Global tax compliance vendor RFP template

XX/XX/2026

Below is a structured guide for evaluating tax automation vendors. Stripe Tax is included as a reference point throughout—a concrete example of what best-in-class global tax compliance looks like in 2026. The guide covers setup and implementation, geographical coverage, calculation accuracy, obligation monitoring, registration, filing and remittance, and commercials.

This template includes both section outlines and sample copy. You can design your own branded RFP document or use the copy provided.

Important note: This template doesn't constitute tax or legal advice. It's provided for informational purposes only. Consult your own tax, legal, and other advisers when you're deciding which tax software is right for your business

100+

Countries supported for tax calculation and collection

600+

Product and service tax categories covered

99.999%

Historical uptime for Stripe Tax services

72%

Of online businesses see compliance as a barrier to international growth

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Cover page

The goal of the cover page is to tell vendors exactly what they're looking at and whom to talk to. Include the RFP title, your company's name, a short confidentiality notice, and contact details for the person who manages the process. Dates matter, too. List the issue date and due date right up front so nobody can claim they missed them. Keep the cover page concise.

Contact information

RFP manager	[Full name]
Title	[Title]
Email	[email@company.com]
Phone	[###-###-####]

Key dates

Issue date	[MM/DD/YYYY]
Question due	[MM/DD/YYYY]
Response due	[MM/DD/YYYY]
Evaluation period	[MM/DD/YYYY–MM/DD/YYYY]
Final selection	[MM/DD/YYYY]

Submission format

All responses must be submitted electronically via email in PDF format. Pricing and scoring templates (provided separately in Excel) must be attached in their original formats.

File naming convention

[Vendor name]–[Project name]–RFP–Response–[Date].pdf

Purpose of this RFP

[Your company] is seeking a tax infrastructure partner capable of supporting secure, multicurrency transactions, integrating easily with internal systems via modern APIs, and delivering high reliability, proactive fraud detection, and data transparency across regions.

This document outlines the requirements, evaluation criteria, and process for submitting proposals.

Short confidentiality notice

This RFP contains confidential and proprietary information belonging to [your company]. It's provided solely for the purpose of preparing a response. Distribution beyond those directly involved in preparing a proposal is prohibited. By accepting this RFP, the recipient agrees to protect this information with at least the same degree of care they apply to protect their own confidential information.

Section A: Administrative instructions

Tax compliance cannot wait for a slow vendor selection process—every day without accurate tax collection increases potential exposure. Set the ground rules clearly so vendors can respond quickly and precisely.

A.1 Statement of confidentiality & nondisclosure

All information in this RFP is confidential and intended solely to enable the vendor to prepare a response. Vendors must not disclose, reproduce, or distribute this document or any portion of it without prior written consent from [your company]. Proprietary information included in proposals should be clearly labeled; [your company] will treat it accordingly.

A.2 Limitation of financial liability

This RFP isn't an offer to contract. [Your company] is under no obligation to award a contract or reimburse costs incurred in preparing a response. Vendors are solely responsible for their own expenses throughout this process.

A.3 RFP timeline

Milestone	Target date
RFP issued	Q2 2027
Vendor acknowledgment due	[+3 business days]
Vendor questions due	[+2 weeks]

Milestone	Target date
Q&A distributed to all vendors	[+3 weeks]
Proposal submission deadline	Q3 2027
Evaluation period	Q3 2027
Short list notifications	Q3 2027
Vendor demonstrations	Q3–4 2027
Final selection	Q4 2027
Target go-live	Q1 2028

A.4 Submission guidelines

- All proposals must be submitted by email to [contact email address].
- Vendors must acknowledge receipt within three business days of issue.
- Questions must be submitted in writing by the date listed in A.3.
- All communication must go through the designated RFP manager. Direct contact with other [your company] employees during the evaluation period might result in disqualification.

A.5 Required submission documents

Document	Included?	Notes
Executive summary (PDF)	☐ Yes ☐ No	–
Section E requirements response (PDF)	☐ Yes ☐ No	–
Completed pricing template (Excel)	☐ Yes ☐ No	–
Company profile and financial summary (PDF)	☐ Yes ☐ No	–

Document	Included?	Notes
Three or more client references from comparable businesses (PDF)	☐ Yes ☐ No	–
Compliance certifications: SOC 2 Type II, ISO 27001 (PDF)	☐ Yes ☐ No	–
Geographical coverage list—countries and US states supported today (PDF)	☐ Yes ☐ No	–
Product tax code coverage list (PDF)	☐ Yes ☐ No	–
Case studies with documented implementation timelines and tax accuracy outcomes (PDF)	☐ Yes ☐ No	–
API documentation or developer portal link (PDF or URL)	☐ Yes ☐ No	–
12 months of historical uptime data (PDF)	☐ Yes ☐ No	–
Filing partner list and supported jurisdictions (PDF)	☐ Yes ☐ No	–

A.6 Evaluation overview

[Your company] will evaluate proposals on implementation speed, geographical coverage, calculation accuracy, obligation monitoring, registration support, filing and remittance capabilities, platform integration, and pricing transparency. Vendors must demonstrate capabilities with production evidence. Claims without data or documentation will not be scored.

A.7 Vendor acknowledgment

Vendors must complete and return the acknowledgment below within three business days of receiving this RFP.

We acknowledge receipt of the RFP titled “[RFP name]” and confirm our intention ☐ to submit / ☐ not to submit a response.

Company name: ______________________

Authorized representative: ______________________

Title: ______________________

Date: _______

Section B: Overview and scope of work

Tax compliance complexity grows with every new market, product type, and business model you add. Give vendors the specific context they need to assess whether they can actually serve your business—today and as you grow.

