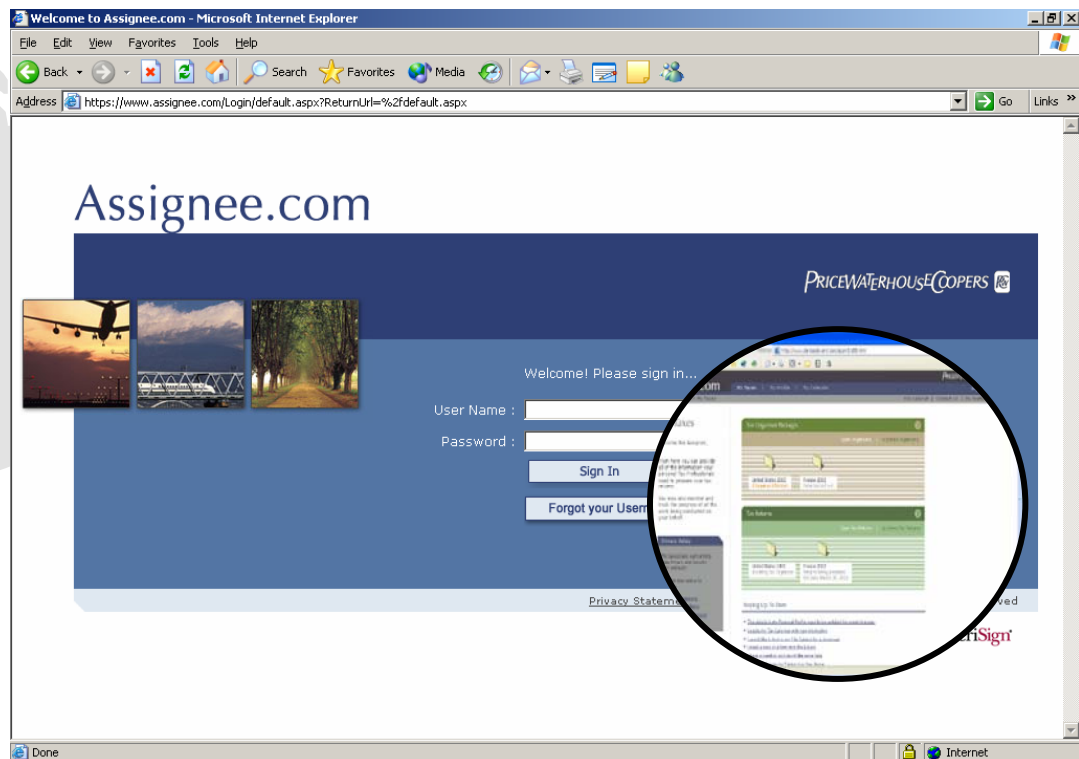


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# International Assignment Solutions

## Presenting ... *The Global Tax Organiser Package*



PRICEWATERHOUSECOOPERS 

## Presenting...The Tax Organizer Package

The strategy of the PricewaterhouseCoopers International Assignment Services practice is to provide assignees with all the tools and information they need to effectively and efficiently meet their global tax compliance responsibilities. Assignee.com provides a secure **single point of contact** for all activities and interactions between assignee and the members of the global engagement team working on their behalf.

The key activity the assignee will undertake is that of providing the PwC team with the information necessary for the preparation of their tax returns. The **Global Tax Organizer Package** – which is delivered in Assignee.com – contains a highly customized set of questions that need to be answered, and ensures that this process is quick, efficient and above all, simple. PwC recognizes and respects the limited time busy assignees have available to devote to this process together with the demand to offer maximum choice and flexibility. Our approach is to significantly simplify and enhance information gathering by eliminating duplication of questions and to providing a **consistent, focused and efficient data collection environment** directly targeted at the individuals circumstances. This approach minimizes the time and effort that assignee must spend recording and returning the requested information.

There are four components in the PwC Global Tax Organizer process – all completed within Assignee.com.

The **Personal Profile** and the **Travel & Workday Calendar** each capture commonly requested information, typically used by those preparing the tax returns in both home and host locations. The third component revolves around the collection of **compensation data** from the individual.

The last is the **Country Transactional Supplement** that collects the detailed transactional information required for a particular country filing.

### Tax Profile for John Assignee

Here is an instruction line on the saving procedure. I.e., click on any update button for the whole profile or something like that.

