WHAT THE NEXT GEN OF PARTNERSHIP TAX TECHNOLOGY LOOKS LIKE

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Introductions

Brad Collins  
PRINCIPAL  
Partnership Technology  
Services Leader  
New York, NY  
Brad.Collins@rsmus.com

Lauren Demas  
PRINCIPAL  
Partnership Technology  
Services  
Washington, DC  
Lauren.Demas@rsmus.com

Dave Schwartz  
SR. DIRECTOR  
Partnership Technology  
Services  
New York, NY  
Dave.Schwartz@rsmus.com

John Ihne  
SR. MANAGER  
Partnership Technology  
Services  
New York, NY  
John.Ihne@rsmus.com
“Speed” has an expanded definition.
The data you have is only as good as the *time it takes* to act on it.
Data is an asset of your entire organization, *not* your vendor’s organization.
Efficiency is king—but *reliability* is queen.
Tax compliance technology isn’t a product; it’s a service.
You have multiple tiers in your private equity structure and you need to make a last-minute change to an investment at the bottom of your structure before issuing K-1s.
PRACTICAL APPLICATION 2

You need to change an amount in the investment but you don’t want to change the work you have done.
You want to see the tax footprint of one partner in your structure
Practical applications

The Old Way (Excel) v. The New Way (PartnerSight)

PRACTICAL APPLICATION 4

You want to see all K-1s for one partner in your structure
Tax technology in 2021 and beyond

Implementing Partnership Tax Technology
WHAT'S NEXT: Tax innovation webcast series

1. July 13 / 2 p.m.
   THE TAX FUNCTION OF THE FUTURE

2. Sept. 9 / 2 p.m.
   STATE AND LOCAL TAX TECHNOLOGY

3. Oct. 19 / 2 p.m.
   INTERNATIONAL TAX TECHNOLOGY

4. Dec. 2 / 2 p.m.
   TAX TECHNOLOGY FOR FAMILY OFFICE