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exchange

HUMAN IN THE LOOP AI

Amplifying Human Judgment in the Age of Machine Intelligence

- How Customer Insights Drive Continuous Improvement
- Key Takeaways from Vertex's Mid-Year Sales Tax Report

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President, CEO and Chairperson of the Board, Vertex

Welcome from David

In the spirit of connection, welcome to Vertex U.S. Exchange Magazine. We aim to keep that spirit of exchange alive all year long. Here, you'll find perspectives from across the Vertex community—insights that matter most to you as you lead your teams through the challenges and opportunities of today's dynamic business environment.

Let's be candid: The pace of change in global commerce is relentless and compliance is more intricate and demanding than ever. We know that regulatory landscapes shift constantly, and data volumes explode—making the pressure for accuracy and efficiency more intense. We also know that for too long, tax functions have operated in silos, grappling with fragmented systems and disconnected data. But the future of indirect tax compliance is different. It's connected.

In this issue we'll showcase the big ideas and tangible solutions that empower you and your team to make continuous compliance a part of your business strategy—and accelerate global commerce. Specifically, we'll discuss our commitment to customer success, our human-centric approach to AI, the latest trend in rates and rules, and the power of our end-to-end solution.

I hope you enjoy the insights in this magazine and stay connected with us in every issue. One of the greatest strengths of the Vertex community is the collective expertise we share. Let's continue to learn from one another and become future-ready—together.

How Customer Insights Drive Continuous Improvement

Mindy Cunningham, Senior Vice President of Customer Success & Services, Vertex

At Vertex, customer experience isn't just something we deliver—it's something we intentionally design. Every interaction is an opportunity to elevate how our customers feel about working with us, creating lasting impressions that extend far beyond the moment.

Recent feedback—gathered through surveys, user groups, and dedicated listening sessions—has highlighted both our strengths and the areas where we have room to grow. These insights are helping us shape a more responsive, connected, and impactful customer experience.

Building a Culture of Listening and Action

To transform valuable insights into meaningful change, we have established a cross-functional Customer Experience Governance Council. Comprised of senior leaders, this council is focused on listening to your needs, aligning teams, and taking decisive action. Already, several initiatives have been launched to move from analysis to implementation.

Advancements Driven by Customer Feedback

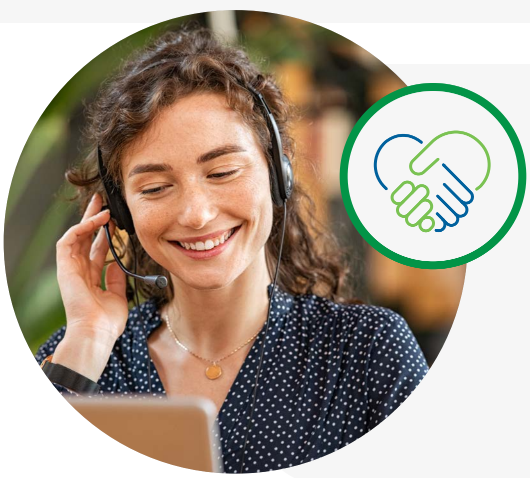
Our recent efforts have focused on three key areas highlighted by our customers:

Greater Transparency in Our Solutions

- Customers now benefit from a clearer view into what's coming next, thanks to a formal content roadmap and more consistent, easy-to-digest updates—helping them plan and take full advantage of new capabilities.
- With a globally aligned Tax Research team, customers receive more consistent, expert support across regions—especially in critical areas like compliance and calculation—ensuring confidence and continuity no matter where they operate.

Maximizing Solution Value

- Enhanced release communications now provide clearer, more actionable insights into new features—empowering customers to adopt innovations faster and drive measurable impact.
- Our annual Vertex Exchange conference equips attendees with practical knowledge through hands-on learning opportunities and peer connections to unlock greater value from their Vertex solutions and accelerate outcomes.



Consistent and High-Quality Support

- Customers now experience faster, more seamless support thanks to improved coordination across our support, product, and engineering teams—ensuring they are connected with the right experts when it matters most.
- New Customer Empathy training is helping our teams engage more thoughtfully and effectively, leading to more meaningful interactions and stronger customer relationships.

