



Consulting
Services

“In today’s challenging environment, it is imperative to effectively manage tax data. We partnered with Vertex to develop tax data management tools to assist other tax departments in increasing efficiencies, delivering more content, and producing more audit-ready returns.”

*– Michael Davis
Vice President – Taxes
Nestle Holdings, Inc.*



UNLOCKING THE HIGH-VALUE WITHIN YOUR TAX DEPARTMENT

Too often, tax departments are viewed as cost centers.

But locked inside your tax department is a wealth of potential business value. To unlock it, join the hundreds of companies worldwide that have turned to Vertex Consulting.

By delving deeply into how your business works and designing customized solutions, the professionals of Vertex Consulting can help you turn your tax department into a high-value entity.

For example, Vertex Consulting can help you:

- Uncover business risk that could result in costly penalties and interest
- Ensure that tax is calculated correctly and savings opportunities are not overlooked
- Enable reporting and analysis of tax data for better business decisions
- Guide additional departments in leveraging tax-level information

Results like these are what clients have come to expect from Vertex. After all, we've built a growing reputation for delivering outstanding, highly-personalized consulting services. And we've assembled teams of specialists who are known for their expertise, their integrity, and their commitment to seeing every assignment through to a successful outcome.







VERTEX SERVICE SOLUTIONS

COMPREHENSIVE SERVICES

Vertex Consulting can support you at every step of your tax management process, including:

- **Tax System Implementation**

Services: We can work with you to maximize the power of your Vertex software while enjoying the convenience of a single source for both software and services.

“Vertex took the time to understand our business and the unique needs of our tax department to deliver an effective solution tailored to our business.”

*– Bahir Limaye
The College Board*

- **Tax Process Optimization**

Services: We'll help you identify and implement best practice improvement opportunities in regulatory compliance, content, and automation while minimizing internal costs.

- **Tax Data Management Services:**

We'll show you how to manage your data for maximum value in business operational planning and audit support – while ensuring that you have access to the information you need, when you need it.

CONSULTING SERVICES ENGAGEMENT METHODOLOGY

Vertex Consulting's client-centered engagement methodology guides you through a step-by-step process resulting in a tailored solution that can be implemented in a phased or modular approach over time – providing measurable business results.

What's more, by bringing Vertex Consulting to the table when planning upgrades and new implementations, you can help avoid potential complications while saving time and money.

The key steps in the Vertex Client Engagement Methodology are:

- Analyze your unique business environment
- Review your current tax and technical processes
- Provide a detailed assessment of your requirements
- Design a customized solution
- Implement the outlined solution
- Provide knowledge transfer and continuous support

The Vertex Consulting approach revolves around a simple goal: enabling your tax department to raise its business value with effective tax management that more accurately and efficiently supports compliance, and ensures that tax data is compiled in a manner that is useful to your entire organization.



TAX SYSTEM IMPLEMENTATION SERVICES

Without the right implementation, even the best software falls short of its full potential. And very often, the most powerful software capabilities go unused due to a lack of knowledge and a lack of tailoring to your business requirements.

That's why Vertex has developed world-class implementation services to match our world-class software — because nobody knows Vertex software like our team of experts.

Whether you're upgrading an existing product, migrating to a different platform, or implementing new software, you can count on Vertex Consulting for complete technical support.

Our System Implementation Services include:

- **Tax and Technical Reviews** that provide current state assessments of your systems and processes from both tax functional and technology perspectives. These services capture and document the unique requirements of your operations in relation to tax, and ensure that they are addressed during implementation.
- **Systems Design and Configuration Services** ensure that your organization addresses any gaps prior to automation, and that you have a comprehensive plan for success that can be carried through to implementation.

- **Project Implementation Strategies**

complement your company's own level of resources and skills with the expertise that only a thorough understanding of both tax and technology can provide.

- **Custom Development Services**

provide support for integrations, utilities, and data flow components. Whether you require a bridge to extract data from financial systems, or you need to create a full integration to the host financial system, Vertex has the skills and experience to help.

“It's imperative that ERP implementation teams engage transaction tax expertise early during all phases of an integrated system implementation to help eliminate re-work, aid timely delivery, and prevent unexpected audit reporting issues after go-live.”

*– Dawn Bare Regan, CMI
Manager, Integration and Compliance
Whirlpool Corporation*

- **Training Services** deliver user training on standard software packages, customized system training based on your unique operations, and tax functional area education. These comprehensive services will enable your understanding, use, and ongoing maintenance of your system and processes.

