

CPA.com and Vertex  
**Firm Advisor Program**

CPA.com/Vertex | 855.855.5CPA

A revolutionary  
approach to  
sales and use  
tax automation



# Simplify sales tax for your clients.

## Automation makes it possible.

The complexity of managing sales and use tax can drain your clients' time and resources — yet many of them are still handling this arduous work. With ever-changing legislation, it will only continue to get more complex and time-consuming for your clients.

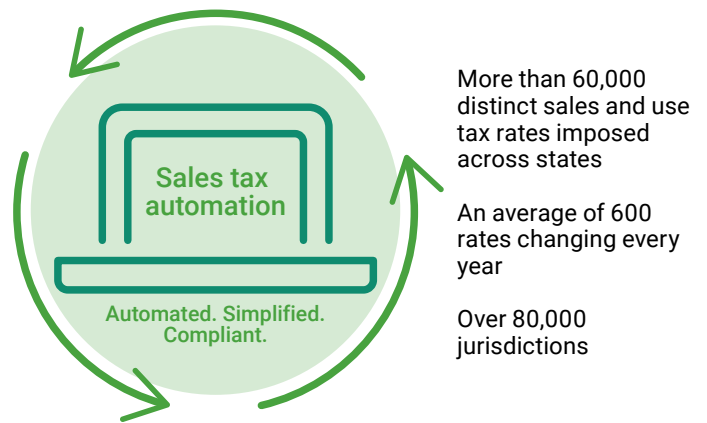
When you consider the thousands of state- and federal-level jurisdictions as well as the volume of changing rates each year, it's easy to understand why clients struggle to keep up. Additionally, these continuous changes heighten your clients risk of non-compliance, leaving them vulnerable to audits and hefty penalties. With an average small business audit costing over \$100,000, clients require your support more than ever.

CPA.com and Vertex recognize these challenges, and have partnered to bring firms an end-to-end sales and use tax solution as part of the Firm

Advisor Program. This program allows you to expand your trusted advisor role in sales and use tax, create a new revenue stream and bolster client satisfaction.

## Complete sales and use tax automation in one solution

The Firm Advisor Program represents a revolutionary approach to keeping up with thousands of jurisdictions and rapidly changing rates.



## A single solution to manage sales and use tax compliance.

The Firm Advisor Program simplifies sales and use tax while also offering exclusive pricing for firms and their clients. The program is powered by the leading corporate tax solution, Vertex Cloud, and is used by some of the world's largest enterprise organizations. It provides sales and use tax automation across the board to support clients in all areas and ensures compliance.



### Calculations and returns in one solution

Perform tax calculations and generate signature-ready PDF returns.



### Consumer use tax

Calculate consumer use tax and file returns.



### Exemption certificate management

Store, update and maintain exemption certificates.



### Rate files

Download rate files by state to access tax rates.



### Returns-only offering

Upload tax data files from any data source and generate signature-ready PDF returns.