Looking Forward

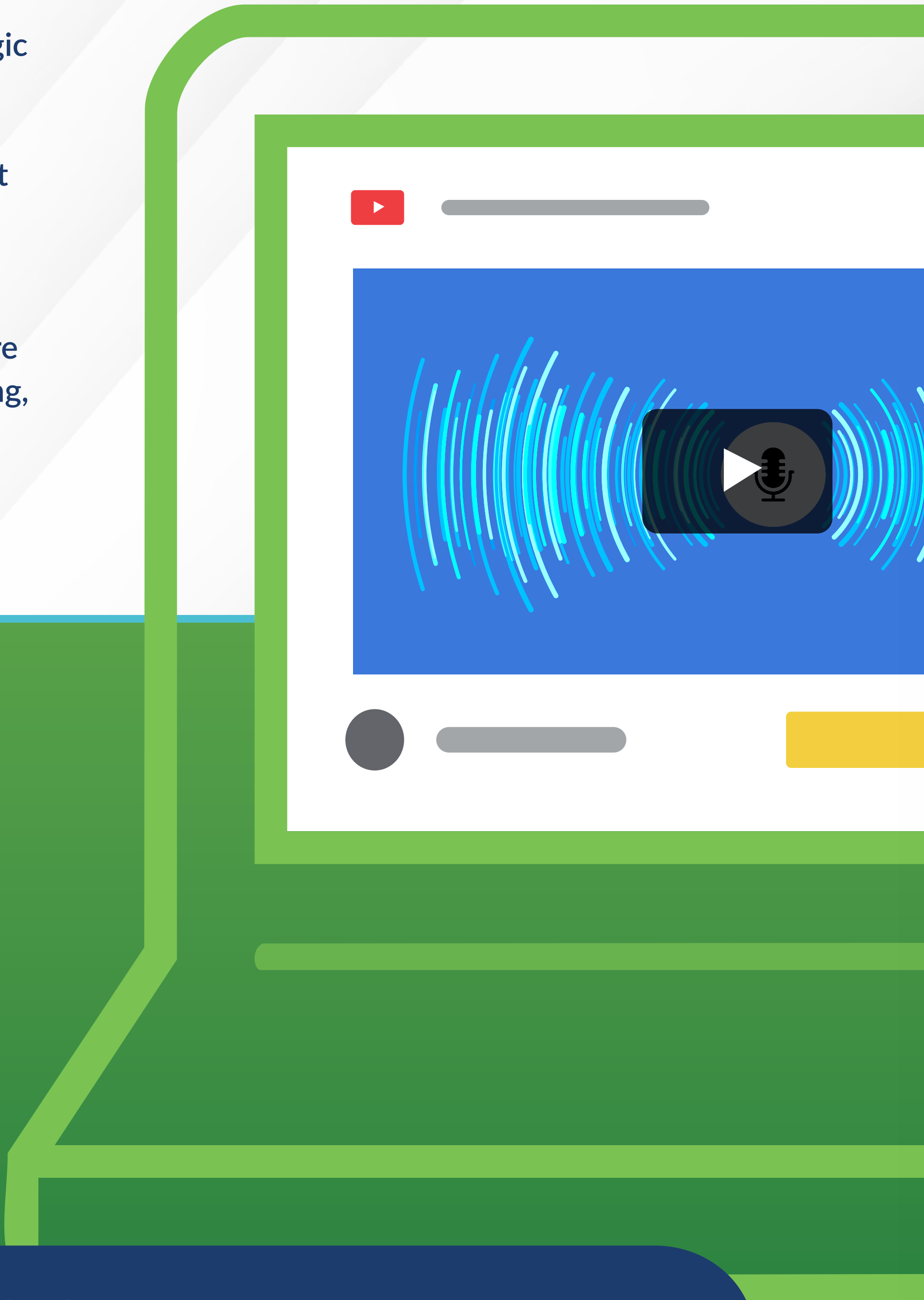
Our journey to elevate the customer experience is far from over—it's gaining momentum. The Customer Experience Governance Council continues to meet regularly, ensuring that your feedback doesn't just inform our strategy—it drives it.

At Vertex, we're committed to building a seamless, empowering experience rooted in transparency, partnership, and measurable outcomes. Your insights are shaping the future of our solutions, and together, we're creating a space where innovation thrives, and your success is the standard we strive for.

Introducing...

The e-InVOICE

E-invoicing continues to grow in strategic importance for finance and tax teams around the world—which means it can be difficult to stay updated on the latest mandates, deadlines, and business impacts. And why we're excited about the launch of the e-InVOICE—our new video series where our experts will share insights, discuss evolutions in e-invoicing, and expand your understanding of the factors impacting tax compliance.



