



WHAT THE NEXT GEN OF PARTNERSHIP TAX TECHNOLOGY LOOKS LIKE

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Introductions



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“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***.

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



PRACTICAL APPLICATION 1

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

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



PRACTICAL APPLICATION 2

You need to change an amount in the investment
but you don't want to change the work you have done

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



PRACTICAL APPLICATION 3

You want to see the tax footprint of one partner in your structure

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



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