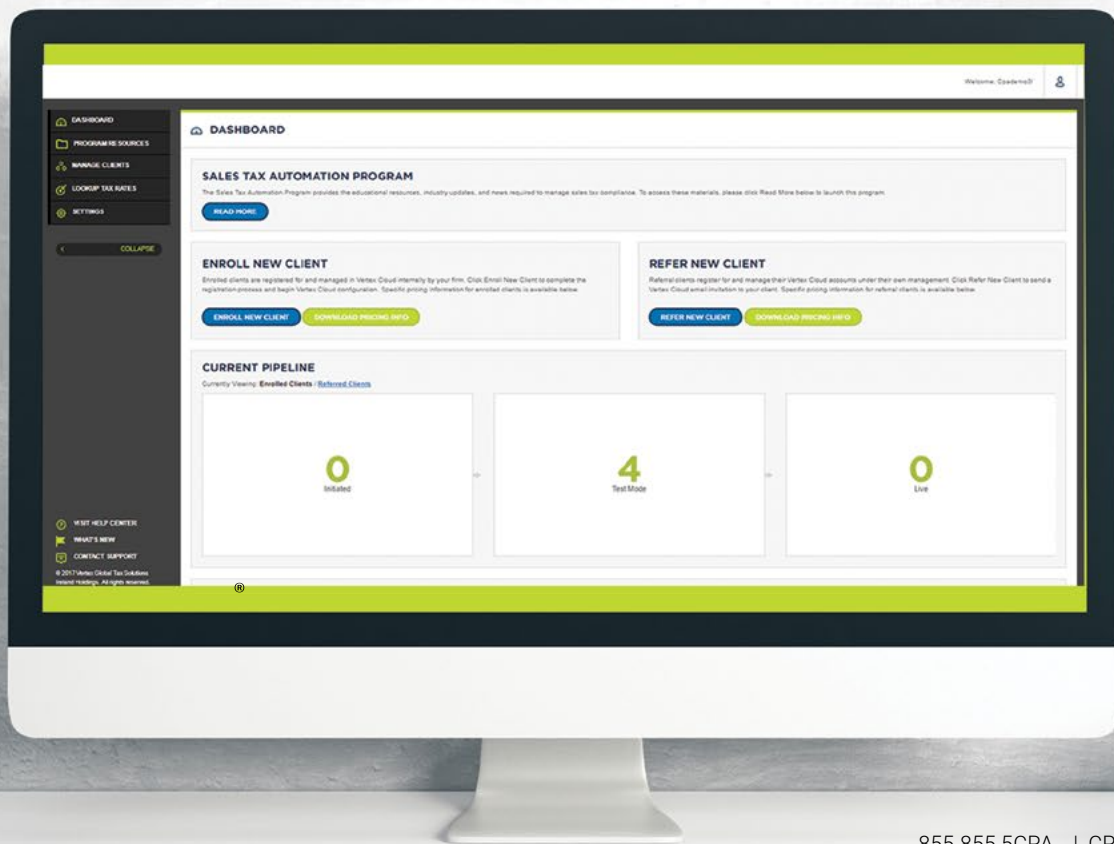
# Further expand your trusted advisor role.

The Firm Advisor Program helps you provide higher value advisory services to your clients by leveraging Vertex Cloud to extend your firm's offerings into sales and use tax.

The program is specifically designed for accounting firms, and is customizable to fit the needs of your firm and clients. Additionally, this program gives your firm access to the Accountant Console. This unique online console allows your firm the ability to manage all client information in one central location, providing your firm with clearer visibility.

## The Accountant Console offers:

- **Dashboard** — Data analytics and quick navigation to commonly used functions
- **User access** — Create, view and manage firm user access with defined roles.
- **Secure and accessible** — Access to your client data and returns 24/7 through a cloud-based solution
- **Reporting** — View and analyze information via detailed reports such as product taxability.
- **End-to-end solution** — Configuration, calculations and returns in a single solution to fulfill your clients' sales and use tax obligations
- **Resources** — Access resources and tools built for the accounting professional, to help aid in your client discussions surrounding SUT compliance.



# CPA.com and Vertex Firm Advisor Program

## Firm referral option

If your firm does not want to provide outsourcing services internally, you can refer clients directly to Vertex. By doing this, you can be assured that your clients have access to best-of-breed tools and superior customer service through the experts at Vertex. If your firm is looking for ways to support your clients looking for SUT compliance and advisory services, but is not equipped with internal experts to offer these services, the referral option is a convenient way to fully service clients.

- **Preferred pricing** for clients of enrolled accounting firms of the program
- **Enhanced on-boarding** through a dedicated implementation team

## Contact us today.

The Firm Advisor Program, brought to you by CPA.com and Vertex, combines a leading sales and use tax automation solution with the tools your firm needs to manage these services. Learn how you can expand your trusted adviser role and offer clients a single solution for automating sales and use tax to ensure SUT compliance and reduce the risk of audit and penalties.

**Call 855.855.5CPA or learn more at:  
CPA.com/Vertex**

The power of smart business

“Vertex Cloud is designed for the small and medium business segments – a market that has been in need of an easy-to-use solution for sales and use tax compliance. The solution is simple to navigate and understand, yet the tax content and tools available in this online sales tax solution are unsurpassed. The Firm Advisor Program has been a significant asset in my practice and a wonderful tool for my clients.”

**Joni Johnson-Powe, CPA, J.D.**

CEO/Principal  
Taxnologi Solutions

