



PREMIUM TAX AS A SERVICE (PTAAS): “AT A GLANCE”

Tax Technology Reimagined with SAP S4 and SAP Analytics Platforms

COMPANY OVERVIEW

Who we are ...

- We are a group of professionals, whose backgrounds and prior leadership roles are rooted in Big 4 and global technology consulting firms, as well as Wall Street insurers. Together coupled with the companies infusion of young and talented resources who come well versed in new cloud technologies, we have developed solutions and tools both to make a long lasting difference in the insurance sector, as well as to support our own planned strategic growth.

What we do ...

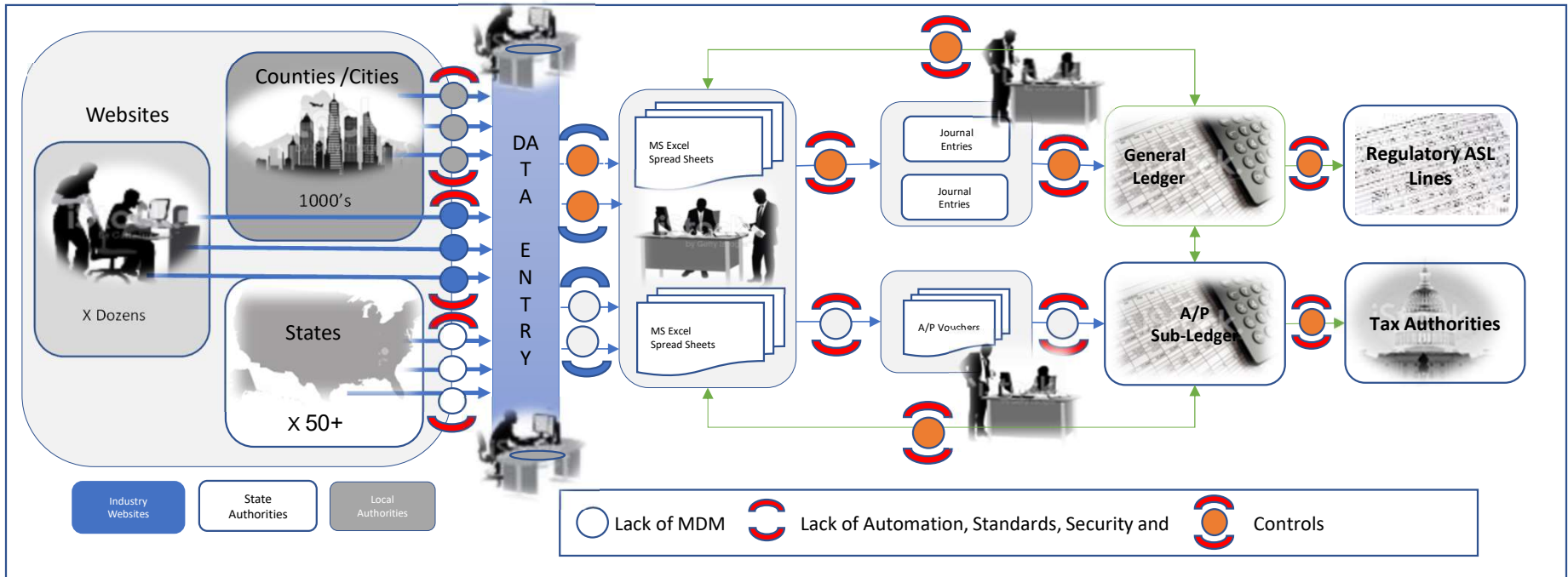
- Provide the insurance industry with unique tax, and value adding business services within a secure cloud environment. These capabilities support calculation of tax provisions, as well as provide tax, finance, and underwriting data to enable tax savings forecasts , avoidance of underpayment of taxes resulting in penalties on premium revenue to a level to support audit defense down to the policy level

Markets we serve ...