B.1 Company background

[Your company] is a [B2B / B2C / marketplace / SaaS / ecommerce] business that's operating in [insert current markets]. We process about [X] transactions per month across [X] countries and [X] US states. Our product mix includes [physical goods / digital goods / SaaS / services (describe)]. We currently [do / don't] have a tax solution in place. Our primary challenge is [describe (e.g., we're approaching economic nexus thresholds in multiple US states, we're expanding into the EU and need VAT compliance, we have no visibility into where we have tax obligations)].

Here are some additional details you can include to customize:

- Headquarters and primary markets today
- Markets you plan to enter in the next 12–24 months
- Primary product and service types sold
- Split of B2B vs. B2C transactions (relevant for VAT reverse charge and exemption handling)

- Current payments and billing infrastructure (important for integration scope)
- Internal teams involved (e.g., Finance, Tax, Engineering, Legal)

B.2 Project's purpose

This RFP exists to identify a tax compliance partner that can automate our tax obligations as we grow. Here's our current situation: [describe the gap (e.g., we're calculating tax manually and approaching the point where this is no longer sustainable, we have received a notice from a tax authority, we're preparing for an audit or funding round and need to close our compliance gaps)].

Our ideal partner will enable:

- *Accurate, real-time tax calculation at the point of transaction, using precise customer location data*
- *Visibility into where we have tax obligations before we inadvertently exceed thresholds*
- *Registration support in new markets so our team doesn't have to work through local processes from scratch*
- *Automated or partner-enabled filing and remittance so our team isn't manually compiling reports for each jurisdiction*
- *Coverage for our full product mix across all current and planned markets, including digital goods, SaaS, and physical goods*
- *Implementation in days or weeks, not months*
- *A solution that integrates with our existing payment and billing stack without requiring a separate platform*

B.3 Scope of work

Core deliverables:

- **Real-time tax calculation:** Accurate tax rates at checkout across all current markets, achieving rooftop-level precision using customer location data

- **Obligation monitoring:** Automated tracking of our transaction volume against registration thresholds in each jurisdiction, with alerts before thresholds are exceeded
- **Registration support:** Assistance with tax registration in new markets, including prefilled applications and guidance on local requirements
- **Filing and remittance:** Jurisdiction-specific reports formatted for each tax authority, and access to filing partner integrations that enable us to hand off the filing process
- **Product tax code coverage:** Accurate tax classification for our full product mix—[insert products (e.g., digital goods, SaaS, physical goods, services, ticketing)]
- **B2B tax handling:** Automated VAT ID validation and reverse charge application for European and Australian business customers
- **Unified dashboard:** Real-time visibility into tax collected, obligations, registration status, and filing deadlines in one place

Additional deliverables:

- **API access for custom integrations:** The ability to calculate and report tax on payments processed outside the vendor's native platform
- **Support for [insert required currencies and payment methods]**
- **No-code setup options for nonengineering teams:** Tax collection via dashboard toggle or invoice-level configuration

B.4 Out-of-scope work

Define what's excluded so vendors don't price or assume responsibility for it. Here are some examples:

- Corporate income tax, transfer pricing, or direct tax compliance
- Customs duties and import tax beyond VAT or GST at the point of sale
- Payroll tax compliance
- Tax advisory or legal opinion on specific transactions

B.5 Desired outcomes

- Live tax calculation across all current markets within [X] weeks of contract execution
- Zero instances of incorrect tax rates applied to transactions (measured against a postlaunch accuracy audit)
- Obligation monitoring alerts that fire before thresholds are exceeded in any jurisdiction
- Filing reports available in each required jurisdiction’s format, with no manual reformatting required
- Engineering time spent on tax maintenance reduced by [X]% within 90 days of going live
- Tax registration completed in new markets within [X] business days of a threshold alert

Section C: Proposal instructions

Tax vendors often lead with coverage lists and feature grids. Require production outcomes instead: implementation timelines from comparable businesses, accuracy audit results, and evidence that their jurisdiction coverage is real, not theoretical.

C.1 Submission format and structure

Each proposal must follow this structure:

- Executive summary (three pages maximum)

- Responses to all requirements in Section E, numbered to match
- Completed pricing template in Excel
- Vendor profile and financial summary
- Minimum of three client references from comparable businesses
- Supporting documents: compliance certifications, case studies with documented implementation timelines, geographical coverage list, product tax code coverage list, and filing partner list

C.2 Formatting requirements

- Narrative responses as PDF; pricing template as Excel file
- Minimum 11pt font, one-inch margins, page numbers required
- All monetary figures in USD unless otherwise specified
- File naming: [Vendor name]–Tax–RFP–[Date].pdf

C.3 Proposal content guidance

Executive summary

- Lead with documented outcomes from comparable deployments: implementation timelines, accuracy rates, number of jurisdictions supported, and filing partner coverage. Don’t describe your product. Show what it produces.
- Include your vision for this partnership over three years: specifically, how your platform handles tax rule changes, new jurisdiction coverage, and product tax code expansion without requiring engineering work from our side.

Solution overview

- Describe how your platform covers the full tax compliance lifecycle (obligation monitoring, registration, calculation, collection, and filing) in a single integration. Explain specifically what's automated and what requires manual work from our team.
- Describe your approach to tax rate accuracy: how rooftop-level precision is achieved, how tax rule changes are incorporated, and how quickly updates are applied after a jurisdiction changes its rules.
- Describe your integration model. A solution built into an existing payments or billing platform is materially faster to implement than a stand-alone product.

Geographical coverage

- Provide a complete, current list of every country and US state where you support tax calculation and collection today. "Supported" means ready for production, not in development and not via a partner with separate onboarding.
- For each market, specify whether coverage includes digital goods, SaaS, physical goods, and services. Coverage gaps by product type in a given jurisdiction are as significant as gaps in jurisdiction coverage itself.

