

Tax planning Uncover potential savings and manage risk

Many CFOs face the challenge of creating an organizational model to support business growth while effectively addressing taxes. Deloitte's¹ Tax Planning Solution Set can help leaders identify potential tax savings, manage risks, improve efficiency, and enhance tax compliance—positioning their organizations to add potential value to the bottom line.

What Finance capabilities does this solution set help to enhance?

Core capabilities	
Operating model review	Define a tax-efficient Finance operating model and intellectual property approach.
Business model optimization	Provide an overarching methodology and framework for other core services within Tax Planning that help integrate tax and operational planning to enable more effective decisions on an after-tax basis.
System reconfiguration	Review capabilities of Finance systems to support tax requirements. Develop systems and adapt the IT infrastructure to support improved business processes.
Workforce transition and talent strategy	Develop and implement Finance workforce transition, change management, and training strategies to maintain business continuity.
Structural reorganization	Reorganize the entity structure and contractual relationships to support the new operating model.
Program management	Analyze the business case for tax planning, including potential results, cost, benefits, and timing. Define roles and responsibilities for effective implementation. Manage and track.
Value-added capabilities	
Indirect tax	Analyze import/export documentation related to customs and value-added tax. Advise with respect to managing risk and lowering indirect taxes.
Strategic tax review	Analyze the effectiveness of tax planning, including analyzing potential opportunities for cash tax savings and reduction of global tax burdens.
Legal entity rationalization	Perform strategic legal entity review to identify opportunities to decrease or simplify legal entity structure to create cash savings and manage risk.
Transfer pricing	Conduct economic analysis to confirm requisite support of intercompany markups and valuations.
Treasury design	Provide recommendations for the alignment of treasury strategy and design with the operating model. Advise with respect to treasury processes and technologies.
Location analysis	Analyze alternative locations related to principal operating companies and intellectual property, incorporating tax and non-tax criteria.
Legal entity/asset valuation	Conduct legal entity and asset valuations to support shared services/legal entity design.
Property tax valuation	Establish property value and analyze tax planning to reduce property taxes.

¹ As used in this document, "Deloitte" means Deloitte & Touche LLP, which provides audit and enterprise risk services; Deloitte Consulting LLP, which provides strategy, operations, technology, systems, outsourcing and human capital consulting services; Deloitte Tax LLP, which provides tax services; and Deloitte Financial Advisory Services LLP, which provides financial advisory services. These entities are separate subsidiaries of Deloitte LLP. Please see www.deloitte.com/us/about for a detailed description of the legal structure of Deloitte LLP and its subsidiaries. Certain services may not be available to attest clients under the rules and regulations of public accounting.

Bottom-line benefits

- Trim tax costs and leverage Finance-related tax incentives
- Manage global risk related to tax structure compliance
- Manage reporting risk through data management, data validation, and improved data systems

Indicators that action may be needed

- Transaction—IPO, merger, acquisition, or divestiture—creates a need for a new tax structure
- Tax payments are high because of an inefficient tax structure or underutilization of tax benefits
- Tax reporting is inefficient or ineffective
- Company growth or global expansion has changed tax structure

Find out more

If you have questions or need additional information about Finance Transformation Solution Sets, contact:

Rich Rorem

Principal
Deloitte Consulting LLP
rrorem@deloitte.com

Justin Silber

Principal
Financial Advisory Services LLP
jsilber@deloitte.com

Bob Comeau

Principal
Deloitte Consulting LLP
rcomeau@deloitte.com

Mark Lazzaro

Partner
Deloitte Tax LLP
mlazzaro@deloitte.com

John Gimpert

Partner
Deloitte & Touche LLP
jgimpert@deloitte.com

Learn more by visiting our Finance Transformation website at www.deloitte.com/us/ft.

About Deloitte's Finance Transformation practice

Deloitte's market-leading Finance Transformation (FT) practice helps CFOs and other finance executives drive business performance and shareholder value while improving operational effectiveness and efficiency within the Finance organization. Our cross-functional, integrated FT Solution Sets help address the most critical finance issues facing our clients, including finance vision and strategy, organization and talent, business processes, and technology. Each FT Solution Set is composed of select cross-functional FT offerings configured to provide more value—faster—for the clients we serve.

This publication contains general information only and is based on the experiences and research of Deloitte practitioners. Deloitte is not, by means of this publication, rendering business, financial, investment, or other professional advice or services. This publication is not a substitute for such professional advice or services, nor should it be used as a basis for any decision or action that may affect your business. Before making any decision or taking any action that may affect your business, you should consult a qualified professional advisor. Deloitte shall not be responsible for any loss sustained by any person who relies on this publication.