



# A Breakthrough Solution for Income Tax Management



# We can help you manage income tax in a new way. A better way.

The world of tax is changing, driven in part by the changing world of finance. And to keep pace, your tax processes need to change with it.

That is why Vertex has applied its expertise in tax and tax technology, along with extensive input from tax professionals like you, to transform your income tax process.

## **The result is Vertex® Enterprise.**

Vertex Enterprise enables income tax executives to proactively manage through the changing needs of a global company: mergers, acquisitions, multiple financial systems and ERPs, shared service centers, and other complex business growth challenges.

It's a brand-new suite of software solutions – and a brand-new approach – that can help income tax executives optimize the benefits of globalization and unleash the strategic potential of corporate tax. And it's the kind of innovation that customers have come to expect from Vertex, the only major provider that is 100% focused on tax technology.

“ I need a solution that fits the way I work today – and the way I want to work tomorrow. ”



## Vertex Enterprise is designed by tax professionals, for tax professionals.

If you could build the ideal income tax solution, what would it look like?

Chances are, it would provide data that is current, accurate, standardized, and reliable – because it comes directly from your ERP, financial, and other source systems.

It would proactively manage the changing needs of a global company. And it would allow you to enter information once and leverage it across all reporting and analytical processes.

And it would be easy to learn and use.

That's exactly what Vertex has done with its groundbreaking Vertex Enterprise solution suite.

Starting with a clean sheet of paper, Vertex has developed an entirely new approach to income tax management. One that:

- Provides advanced analytical tools that help you align financial and tax reporting in a way that drives real business performance
- Keeps pace with globally changing regulations and the latest practices in tax management
- Integrates tax data with your major business software applications – including those from SAP and Oracle
- Provides the flexibility to integrate with any existing tax software application

Vertex Enterprise is the most advanced enterprise-level tax platform on the market, combining Vertex<sup>®</sup> Tax Accounting and the Vertex<sup>®</sup> Tax Data Warehouse into a solution that's even greater than the sum of its parts. And for the first time, it gives you the power to make tax an integral part of your organization's applications, business processes, and overall strategy.

The result is a solution that fits the way you want to work today – and is flexible enough to adapt to the changes you expect – and don't expect – tomorrow.

“ I need more than just provisioning capabilities. ”



## Vertex<sup>®</sup> Tax Accounting can help elevate your role with analytics, modeling, and more.

Many solutions deliver basic income tax provisioning.

And Vertex Tax Accounting - part of Vertex Enterprise - is no exception.

But as your role evolves, you will also need capabilities that traditional income tax provision solutions simply can't provide.

For example, Vertex Tax Accounting is currently the only solution that provides multi-GAAP, multi-ledger, multi-year, multi-currency support. It includes centrally managed internal tax controls, a computed provision for multiple book ledgers, a comprehensive tax sub-ledger, automated tax journal entries, and other features that keep you in compliance and on track worldwide.

## Other unique features include:

- **Analytics:** Vertex Tax Accounting is the first solution that imports tax data to your organization's analytical software. As a result, you can develop forecasts, engage in what-if scenarios, and manage taxes more proactively. And, you can use tax insights to influence business decisions like never before.
- **Modeling:** Vertex Enterprise delivers the detailed data you need to engage in sophisticated modeling processes. For example, you can test a tax strategy that involves shifting revenues and assets among foreign subsidiaries to determine your potential savings. Or, you can explore how the acquisition of a new business would impact overall tax liabilities. Capabilities like these can help deliver substantial bottom-line results, while raising the profile of the tax function within your organization.
- **Audit support:** With Vertex Enterprise, audits can be more efficient and less traumatic. The entire process is designed for full transparency, allowing you and your auditors to quickly locate key answers and drill down for full details.
- **Global scale:** Everything about Vertex Tax Accounting – reporting, analytics, document management, and automated tax data collection – is built to handle the volume, complexity, and speed you require.
- **Multiple users:** Our provisioning allows collaboration by users in multiple locations, to help you speed the flow of information while ensuring accuracy.

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## FUTURE-READY DESIGN

To help you keep pace with change, the calculation functions of Vertex Tax Accounting automatically comply with GAAP regulations for all domestic and international jurisdictions. And the reporting functions help make return preparation faster and simpler.

To ensure accuracy, Vertex Tax Accounting draws on a comprehensive data repository that serves as the foundation of Vertex Enterprise. So you can count on accurate, up to the minute information for every report and audit.

And to ease adoption, Vertex Tax Accounting is built around you, the corporate tax professional. It speaks your language, provides exceptional flexibility, and works the way you work.

## VALUABLE PARTNERSHIPS

For decades, Vertex has worked closely with the Big 4 accounting firms and other tax consulting firms to ensure that our income tax solutions are designed to support the latest best practices.

In addition, Vertex has long been a premier partner with SAP, Oracle, and other leading software providers. As a result, tax data can be easily imported and exported between your company's ERP and financial applications.

“ I need to build stronger links between tax and our corporate systems. ”



## The Vertex<sup>®</sup> Tax Data Warehouse takes integration to a new level.

The Vertex Tax Data Warehouse is the foundation of Vertex Enterprise, providing a single source of data for all features and functions. It is the first commercial, off-the-shelf tax data warehouse that lets you import data from multiple sources and export data to multiple tax applications – regardless of which vendor’s tax software you are using.

What does that mean?

- It means your tax regime can adapt easily as your business acquires new companies and grows organically.
- It means you can centrally store and keep current all tax-relevant data needed to support outstanding tax obligations whether in the provision, return, audit defense, or even the planning phase of the tax lifecycle.
- It means you can automatically import and export data from the major ERP and financial systems.
- And, it means you and other authorized users can share and leverage the same complete, trusted data across your tax planning, provision, compliance and audit defense functions.

It’s taken the industry decades to develop something this powerful. And now that it’s here, you’ll wonder how you ever managed without it.



“ Why Vertex? ”

## Experience, commitment, and a history of making tax processes work.

Vertex is a choice you can make with complete confidence to solve the complex puzzle of global income tax management.

Since 1978, we've built a track record for excellence in tax and technology, building solutions that help tax professionals work more efficiently, effectively, and strategically. And unlike other major providers, developing tax solutions is all we do.

Our continued innovation ensures that you can keep pace with the demands of your job. Our alliances with the Big Four accounting firms and the leading software providers ensure seamless integration with your organization's processes and technologies. And our global presence ensures that you'll never outgrow your Vertex solutions.

No wonder Vertex is the choice of global leaders that include American Honda Motor Company, Bristol-Myers Squibb, Callaway Golf, Hewlett-Packard, Mercedes-Benz USA, Pepsi, SAP, Starbucks, Verizon Wireless, and many more.

For the full story on Vertex Enterprise, call 1-800-355-3500 or visit [www.vertexinc.com/go/incometax](http://www.vertexinc.com/go/incometax).



Founded in 1978, Vertex is the leading provider of corporate tax software and services worldwide. We help companies realize the full strategic potential of corporate tax by serving every major line of business tax including; income, sales and use, value added, and payroll. The company's offerings are showcased by Vertex® Enterprise, a data driven, open-architecture approach to tax technology that integrates all direct and indirect tax processes and technologies on a single platform.

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