Filing and remittance

- List every jurisdiction where you offer filing support today, whether it's native or via a partner. For partner-supported jurisdictions, name the partner, describe the handoff process, and confirm whether our team needs to create a separate account with that partner.
- Describe the experience for a business that's filing in a jurisdiction for the first time. What does our team need to do and how long does it take?

C.4 Clarification and questions

Questions must be submitted in writing by [question deadline] to [RFP manager's email]. Answers will be distributed simultaneously to all participants. No informal discussions with other [your company] employees are permitted during the process.

C.5 Proposal validity

Proposals must remain valid for 90 days from the submission deadline unless extended by written mutual agreement.

C.6 Right to reject or negotiate

[Your company] reserves the right to reject any proposal, request clarifications, or conduct parallel negotiations with one or more vendors. Participation doesn't constitute a commitment to purchase.

Section D: Evaluation process

Transparency in scoring pushes vendors to respond with evidence rather than coverage lists. Every criterion maps directly to requirements in Section E.

D.1 Evaluation methodology

All proposals will be reviewed by a cross-functional team including Finance, Tax, Engineering, Legal, and Operations.

The evaluation runs in three stages:

1. **Compliance review:** Confirm all required documents are present and meet formatting requirements.

2. **Qualitative assessment:** Score each submission against weighted criteria using a 1–5 scale (5 = exceptional, backed by production evidence; 1 = fails to meet baseline). A score of 5 requires documented production outcomes, not feature descriptions.

3. **Demonstration and final review:** Short-listed vendors present live platform demonstrations. Demos must use a production-parity environment, not a scripted walkthrough with preloaded data.

D.2 Evaluation criteria and weights

Criterion	Weight	What we're evaluating
Setup and integration	20%	Time to first transaction with tax collected, integration model (native vs. third-party plug-in), code required, no-code options, documentation quality, testing support before going live
Geographical coverage	20%	Countries and US states supported today, product type coverage within each jurisdiction, planned expansion, registration support in new markets
Calculation accuracy	20%	Rooftop-level precision, product tax code breadth (600+ is the benchmark), real-time rate updates, B2B VAT ID validation and reverse charge, update frequency after rule changes

Criterion	Weight	What we're evaluating
Obligation monitoring	15%	Automated threshold tracking, proactive alerts before thresholds are exceeded, dashboard visibility into nexus exposure across all jurisdictions
Registration support	10%	Scope of registration assistance, prefilled applications, time to complete registration in a new market, US registration automation, non-US partner coverage
Filing and remittance	10%	Jurisdiction-specific report formats, filing partner coverage, due date reminders, ease of handoff to filing partner, remittance automation
Commercials and vendor stability	5%	Pricing transparency, usage-based pricing vs. flat fee, absence of hidden fees, contract flexibility, financial health

D.3 Demonstration requirements

Short-listed vendors will demonstrate the following live in a production-parity environment:

- Tax calculation at checkout for a transaction in each of the following jurisdictions: [insert your key markets]. Show the rate applied, the product tax code used, and how the customer's location was determined.
- Obligation monitoring dashboard—show the current threshold status across all jurisdictions and demonstrate what an alert looks like when a threshold is approaching.
- Adding a new country—walk through the steps to enable tax collection in a new market from scratch. The benchmark for best-in-class platforms is enabling a new state or country in seconds after registration.
- B2B transaction—show VAT ID validation and reverse charge application for a European business customer.
- Filing report—generate a filing report for [insert a jurisdiction you file in] and walk through how it maps to that jurisdiction's filing requirements.

- Implementation path—show the code required (or confirm no code is required) to collect tax on a new transaction type.

Vendors must provide temporary demo access that's valid for at least 10 business days after the demonstration.

D.4 Negotiation and contract award

[Your company] reserves the right to conduct clarification sessions, request best-and-final offers, and conduct parallel negotiations. No contract is binding until executed by both parties.

Evaluator notes—remove before sending to vendors

- Score independently before group deliberation. A score of 5 requires documented production outcomes—not feature lists or coverage tables.
- Probe geographical coverage market by market. For every jurisdiction on your list, ask whether coverage includes your specific product types (e.g., digital goods, SaaS, physical goods). A jurisdiction listed as "supported" that excludes digital goods isn't supported for your business.
- Ask vendors to walk through the full implementation timeline from contract signature to first transaction with tax collected. Ask for specific examples from comparable businesses, not projected timelines.
- Ask how long it takes to add a new country after completing registration. Best-in-class platforms enable this in seconds. A process that takes days or requires engineering work is a significant operational drag as you expand.
- For filing support, ask whether your team needs to create separate accounts with third-party filing partners or whether the handoff is simple from the vendor's dashboard. The friction of a separate onboarding with a partner compounds at every new jurisdiction.
- Ask specifically about tax rule update latency. When a jurisdiction changes a rate or rule, how quickly is it reflected in calculations? Ask for examples from the last 12 months.
- Require a live demo of the obligation monitoring dashboard. Ask what triggers an alert, how early it fires relative to the threshold, and what information it provides to your team.

Section E: Core requirements

This is the most important section. Require factual, evidence-backed responses. Any vendor worth deploying can point to documented outcomes from real implementations. For each requirement, vendors must indicate: Standard (in production today), Configurable (requires setup), Custom (requires development), or N/A.

E.1 Setup and implementation

Compliance risk increases the moment you have a tax obligation and aren't collecting. A solution that takes months to implement is a liability extension. The benchmark for best-in-class tax infrastructure is same-day to one-week setup: one line of code, one dashboard toggle, or one API call. For example, Keap deployed Stripe Tax in eight weeks; with its previous provider, the same implementation took 24 weeks.

