INTERNATIONAL

International income tax compliance is often a complex process. But Vertex helps you simplify it through an intuitive workflow methodology and automated form population.

Our international income tax solution automates the processing of key forms and schedules, including forms 5471, 1118, 8858, and 8865. The robust calculation engine for allocation and apportionment, Earnings & Profit (E&P) tracking and Subpart F, and Foreign Tax Credit computations help you minimize your tax season by making forms a simple by-product of your tax department compliance process.

It also provides comprehensive reports, that include cross-references, Internal Revenue Code (IRC) references,

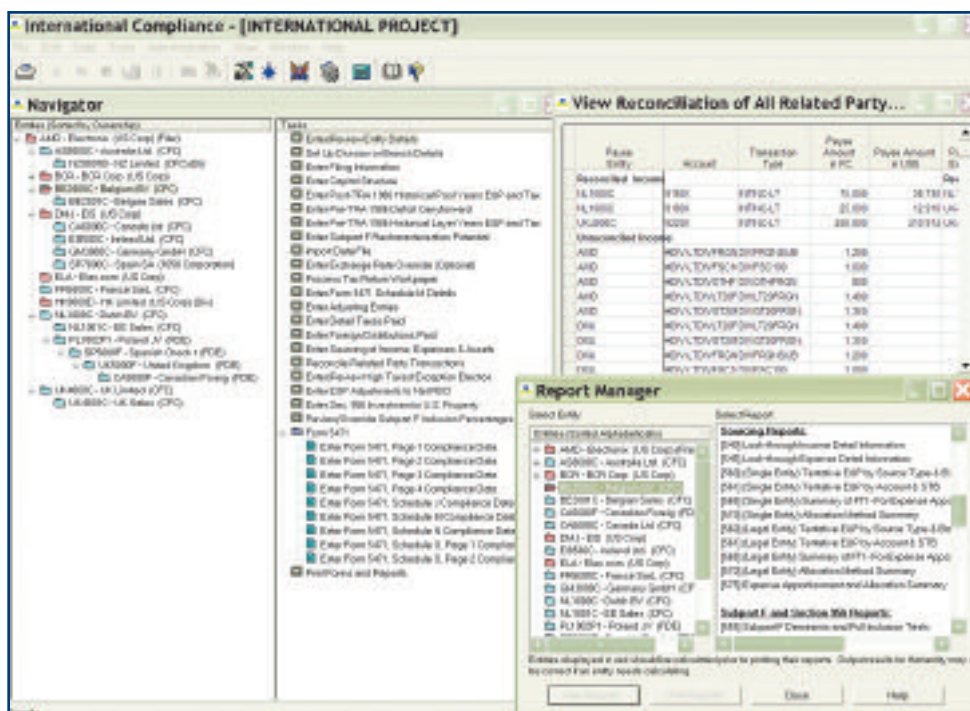
and informational footnotes when tax rules are applied.

Look-through rules are applied for accurate income tax characterization, including an intuitive interface to view and reconcile all eligible inter-company payments.

Vertex Income Tax – International also manages the complex tracking process for full historical E&P and tax pool analysis. Customizable sourcing templates that are reusable and referenced by multiple entities to save you time with allocation and apportionment.

With Vertex Income Tax – International, form completion becomes automatic. Complex calculations become effortless. And timely compliance becomes routine.

## INTERNATIONAL WORKFLOW PROCESS



The Navigator screen within Vertex International provides an intuitive workflow process that identifies tasks and allows multiple views of data such as the View Reconciliation of All Related Party Transactions.



# VERTEX ANALYSIS & PLANNING SOLUTIONS

To go beyond compliance, you need powerful tools that transform income tax data into meaningful views and reports.

Vertex Analysis and Planning solutions make it easy for your tax department to manage their day-to-day responsibilities, and gain access to your compliance data for value-added activities such as planning and audit defense. And, they help your entire management team access information and delve more deeply into tax data than ever before.