EPISODES INCLUDE:

- E-Invoicing Foundation
- What 1,000+ Companies Told Us About E-invoicing Readiness
- Why Clean Data = E-Invoicing Success
- Top 3 Tech Essentials for a Smooth E-Invoicing Rollout
- The Future of VAT Reporting (in 60 Seconds)
- Mandates to Watch (E-invoicing Trends to Watch)

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Human in the Loop AI

Amplifying Human Judgment in the Age of Machine Intelligence

Christopher Zangrilli, Vice President Technology Strategy, Vertex

Introduction

Artificial intelligence (AI) has revolutionized industries, research, and many aspects of daily life with its ability to process vast amounts of data, recognize patterns, and automate complex tasks. And its capabilities keep evolving—at an increasingly rapid rate.

Yet, there remain essential areas where human judgment and oversight are indispensable—this is the foundation of the human in the loop approach, which ensures AI integrates human feedback for more accurate, ethical, and reliable results.

How Human Oversight Shapes the Future of AI

As artificial intelligence transforms industries across the board, its rapid evolution brings both opportunities and challenges. While AI excels at processing data, identifying patterns, and automating complex tasks, there remain critical domains in which human judgment and oversight are indispensable. The human in the loop (HITL) approach addresses these gaps, ensuring AI systems benefit from the irreplaceable expertise, ethical awareness, and contextual understanding that only humans can provide.

The Trust Journey: Shared Responsibility in AI Adoption

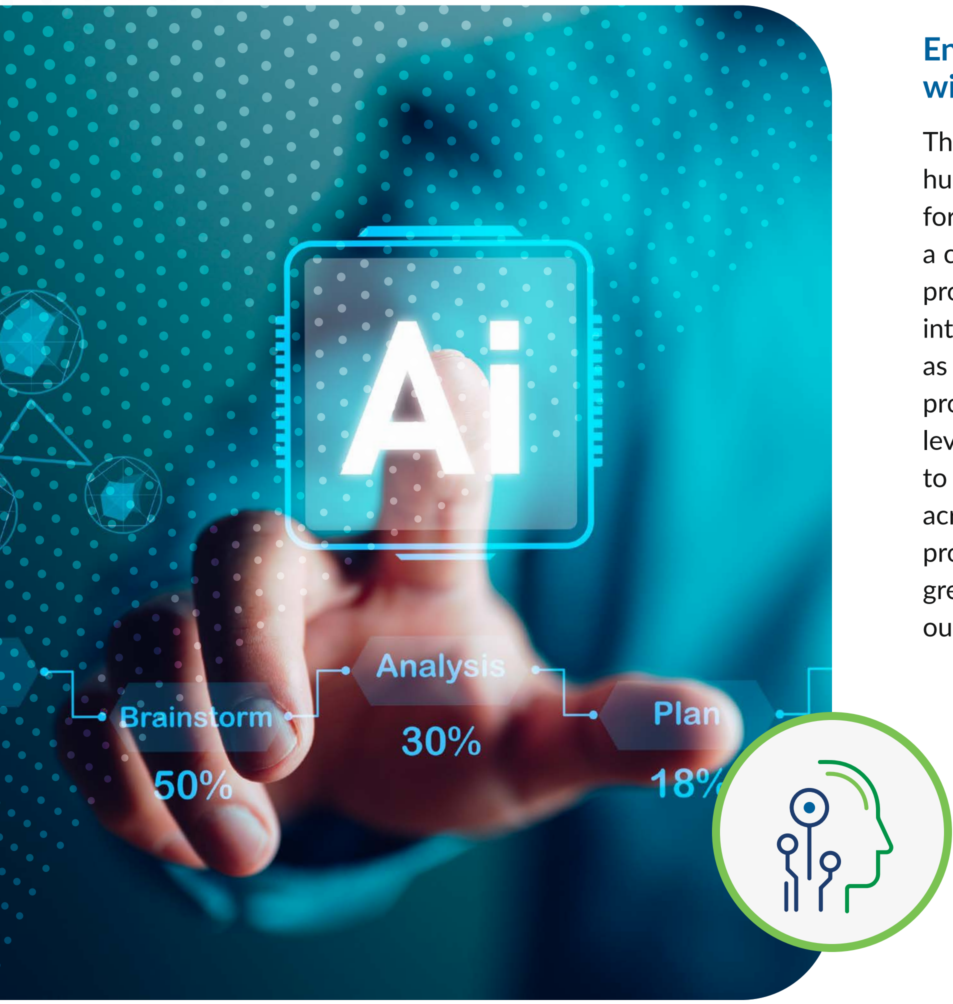
Much like the transition to cloud computing, adopting AI is a journey of trust that relies on a shared responsibility model between the customer, the technology, and the vendor. It is actually quite similar to the trust journey that our customers embarked on at the start of cloud computing. Technology provides benefits, but humans remain a vital control point, retaining the ability to oversee, approve, and guide decisions made by AI. This shared involvement is key to scaling human intelligence and maintaining our customers' trust –allowing users to exercise control over how AI operates within their organizations.

