

Vertex O Series for Brazil

Streamlined tax determination for Brazil

Vertex O Series is an industry-leading tax engine for automated, centralized indirect tax determination. Rich tax content and flexible deployment options paired with robust integrations to your financial systems provide a single solution for managing global indirect taxes, including Brazil's complex indirect tax requirements and the coming Tax Reform*.

Reliable Tax Determination

Vertex O Series delivers a comprehensive and scalable tax determination solution tailored to streamline the supply chain in Brazil's complex indirect tax landscape. From product-level classification (NCM and CEST) to accurate rate management and place-of-supply logic, the platform supports consistent, compliant tax outcomes. Monthly content updates cover federal, state, and over 340 municipal jurisdictions. A centralized interface enhances visibility and control, helping tax teams operate with greater confidence and efficiency.

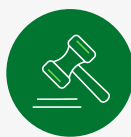
Support Business Growth

Vertex O Series enhances tax accuracy while enabling your business to scale confidently. Whether entering (or expanding within) the Brazil market, expanding product lines, new entities, or launching new sales channels, the solution adapts to evolving business needs with centralized control and reliable tax logic.

Benefits



Reduced audit exposure



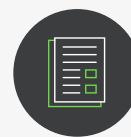
Improved compliance



Global scalability



Centralized control



Accuracy for invoicing

* Vertex Tax Research team is actively monitoring new regulations and will be prepared to start calculations by early 2026 when the new mandates start taking effect. Vertex O Series will automatically update to remove/suppress outdated legislation as it becomes obsolete.

Features



Integrated with Your Financial Systems

Integrates seamlessly with your ERP, e-commerce, procurement, and other financial systems to automatically calculate tax and provide centralized control and visibility.



Robust Brazil-specific Tax Content

Robust tax content, automatically updated monthly, helps ensure the right tax is applied to every transaction and keeps you in compliance with the latest tax reform changes*.

- Brazil “standard” content is part of the O Series Central/South America license, providing the basic tax framework for Brazil transactions and taxability for services.
- Brazil “premium” content can be added, including federal impositions for the sale of goods for all states and 340+ (and growing) municipalities, as well as all service codes according to the LC 116/2003 and updates.



Custom Taxability Setup

Simple set-up of your company's unique taxability rules and data (even for multiple entities) for improved accuracy and usability.



Pinpoint Brazil Jurisdiction Identification

Precise jurisdiction assignment using IBGE codes improves tax accuracy across 340+ municipalities, ensuring the correct tax is applied based on location.



VAT Withholdings

Easily manage which transactions will be subject to taxability of WHT at federal and municipal level, providing rates and basis (PIS WHT, COFINS WHT, IRPJ WHT, CSSL WHT, INSS WHT).



Improved Source Data

Tax-sensitize business data for invoicing and purchase validation. Accurate up-front tax determination improves the quality and consistency of source system data.



System Scalability

License the tax data and capabilities you need today, and add capabilities as you expand into new markets and businesses. Provide Web-based access for worldwide users. Gain centralized control of company-specific taxability, rate research, reports, and monthly content updates.



Security & Access

Role-based access enables you to control tax processes and data visibility more effectively. Audit logs help ensure SOX compliance. Federated security enhances protection. And single sign-on (SSO) improves convenience.



Improved Compliance

Real-time request and response to/from source systems. Improved tax calculation accuracy improves source system data quality for more accurate digital invoicing and reporting.



Tax Reform Support

Vertex is preparing for Brazil's 2026 tax reform with dual-system readiness and monthly updates to support both legacy and reform structures through the transition.

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To learn more, visit VertexInc.com.

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