



Vertex Sales & Use Tax Compliance Service

Outsource Your Returns While Remaining in Control

Most tax departments today are under pressure to do more with less. Combine this with growing tax complexity, increasing audit activity, and in-house staffing constraints, and you can understand why so many tax executives are considering outsourcing sales tax compliance. Vertex Sales & Use Tax Compliance Service helps by reducing the time tax staff spend on the administrative aspects of compliance so they can focus on more strategic work.

Expert Returns Outsourcing

Vertex Sales & Use Tax Compliance Service allows you to outsource the day-to-day tasks of returns preparation, filing, and treasury management – all while staying in control of compliance. You can offload the administrative tasks and re-focus your in-house resources on higher-value activities.

Vertex handles the entire returns lifecycle—from preparation and filing to payments and funds management and managing notices and credits. The entire process is SOC 1 Type 2-audited to ensure quality and security for our clients.

Experienced Professionals

Each client is assigned a dedicated Returns Processor who serves as their single point of contact. These professionals handle all aspects of returns management, as well as communication with tax jurisdictions. Because they are each dedicated to a single client, Returns Processors gain a deep understanding of their client's tax data sources, jurisdictional requirements, and reporting needs.

Every member of our staff brings an average of 7+ years of sales tax returns experience from corporate tax departments, Big 4 accounting firms, and regional CPA and law firms. Our low staff turnover means you can count on continuity and consistency over time.

Our Competitive Difference

Vertex provides a highly effective and efficient outsourcing solution that exceeds competitors in the marketplace. Our competitive differences include:

- End-to-end service, including returns processing, funds management, and notice management
- Expert handling of returns preparation and filings by professionals with an average of 7+ years of industry experience
- Continuity by having Returns Processors work directly with an assigned client
- A proven process (SOC 1 Type 2-audited) for compliance management, funds management, and remittance
- 40+ years of sales & use tax expertise, including industry-leading sales and use tax software

Reliable Data Management

Vertex can accept your tax data in multiple formats from a wide range of tax calculation and/or host financial systems. This flexibility helps ensure that compliance is accurate and on time, regardless of the data structures that your financial systems provide. Each client's data is segregated and protected, and every client has 24/7 access to their data via an online portal.

Easy-to-Use Online Portal and Dashboard

When you outsource your sales tax returns to Vertex, you're always informed and in control, thanks to Vertex's online portal. It keeps you informed at every step and supports secure data and document transfers each month. An easy-to-use dashboard provides anytime/anywhere visibility into the status of returns, as well as complete visibility into your tax data, confirmations, notices, and all communication with tax jurisdictions.

Secure Funds Management

In addition to returns processing, Vertex offers complete payment services. We manage more than \$14 billion in tax payments for our clients each year. Each client has a separate (domestic) bank account so client funds are not co-mingled. Each month, Vertex provides a funds request outlining the tax liabilities by jurisdiction along with the returns ready for review. Funds can be transferred via wire, check, ACH debit, or ACH credit. All payment confirmations are filed on the client portal. In addition, Vertex provides a monthly reconciliation of all funds requested and received.

About Vertex

Vertex Inc. is a leading global provider of indirect tax solutions. The Company's mission is to deliver the most trusted tax technology enabling global businesses to transact, comply and grow with confidence. Vertex provides solutions that can be tailored to specific industries for major lines of indirect tax, including sales and consumer use, value added and payroll. Headquartered in North America, and with offices in South America and Europe, Vertex employs over 1,400 professionals and serves companies across the globe.

To learn more, visit VertexInc.com.



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