



FINANCIAL PERFORMANCE DRIVEN BY TAX DATA

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Introductions



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Social digital evolution

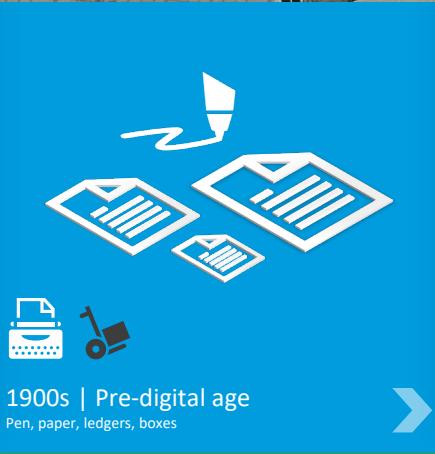
Take flight:
Embrace change, for our
upcoming generation



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



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.

Partner Sight



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
for more information



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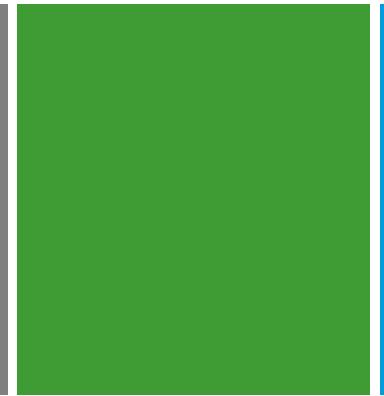
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