Human in the Loop—Indirect Tax

One area specifically where human in the loop AI is especially impactful is tax automation. In the complex landscape of ever-evolving regulations and intricate tax codes, AI systems can process and analyze vast quantities of financial data with unprecedented speed and precision. Automated AI tools are also increasingly employed to categorize expenses, flag anomalies, and track compliance deadlines. However, because tax regulations can be subject to interpretation, and real-world business scenarios often present unique exceptions, human expertise remains an essential part of the equation.

By integrating AI for repetitive, high-volume tasks—such as data extraction from invoices, reconciliation of accounts, and initial compliance checks—organizations can dramatically reduce manual effort and minimize the risk of clerical errors. At the same time, tax professionals play a pivotal role as the "human in the loop," overseeing AI recommendations, reviewing flagged transactions, and applying nuanced judgment to ambiguous cases. For example, a tax professional needs to be able to explain to auditors or their management what their tax position is. And because they are ultimately accountable for the tax process, it's important for them to be accountable for the AI process, validate recommendations, ensure data governance, and maintain audit readiness.

Another example is procurement teams using AI to manage contracts and vendor relationships—with human oversight crucial for ensuring tax accuracy and compliance. Nearly half of procurement groups have piloted generative AI tools, yet the most effective implementations embed human feedback into existing solutions.



Enhancing Human Interaction with AI Systems

The human loop can take two forms in how humans interact with the system—an interactive form and a workflow form. For example, there is a conversational interface, such as Copilot, which provides real-time information and illustrates the interactive form. Then there are solutions, such as categorization technology, which starts off processing thousands of recommendations and leverages a workflow to the user to prioritize what to review. And while the user experience will vary across applications, the benefits, and what the tax professional is trying to accomplish, are the same—greater efficiency, ability to review/correct the output, and more time for strategic activities.

In addition, the collaboration between humans and AI include:

- **Quality Assurance:** Humans catch mistakes and provide nuanced judgments machines may miss, especially where empathy or context is needed.
- **Ethical Oversight:** Human involvement enforces ethical standards, preventing harmful or unjust decisions.
- **Business Decisions:** Ability for the human professional to apply business context and strategy to guide decisions and actions of AI.
- **Continuous Improvement:** Feedback loops allow experts to refine models, improving accuracy and reliability over time.
- **Accountability:** Human professionals remain responsible for explaining and validating outcomes, particularly in regulated fields like tax.

Looking Ahead: The Future of Human in the Loop AI

As AI technologies evolve, the relationship between humans and machines will continue to shift. We may see increased automation in low-risk domains, while human involvement remains essential where stakes are high. Innovations such as explainable AI, active learning, and collaborative workflows will strengthen human in the loop frameworks, ensuring that AI serves human interests.

Ultimately, human in the loop AI is a testament to the enduring value of human judgment. It recognizes that the synergies of human intelligence plus artificial intelligence results in better outcomes than AI alone. By keeping humans in the loop, we build systems that are not only smarter, but also more compassionate, trustworthy, and aligned with our values.

Here at Vertex we are exploring:

- Integrating AI across our end-to-end platform.
- Simplifying complex tasks through AI enabled user experiences.
- Leveraging agents to help automate workflows and help with decision intelligence.

Conclusion

As AI technologies evolve, the relationship between humans and machines will continue to evolve, yet human in the loop AI leverages the strengths of both humans and machines, fostering collaboration that leads to more ethical, accurate, and responsible outcomes. As we embrace the possibilities of AI, the presence and participation of humans within these systems will remain crucial—guiding technological progress with wisdom, empathy, and oversight.

