



## THE POWER OF BEING UNDERSTOOD

## SALES AND USE TAX OUTSOURCING AND CO-SOURCING

Put our experience to work for your business

Are you concerned with the efficiency or accuracy of your sales and use tax filings in all the states in which you are liable?

Has recent growth expanded your sales and use nexus beyond the experience of your existing staff?

Have you experienced turnover or layoffs that are leaving you temporarily understaffed in terms of experience or availability?

Sales and use tax return processing is often a manually driven, time-consuming process for businesses and can stretch your valuable tax resources to the limit. Whether it is a lack of sales and use-specific experience or simply insufficient staffing to meet demands, it may be prudent to rely on external support to fulfill critical or ongoing needs.

RSM has dedicated sales and use tax specialists within our state and local tax practice. These experienced professionals are available to support your tax department through customized co-sourcing solutions or turnkey outsourcing of your sales and use tax returns compliance-related processes.

Which solution is right for your needs?

### Realize greater efficiency and reduced overall compliance costs

Outsourcing your sales and tax return filing is a strategic option for many businesses. You will free your internal resources to engage in activities that add strategic value, such as proactive tax planning, audit management and audit defense, while simultaneously minimizing the need to hire additional personnel, maintain expensive third-party returns software and continuously update tax rates and forms.

RSM's sales and use tax outsourcing centers combine the knowledge of experienced state and local tax professionals with the efficiencies of top tax technology to create a solution that allows our clients to alleviate the filing burden, while maintaining full confidence in their compliance.

Our sales and use outsourcing team will:

- Work with your IT department to extract the required data from your ERP system
- Validate current tax calculations and tax rates
- Prepare returns and transmit securely for your review
- Obtain electronic signatures
- File returns with appropriate states and local jurisdictions (EDI, Web filing or paper filing)
- Manage tax payments according to engagement agreement (accounts payable, imprest bank account or dedicated bank account)

Our cost-effective, turnkey solution delivers more than the just the required returns. At RSM, we understand that the tax function does not exist in a vacuum; it requires constant vigilance and review. We consider our outsourcing team to be an extension of your business team and provide additional value to our outsourcing clients through complementary services, which include:

- High-level general ledger reconciliation
- Initial tax notice review and action-step recommendations
- Precursory front-end tax system review
- Monthly management summary reports

## Who benefits from outsourcing?

Outsourced sales and use tax return filing is often beneficial for high-revenue companies collecting sales and use tax in at least eight states, or in at least one of the following states: Alaska, Arizona, Colorado or Louisiana, where "home-rule" status requires filing individually in multiple jurisdictions, further increasing the filing burden.

You may also be a strong candidate if your business fits any of the following industry profiles:

- Manufacturing
- Mining
- Gas and oil drilling
- Multistate contractors and home builders
- Retailers
- Publishing
- Fabricators and installers
- Medical sciences
- Software distribution
- Hospitals with out-of-state outpatient service centers, branches or labs
- Mail order or catalog sales-based companies
- Financial institutions
- Interstate or national retailers
- Companies with Internet-based sales

## Augment your internal resources with specialty experience

If your tax department is experiencing a temporary resource gap or requires specialized support on a less than full-time basis, co-sourcing (also referred to as loan staff) may be your ideal solution. This service provides dedicated, experienced professionals working on-site alongside your tax team to achieve specific goals or fulfill an interim need.

Whether you need a sales and use tax partner with proven experience in nexus evaluation and voluntary disclosure or an associate to quickly and efficiently assist in preparing returns, RSM has qualified professionals ready to support you. Through a customized co-sourcing engagement, your business can:

- Access qualified sales and use tax resources without adding to headcount
- Free up existing resources to focus on more value-driven tasks
- Leverage deep experience and hands-on involvement to solve complex sales and use tax challenges

## Who benefits from co-sourcing?

Co-sourcing is often a response to a greater business need or objective, and therefore, can be an effective resource management solution for businesses of any size, in any location and for any industry. Common reasons companies choose to engage in short- or long-term sales and use co-sourcing solutions include:

- Unexpected turnover at staff, manager or director levels
- Change in business strategy resulting in additional taxing liabilities
- Workforce reductions or company consolidations overburdening remaining staff
- Corporate acquisitions requiring an assessment of current resource capabilities
- Staff changes resulting in mismatch of skills and needs
- Special projects requiring higher-level experience for a distinct time period

## Experience the power of being understood

If you are concerned that your company may not have the right skill sets and support in the right places to achieve your sales and use tax priorities, RSM can provide the experience and dedicated support you require. Whether through full outsourcing or on-site co-sourcing, our dedicated professionals are committed to helping you succeed.

Our collaborative approach keeps your business needs in mind to make our team part of your team, working together toward a common goal. You can be confident in your overall sales and use tax compliance processes, while placing greater emphasis on strategic activity that can improve your bottom-line results.

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