

Assessment Tool: What's the Current State of Your Tax Function?

CBIZ TAX FUNCTION ASSESSMENT TOOL			
	Effective Processes in Place	Processes Need Some Improvement	Processes Need Major Improvement
Timely and accurate Schedule K-1 delivery to investors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
State filing and withholding responsibilities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
U.S. foreign reporting requirements, including CFC, PFIC, GILTI, and other international compliance provisions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Foreign withholding, including FATCA/CRS and foreign partnership withholding requirements	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Management of portfolio company tax information reporting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tax planning and forecasting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Transaction planning and related compliance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Investor data management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tax staff recruiting, training and retention	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tax department process efficiency and effectiveness	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>