



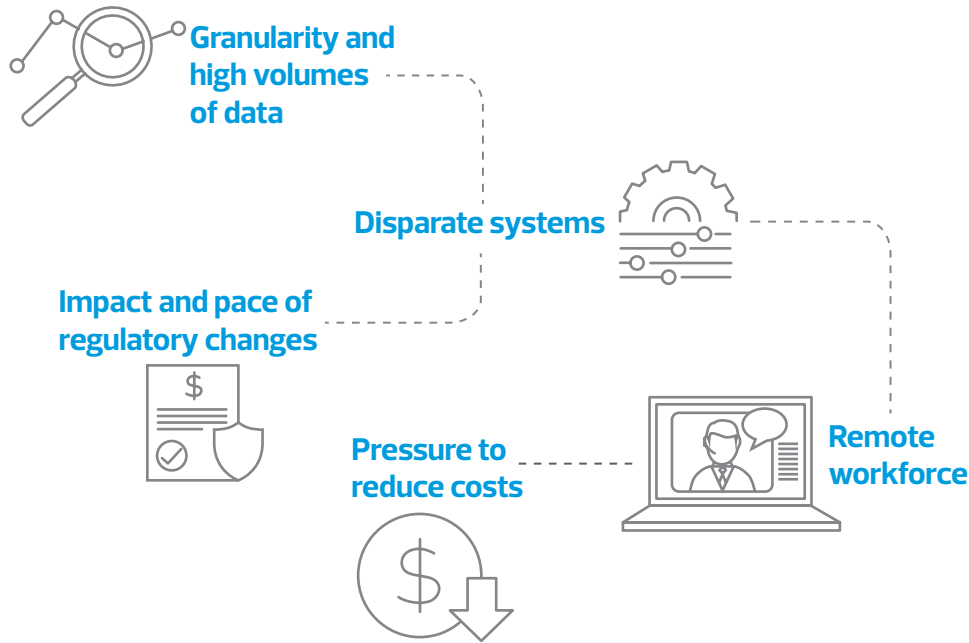
TAX TECHNOLOGY CONSULTING

From hindsight
to foresight

SECTION 1

From hindsight to foresight: Technology's role in elevating the tax function

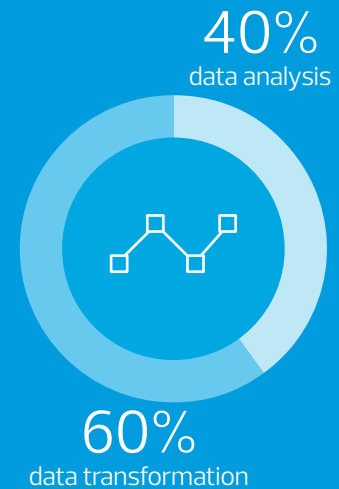
Complexities facing tax departments



GAINING INSIGHTS

About 60% of tax department effort today is in gathering and transforming data rather than analyzing it to draw insights and make predictions—functions that require digging into the details of data. But for our clients who have thousands or even millions of transactions, digging into that detail manually isn't an option—technology is imperative.

