



# 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 Tax Processing Specialist who serves as their main day-to-day point of contact. These professionals work with the client's tax team to gain an understanding of their tax data sources, jurisdictional requirements and reporting needs, and handle all aspects of returns management as well as communication with tax jurisdictions.

Our experienced staff members come 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 Tax Processing Specialists work directly with assigned clients
- 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, ACH debit, or ACH credit. All payment confirmations are available 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](https://VertexInc.com).

## Timely Notice and Credit Management

Proper handling of notices is critical to maintaining your company's reputation with the taxing jurisdictions and the public. Your Vertex Tax Processing Specialist will manage all notices on your behalf in a timely and efficient manner, with complete documentation on the client portal to ensure transparency. Vertex has the unique ability to track credits at the jurisdiction and tax type level and to manage those credits in accordance with the client's defined processes.

## Detailed Reporting

One of the most valuable resources a tax department has is information. From your Vertex dashboard, you can access a variety of reports each month to help you stay in control of the tax compliance process.

- **The Tax Calendar Report** provides a breakdown by filing entity and due date of exactly what returns are being filed for that given period. It also details net tax due and estimated funds to be transferred.
- **The Reconciliation Report** provides a breakdown, by filing entity and tax return, of the data being used to file the returns, prepayments, discounts, rounding, credits, and carry-forward amounts.
- **The 13-Month Trend Analysis Report** gives a high-level look at the gross tax broken out by filing entity and tax return.

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