



KPMG Asset Management Platform

Real Estate



Pioneering the automation of tax compliance and planning with innovative technology.

The demands on the chief tax officer are growing and now technology is available to assist and enable significant improvements.

KPMG's Asset Management Platform is leading-edge technology that can help you reimagine cost-effective, innovative ways to execute tax compliance and planning. Informed by our extensive, in-depth tax knowledge of pass-through structures, our Asset Management Platform enables efficiency and transparency, and helps normalize big data so you can save time, improve accuracy, and discover new tax value-adds for your organization.

In an environment of accelerated complex needs, pass-through organizations require an operating environment that offers:

- Complete transparency into the status of tax deliverables and the capability to drill-down into calculations (not a black box)
- Reduced risk of missing tax compliance and investor reporting deadlines
- Increased operational efficiencies across all aspects of tax compliance (data collection, updating investor/tax info, creating reports, and tax calculations)
- Shared access for client, KPMG, and authorized third parties
- Reduced rework time and enhanced reporting derived from one tax technology platform supporting all major asset classes for both federal and state
- Improved decision support enabled by scenario planning, modeling, estimates, and data analytics
- Removal of constraints on business growth and profitability by replacing manual processes and legacy systems.



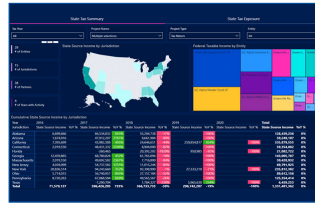
Key system attributes

- Data/document sharing and collaboration
- Workflow/project task tracking
- Dynamic fund/organization chart generation
- Allocations from fund to partner level
- Automated tiering in multi-level structure
- Integrated federal and state calculations
- Powerful, easy-to-customize report writing
- Graphic data visualizations for decision support
- K-1 production and state withholding vouchers, and state composite workpapers
- Data extraction for electronic filing of federal and state tax returns

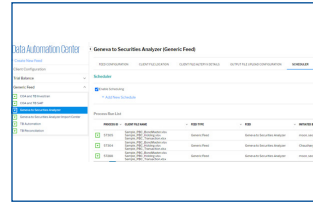
KPMG Asset Management Platform provides:

What-if scenario planning

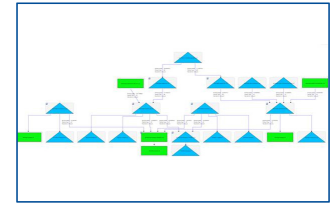
Business intelligence



Data Automation



Multilevel tiering and complex allocations



Our people serving you

KPMG's Asset Management Platform, coupled with our tax experience serving partnerships, RICs, and REITs and executing consistent processes, can help keep your compliance, planning, and reporting on track.

The partners and professionals of KPMG's Pass-through Services practice have extensive experience helping numerous partnership, RIC, and REIT structures overcome their unique tax challenges. Working with our State and Local and Washington National Tax teams, we help you realize tax advantages and maintain compliance by adding clarity through:

- Modeling
- Transactions
- Entity formation structuring
- Tax planning
- Legislative and regulatory developments.

As part of the delivery model, a member of the tax technology team will be available to you throughout the transition planning, client onboarding, and service stages. Some of the key tasks that will be performed during your onboarding include:

- Understanding your current process, data, and systems
- Identifying key milestones to track
- Reviewing and importing your investor and entity data
- Reviewing system-generated fund/organization charts for accuracy
- Tailoring reports to serve your management team and investor demands.

For additional information including a demonstration of KPMG's Asset Management Platform, take a tour of our interactive website at visit.kpmg.us/AMP. For insights from our Asset Management practice, visit us at home.kpmg.us.

Contact us

Yesenia Scheker
Partner, Global Tax Leader, Building,
Construction & Real Estate
 T: 212-954-3509
 E: yscheker@kpmg.com

Charles Ferentinos
Partner,
Tax Technology
 T: 201-307-8093
 E: cferentinos@kpmg.com

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