HOW 2025'S TAX RATE CHANGES ARE RESHAPING LOCAL AND NATIONAL LANDSCAPES

Shifting Tides

Key Takeaways from Vertex's Mid-Year Sales Tax Report

Michael J. Bernard, Vice President and Chief Tax Officer, Vertex

Like so many other industries, the world of tax administration is in the midst of a dynamic transformation—driven by the intersection of regulatory shifts, economic influences, and technological advances. As organizations increasingly turn to Human in the Loop AI to navigate complex compliance challenges, local tax authorities are responding to shifting fiscal pressures with notable changes to sales tax rates. *Vertex's Mid-Year Sales Tax Rates and Rules Report*, released at the end of June, illuminates the magnitude of these adjustments and what they mean for businesses and governments alike—both now and into 2026.

Tax Rate Changes Surge Across the Nation

The first half of 2025 witnessed a significant uptick in sales tax rate activity, with 408 combined changes and new rates enacted nationwide—a striking 24% increase compared to the same period in 2024. This surge is especially pronounced at the city and district levels, highlighting a move toward more localized adjustments as municipalities and districts respond to evolving economic challenges. While only one state, Louisiana, increased its sales tax rate this year, the ripple effects of both local and state changes suggest that more may follow suit as budgetary pressures mount.

Economic Factors Fueling Fiscal Decisions

With changes to federal spending and potential shortfalls, state governments may be compelled to reconsider their own tax structures. **Coupled with inflationary pressures driven by numerous factors, these items could shape consumer spending and trigger additional tax hikes at various levels of government.**

By the Numbers: Highlights from the Mid-Year Report

One State Sales Tax Rate Change: Louisiana raised its state sales tax from 4.55% to 5% on January 1—a notable 10% increase—with plans to reduce the rate to 4.75% by 2030 unless future legislation dictates otherwise. The new law also expanded tax coverage to telecommunications and direct marketing.

An impressive 140 new district taxes took effect in the first six months of 2025, compared to just 77 in the same timeframe last year. This number surpasses annual totals from previous years, underscoring the growing need for tax revenues.

82%

Increase in New District Taxes

Since 2015, the average number of new and updated sales and use taxes per year has hovered at 617, reflecting the constant churn in tax policy.

617

Annual Average Tax Updates

6:1 Ratio of City Rate Increases to Decreases: City tax rates are overwhelmingly on the rise, with nearly six increases for every decrease. Though the total number of city tax changes fell from 159 to 117, the majority were upward adjustments.

2.9:1 Ratio for County Rate Changes: County-level changes also skew toward increases, with nearly three hikes for every reduction.

As of June 30, the U.S. boasts a vast landscape of 7,076 cities, 1,972 counties, 3,205 districts, and 45 states and Washington, D.C., each managing their own sales and use tax rates.

12,299

Tax Jurisdictions Nationwide

Doubling of Taxing Cities: Sixty cities introduced new tax rates so far this year—double the figure from early 2024—reflecting a trend toward municipal-level fiscal action.

The Real-Life Implications of These Trends for Businesses

For organizations navigating the changing terrain of sales taxes, agility and accuracy are more vital than ever. Automated AI solutions—particularly those incorporating Human in the Loop frameworks—play an essential role in processing high volumes of tax data, flagging regulatory changes, and supporting compliance teams in real time. As local and state governments adapt to external pressures, it's essential for businesses to remain informed and be ready to respond to new rates and rules.

Looking Forward: Anticipating Further Change

With the remainder of 2025—and the years beyond—likely to bring additional rate changes, vigilant monitoring and flexible systems will be critical. The Vertex mid-year report not only delivers key data points but offers context for understanding how economic, legislative, and technological trends converge to shape the tax landscape.

> **For example, from an indirect tax perspective, states will have to be prepared to manage their budgets for social services and assistance programs, since they are facing a reduction in federal money due to the passage of the One Big Beautiful Bill Act [OBBBA 2025]. If states determine that they want to continue the same level of eligibility that they've provided in the past, they will have to consider increasing income or sales tax.**

Another example for the remainder of 2025 and going into 2026 is the enforcement of select policy initiatives by the current administration, which may impact federal matching funds. **Federal matching funds on average amount to 20% of most state budgets and if cut, states will need to find alternative funding streams.**

The bottom line is in an environment where fiscal choices are increasingly complex, and technological innovation is a driving force, staying ahead of tax rate changes is not just a matter of compliance—it's a strategic imperative.

PODCAST

Career Journeys in Tax Technology

Join Mindy Cunningham, Senior Vice President Customer Success & Services at Vertex, and Sophia Weber, Partner at PwC, for an insightful conversation on the topic of careers in tax technology. Mindy and Sophia share their personal career journeys in the tax and technology sectors, discuss current development trends in the industry, and recommend ways to build on experiences to achieve leadership roles.