TAX SYSTEM IMPLEMENTATION

Project Plan

- Tax Management
- IT
- Finance/AP/AR
- Project Management







TAX PROCESS OPTIMIZATION SERVICES

As you're working to keep up with day-to-day operations, it can be difficult to identify potential areas of increased effectiveness and efficiency within your tax department. With Vertex Consulting as your trusted partner, you can assess your company's opportunities for improvement in sales, consumer use, payroll, and income tax processes.

Based on our experience in engagements with more than 600 companies, we can help you identify inefficiencies and implement best practices in all of your critical tax processes.

The results can include operational cost savings, streamlined business processes, and significant business advantages.

Our Tax Process Optimization Services include:

- **Tax Process Assessment Services** provide a high-level analysis and evaluation of your overall tax technology processes, including the remittance of tax, allocation of tax and technology resources, and management of tax information. The Tax Process Assessment enables your tax department to understand what is needed to better manage and locate information for audits, improve workflow management, better comply with regulatory requirements, and reconcile tax and financial data.
- **Sarbanes-Oxley Act Section 404 Internal Controls Services** offer a range of services to ensure corporate tax

department compliance with Section 404 of the Sarbanes-Oxley Act. Our consultants can assist with education, preparedness, situation assessment, gap analysis, remediation and ongoing monitoring, automation, and improvement. We will also help with documentation of current processes and make specific recommendations for improvement through additional controls and process automation.

- **Taxability and Tax Research Services** provide your tax department with tax research assistance for taxability and nexus determination, rate imposition, voluntary disclosure, and registration. Whether it's a taxability matrix review or fully outsourcing your tax research needs, we can help.
- **Audit Support Services** can assist in preparing for the audit process, and can reduce or eliminate exposure in the future. By performing reverse audits and analyzing your processes and data, we can identify areas of liability and overpayment. In addition, Vertex Consulting can help you reduce audit cycle time and the number of concurrent audits by implementing tools to streamline your efforts.
- **Temporary Staffing Services** can help when you're short on resources. Vertex Consulting can provide short-term loan staffing, on-site or otherwise, for various tax department needs, such as returns filing and compliance process documentation.

TAX DATA MANAGEMENT SERVICES

Transforming tax information into valuable information for your business requires intelligence – the kind you get from Vertex Data Management Services. Our data management services cover income, value added, sales, and consumer use tax.

When combined with our software and utilities, these services help transform tax data from multiple sources into information you can archive, retrieve, manage, and analyze for workflow management, audit defense, and “what if” scenario tax planning.

Vertex offers the most comprehensive and cost effective data management portfolio in the industry. Unlike the offerings of other product – or consulting-based organizations, our services enable both better compliance and strategic value-add by the tax department.

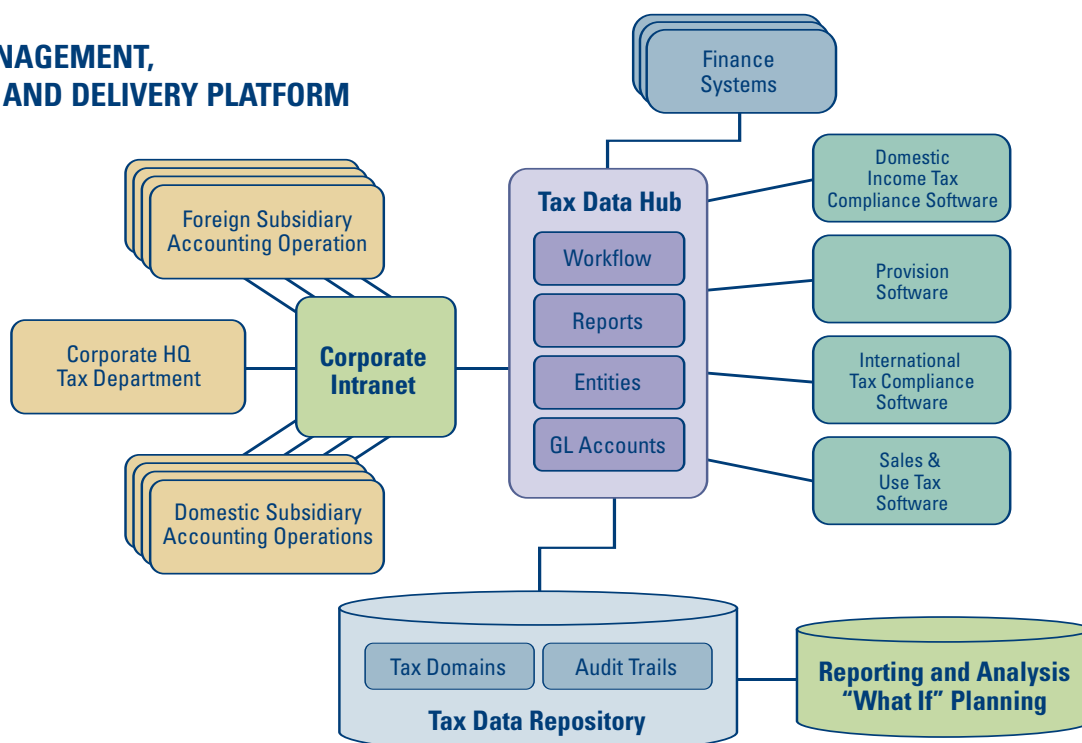
- **Tax Data Collection Services** provide standardized collection and validation of tax and entity data, and enable workflow and document management.

