



Indirect Tax Compliance Services



Value to your company

Whether preparing 40 returns per month or 400, indirect tax compliance can consume a significant amount of your limited indirect tax resources. Time that could be spent on proactive tax planning or potential savings opportunities.

Whether it is dealing with the consolidation of multiple data sources, manually preparing returns, populating reports to aid in general ledger account reconciliation, or handling jurisdictional notices, indirect tax compliance is often a time consuming and tedious process that, if done improperly, may result in exposure to taxing authority audits and related potential financial reporting errors.

Leverage Deloitte's technology and knowledge to potentially help you:

- Efficiently prepare hundreds of state and local tax filings
- Handle resource turnover challenges
- Better manage your internal staff and resource workloads
- Utilize Deloitte's compliance and experience within a dedicated center

Process and deliverables

Deloitte's indirect tax compliance services comprise the following processes:

1. Transition — During this phase, we meet with you to gather information to allow us to configure our software and map your tax source data. We perform parallel testing to get comfortable with transition of information.
2. Data Consolidation and Reconciliation — On a monthly basis, we provide you with a report reconciling your tax source data to tax payments due.
3. Return Preparation — We prepare tax returns for your review and approval and if requested, attach your digital signature to approved returns.
4. Finalizing Returns — If appropriate, we then e-file returns as instructed by you and provide you with returns and data in your prescribed format.

For more information, contact:

Dwayne Van Wieren
 National Indirect Tax Leader
 +1 213 593 3734
dvanwieren@deloitte.com



Our approach and tools

Deloitte leverages leading technology tools and processes in the delivery of indirect tax compliance services.

Our approach is focused on:

- Adopting a methodology that addresses your objectives
- Efficiently transitioning your current tax preparation obligations
- Providing returns timely for your review and approval
- Providing feedback on discovered data or tax compliance issues
- Providing you reports in the requisite format, including reconciling your tax source data to tax payments
- Addressing indirect tax notices in a timely manner and providing notice status via a notice tracker

We leverage our Deloitte Online technology to provide you electronic copies of returns for your review and approval.

Timing and fees overview

Our focus on an efficient transition allows us to initiate return preparation services on behalf of most clients in less than 30 days. Our one-time implementation fee is based on the setup required and the complexity of your data and includes a one-month comparison of our returns to your prior year returns.

We can work with you to establish a fixed fee arrangement based on the number of returns we prepare for you annually to help you better define your costs of compliance.

Should you need additional indirect tax consulting assistance outside of return preparation (e.g., audit defense, tax research, etc.), we can provide competitive hourly rates and leverage our network of dedicated indirect tax professionals to address your objectives.

Qualifying questions:

- Does the preparation of indirect tax returns take you weeks per month?
- Are your limited resources being spent on preparation/filing of returns?
- Do you have multiple sources of data that need to be consolidated?
- Do you prepare returns manually or use licensed tax software and still spend significant time preparing returns?
- Has your company experienced turnover of indirect tax compliance personnel?
- Is your company making acquisitions or expanding nexus activities that are creating increased filing requirements?
- Are you receiving a high volume of indirect tax notices from taxing jurisdictions?
- Do you have exposure to taxing authority audits and related potential financial reporting errors from improperly filed tax returns?

Potential benefits:

- Dedicated team of tax professionals
- Leverage process and technology
- Reduced errors and notices

This service summary contains general information only and Deloitte is not, by means of this summary, rendering accounting, business, financial, investment, legal, tax, or other professional advice or services. This summary 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 summary.

As used in this document, "Deloitte" means Deloitte Tax LLP, a subsidiary 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.