



TAX INNOVATION FOR PARTNERSHIPS



THE POWER OF BEING UNDERSTOOD
AUDIT | TAX | CONSULTING





COMPLEX PARTNERSHIPS. COMPLEX TAXATION RULES. SIMPLE DECISION.

Tax departments for pass-through organizations are being stretched by increasingly complex regulations, higher expectations from investors, and antiquated processes and technology. Industry leaders recognize the need for automation, enhanced insights and trusted providers who can support them.

RSM US LLP's proprietary tax technology enables complex partnerships to effectively manage tax compliance and reporting obligations while surfacing insights to guide investment strategies and investor transactions. Our platform offers a modern architecture that provides clients with unprecedented access to data and analytics.

RSM Xcelerate for Tax

RSM Xcelerate for Tax is a cloud-based tax compliance platform that enables improved workflow and enhanced decision-making. Information is shared throughout the system to provide end-to-end support and visibility. The platform's flexible approach enables it to work with your existing ERP or tax preparation systems and scale with your organization as needed.

Our fund-specific interfaces provide additional features tailored to meet the unique needs of alternative investment clients and family offices.

Provided-by-client automation

- Streamlined data collection process—known information is pre-populated
- Technology-enabled data extraction, transformation and mapping from your PDF source documents and Excel data files
- Specialized interfaces support efficient handling of high volumes of source documents and data files (e.g., K-1s)

Real-time secure collaboration

- Secure sharing of tax information with 24/7 web access from anywhere on any device
- Built-in communication features reduce reliance on email and enhance collaboration
- Real-time, automated progress and status tracking
- Full audit trail of platform interactions

One-stop shop for tax information

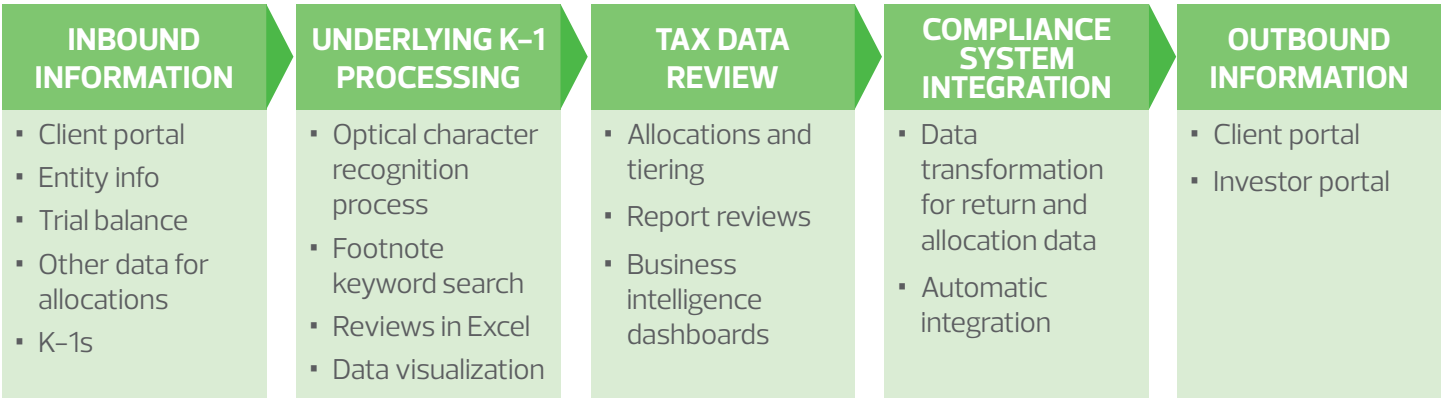
- Cloud-based data storage provides clients with direct access to their information
- Centralized organization and distribution of tax documents across related funds
- Customizable dashboards provide business intelligence and analytics of tax data

Enhanced investor relations

- Facilitated production of transparent tax estimates, projections and K-1s
- Convenient centralized management of investor profiles

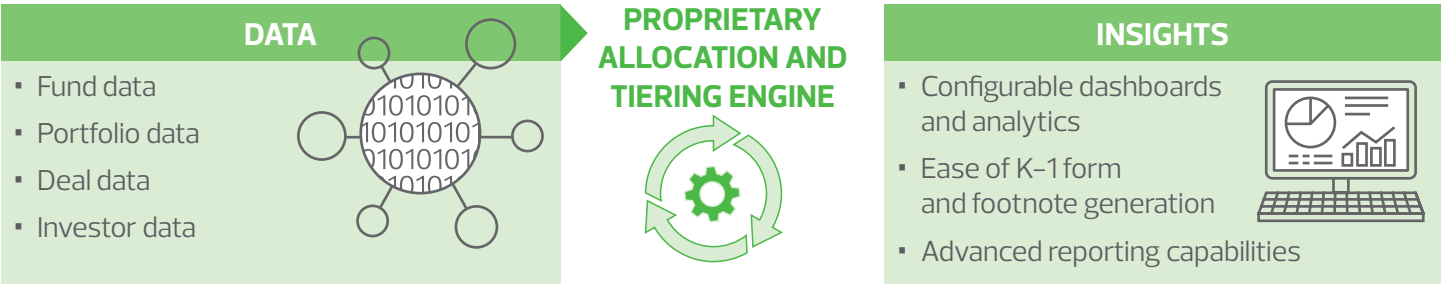


Information is shared throughout the system to provide end-to-end support and visibility