Personal Details
Edit

\* indicates the fields that are required

* First Name	<input type="text" value="John"/>
Middle Initial	<input type="text"/>
* Last Name	<input type="text" value="Assignee"/>
Prefix	<input type="text"/>
Suffix	<input type="text"/>
Known as	<input type="text"/>
Maiden Name	<input type="text"/>
* Gender	<input type="text" value="Male"/>
* Marital Status	<input type="text" value="Single"/>
* Date of Birth	<input type="text" value="March 01, 1972"/>

Figure 1 – Collectively the Personal Profile, Travel & Workday Calendar, Compensation and the global Country Supplement provide all the information needed to prepare all required tax returns

The on-line **Personal Profile** contains basic personal data about the assignee, their family and their assignment, together with addresses and contact details. The information requested as part of the Profile is a **shared resource** to everyone on the engagement team preparing the assignees returns, since most of the information is commonly required in the preparation of different country-specific returns.

Placing this commonly requested data within Assignee.com and making it available to everyone on the engagement team who needs it ensures that assignees **only need supply the information once**. No longer are they asked to provide information about individual family members each time a tax return needs to be prepared. As part of the Tax Organiser Package, assignees are offered the opportunity to review and if necessary update the information in the Profile. This approach saves the assignee a significant amount of time and contributes to improved assignee satisfaction in the overall tax compliance process.

The **Travel & Workday Calendar** is the second part of the global process. It is a common requirement to understand how long an assignee worked in different countries, states or provinces. This information is typically used to establish residency or filing requirements and historically was asked as part of each organiser sent.

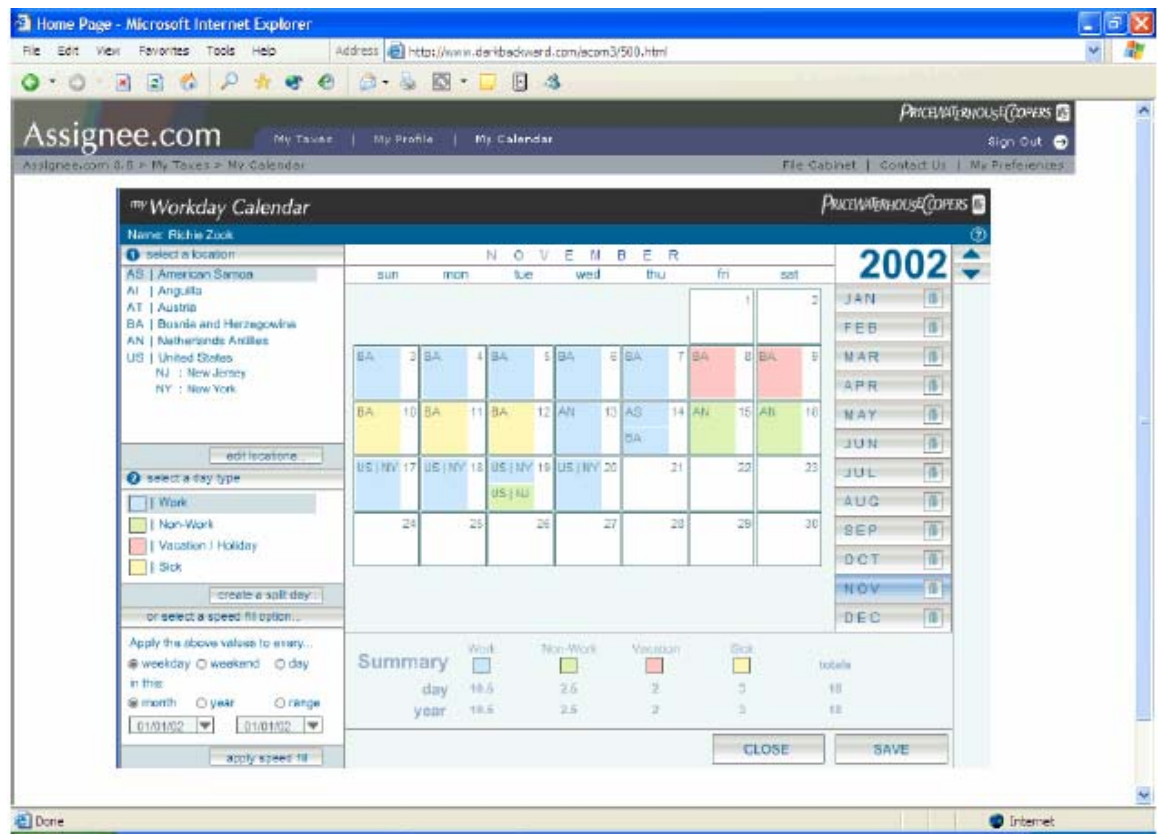


Figure 2 - The Travel & Workday Calendar allows assignees to keep a daily log of their location, activities and travel days. This information is then used by the engagement team to prepare the individual tax returns

