

VERTEX[®] SERVICE SOLUTIONS

VERTEX SERVICE SOLUTIONS:

- Tax Systems Implementation
- Tax Process Consulting
- Tax Data Management

SUCCESS STARTS WITH A STRONG PARTNERSHIP

Managing your company's tax processes is a daunting task. For over 25 years, Vertex has built strong partnerships with companies that have used our tax technology solutions to successfully manage their tax processes. We have deep knowledge of the issues that companies face in managing their income, sales, and consumer use tax processes, and have developed comprehensive service offerings in each area.

Now it's time for your business to benefit from our leadership, experience, and singular focus on tax technology. With Vertex's expertise at your disposal, you're receiving much more than innovative tax solutions for today. You're gaining a partnership that will provide lasting value well into the future.

Vertex Tax Systems Implementation Services

Whether you're implementing a new software acquisition, upgrading an existing product, or migrating to a different platform; Vertex Consulting offers complete support for the technical implementation of our products. This includes project management, system design and development, system configuration and documentation, custom integrations, tools and utilities, and training.

For income tax needs, we provide process efficiency tools that can be customized to streamline and format data appropriately for your particular tax return needs. These components can:

- Replace Excel[®] spreadsheets, Access[®] databases, and source systems containing data and calculations
- Reduce the cost of analyzing the data by improving data integrity and reducing the number of manual steps in data entry and processing
- Provide data control, audit, and workflow support to complete various tasks throughout the tax cycle



WE'RE CONTINUALLY EXPANDING OUR SOLUTIONS WITHIN AND ACROSS ALL LINES OF TAX.

Income Tax · Sales Tax · Consumer Use Tax · Value Added Tax · Communications Tax · Payroll Tax

CUSTOMER REVIEWS

"Vertex Consulting helped us measurably improve sales and use tax processes, compliance time, and accuracy. Working with our Tax and Information management people they developed custom utilities to extract and manage tax data from our systems. This enabled us to cut our returns preparation time in half, and identify substantial dollars in credits that our old processes and systems did not capture."

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

"Vertex Consulting significantly helped improve JM Family's federal income tax compliance processes. Their representatives were professional and well-informed and their in-depth understanding of both tax and technology were great contributors to making this a successful partnership. They delivered what they promised on time and on budget. We plan to use their services on projects that are non-VantageTax related as a result of our past experience."

– Monique Calhoun, Tax Systems Manager
JM Family Enterprises, Inc.

Vertex Tax Process Consulting Services

Vertex Consulting will partner with you to assess your company's needs and create comprehensive income, sales, and consumer use tax process solutions to improve your current tax and technical compliance processes, resources, and systems. Our specific offerings include:

- **Tax Process Assessment**

Vertex Consulting will provide a high-level analysis and evaluation of your overall tax and technology processes, including an evaluation of application and remittance of tax, allocation of tax and technology resources, and management of tax information.

- **Tailored Tax Process Assessment**

Through a series of tailored services, Vertex Consulting will provide you with customized support for managing your overall tax cycle, including real-time tax compliance, business intelligence, tax planning, and unique company or industry needs. These services can incorporate tax research, process analysis or mapping, system automation and integration, custom coding, and tax technical consulting.

- **Sarbanes-Oxley Act Section 404 Internal Controls**

Vertex Consulting offers a range of services to ensure corporate tax departments comply with Section 404 of the Sarbanes-Oxley Act. Our representatives can assist with education, preparedness, situation assessment, gap analysis, remediation, and ongoing monitoring, automation, and improvement. We will also help with the documentation of current processes and make specific recommendations for improvement through additional controls and process automation.

- **Taxability**

These services provide your tax department with tax research assistance to help with taxability determination, nexus determination, rate imposition, voluntary disclosure, and registration.

- **Audit Assistance and Refund Support**

Vertex Consulting can analyze your processes for opportunities that use your data to assist you in the audit process with planning and audit defense. Vertex Consulting can help you to reduce audit cycle time and the number of concurrent audits by implementing tools to streamline your processes – reducing or eliminating future audit exposure.

- **Temporary Staffing**

When 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 AND TECHNOLOGY EXPERTISE

Vertex Consulting, has built an inter-disciplinary team comprised of both tax and technology professionals. We have more than 25 years of tax industry experience and over 20 consultants. Our consultants are seasoned professionals who have worked on tax technology solutions for many years in a variety of industries.

Vertex Data Management Services

Vertex Consulting offers comprehensive income, sales, and consumer use tax data management services to help you better utilize and manage various tax data resources, processes, and systems, including tax documents, workflow, and reporting. The specific offerings include:

- **Tax Department Document Management**

This service focuses on overall tax-specific document, knowledge, and workflow management needs in corporate tax departments. It includes acquiring, tailoring, and implementing document management tools that will provide data collection and document management.

- **Tax Decision Support and Reporting**

Gathering disparate information manually is a time consuming process. Tax Decision Support and Reporting services provide you with the tools to help analyze this valuable tax information. Our services and tools can help gather and report on your key tax department metrics for near real time decision support capabilities.

- **Income Tax – International Web-based Data Collection**

This service improves the collection of data needed to complete the U.S. Form 5471 filing for foreign entities. It will also help you consolidate the current and historical entity information into a legal entity for reporting and analysis purposes, and monitors the workflow process.

- **Income Tax – Domestic Web-based Data Collection**

Income Tax - Domestic Web-based Data Collection improves the collection of data you need to complete corporate provision and compliance for FAS 109 and U.S. federal and state compliance (Forms 1120, 1120-PC, 1120-L, 1120-F, and 990-C). This service also consolidates the current and historical entity information into various legal entities for reporting and analysis purposes, and monitors the workflow process.

Vertex Service Solutions	Services Offered	Income Tax	Sales Tax and Use Tax
Systems Implementation	Installation and implementation	✓	✓
	Systems design configuration and development	✓	✓
	Custom integrations	✓	✓
	Customized training	✓	✓
	Specialized data flow components	✓	
Process Consulting	Tax process assessments	✓	✓
	Sarbanes-Oxley Section 404 internal controls	✓	✓
	Tailored tax process consulting	✓	✓
	Taxability studies		✓
	Nexus determination	✓	✓
	Audit assistance and refund support		✓
	Temporary staffing		✓
Tax Data Management	Custom reporting and decision support tools	✓	✓
	Document management	✓	✓
	Workflow analysis	✓	✓
	International Web-based data collection	✓	
	Domestic Web-based data collection	✓	

For more information on Vertex Service Solutions, call Chris Thompson at 484.595.6146 or email vc@vertexinc.com.

A Proven Provider

For businesses that want more effective tax technology solutions, Vertex provides a comprehensive suite of software and consulting services for income tax, sales tax, and consumer use tax that combine Vertex's 25 years of tax technology experience with a fresh approach to tax consulting. Unlike public accounting and audit firms, Vertex is focused exclusively in offering tax technology solutions that are not in conflict with the restrictions of Sarbanes-Oxley.

Vertex Inc.

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