Requirement	Status	Vendor response or evidence
Implementation timeline: provide documented time from contract signature to first transaction with tax collected, from at least three comparable client implementations. Provide specific timelines, not ranges. The benchmark is days to weeks, not months.	Standard / Configurable / Custom / N/A	
No-code setup: tax collection can be enabled via a dashboard toggle or product configuration, with zero engineering work. Confirm this is available in production today and describe what it covers.	Standard / Configurable / Custom / N/A	

Requirement	Status	Vendor response or evidence
Low-code setup: tax collection can be added to an existing integration with a single line of code, without a full reintegration. Provide the exact code required.	Standard / Configurable / Custom / N/A	
API integration: offer a fully programmable integration for teams that need custom tax calculation workflows or need to calculate tax on payments processed outside your native platform. Confirm availability and provide documentation.	Standard / Configurable / Custom / N/A	
Native platform integration: the solution is built into the payments or billing platform [your company] already uses, eliminating the need for a third-party plug-in or separate onboarding. Describe the integration model.	Standard / Configurable / Custom / N/A	
Testing before going live: enable a test of tax calculations against real transactions in a sandbox environment before going live, with confirmation that sandbox behavior matches production. Describe the testing process.	Standard / Configurable / Custom / N/A	
Documentation quality: list code snippets, detailed step-by-step instructions, and easy-to-follow examples that let our team learn during implementation. Provide a link to your documentation.	Standard / Configurable / Custom / N/A	
The first 30 days: describe the typical onboarding journey, the information required from our team, and the milestones from contract to going live.	Standard / Configurable / Custom / N/A	

E.2 Geographical coverage

Tax obligations don't wait for your coverage list to catch up. Before you exceed a threshold in a new market, your tax solution needs to be ready to collect there. Over 80% of startups on Stripe sell into more than 20 states and countries. Coverage gaps—whether by jurisdiction or by product type within a jurisdiction—are compliance risks.

Requirement	Status	Vendor response or evidence
Country coverage: provide a complete, current list of every country where you support tax calculation and collection in production today. The benchmark is 100+ countries. Distinguish between markets where coverage is ready for production and markets where it's in development.	Standard / Configurable / Custom / N/A	
US state coverage: confirm coverage for all 50 US states and Washington, DC, including states with no state-level sales tax (Alaska, Delaware, Montana, New Hampshire, and Oregon) where local taxes might still apply.	Standard / Configurable / Custom / N/A	
Product type coverage within each jurisdiction: for every market on your list, specify which product types are covered (e.g., digital goods, SaaS, physical goods, services). SaaS is taxable in some US states but not in others; coverage must be specific.	Standard / Configurable / Custom / N/A	
Digital goods coverage: over 100 countries tax digital goods. Confirm coverage for digital goods in each country on your list, and describe how the platform handles B2C digital goods taxation for EU customers (OSS, MOSS, or equivalent).	Standard / Configurable / Custom / N/A	

Requirement	Status	Vendor response or evidence
Rooftop-level location precision: tax rates are calculated using the customer's exact address (latitude and longitude), not their ZIP code or postal code alone. Describe how customer location is determined and how edge cases (e.g., PO Box addresses) are handled.	Standard / Configurable / Custom / N/A	
Dynamic rate selection: the platform automatically selects the correct tax rate based on the customer's precise location, without manual configuration per jurisdiction.	Standard / Configurable / Custom / N/A	
Adding a new country: describe the steps and timeline to enable tax collection in a new market after completing registration. The benchmark is seconds after registration, not days or engineering work.	Standard / Configurable / Custom / N/A	
Planned coverage expansion: which markets are you planning to add in the next 12 months? Provide dates, not road map intentions.	Standard / Configurable / Custom / N/A	
Registration support in new markets: describe what assistance is available when [your company] needs to register to collect tax in a new market. Distinguish between markets where you offer direct registration support and those where you refer to external advisers.	Standard / Configurable / Custom / N/A	

E.3 Calculation accuracy and tax content

An incorrect tax rate on a transaction is both a customer experience problem and a compliance issue. For digital goods especially, the rules are complex: over 100 countries tax them differently, SaaS is taxable in some US states but not in others, and European businesses that sell digital products must collect two pieces of nonconflicting location evidence per customer. The tax content engine behind the calculation is what separates a solution that holds up across your full product mix from one that requires manual overrides.

Requirement	Status	Vendor response or evidence
Product tax code coverage: provide a complete list of the product and service categories your platform supports. The benchmark is 600+ product tax codes. Confirm whether our current product mix—[insert products (e.g., digital goods, SaaS, physical goods, services, ticketing)]—falls within your coverage.	Standard / Configurable / Custom / N/A	
Tax content accuracy: describe your process for ensuring tax rates and product tax codes are kept up-to-date as jurisdictions change their rules. How quickly are changes reflected in calculations after a rule change takes effect? Provide examples from the last 12 months.	Standard / Configurable / Custom / N/A	
Tax content research team: describe the team or process responsible for monitoring tax law changes globally. Tax rule changes should be automatically applied without requiring any action from our team.	Standard / Configurable / Custom / N/A	
B2B VAT ID validation and reverse charge: the platform automatically validates VAT IDs and ABNs for B2B customers, with automatic application	Standard / Configurable / Custom / N/A	

