



Tax & Accounting

CCH[®] Sales Tax Compliance Services

Corporate

Sales and use tax compliance can often involve hours of management and valuable staff labor each month to ensure tax returns are prepared correctly and filed in a timely manner to the applicable taxing authorities. With CCH Sales Tax Compliance Services, you shift your company's labor-intensive sales and use tax filing burden to Wolters Kluwer. Let the industry's most highly respected tax company function as an extension of your corporate tax or accounting department.

As a CCH Sales Tax Compliance Services client, you will always have full visibility of your tax returns and will be notified of any needed action on your part. Your designated Wolters Kluwer account manager will ensure you have regular open communication whenever you need it.

For Maximum Peace of Mind, Trust the Best
With Wolters Kluwer on your team, you'll benefit from:

- **Best Practice Methodology** — Wolters Kluwer is one of the most recognized and trusted leaders in the tax compliance world.

We apply a "best practice" approach to sales and use tax return outsourcing that will ensure your tax returns are complete, accurate and filed in a timely manner.

- **Stability** — Five generations of professionals have considered Wolters Kluwer an essential

part of the compliance process. You can trust us to be here today, tomorrow and for years to come.

- **Cost Savings** — Shifting the administrative burden of tax return filing to sales and use tax experts can generate significant savings to your company while simplifying your operations.
- **More Efficient Use of Skilled Company Resources** — Using CCH Sales Tax Compliance Services will free up your personnel to focus on improving your company's tax compliance level through internal reviews, taxability research, exemption certificate management and inter-departmental (i.e. AR, AP, Order Entry, Inventory Management, etc.) tax-related guidance and training.
- **Quality Service** — By continuously monitoring our performance against customer Service Level Agreements (SLAs), Wolters Kluwer ensures your satisfaction remains high and your expectations are met.

World Class Customer Service, Guaranteed

CCH Sales Tax Compliance Services are governed by client-specific SLAs. As a CCH Sales Tax Compliance Service client, you will have a designated account manager who will ensure that all services performed meet your SLA. During the monthly cycle, you will have visibility to the preparation and filing process as well as all tax authority correspondence through a secure customer portal.

After each production cycle is completed, an evaluation is performed and any issues or concerns are addressed and resolved. Your designated account manager will be in regular contact with you and your staff to receive and provide feedback in order to ensure that your expectations are fully met.

Everything You Need for Hassle-Free Compliance

The CCH Sales Tax Compliance Service includes:

- **Company Setup and Tax Return Configuration** — Wolters Kluwer works with your staff to compile all required company profile and tax return-related information, including applicable states and separately reported localities, filing frequencies, permit numbers and other relevant information. Additionally, Wolters Kluwer will work with you to ensure we understand all of your data requirements so that the monthly transactional data can be accurately populated. Once the setup is completed, there will be a one month parallel test to confirm that the returns are producing the expected results.
- **Tax Return Population and Review** — At the beginning of each month, your company will generate and submit a file of monthly transactions/liability data to Wolters Kluwer. Our tax preparers will load the transactional data file, populate the required sales and use tax returns and perform an initial review to verify that the tax returns were populated correctly.
- **Manual Adjustments** — Based on your company's particular needs, the tax preparer will include all the needed adjustments to the tax return. These adjustments may include, but are not limited to:
 - Identifying untaxed purchase transactions that require consumer use tax reporting.
 - Zeroing-out negative numbers from the tax returns that are not allowable under state and local law, and transferring them to a credit carry-forward spreadsheet.
 - Applying previous credits on current tax returns when applicable.
 - Calculating and applying prepayments.
 - Bad-debt deductions.
 - Excess tax collected if gross-up processing is not utilized.
 - Other adjustments as needed.

- **Final Review and Wolters Kluwer Approval** — After all adjustments have been made to the returns, a senior level tax professional will complete a detailed review and approve the tax return.
- **Fund Notification and Management** — After all required tax returns are prepared, reviewed and approved, a remittance request is generated so that you can fund all remittances for the period. Once a confirmation of funds is provided, checks are printed and/or EFT payments are prepared for origination.
- **Tax Return Filing and Remittance** — All tax returns are generated and attached to the associated check and mailed to the applicable taxing authority. Additionally, all electronic and website tax returns are prepared and sent.
- **Tax Return Archiving** — Following the completion and filing of required sales and use tax returns, all returns, reporting and remittance documentation are archived. All archived documentation will be available to you at any time for review or audit purposes.
- **Tax Notice Management** — Wolters Kluwer handles all notices received by tax authorities. Occasionally, a tax notice from a state department of revenue may be received that could represent a reporting-related issue that will need to be addressed. Wolters Kluwer will log all notices within 48 hours. Every notice will be addressed and resolved before the beginning of the next production cycle, or before the required deadline of the tax notice, whichever comes first.

Professional Services

Partner with our highly knowledgeable and skilled Professional Services team to streamline your sales tax workflow. Reduce risk and manage complex sales tax operations and issues with beneficial features, including nexus studies, SKU mapping, rules and configurations, and custom taxability research. Form a partnership today with Wolters Kluwer and discover our personalized, hands-on services that will meet your individual needs and ensure you are achieving the highest levels of compliance.