A conversation that was recorded as part of our Exchange Europe event, they explain how companies and mentorship programs can foster and support career advancement, emphasizing the importance of cultivating role models and mutual support among colleagues. They also highlight the opportunities that digitalization and the growing significance of tax technology provide for today's professionals, demonstrating how engaged experts can actively shape this transformation.

An inspiring conversation on how the future of tax technology continues to grow and evolve.

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Listen to the Tax Matters Podcast today!

The Global E-Invoicing Shift

2025 Perspectives and Momentum

Gunjan Tripathi, EMEA Director of VAT and Tax Technology, Vertex

In just a few short years, nearly every business around the world will be dealing with mandatory near and real-time tax reporting. For companies selling in multiple countries—especially those trading across borders—this means things are about to get much more complex when it comes to e-invoicing compliance. Better data, seamless system integration, and scalable solutions that are ready for the future are going to be absolutely essential. E-invoicing isn't just an upcoming trend—it's quickly becoming something everyone needs to pay attention to.

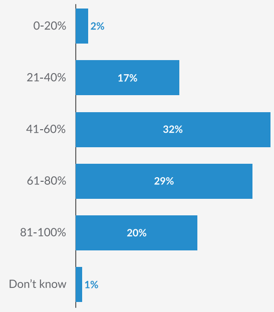
So, what's the best way to approach it? It's all about mixing regulatory know-how with tight teamwork across tax, finance, and IT departments. Companies that go for integrated, flexible platforms instead of quick, patchwork fixes are really setting themselves up to adapt, keep up with rules, and continue to grow. In short: Think long-term, collaborate, and invest wisely, and you'll be ahead of the curve.

To help with this process, we conducted a research study, canvassing the opinion of 1,150 senior decision makers in finance, IT, and tax functions. The full report is available for download. To help you get started, here's some highlights of how e-invoicing can enhance your business.

OPPORTUNITY 1: Creating efficiency through automation, integration, and AI

The automation required for e-invoicing enables businesses to streamline processes and reduce complexity at scale. This is creating an opportunity to use e-invoicing to create more streamlined business operations. According to our survey, businesses selling in multiple mandated countries now automate **60% of their e-invoicing processes on average**. The growing number of mandates globally is helping to accelerate the adoption of emerging technologies and automated processes.

Automation Trends Driven by E-Invoicing Mandates

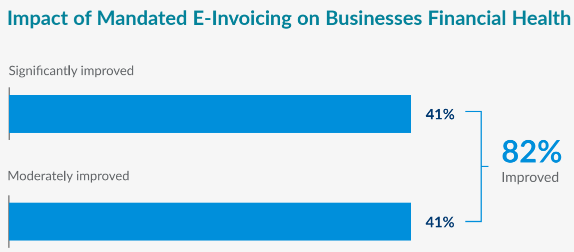


Benelux Belgium & Netherlands	57%
DACH Austria & Switzerland	62%
LATAM Argentina, Brazil, Mexico	58%
Nordics Denmark, Norway, Sweden	62%
North America	61%
Southern Europe Portugal & Spain	61%
UK	58%

Overall mean: **60%**

Average percent by region of automated invoicing due to mandatory e-invoicing

Respondents were asked: What percentage of your invoicing process is now automated due to mandatory e-invoicing? Select one.



Respondents were asked: What impact has the adoption of mandated e-invoicing had on your business's overall financial health?

Opportunity 2: Improving the business's financial health

Financial health improvement is another prominent opportunity emerging from e-invoicing as adoption matures. Over eight out of every ten multi-country sellers agreed that complying with global e-invoicing mandates has had a positive effect on their business's financial performance. E-invoicing also helps to create the right conditions for economic success. When asked about the impact it has on global and domestic economies, respondents saw better economic planning, more global competitiveness, and faster payment cycles as positive outcomes.

OPPORTUNITY 3: Improving data insights, reporting, compliance, and decision making

Data governance is a core challenge, so it follows that one of the most powerful opportunities created by e-invoicing is the relative improvement in data quality, leading to better decision-making and easier compliance with changing regulations. **81% of multi-country sellers** believe that e-invoicing enhances data accuracy, which supports stronger financial reporting and better policy and strategic decisions. This percentage rises to **87%** among businesses operating in e-invoicing mandated countries.