Requirement	Status	Vendor response or evidence
of reverse charge or zero VAT rate where applicable. Describe accuracy rates from production.		
Evidence collection for EU-bound digital goods: for businesses that sell digital goods to EU customers, describe how the platform collects the two pieces of nonconflicting location evidence required under EU rules.	Standard / Configurable / Custom / N/A	
Exemption handling: provide support for tax-exempt customers (e.g., resellers, nonprofits, government entities), including exemption certificate collection and storage. Describe the workflow.	Standard / Configurable / Custom / N/A	
Expanding product lines: describe the process and timeline for adding new product tax codes as [your company] launches new product types. Is this self-service or does it require vendor involvement?	Standard / Configurable / Custom / N/A	
Checkout tax display: taxes are shown to customers in the most familiar format for their locations, using available location signals (e.g., currency, ZIP code, billing address) to determine the display before a full address is entered.	Standard / Configurable / Custom / N/A	
Prorations, discounts, and credit notes: enable automatic, accurate tax calculation on prorated charges, discounts, and partial or full credit notes.	Standard / Configurable / Custom / N/A	
Card data handling that's compliant with PCI DSS v4.0 (standard effective March 2024).	Standard / Configurable / Custom / N/A	

E.4 Tax obligation monitoring

The most expensive tax problem is the one you didn't see coming. US sales tax registration thresholds vary from $100,000 in sales or 200 transactions in most states to $500,000 in California, New York, and Texas. European registration thresholds vary from €0 in Spain to £90,000 in the UK. Non-EU businesses must collect VAT from their very first sale into the EU. If you don't collect tax when you're obligated to, you'll pay past-due taxes out of your own pocket—plus interest and penalties that can surpass 30% of the tax due. Your tax solution must monitor your obligations proactively, before you exceed a threshold.

Requirement	Status	Vendor response or evidence
Automated threshold tracking: the platform continuously monitors our transaction volume against registration thresholds in every jurisdiction where [your company] sells, without manual configuration per jurisdiction.	Standard / Configurable / Custom / N/A	
Proactive alerts: the platform notifies our team before a threshold is exceeded, with enough lead time to complete registration before our first taxable transaction in a new jurisdiction. Describe what triggers an alert and how early it fires.	Standard / Configurable / Custom / N/A	
Obligation dashboard: offer real-time visibility into our current status relative to registration thresholds in every jurisdiction, accessible without a manual query. Describe what information is shown and how it's presented.	Standard / Configurable / Custom / N/A	
Historical transaction analysis: enable a review of past transactions to identify whether [your company] had an obligation in a jurisdiction before	Standard / Configurable / Custom / N/A	

Requirement	Status	Vendor response or evidence
our current monitoring began. Describe the lookback capability.		
Alert delivery: describe the channels through which obligation alerts are delivered (e.g., dashboard, email, webhook) and whether alerts are configurable by jurisdiction or threshold level.	Standard / Configurable / Custom / N/A	
Coverage for all transaction types: obligation monitoring applies to all relevant transaction types in our mix, including digital goods, SaaS, and physical goods, across all supported jurisdictions.	Standard / Configurable / Custom / N/A	

E.5 Registration support

Registering to collect tax is often the most difficult step of entering a new market. In the US, each state has different registration processes and requirements. Outside the US, some jurisdictions require a local tax representative. In the UK, about 17% of VAT registration requests with HMRC were rejected in 2025. Remote sellers in Canada might need up to five separate registrations. The right vendor reduces this burden materially by prefilling application details, guiding your team through local requirements, and completing registrations as quickly as possible.

Requirement	Status	Vendor response or evidence
US registration automation: for businesses based in the US, the platform manages tax registrations directly. It prefills application details to minimize errors and save time. Describe the process and the typical completion timeline per state.	Standard / Configurable / Custom / N/A	
Non-US registration support: for markets outside the US, describe what assistance	Standard / Configurable /	

Requirement	Status	Vendor response or evidence
is available. Confirm which jurisdictions are covered by your own registration service and which are referred to a third-party partner (e.g., Taxually or equivalent). Name any partners.	Custom / N/A	
Prefilled registration applications: subsequent registrations in new markets reuse previously provided business information, reducing the time and effort required. Describe how this works in practice.	Standard / Configurable / Custom / N/A	
Time to complete registration in a new market: provide documented timelines for completing registration in the key markets on your list. Include US states and priority international markets separately.	Standard / Configurable / Custom / N/A	
Local regulation guidance: when [your company] registers in a new market, the platform provides guidance on local requirements (e.g., need for a local tax representative in Mexico or Switzerland, VAT number requirements in the EU). Describe the guidance provided.	Standard / Configurable / Custom / N/A	
Registration status tracking: offer real-time visibility into the status of pending and completed registrations across all markets, accessible in the platform dashboard.	Standard / Configurable / Custom / N/A	
Post-registration activation: once registration is complete, how quickly can tax collection be enabled for that market? The benchmark is seconds, not days.	Standard / Configurable / Custom / N/A	

E.6 Filling and remittance

For most businesses, filing is the most operationally burdensome step of tax compliance. Each jurisdiction has different formats, deadlines, and submission processes. The best solution produces jurisdiction-specific reports that match the exact format required for filing, provides due date reminders so your team never misses a deadline, and connects to filing partners that can handle filing for your team.