Assignee.com contains a Travel & Workday Calendar application that allows assignees to continually record information about the countries they visited over the **lifetime of their assignment**. This perpetual Calendar provides the tax preparer with a detailed breakdown of how long an assignee visited and or worked in each country, together with travel day information.

As part of our goal of ensuring the **maximum flexibility**, the Travel & Workday Calendar can be maintained on-line while within Assignee.com, or a desktop version can be downloaded and installed so that it can be completed off-line throughout the year. When the assignee is ready, they can automatically synchronize the data from their desktop version with Assignee.com at the touch of a button.

Since the Tax Calendar is a common resource shared amongst the global engagement team, as the assignee maintains the information, the **data is used by everyone who needs it**, thus eliminating questions from the individual country supplements. By using the same data in the preparation of both home and host location returns, we help eliminate any chance of data inconsistencies.

The third component of the Tax Organizer Package is **Compensation Collection**. Here assignees are able to supply all the compensation data that they have, both for their current and any previous employer as well as for their spouse. This comprehensive tool is customized to the individual needs of the assignee and their particular circumstances. For example, if the employer is providing compensation data directly to PwC, Compensation Collection will be configured to avoid asking for the same data from the assignee.

**2003 US Organizer Package**  
 Return Package before: **March 1, 2004** Questions? Contact Nick Miller

**Record Compensation Details**

**Compensation Details for Nick Brown**  
 Statement confirmation is located at the bottom of the page

**Compensation Statements**

Please record the details for compensations you have received during the year

The company that authorized PwC services has provided your compensation details to us directly. Therefore, please provide compensation details for you (and your spouse, if applicable) for any other employers during 2003.

Delete	Received from	Edit
	New Employer	<input type="button" value="▶"/>

By ticking this box, I confirm the above details to be correct

Figure 3 - With Compensation Collection the assignee is able to provide all the compensation data they have - customized to their specific needs

The fourth element of our data collection approach is the **Country Transactional Supplement**. In preparing home or host location returns, the tax preparer will have a set of unique questions that will need to be answered. All the questions relating to a single country are collated and placed together within the Global Tax Organizer. In effect, each country has its own 'chapter' within the Organizer. For 2003 there are over 40 different countries available within the Global Tax Organizer process.