Spotlight on allocation capabilities

The platform's industry-leading allocation and tiering engine handles complex partnership structures and relationships more quickly and accurately than antiquated alternatives. It provides ease of tiering from portfolio companies through to funds as well as configurable dashboards that deliver insights from end to end and top to bottom.



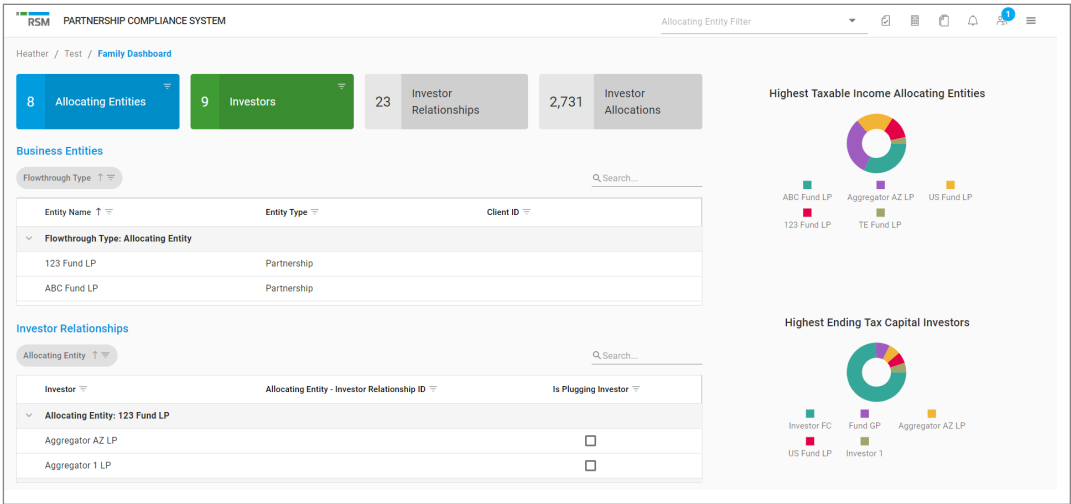
Depth of experience

RSM's extensive experience serving private equity firms and their portfolio companies, fund families, asset management organizations, and family offices positions us to provide unique insights for clients in those industries. Our team of tax technology consultants has the tax technical qualifications, the technology certifications and the deep industry knowledge needed to help you optimize and innovate within your tax function.

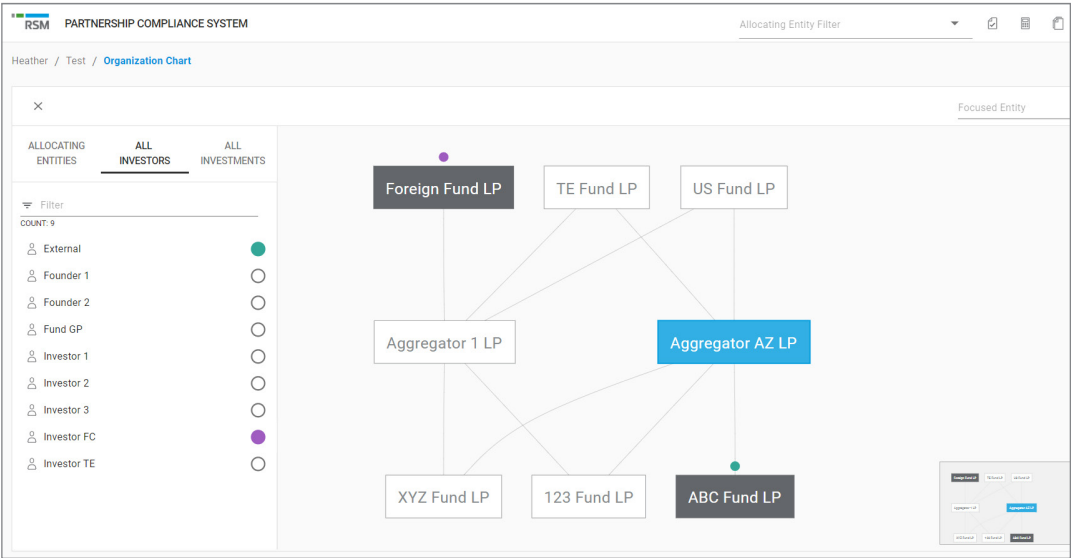


DATA AND INSIGHTS AT YOUR FINGERTIPS

Accessibility
Access your tax data in real time and view configurable dashboards for in-depth analytics



