WHY CHOOSE TAXIOM

Taxiom
Your Tax Operations Team

Avalara
Certified Implementation Partner

VERTEX®

At Taxiom, we're your tax operations team—managing the complexity of sales tax compliance so your team doesn't have to.

Most finance teams aren't trained in sales tax <u>or</u> automation, making compliance difficult to manage effectively.

Rather than navigating this alone, we provide compliance guidance and ensure your systems and processes stay fully aligned with your ongoing needs.

From setup to ongoing maintenance of tax automation tools, we keep compliance clean, your team freed up, and risk minimized.

We also manage nexus exposure, registrations, backfilings, and provide tailored compliance support that fits your systems, structure, and stage of growth.

THREE REASONS TO TRUST US WITH MANAGING SALES TAX AUTOMATION

1 **We know your business**

We're already familiar with compliance requirements, your business, systems, and technology — and that makes for a quick discovery process. We know how all the pieces will fit together to keep your compliance clean leveraging industry leading tax automation tools.

2 **We're trained by your providers**

We've undergone in-depth training with various sales tax automation platforms to learn how to ensure a smooth implementation process.

3 **We can manage it for you**

Tax automation tools like Avalara are powerful—but complex. Most finance teams aren't trained in sales tax or automation.

Instead of piling this onto someone's already full plate, we handle your sales tax compliance and automation end-to-end, freeing your team to focus on higher-value work.

WHAT ARE THE CHALLENGES?

Managing Tax Compliance

Having tax automation software is just one piece of the puzzle. The overall compliance process needs to be coordinated and managed to ensure companies can grow without risk. It's essential to have the right expertise and processes in place.

Managing Changing Compliance Needs

Setting up your software is just part of implementation. The overall process needs to be coordinated and managed to ensure a smooth cutover to your new system. The Vendor's support assumes that the customer will manage the process themselves.

Managing Automation Tools

You need to know your precise business profile and tax requirements to configure your software correctly. Sales Tax Automation software can easily take months to master as automation tools need to be constantly fine tuned for your changing compliance needs.

Minimizing Your Risk & Freeing Up Time

Tax laws are complex and ever-changing, requiring constant attention and expertise. Without the right people, tools, and processes in place, your team will spend valuable time on compliance instead of focusing on strategic, high-value activities that drive growth.

WHAT YOU GET WITH OUR MANAGED SERVICES

MORE CONFIDENCE

With our rigorous training and access to vendor tools and support, you can be confident compliance will be clean.

A BETTER EXPERIENCE

We're your single, seamless point of contact. We're knowledgeable about your systems, familiar with your challenges, and focused on your business success.

FASTER TIME TO VALUE

Implementing & maintaining a tax compliance solution can be time-consuming, but we're trained to accelerate your time to value while minimizing your employee time commitment.

We're Here to Help

From managing the tax technology to ongoing compliance support, let us make this easier on you.

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HOW DO WE HELP MANAGE SALES TAX?

- Taxiom can help you understand your sales tax requirements and provide & execute on a plan of action once you approve.

- We'll schedule regular meetings to check-in on any changes with your business that may impact sales tax, we'll provide recommendations, and then make any needed changes to your sales tax automation platform (once you approve).

- We manage the ongoing maintenance of tax automation tools like Avalara, keeping them in tune with changing business needs.

- We'll make sure your sales/invoicing systems are properly connected and working with your sales tax automation platform.

- We can work with you to optimize invoicing & exemption certificate workflows.

- We'll help ensure the automated sales tax filings are done right and we can get your team the reports they'll need to do reconciliations.

- We can aid in working with your sales tax automation vendor to save you money on the software, implementation costs, and return filing costs.

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TAXIOM VS VENDOR IMPLEMENTATION & MANAGED SERVICES

While software vendors specializes in sales tax automation software, their implementation and managed services options may not be right for everyone. Below is how our services compare:

How We Compare	Vendor Implementation	Vendor Managed Support	Taxiom Managed Services
Ongoing support	Not included	YOU initiate through case	Just call/email us
Set up system connections	One time project	Only certain connections	Included
Monitor nexus obligations	Not included	Once a year	Included
Update nexus settings	One time only	YOU initiate through case	Included
Update sales tax filings	One time only	YOU initiate through case	Included
Work with vendor on issues	Not included	Not included	Included
Figure out sales tax answers	Not included	Not included	Included

==Save time and money be leveraging our services instead. They will be less expensive, and can do more for your company.==

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