Requirement	Status	Vendor response or evidence
Jurisdiction-specific report formats: filing reports are formatted to match the exact requirements of each jurisdiction so our team doesn't need to reformat data before filing. Confirm coverage for every jurisdiction on our list.	Standard / Configurable / Custom / N/A	
Due date reminders: the platform sends automated reminders before filing deadlines in each jurisdiction where [your company] is registered. Describe the reminder schedule and delivery channels.	Standard / Configurable / Custom / N/A	
Filing partner integrations: the platform connects to third-party filing partners that can file on our behalf using its transaction data. List every filing partner, the jurisdictions they cover, and whether our team needs to create a separate account with each partner.	Standard / Configurable / Custom / N/A	
Simple filing handoff: the process for handing off filing to a partner should take place within the vendor's dashboard, without requiring our team to export and re-upload data. Describe the handoff experience.	Standard / Configurable / Custom / N/A	
Self-filing support: for businesses that prefer to file independently, describe the resources available, such as report downloads, filing instructions, and guidance on the filing process for each jurisdiction.	Standard / Configurable / Custom / N/A	
Remittance automation: describe whether the platform automates the payment of tax owed to each jurisdiction or whether remittance is a	Standard / Configurable / Custom / N/A	

Requirement	Status	Vendor response or evidence
manual step our team must complete separately.		
Filing accuracy: describe how the platform ensures that the data used for filing matches the transactions processed through the platform. How are discrepancies identified and resolved?	Standard / Configurable / Custom / N/A	
Partner onboarding friction: for filing partners that require a separate account creation, describe the onboarding process and typical time to activate for each partner.	Standard / Configurable / Custom / N/A	

E.7 Platform integration and developer experience

A tax integration that requires months of engineering work or is an ongoing maintenance burden is a cost that compounds with every new market and product type you add. The best solution fits into your existing stack without requiring a separate platform, and gives your engineering team the tools to go live quickly and stay live without manual upkeep.

Requirement	Status	Vendor response or evidence
Single platform integration: the tax solution is part of the same platform [your company] uses for payments and billing, not a stand-alone product that requires a separate login, API key, and data sync. Describe the integration architecture.	Standard / Configurable / Custom / N/A	
Adjacent product compatibility: describe how the tax solution works with adjacent products our team uses (e.g., invoicing, subscriptions, billing) and whether tax features are designed collaboratively with those product teams.	Standard / Configurable / Custom / N/A	

Requirement	Status	Vendor response or evidence
API documentation quality: provide comprehensive, versioned API documentation with code snippets in primary development languages (Node.js, Python, Ruby, Java, Go, and PHP), a public changelog, and a sandbox environment that matches production behavior.	Standard / Configurable / Custom / N/A	
Webhook support: tax-related events (e.g., new obligations, rate changes, filing deadlines) are delivered via webhooks with configurable retry logic and delivery monitoring.	Standard / Configurable / Custom / N/A	
Tax calculation for externally processed payments: the tax engine can be used for transactions processed through a different payment processor. Describe how this works and any limitations.	Standard / Configurable / Custom / N/A	
Uptime: 99.999%+ uptime (under 44 seconds of downtime per year) is the standard for tax infrastructure that runs on every transaction. Provide 12 months of historical uptime data.	Standard / Configurable / Custom / N/A	
Automatic tax content updates: when tax rules or rates change, updates are applied automatically without requiring any engineering work from [your company]. Confirm this is the case and describe the update process.	Standard / Configurable / Custom / N/A	
No-code configuration for nonengineering teams: Finance and Tax teams can manage registrations, review obligations, configure tax collection for new markets, and access filing reports without engineering involvement.	Standard / Configurable / Custom / N/A	

E.8 Reporting and analytics

Tax reporting is an operational function. Your Finance and Tax teams need real-time visibility into tax collected, obligations, and filing status across every market, without running manual queries or exporting spreadsheets.

Requirement	Status	Vendor response or evidence
Unified tax dashboard: offer real-time visibility into tax collected, registration status, obligation thresholds, and filing deadlines across all jurisdictions, in a single view.	Standard / Configurable / Custom / N/A	
Transaction-level tax detail: enable a review of the tax calculation for each individual transaction, including the rate applied, the product tax code used, and how the customer's location was determined.	Standard / Configurable / Custom / N/A	
Jurisdiction-level reporting: aggregate tax collected by jurisdiction, time period, and product type, without a manual export and pivot table.	Standard / Configurable / Custom / N/A	
Data export: offer the ability to download transaction-level tax data for reconciliation, audit preparation, or handoff to an external accountant or filing partner. Describe available export formats.	Standard / Configurable / Custom / N/A	
Data warehouse connectivity: export tax data to our data warehouse (e.g., Snowflake, BigQuery, Redshift) on a scheduled basis. Describe the sync mechanism and schema documentation.	Standard / Configurable / Custom / N/A	
Audit trail: provide a complete, tamper-evident record of every tax calculation, rate applied, and configuration change—accessible for audit purposes without reconstructing data from logs.	Standard / Configurable / Custom / N/A	

Requirement	Status	Vendor response or evidence
Filing status tracking: enable real-time visibility into the status of upcoming and completed filings across all jurisdictions, including due dates, amounts owed, and confirmation of submission.	Standard / Configurable / Custom / N/A	

E.9 Security and compliance

Tax infrastructure processes sensitive financial and customer data on every transaction. Security and compliance aren't optional.

Requirement	Status	Vendor response or evidence
SOC 2 Type II certification: provide the most recent audit period and report date.	Standard / Configurable / Custom / N/A	
ISO 27001 certification or equivalent.	Standard / Configurable / Custom / N/A	
GDPR-compliant data handling with configurable retention, deletion, and portability controls. This is particularly relevant for customer location data collected for tax purposes.	Standard / Configurable / Custom / N/A	
CCPA compliance for US customer data.	Standard / Configurable / Custom / N/A	
Data residency options for markets with localization requirements.	Standard / Configurable / Custom / N/A	

Requirement	Status	Vendor response or evidence
PCI DSS compliance where applicable: describe how cardholder data is handled in the context of tax calculation.	Standard / Configurable / Custom / N/A	
Incident response plan with defined client notification timelines: state the contractual commitment.	Standard / Configurable / Custom / N/A	

E.10 Vendor certification statement

I hereby certify that all responses are accurate as of the submission date and that capabilities marked Standard or Configurable are currently available in production environments. Claims not supported by documentation or a live demonstration will not be evaluated.