## VERTEX® INCOME TAX CUSTOM REPORTER

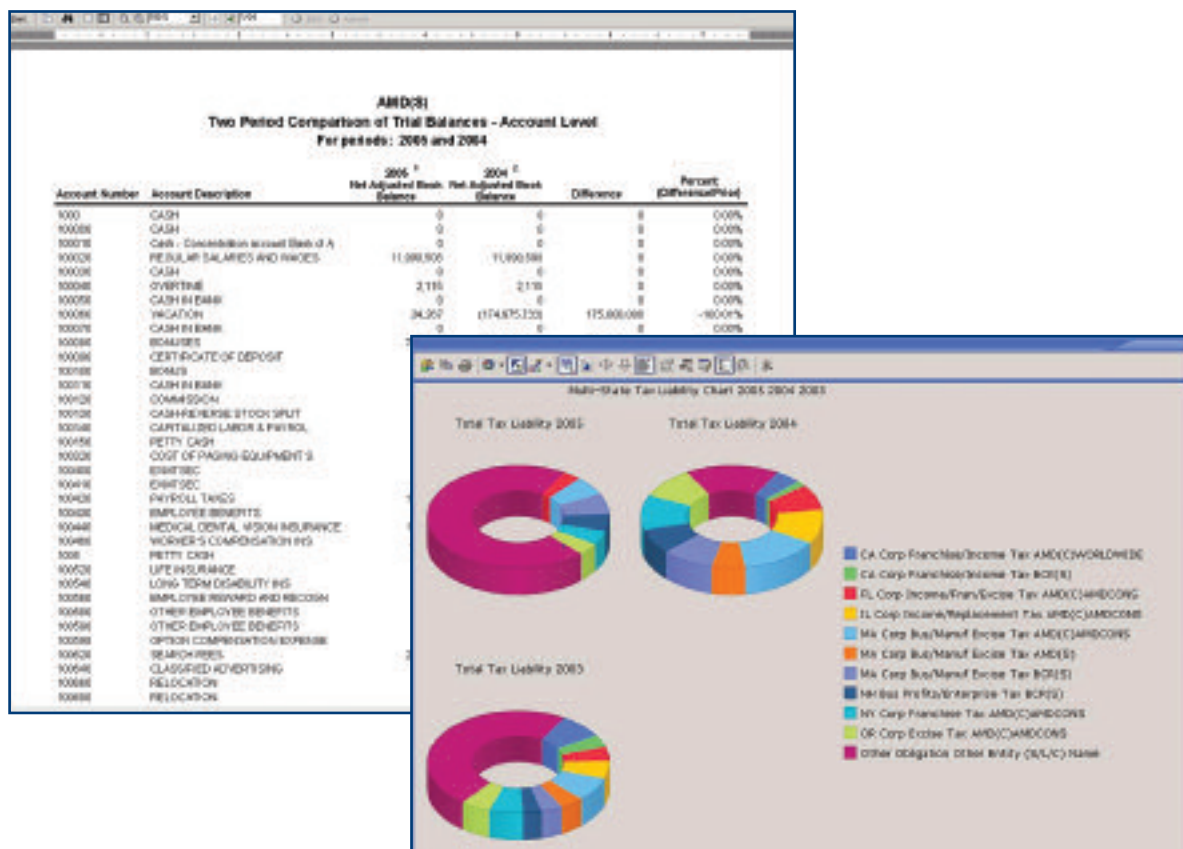
Vertex Income Tax Custom Reporter provides everything you need to access the tax compliance data that is captured in Vertex Income Tax – Domestic.

It offers comprehensive reports featuring multi-period, multi-year, and multi-jurisdictional selections. It gives you the flexibility to section and filter balances. And, it lets you edit report templates for company-specific information.

With the Vertex Income Tax Custom Reporter, you can translate important tax data into custom reports and valuable insights that lead to better decisions and potential tax savings.

It's an ideal way to save time on managing your tax compliance data and devote more time to planning activities that positively contribute to your company's bottom line.

## INCOME TAX CUSTOM REPORTER



With Income Tax Custom Reporter, you have the convenience of ready-made reports and the flexibility to create custom reports and graphs.

## VERTEX TAX CALENDAR

The Vertex Tax Calendar is your tax department's most valuable scheduling tool.

Available in a uniquely intuitive format, the Vertex Tax Calendar comes pre-populated with form names, form numbers, due date formulas, and mailing addresses of income and franchise returns. Plus, it helps you track due dates for estimated payments, filing extensions, returns, Information Data Requests (IDRs), Notices of Proposed Assessments (NOPAs), and more.