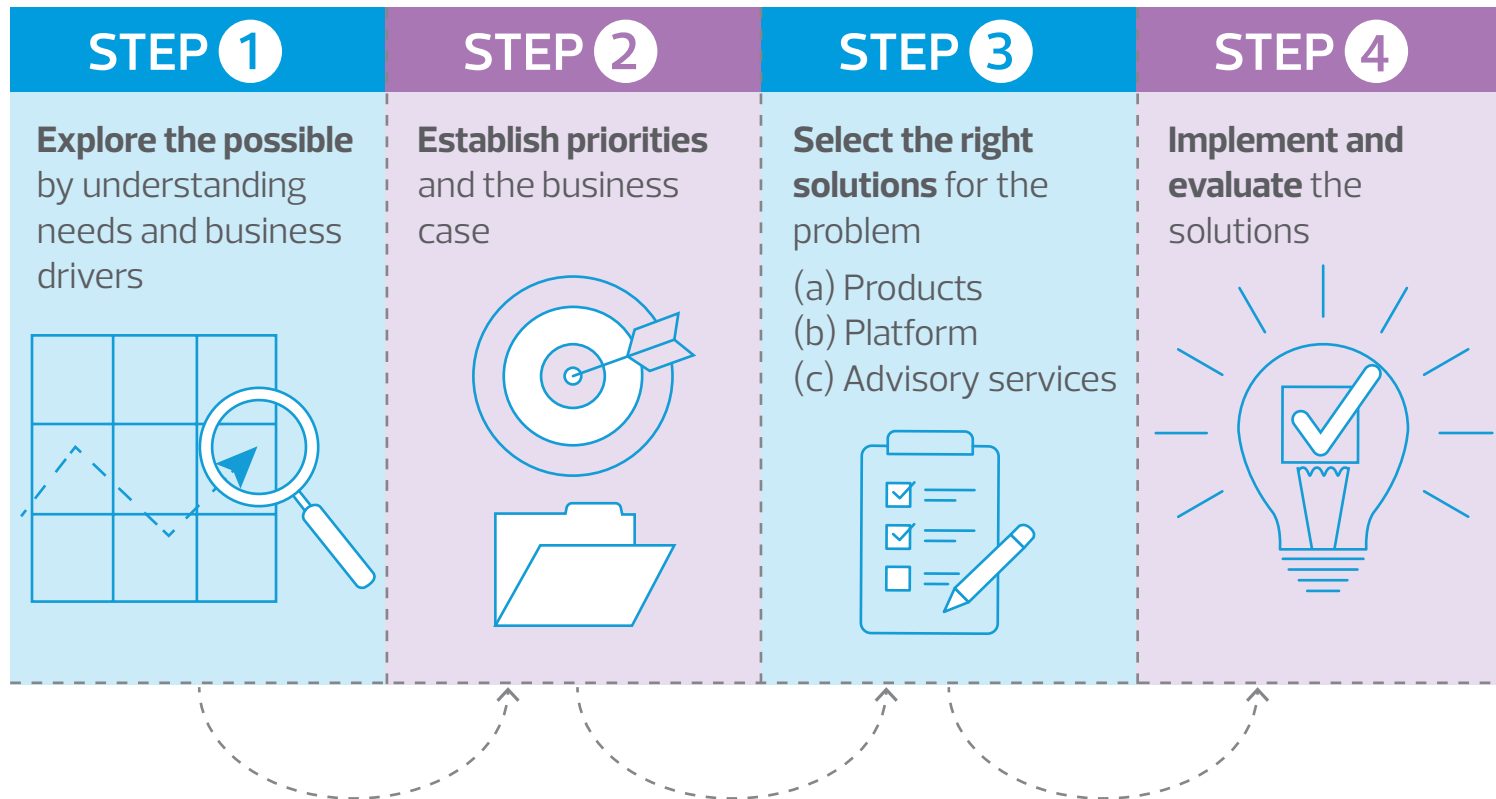
Through technology, we have the opportunity to help our clients address these challenges, elevating their tax functions to help inform and execute their organizational strategies.



SECTION 2

Start your journey

With so many complexities, and tools to help solve them, where to begin? Our tax technology specialists take a consultative approach to help you get started.



Take your tax function from reactive to proactive. Tax transformation is a journey and your RSM advisors are here to help at every step. Efficiency isn't the goal; it's just one stop along the way. The true destination is when that efficiency carves a new path, one paved by data analysis, decision-making, innovation and enlightenment. Put your tax technology to work for you -- and you'll have fulfilled tax professionals and business growth to show for it.

SECTION 3

See what's possible through technology

Client requests for easy scenario-planning solutions related to proposed regulatory changes are on the rise. Our team leverages data visualization and analytics tools to develop custom dashboards on-demand with clients, who can then create alternative modeling and quickly understand the impact on their business.



These sleek solutions put clients in control, enabling them to adjust the parameters based on proposed changes to legislation. Recent examples include dashboards showing potential impacts on a multinational business as a result of proposed GILTI changes, or the impact of selling a business now vs. deferring as a result of regulatory changes proposed in the Made in America tax plan.

Whether RSM is building a solution using a ready-made platform, or upskilling tax function staff to begin developing tax visualization models on their own, we can help.

The challenges facing tax departments are many, and the number and variety of available solutions are even greater. Our tax technology teams specialize in meeting clients where they are in their transformation journey, cutting through the buzzwords to offer scalable technology services.



SECTION 4

What you need to know

Identifying when technology can benefit the organization

The following are just a few examples of scenarios where tax technology can—and in many cases, should—be brought into discussions.

- ERP implementation, upgrade or conversion is pending
- Finance transformation or modernization programs are planned or in process and the tax department should have a seat at the table
- C-suite wants the tax department to do more with less or wants them to automate their processes and deliver more business value
- Significant turnover is requiring leadership to rethink their tax function
- Tax is transitioning back to an in-house function
- Business leadership needs more organization, collaboration and tracking of tax department deliverables for full transparency
- Changing tax regulation and regimes require change across people, processes and technology in the tax function

- Tax personnel are seeking to drive change from within to ease the burden of collecting and cataloging information gathering for compliance season and planning activities
- Major expansion or a change in business operations is under consideration
- Post-merger tax functions or system integration need retooling
- IPO/SPAC readiness requires review of tax processes and technology



SECTION 5

Who to call

 Corporate	 Partnership	 Family office
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Who we are

Right-fit solutions are as unique as our clients' businesses. We can help.

There is no one-size-fits-all tax technology solution. RSM's dedicated tax technology specialists are skilled at helping clients select the best solutions for today while anticipating their future needs.

 <p>100+</p> <p>100+ tax consulting professionals with backgrounds in tax technical, technology, product development and innovation</p>	 <p>36</p> <p>innovative technology solutions...and growing</p>	 <p>1000s</p> <p>of manual hours reduced for our clients through technology</p>
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