Taking Action

The message from this research is clear: Businesses that act early, invest wisely, and integrate strategically will benefit from e-invoicing. Based on the insights gathered, here are five practical takeaways to guide your next steps:

Prioritize integration: Integration remains the single biggest technical challenge—and the most important enabler. Review how your current systems handle e-invoicing and build a roadmap to connect specialized global platforms, ERPs, and local solutions into an ecosystem.

Align with broader digital transformation: Don't treat e-invoicing as a standalone compliance fix. Instead, embed it within your wider technology and digital finance strategy—linking it to AI, automation, and data initiatives already underway.

Focus on data governance: Accurate, accessible data is essential for compliance and reporting. Strengthen data governance frameworks now to avoid issues later—especially if you're expanding into multiple jurisdictions.

Empower your people: Internal resistance and lack of readiness can hold businesses back. Invest in training, change management, and cross-functional collaboration to ensure your teams are informed, engaged, and equipped to deliver.

Choose scalable solutions: E-invoicing is not a static deliverable. As mandates evolve, your systems must keep pace. Look for technology partners and platforms that can scale with you—both across regions and into the future.

Built for the Long Game

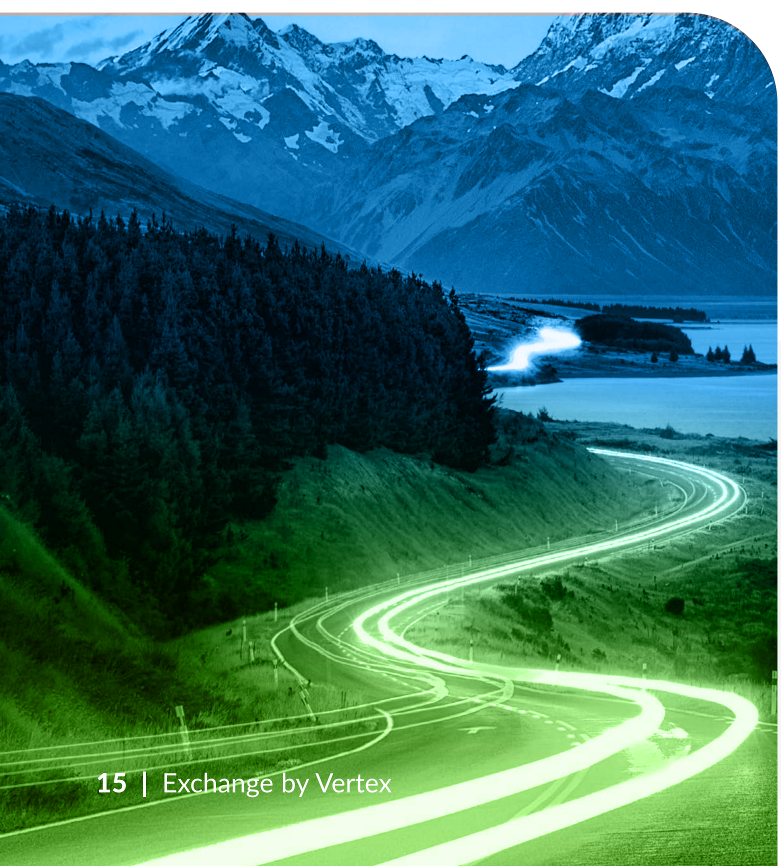
Staying in Control Across the Tax Lifecycle

Jennifer L. Galan, Vice President, Global Product Marketing, Vertex

You've already done the work.

Your Vertex platform is live. The integrations are in place. Returns are running, data is flowing, and the processes your team built are holding steady in an environment that rarely sits still. For many of you, Vertex has become part of the background. It remains reliable, integrated, and does exactly what you need it to do. But as tax requirements shift and business priorities accelerate, that foundation is about to carry a lot more weight.

Governments around the world continue to tighten control over indirect tax in increasingly sophisticated ways, introducing real-time mandates, electronic invoicing, and new validation and audit protocols. In some regions, tax authorities now have access to transactional data before internal teams do. As a result, reporting is no longer just a month-end activity. It is now embedded directly within the transaction flow.



This isn't about faster filings. It's about continuous compliance, dictated by government timelines and data models.

And that change doesn't happen in isolation. Most companies are also navigating ERP migrations, billing system overhauls, cross-border expansion, new digital business models. Every internal move creates downstream impacts for tax. And every new rule adds pressure on teams that are already stretched.

This is where alignment matters most. And where the platform you already have plays a bigger role than ever.

Connecting the Lifecycle, Not Just the Process

What sets Vertex apart is how we think about tax. We see it not as a series of tasks, but as a connected lifecycle.

