

# Vertex Exemption Certificate Services

## Refresh Your Certificates to Improve Audit Performance

Mismanagement of exemption certificates is the largest single contributor to audit assessment. But effectively managing all the details is labor-intensive. Now you can outsource the administrative tasks of certificate validation, renewal, and collection to an experienced tax service provider so you can re-focus your time on more value-driven tax work.

## Three Services to Meet Your Needs

Vertex offers three services to help you manage exemption certificates and improve audit performance. You can engage us at any time to perform one, two, or all three services, depending on your needs.

### Certificate Validation Service

With the Certificate Validation Service, Vertex experts will review your existing certificates, so you know which ones are valid and invalid (and the reason why). Simply complete the Vertex-provided template listing all your tax-exempt customers/ jurisdictions and provide us with your existing certificates (PDF or hard copy of each certificate).

During this step, Vertex will validate each certificate by reviewing:

- The certificate number
- Signature
- The issue date and expiration date
- The reason for exemption
- Customer information

At the end of this step, Vertex will return a Certificate Validation Report indicating whether the certificates provided were valid or invalid (including the reason why), along with expiration dates, where applicable.

### Certificate Collection Service

If you would like Vertex to collect certificates, simply provide the contact information for tax-exempt customers/ jurisdictions where certificates are invalid, expired, or missing. Vertex will make three (3) attempts to contact each customer to collect certificates. Vertex will also validate the collected certificates and provide a Certificate Validation Report identifying certificates that are still invalid or missing.

You can engage Vertex to collect certificates from your customers at any time. You do not need to first engage Vertex for the Certificate Validation Service. As long as you know which customers/jurisdictions require certificates, you can engage Vertex for certificate collection.

## Certificate Storage Service

You can also engage Vertex to store your certificate PDFs and provide you with online access to search, download, and run basic reports. This will eliminate the need to manage these documents in-house, as well as facilitate audit preparation. With your online access, you can easily search for certificates, customers, and jurisdictions. You can print a selection of exemption certificates based on specific customer(s), states, and time period. You can also generate a report that can be used to satisfy an auditor's request to review specific certificates for customers for a specific state and time period.

## Validation and Collection When You Need It

The outsourcing services described above are offered as standalone services. You can engage Vertex to validate the certificates you have at any time – whether you're doing a one-step cleanup of all your certificates or preparing for a state-specific audit. You can also engage Vertex to collect certificates for you at any time. Just send us your list of expired or missing certificates. You can also use Vertex Exemption Certificate Outsourcing services to manage the administrative tasks of certificate validation and collection so you can focus on more value-add tax work.

## Vertex Exemption Certificate Services

Clients can engage Vertex for one, two, or all three of the services below, as often as needed.

Certificate Validation Service	Certificate Collection Service	Certificate Storage Service
Client provides file listing all tax-exempt customers/jurisdictions plus an individual PDF of each existing certificate. Vertex reviews supplied certificates for validity	Client provides contact information for tax-exempt customers and jurisdictions where certificates are invalid, expired, or missing. Vertex makes three (3) attempts to contact each customer to collect certificates. Vertex reviews the collected certificates for validity.	Vertex stores certificate PDFs and provides clients online access to search, download, and run basic reports.
<b>Vertex Deliverable:</b> A Certificate Validation Report (Excel file) lists all certificates, indicating valid or invalid (including reason), plus the issue and expiration date for each.	<b>Vertex Deliverable:</b> A PDF of each collected and validated certificate is provided. A Certificate Collection Report (Excel file) lists all collected certificates and indicates the issue and expiration date for each. The report also provides the collection activity status for certificates still outstanding.	<b>Vertex Deliverable:</b> Online access to certificates and reports.

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