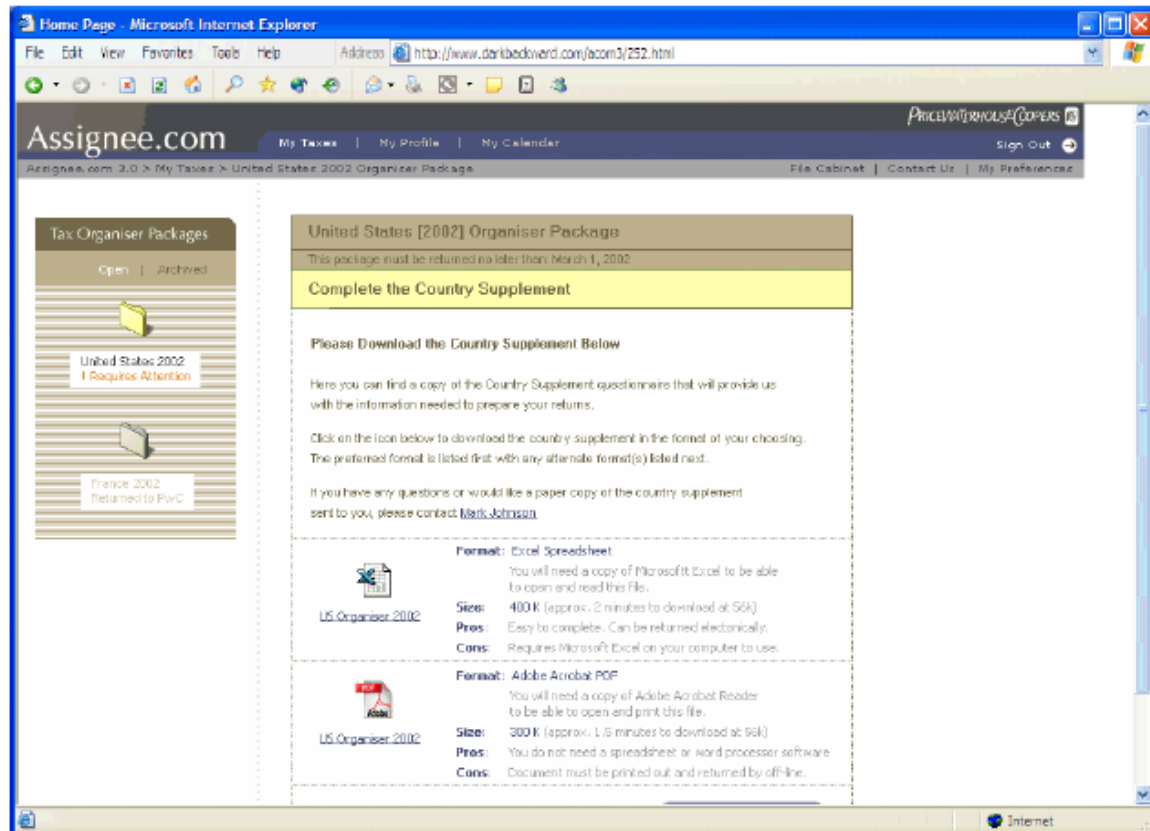


Figure 4 – Individual chapters within the Global Tax Organiser focus on questions relating to a specific country. Each questionnaire is available in a variety of formats

Each country transactional supplement within the Global Tax Organiser has a **familiar and consistent look and feel** to ensure that the assignee is able to quickly focus on providing the relevant information. Customization questions within the Organiser allow the assignee to further tailor the questions presented.

**Flexibility and options** is another hallmark of the PwC Global Tax Organiser process. Most country supplements are available in a variety of formats, and where appropriate different languages. There are even options that allow the country supplements to be customized to the individual needs of a specific engagement or target assignee population. The most popular formats available include Microsoft Excel and Word as well as Adobe Acrobat PDF. All of these organisers can be downloaded and completed off-line and subsequently returned to PwC via Assignee.com

The country transactional supplements for many countries may also be completed **on-line**. The on-line country supplement alternative provides 24 hour a day availability using only a simple web-browser and internet connection for those moving from location to location.

US Country Supplement- Taxpayer Information - Microsoft Internet Explorer

**General**

Occupation Taxpayer  Spouse

X if you want to Contribute to Presidential Campaign fund

X if you authorize taxing authority to discuss your return with PwC

**Wages and Salaries:**

Please send all copies of your current year Forms W-2 to your tax contact.

Taxpayer Spouse	Employer's Name <sup>2</sup>	Taxable wages	Federal Tax Withheld	Fica Withheld	Medicare Tax Withheld	State Tax Withheld	Local Tax Withheld
Taxpayer	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Taxpayer	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Taxpayer	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Taxpayer	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Taxpayer	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

**Information for Direct Deposit of Refund:**

Please send a voided check or deposit slip.

Indicate X for type of accounts:  Checking

I confirm that this page is complete.

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Figure 5 – The on-line country supplement allows assignees to complete their organiser anywhere, anytime using a simple browser and internet connection

Each year, your engagement team reviews the individual circumstances relating to each assignee and determines which chapters of the country supplement are relevant. The supplement chapters are placed inside a **Tax Organiser Package** which is supplemented with detailed instructions and guidance, a timetable and due date for completion is added and a specific engagement team member identified as the primary contact for any questions.

The engagement team will notify assignees via email when the Tax Organiser Package is ready for completion. In Assignee.com, assignees are taken **step by step through the process**.

By offering a variety of formats the PwC Global Tax Organiser process ensures that there few technological or logistical barriers faced by the assignee in the process of the completion of their organisers. Assignee.com provides a secure environment for the exchange of information between the assignee and the PwC engagement team and offers a **greater degree of data privacy and confidentiality** compared to the more traditional email and attachments approach.