Among its many automated features, the Vertex Tax Calendar will:

- Generate e-mail alerts when due dates are approaching
- Create USPS certified mailers for pre-populated addresses

- Set up a calendar for the next year
- Set reminders for all obligation types
- Print an optional "to-do" list
- Enable the planning, documenting, and tracking of your tax department's progress

Tax Calendar also lets you create custom obligations as specific items under a jurisdiction. And, it offers multiple views that help you determine who in your organization is working on a particular obligation, and when that obligation is due.

You'll wonder how you ever managed without it.



## VERTEX INCOME TAX ON-LINE SOLUTIONS

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Vertex Income Tax On-line simplifies domestic and international tax compliance with one integrated, web-based solution scaled to fit your company. This hosted solution is accessible anytime, anywhere, by any computer that can access the Internet.

Let the experts at Vertex manage your application and database in a central, secure location that provides:

- 24x7x365 availability
- Ongoing maintenance
- Service Level Agreement

- SAS 70 compliance
- Security
- Protection through a disaster recovery plan and off-site backups
- Protection from Internet threats
- Support for many different web browsers and operating systems
- Cost efficiency

And, the total cost of ownership for a Vertex Income Tax hosted solution can be far less than for a traditional on-site installation.



## CLIENT SUPPORT AND TECHNICAL ACCOUNT MANAGER PROGRAM

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Vertex is dedicated to ensuring that your professional tax software delivers outstanding results. That's why we offer a wide array of support options to meet the unique needs of our clients.

Our options include:

- **Standard Support**, included with your software license fees to address specific technical questions and issues.
- **Technical Account Manager Program**, provides a direct liaison assigned to your company offering the following benefits:
  - High-level planning and ongoing guidance to ensure deployment success
  - Proactive notification of critical issues
  - Priority support escalation and resolution
  - Insider's perspective on deployment best practices
  - Facilitation of resources and information
  - Optional on-site visits

These services are delivered by experienced specialists who have a deep knowledge of your compliance processes – as well as a strong understanding of your business environment. They can help streamline your tax operations while allowing your staff to concentrate on strategic tasks.

**“The other half of having a system that works well is having a support staff that is responsive. Vertex support personnel never let me down – they are always timely and knowledgeable.”**

*– Cheryl Chung  
TheoDavies Food*

Because of our commitment to service, Vertex has consistently received accolades for outstanding product support from our clients.



## ADDITIONAL SOLUTIONS

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### **VERTEX TRANSACTION TAX SOLUTIONS**

Vertex is also the recognized leader in powerful transaction tax software solutions.

Vertex software can help you achieve efficiency and consistency by automating calculations and reporting for a wide range of domestic and global transaction taxes, including:

- Sales Tax
- Consumer Use Tax
- Value-Added Tax
- Lease Tax
- Communications Tax
- Payroll Tax

These offerings can be configured to support taxation in any type of transaction – from retail, to e-commerce, to business-to-business. In addition, they're delivered on the technology platform that works best for your organization – including today's web-based standards.

Above all, Vertex software is backed by industry leading U.S. and international tax research – and by our reputation for delivering reliable results. So you can trust in Vertex for accurate, compliant results, time after time.

### **VERTEX CONSULTING SERVICES**

To support our many software solutions, Vertex has built the most trusted and reliable team of tax consulting professionals in the industry.

This includes a full-time staff of researchers with an average experience of 15 years in the tax industry. Plus more than 75 dedicated tax technologists and project management professionals who have an unmatched ability to align your IT and tax processes.

Together, our consultants can support you at every step, including:

- **Implementation Services:** We can help you maximize the power of your Vertex software while enjoying the convenience of a single source for both software and services.
- **Tax Process Optimization Services:** We'll help you comply with the latest tax regulations around the globe, while minimizing internal costs.
- **Data Management Services:** We'll help you manage your data for maximum value in research and audit protection – while ensuring that you have access to the information you need, when you need it.



## TURN TO THE INCOME TAX EXPERTS

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No one offers a more complete range of income tax solutions than Vertex. And, no one has a stronger track record of providing the expertise that companies need to achieve full compliance with the latest regulations – while controlling internal costs.


To discover how Vertex can help your organization turn income taxes into a strategic advantage, call today: **800.355.3500**. Or visit **[vertexinc.com](http://vertexinc.com)**.



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**Built with corporations in mind,  
Vertex Income Tax provides  
comprehensive functionality in an  
adaptable, scalable platform that  
accommodates changing business  
needs and data flow requirements.**



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