Our solutions bring together determination, returns, remittance, and reporting in one place. It scales across countries and jurisdictions, but more importantly, across teams. Whether you're processing invoices in your ERP, mapping new product categories for SUT, or validating e-invoicing compliance in a real-time environment, the data and logic stay consistent. Shared content. Shared controls. Shared governance. Supporting all systems and the entire supply chain.

The result? Fewer gaps. Fewer manual interventions.

And while most customers started with a specific use case, such as returns in the U.S., indirect tax calculation on sales, or an e-commerce integration, many are now realizing how much more the Vertex platform can support as their needs evolve.

Tax Is Changing. So Is the Platform.

Vertex is not static. The platform is designed to flex alongside your business. New capabilities are built to support real-time or near real-time reporting, validation, reconciliation, and digital audit readiness.

More countries are shifting from point-in-time compliance to always-on enforcement. That means your solution must do more than calculate. It must also manage complexity across the entire tax lifecycle.

We continue to invest in platform scalability, leverage AI, content expansion, and smarter ways to help customers prepare for what's next without upending what already works. **You don't need to rebuild. You need to extend. And we're building for that.**

AI That Supports, Not Replaces

Let's talk about AI.

It's already here, and it's already helping. Smart Categorization reduces the time teams spend mapping products to tax rules and we are continuing to develop the product and learn from our early adopter customers. Vertex Copilot helps accelerate onboarding and rule alignment. Reconciliation support will flag anomalies before they become audit findings.

But none of it runs without human oversight.

Our AI tools are trained and tested by indirect tax experts and designed for complex, high-effort use cases. They deliver accurate, scalable results that reduce manual effort, while giving your team the ability to confirm outputs align with your company's specific policies and controls.

And the regulatory landscape is moving just as fast. Governments are adopting big data practices. Agentic AI and orchestration models are changing how systems talk to each other. But none of that changes the fundamental need for control, transparency, and real-world expertise. That's where we live.

You shouldn't have to build or manage this complexity yourself. We're investing in AI and automation, so you don't have to. And we're doing it in a way that aligns with how tax actually gets done.

Moving Together, Staying Ahead

Every team we work with is in motion. Some are expanding globally. Others are standardizing internally. Many are rethinking how tax, finance, and IT stay in sync as mandates evolve faster than most systems can keep up.

No matter what the path, the goal is the same: stability, clarity, and confidence.

You've already built the foundation. You don't need to start over. You need a partner who's building with you, anticipating what's next, and delivering the tools to meet it with clarity.

Vertex continues to invest in the innovation that will define tomorrow's tax landscape, including agentic AI, orchestration, and digital reporting readiness. These advancements enable your teams to focus on strategic initiatives that drive business value, while our platform, built by tax-tech professionals, keeps accuracy at the core of everything we do.

You've built the foundation.

Vertex is here to help you manage the shifting tax landscape through software innovation and deep tax expertise, all in one place, on one platform, and deployed to match how your business operates.

Ford Takes Its Vertex Tax Engine Global

The Ford Story

Ford is a global automotive company that designs, manufactures, markets, and services a wide range of vehicles, including cars, trucks, and SUVs, while also advancing electric and autonomous vehicle technologies. Beyond manufacturing, Ford provides mobility solutions, financial services through Ford Credit, and invests in sustainable and innovative transportation initiatives worldwide.

Watch the video to learn how Vertex helps them navigate the complexities of end-to-end indirect tax management.

BENEFITS ACHIEVED

- At Ford, Vertex is fully integrated with SAP, allowing for streamlined global tax compliance. Multiple transactional systems now work together seamlessly.
- All transactional data has been consolidated and can easily be extracted for tax reporting and e-invoicing purposes.
- Ford no longer has to manage the complexity of navigating regulations and policies when trading in multiple countries–Vertex automates it all, saving valuable time and resources.

Save the Date

VERTEX exchange 2026

Join the premier event for tax, finance, and IT professionals around the globe.

We all know that the pace of global commerce is increasing and it’s transforming how we buy, sell and enter new markets—and that creates greater tax complexity. At Exchange, you’ll gain insights around how to proactively manage tax from Vertex experts and thought leaders alike.

Exchange Europe 2026

Tuesday 21 April 2026
Andaz Vienna AM Belvedere by Hyatt
Vienna, Austria

Exchange U.S. 2026

Sunday, October 25 - Wednesday, October 28, 2026
The Cosmopolitan of Las Vegas
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