



Tax & Accounting

## Professional and Client Services

Corporate

Get the most out of all your software investments with Professional and Client Services from Wolters Kluwer. Improve your indirect tax workflow and ensure you are achieving the highest possible levels of compliance. Working hand in hand with you, our team of experienced consultants and certified partners will develop the best game plan to ensure your staff is using all products and services to their full potential.

### Professional and Client Services

- System implementation and configuration
- End-user software evaluations and tax-related process assessments
- Process reviews and recommendations
- SKU mapping
- Custom taxability research
- Nexus determination

**The most trusted source in the industry** — Wolters Kluwer brings over 100 years of tax and accounting expertise providing world class content and innovative solutions that will drive greater levels of accuracy, accountability and efficiency into your workday.

**Deep staff knowledge and expertise** — Our team has decades of experience and expertise in sales and use tax issues, compliance, tax statutes and interpretation, audit defense, software installation and ERP system integration. You can be confident that your sales tax operations are optimized and your tax software solution is configured and installed correctly — the first time.

**An established methodology for approaching all service engagements** — We apply our proven techniques to businesses of all sizes, establishing a clear goal for the engagement, and optimizing workflow for a strong return on investment.

### Tax Workshops

Give your team the power to make your business software perform to its fullest with our Tax Requirements Workshop.

Our Tax Workshops are designed to help you understand your organization's needs as they evolve so you can reap the benefits of an optimized workflow. Once the evaluation is complete, we provide a report of findings and recommendations, including how to build a business case to obtain funds to purchase/license software applications. Wolters Kluwer software purchase or ownership is not required.

**Software Evaluation Service** — An in-depth review and appraisal of your sales and use tax processes, including:

- Existing tax system operations; integration to billing/ERP systems
- Business operations and tax compliance requirements, as well as the status of your organization's sales and use tax footprint
- Current tax collection and filing obligations
- Future challenges and goals with respect to tax automation opportunities that are supported by software applications
- The accuracy and effectiveness of your practices and methodologies
- Opportunities associated with tax savings that may be used to support investments in software

**Tax Requirements Workshop Service** — A comprehensive review and appraisal of your current business processes, including:

- Product line requirements
- Tax and business requirements for processing potential customer exemptions
- Target billing system and ability to consume tax content or integration with Wolters Kluwer products

- Tax integration architecture between billing system, e-commerce and POS register systems
- Best data extraction and consumption process or integration of Wolters Kluwer software products
- Customer current tax registration and collections obligations as well as business operations
- Monthly tax compliance and reporting requirements and associated processes

### Customer Service and Onboarding

Professional Onboarding is designed for new customers using Wolters Kluwer software. With the help of a Professional and Client Services team member or Individual Consultant, you will receive technical guidance to properly configure the software for your needs.

Includes:

- An assigned Implementation Specialist
- Formal kickoff with team introductions and clear expectations
- Assistance with the technical set up associated with Wolters Kluwer software

### Mapping

Professional and Client Services team will perform an in-depth analysis of the products or services you provide, compiling all SKUs and G/L account numbers. They will then review a mapping guide and recommend and select the best Group-Item mappings.

### Address Validation

The Address Validation service includes standardization to US Post Office delivery standards and case formatting for addresses.

Includes:

- Full address verification
- Correct assignment of city, state, county and ZIP code
- Correct the spelling and formatting of the street, city and state
- Return county
- Return ZIP+4

**Tax Compliance Review Services**

Our Professional and Client Services group can provide a Tax Compliance Review Service related to Voluntary Disclosure Agreements (VDA), Nexus Study and/or Tax & Business Registration.

At Wolters Kluwer, we strive to help corporations like yours succeed. From new hires to seasoned professionals, we ensure your staff is using our product and services to their full potential, greatly increasing their efficiency. We also help you properly set up and configure your software solution so your entire business process is fully optimized.

**Tax Compliance Review Process**