These web-enabled offerings can help bring together disparate data for provisioning, compliance, and apportionment.

- **Tax Data Repository Services** enable the construction of comprehensive tax data storehouses from standardized Vertex tax technologies. This provides for legal entity-centric consolidation and rapid data retrieval. In addition, it allows management of multiple tax type data over multiple years, with the transparency that today’s corporate governance standards require.

- **Tax Data Reporting and Analysis Services** enable the retrieval of tax data in views and constructs that are customized to your operational needs. Whether you need to perform tax planning with the benefit of analyzing multiple years of information, to retrieve data for audit defense, or to be alerted to outliers on key performance indicators, Vertex Consulting can help.

TAX DATA MANAGEMENT, ENRICHMENT, AND DELIVERY PLATFORM



Vertex Tax Data Management Services help clients to improve their handling of tax-related data through an integrated systems approach.





EXPLANATION

1:1

1:2

1:3

68/57 60/57 47/57

59/59 63/61 49/60

62/51 57/56 59/60

50/50 48/46 47/50

49/45 51/50 47/50

58/52 54/51 52/55

55/55 48/51 50/57

54/54 57/50 50/57

58/42 42/42 52/57

46/43 50/50 50/57

44/41 53/53 47/57

49/49 47/57

48/49 47/57



SOFTWARE PRODUCTS

TRANSACTION TAX SOFTWARE

What do you get when you combine more than 30 years of tax expertise with innovative technology?

Vertex software – the choice of thousands of companies in all major industries throughout the world.

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

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

Best of all, these offerings can be configured to support taxation in any type of transaction – from retail, to e-commerce, to business-to-business.

And, 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.

INCOME TAX MANAGEMENT SOFTWARE

Vertex combines expert tax knowledge with extensive tax software experience to provide you with a suite of integrated

income tax offerings. This comprehensive suite enables corporations and accounting firms of all sizes to fully automate their income tax processes.

Our income tax management capabilities include:

- **Vertex Income Tax – Domestic:** an advanced, easy to use, e-file ready application that is built on a stable platform and supports federal and state compliance.
- **Vertex Income Tax – International:** comprehensive software that helps corporations analyze foreign information and reduce ever-changing U.S. compliance burdens of foreign operations.
- **Vertex Global Provision:** fulfills the needs of worldwide provisional taxes including current and deferred provision expenses, effective tax rate reporting and direct integration and reconciliation.
- **Vertex Analysis and Planning Solutions:** these tools include reporting functionality to enable the generation of ready-made and custom reports, and a tax calendar to help track due dates for returns, filing extensions, estimated payments, and more.

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



CHOOSE A PARTNER YOU CAN TRUST

Vertex Consulting has worked with hundreds of clients in all major industries, bringing unparalleled tax technology experience to every engagement.

“Vertex Consulting has helped us cut our returns preparation time in half, and identify substantial dollars in credits.”

*– Deborah Ahlinger, Senior Tax Analyst
Johnson & Johnson
Health Care Systems, Inc.*

In our experience, helping clients get the most out of tax and financial/ERP systems – and freeing tax professionals up to play a more strategic role within the business – requires that we look at your organization

holistically from a business, industry, tax, and technical perspective. Because how you do business – and the industry you are in – is what really drives your tax requirements.

That’s why Vertex hires senior consultants who have been in your position and understand how businesses in your industry are run. Vertex has dedicated practices focused on all major ERP systems, with an emphasis on SAP and Oracle (including PeopleSoft and JD Edwards). Our consultants blend extensive knowledge of tax best practices with Vertex and financial/ERP software that can automate, streamline, and simplify tax compliance.

To discover how you can put the experts at Vertex to work for you and turn your tax department into a value center, please call **800.355.3500**. Or visit **vertexinc.com**.



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“ Companies can be assessed hundreds of thousands of dollars due to the inability to document their decisions. Vertex is a key service provider because they can help analyze and document the necessary taxability decisions in addition to providing the software to automate compliance.”

*– Ken Allen
President
Computer Systems Resource Incorporated (CSRI)*



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