



# FINANCIAL PERFORMANCE DRIVEN BY TAX DATA



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# Introductions



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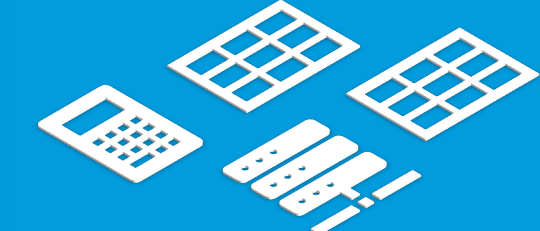
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# Social digital evolution

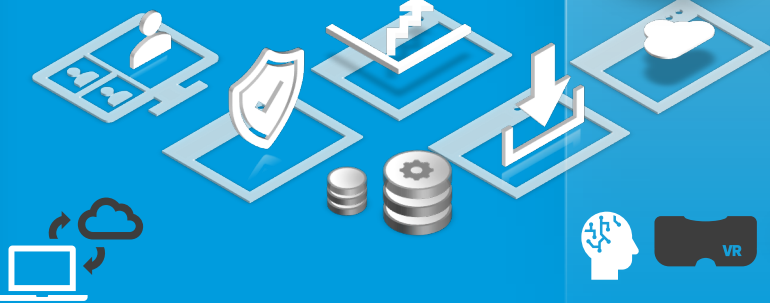
Take flight:  
Embrace change, for our  
upcoming generation



1900s | Pre-digital age  
Pen, paper, ledgers, boxes



1980s | Mid-digital age Web 1.0  
Personal computers, spreadsheets, adoption of the World Wide Web



2000s | Digital revolution Web 2.0  
Mobile computing, web platforms, data security, unified experience



2020s | Full adoption SaaS driven digital futures  
SaaS, Artificial intelligence, blockchain, automation, personalized experiences

Local small offices



Nationwide large offices



Shift to globalization, a decentralized and technology enabled virtual environment



Meeting the future.  
A virtually connected world without barriers.

The data you have is only as good  
as the ***time it takes*** to act on it.



*The old way (Excel) v. The new way (PartnerSight)*



## PRACTICAL APPLICATION 1

Determining state tax liability for investors by calculating withholding for non-resident investors for an asset sale in order to calculate a distribution holdback

*The old way (Excel) v. The new way (PartnerSight)*



## PRACTICAL APPLICATION 2

Reconciling performance (cash) with tax calculations for an investor

*The old way (Excel) v. The new way (PartnerSight)*



## PRACTICAL APPLICATION 3

Understanding and properly planning for tax ramifications  
of a potential investment or sale



# Get in touch to learn more

## PartnerSight core features

**PartnerSight** transforms the tax compliance function from cost-center to value-creation center, with real-time insights for better, quicker investment decisions. Together with RSM's suite of proprietary technologies, PartnerSight provides the high level of support partnerships need.

### REAL-TIME COLLABORATION

- Built-in communication features reduce reliance on email and enhance collaboration
- Real-time automated progress and status tracking make it easy to see your engagement team's work

### STREAMLINED PROCESSES WITH AUTOMATION

- Technology-enabled data extraction, transformation and mapping from your PDF source documents and Excel files
- Specialized interfaces support efficient handling of high volumes of source documents and data files

### ENHANCED INVESTOR RELATIONS

- Facilitates production of transparent tax estimates, projections and K-1s
- Provides investors access to K-1 documents via a secure platform
- Convenient centralized management of investor profiles

### ONE-STOP SHOP FOR TAX INFORMATION

- Centralized organization and distribution of tax documents across related funds
- Customizable dashboards provide business intelligence and analytics of tax data



Visit  
[rsmus.com/partnersight](https://rsmus.com/partnersight)  
for more information



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