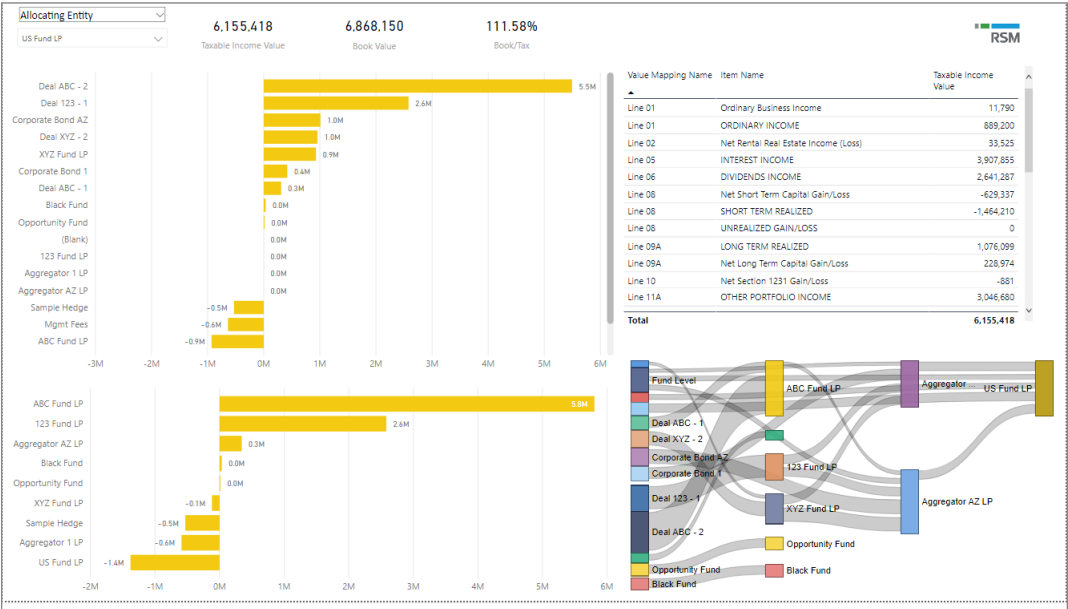
Organization
Display complex organizational structures and related investors instantly to understand the flow of data throughout the entire structure





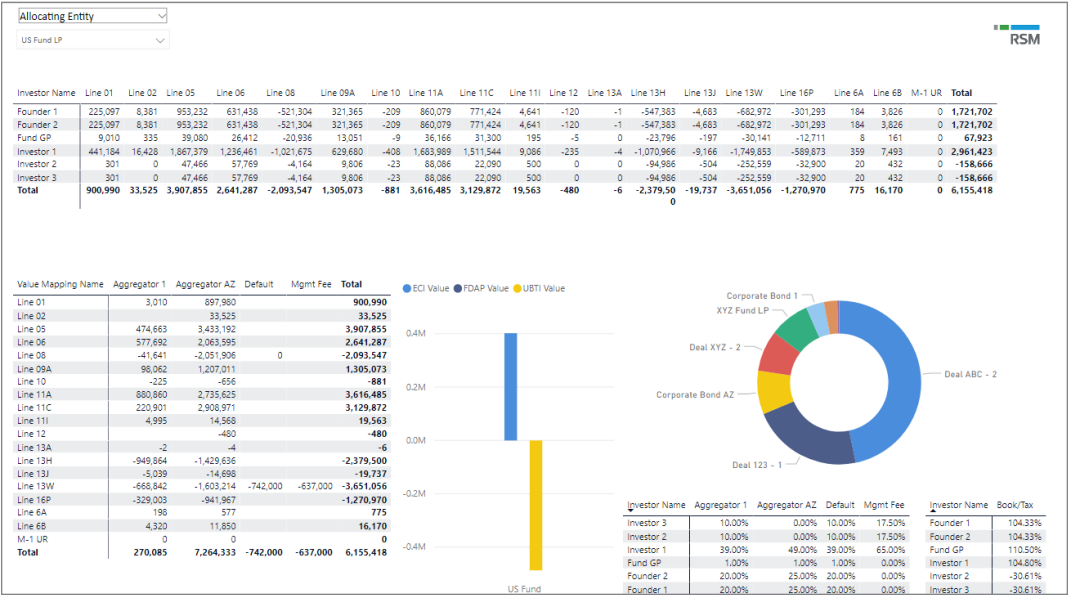
Analytics

Provide investors access to K-1 documents and associated analytics via a secure cloud-based platform



Allocations

Manage complexity across investors, funds, and deals to accelerate compliance and inform new opportunities



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