- Capabilities to support all forms of insurance providers. In the United States alone, we can support over 2,700 insurers and 3,700 self insured entities. Additionally, in more recent years, a number of companies operating in foreign countries are now being assessed taxes based upon company premium revenue with tax rates as high as 21%

Today's Common Tax "End to End" Process Landscape

If this framework resonates with you and the challenges your staff face your not alone. Multiple sources, technologies, manual data entry, and lack of standards & controls are faced every day in aggregating massive amounts data , generating detailed calculations, and having available cost saving analytics...



Risks:

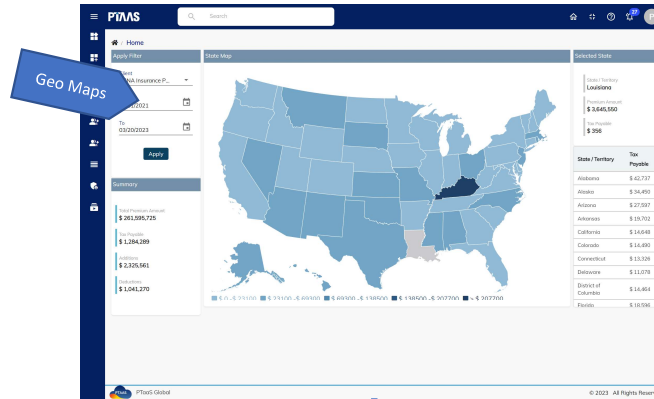
- Consistent inaccurate payments resulting in penalties is likely given the process, controls and data disparity
- External, IRS and State Auditors would present negative findings, and not support a position to refute assessed penalties

Tomorrows Landscape : A Harmonized ‘End to End” Process Landscape

SAP S4 & Core Insurance Systems

Technology Benefits - Highlights

- Single “source to target” Integration layer
- Standardized Tax and Insurance data
- Automated data feeds and controls
- A portal uniting front and back office resources to use common metrics

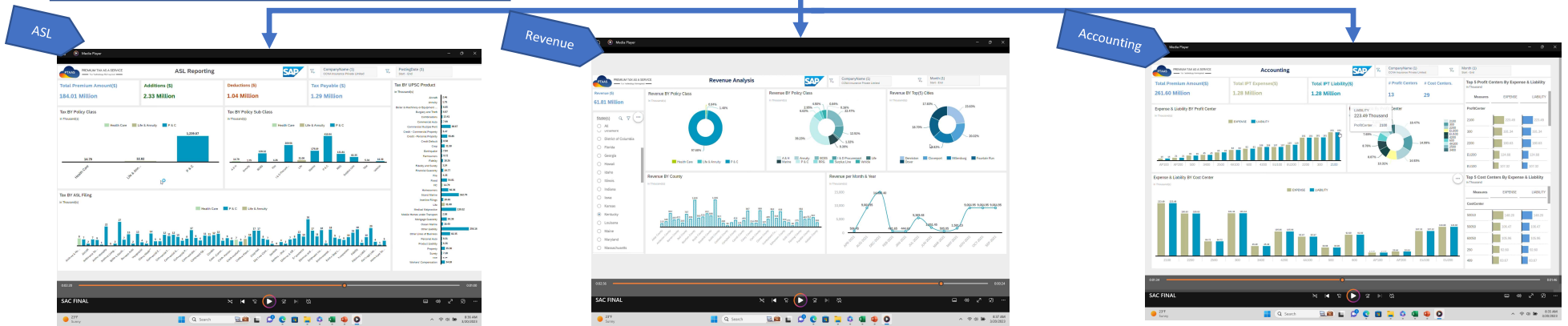


PTaaS

Tax Accounting Benefits - Highlights

- Greater policy level tax and insurance metrics
- Automated liability & Expense JE's generated
- Savings and deductions not taken identified
- Product, Marketing and Underwriting metrics from tax accounting data

SAP Analytics Cloud Dashboards





**PLEASE CONTACT US OR
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MORE INFO**



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