Note: This template doesn’t constitute tax or legal advice. Vendor responses shouldn’t be relied on as tax or legal advice. [Your company] should consult its own advisers.

Authorized representative: ________________________

Title: ________________________

Date: ________

Evaluator notes—remove before sending to vendors

- A score of 5 on any criterion requires documented production outcomes. A coverage list isn’t evidence.
- For every jurisdiction on your list, ask whether coverage includes your specific product types. A jurisdiction listed as “supported” that excludes SaaS or digital goods isn’t supported for your business.

- Ask vendors to walk through a live tax rate calculation for your most complex product type in your most complex jurisdiction. If they cannot do so in the demo, they cannot do so in production.
- Ask for documented implementation timelines from comparable businesses—not projected timelines. The difference between eight weeks (Stripe Tax with Keap) and 24 weeks (Keap's previous provider) is significant.
- For filing support, ask whether your team needs to create separate accounts with third-party filing partners. The more partners involved, the more onboarding friction compounds with each new jurisdiction.
- Ask specifically about tax rule update latency. When a jurisdiction changes a rate or introduces a new rule, how quickly is it reflected in calculations? Ask for examples from the last 12 months.
- Ask about the lead time for an obligation monitoring alert. An alert that fires after you've already exceeded a threshold provides no compliance protection.

Section F: Implementation and support

Every day without correct tax collection increases compliance exposure. This section establishes whether the vendor has the methodology, resources, and support model to get you live quickly and keep you compliant as your business develops.

F.1 Implementation approach

Vendors must describe:

- The typical implementation journey from contract signature to first transaction with tax collected, including documented timelines from comparable client implementations (the benchmark is days to weeks)
- What information [your company] needs to provide during setup and what the vendor provides or prefills
- How tax calculations are tested before going live, including whether a sandbox environment mirrors production behavior exactly
- How they handle a situation where a business already has uncollected tax obligations at the time of implementation—what guidance is provided and what the recommended remediation path looks like

F.2 Resourcing and governance

Vendors should specify:

- Named account manager and tax specialist assigned to this engagement
- Escalation hierarchy and decision-making cadence during implementation
- Whether the implementation team is the same team that handles postlaunch support—the handoff is often where service quality drops

F.3 Training and documentation

Vendors should describe:

- Training available for Finance, Tax, Engineering, and Operations teams, particularly for nontechnical users who will manage registrations, review obligations, and access filing reports
- Self-serve learning resources (documentation, tutorials, and help content that enable your team to answer questions without creating support tickets)
- How documentation and training materials are updated when new jurisdictions, product tax codes, or filing integrations are added

F.4 Support model and SLAs

Vendors must specify:

- Support tiers and what's included—a tax rate error on a live transaction or a missed filing deadline is a Severity 1 issue that requires a rapid response
- Response time SLAs by severity, with contractual commitments
- How clients are notified when tax rules change in a jurisdiction where they're collecting, and what action, if any, is required on their part
- Historical Severity 1 response time data (not just the SLA)

F.5 Continuous compliance

Tax law changes constantly. Describe specifically how your platform monitors regulatory changes across all supported jurisdictions, how quickly updates are applied, and what—if anything—[your company] needs to do when a rule changes. Provide examples from the last 12 months of significant rule changes and how they were handled.

F.7 Vendor attestation

I certify that all implementation and support details are accurate as of the submission date and reflect current production practices.

Authorized representative: ______________________

Title: ______________________

Date: _______

⚑ Evaluator notes—remove before sending to vendors ⚑

- Ask for specific implementation examples from comparable businesses (similar transaction volume, number of markets, or product mix). Reject projected timelines.
- Ask what happens if a tax rule changes in a jurisdiction where you're live. Does your team need to do anything or is the update automatic? The right answer is automatic.
- Ask whether the implementation team is the same team that handles postlaunch support.
- Ask what guidance the vendor provides if [your company] already has uncollected tax obligations. A vendor that helps only with future compliance isn't a complete solution.
- Request Severity 1 response time actuals from the last 12 months.

Section G: Commercials

Tax software pricing varies significantly, from transaction-based models to flat monthly fees and consumption tiers. Standardize disclosure so you're comparing real economics, not headline rates. Usage-based pricing is the most flexible model for growing businesses: you shouldn't pay the same amount in a slow month as you do in a peak month.

G.1 Pricing structure overview

Vendors must provide:

- Itemized pricing for every component, including tax calculation, obligation monitoring, registration support, filing partner access, API calls, additional jurisdictions, and add-ons
- A narrative that explains pricing assumptions (transaction volume, number of jurisdictions, product mix, and filing frequency)
- Clear identification of any minimum monthly commitments, volume thresholds, or tiered pricing that affects the total cost
- All figures in USD, including conversion logic if other currencies are quoted
- Explicit disclosure of all fees (support, implementation, upgrades, additional jurisdictions, and filing partner fees)—hidden fees discovered after contract execution might be treated as a material misrepresentation

G.2 Pricing components

Component	Unit	Unit price	Volume assumption	Monthly total (est.)
Tax calculation	Per transaction or % of transaction	–	–	–
Obligation monitoring	Included or monthly fee	–	–	–
US registration support	Per state or included	–	–	–
Non-US registration support	Per country or partner fee	–	–	–
Filing partner access	Per jurisdiction or included	–	–	–
Filing partner fees (third-party)	Per filing or monthly	–	–	–
API access (external processor calls)	Per call or monthly	–	–	–
Additional jurisdictions	Per country or state, or included	–	–	–
Dashboard or reporting	Included or monthly	–	–	–
Data warehouse export	Included or monthly	–	–	–
Implementation and onboarding	One-time	–	–	–
Ongoing support tier	Monthly	–	–	–
Add-ons (list individually)	–	–	–	–

G.3 Volume sensitivity

Transaction volume tier	Estimated monthly cost
[Your current volume]	
2× current volume	
5× current volume	
10× current volume	

G.4 Pricing model

- Is pricing based on usage (per transaction) or subscription (flat monthly), or is it a hybrid model? Describe the model and its implications for a business with seasonal volume variation.
- Can [your company] switch between pricing models without penalty? Describe the process and any conditions.
- Does pricing scale down automatically if transaction volume decreases?

G.5 Contract terms

- Available contract lengths and any pricing incentives for longer commitments
- Minimum spend requirements
- Exit clauses and data portability—how tax transaction history, registration records, and filing reports are returned on exit, in what format, and on what timeline
- Annual price escalation caps

G.6 Vendor certification

I certify that all pricing and commercial information is complete and accurate as of the submission date, including all fees a client would be expected to pay.

Authorized representative: ________________________

Date: ________

Evaluator notes—remove before sending to vendors

- Reconcile the pricing narrative against the Excel sheet. Discrepancies are a signal.
- Ask specifically about filing partner fees. These are often not included in the headline price and compound with every jurisdiction.
- Ask whether pricing covers tax calculation for payments processed outside the vendor's native platform (external processor API calls). This is often priced separately.
- Ask what happens to pricing when you add a new country. Is it included or is each new jurisdiction another line item?
- Data portability on exit is the real lock-in mechanism for tax software; your filing history and registration records need to be portable. Assess exit terms before you sign.
- Usage-based pricing is more favorable for growing businesses than flat fees. Model the total cost at 10× your current volume.

Section H: Vendor profile

Your tax infrastructure partner sits in the compliance path of every transaction. Understand the company as a whole: its financial health, depth of tax expertise, pace of coverage expansion, and track record with businesses that look like yours.

H.1 Company overview

Your tax infrastructure partner sits in the compliance path of every transaction. Understand the company as a whole: its financial health, depth of tax expertise, pace of coverage expansion, and track record with businesses that look like yours.

H.2 Customer base and track record

Provide specific data on your customer base:

- Number of businesses that use your tax solution
- Markets where businesses use your platform in production today
- Industries and product types represented in your customer base
- Documented implementation timelines for comparable businesses
- Evidence of tax calculation accuracy from production deployments

H.3 Tax expertise

Describe the team responsible for monitoring and incorporating tax law changes globally. For a tax solution, a robust, responsive content team is as important as an engineering team.

Describe:

- The size and composition of your tax research team
- The process for monitoring regulatory changes across all supported jurisdictions
- How quickly rule changes are incorporated and deployed to all clients
- Your track record on significant tax law changes in the last 12 months (provide examples)

H.4 Financial stability

Provide audited financial statements or equivalent evidence of solvency. Private companies should have a CFO letter that certifies liquidity. Describe your funding structure.

H.5 Certifications and compliance

Certification or framework	Status and most recent date
SOC 2 Type II	
ISO 27001	
GDPR	
CCPA	

Certification or framework	Status and most recent date
PCI DSS (if applicable)	
Additional country-specific certifications	

H.6 Pace of coverage expansion

Describe how your geographical coverage and product tax code library have expanded in the last 12 months. Which jurisdictions or product types were added and when? Describe your road map for the next 12–18 months and how you prioritize coverage expansion.

H.7 Vendor statement of accuracy

I certify that all information in Section H is accurate as of the submission date and that [vendor] has the financial, technical, and operational capacity to perform the described services.

Authorized representative: ________________________

Date: ________

Section I: References

References from businesses with comparable product mixes and market footprints are more valuable than any demo. A vendor that has successfully implemented for a SaaS company that sells into 30 US states and 15 countries has references that can speak to real outcomes—not projected ones.

I.1 Reference requirements

Vendors must provide a minimum of three references that meet these criteria:

- Comparable business model to [your company]—same industry or product type (e.g., SaaS, digital goods, ecommerce, marketplace)
- Comparable transaction volume or market footprint at the time of implementation
- At least one reference that's expanded into new markets after initial implementation
- At least one reference that uses filing partner support
- Active customer in production for at least 12 months

I.2 Reference Table

Company name	Contact name and title	Business tyoe	Markets	Tenure	Key use case
–	–	–	–	–	–
–	–	–	–	–	–
–	–	–	–	–	–

I.3 Reference outcome summary

For each reference, provide documented outcomes: implementation timeline, number of jurisdictions supported, accuracy of tax calculations, time saved compared to a manual process, and any near miss compliance situations that the platform helped avoid. Provide specific figures, not ranges.

I.4 Reference validation

I confirm that each client has consented to serve as a reference and that all information is accurate. [Your company] reserves the right to contact references directly.

Authorized representative: ________________________

Date: ________

Evaluator notes—remove before sending to vendors

- Call at least two references by phone. Written summaries are curated by the vendor.
- Ask references specifically whether the implementation timeline in the proposal matches what they experienced. Ask for the actual dates from contract signature to first transaction with tax collected.
- Ask whether the tax rates applied in production were accurate and whether references ever encountered an incorrect calculation.
- Ask about the experience of adding a new market after initially going live. How long did it take and how much engineering work was involved?
- Ask about the filing experience: did the reports match the jurisdiction's requirements exactly or did their teams need to reformat data?
- Flag references from noncomparable businesses. A reference from a physical goods retailer tells you little about SaaS or digital goods tax complexity.

Section J: Appendixes

J.1 Submission checklist (vendor use)

Attach as the first page of your response packet. Incomplete submissions might be excluded from evaluation.

Item	Included?	Notes
Executive summary (three-page maximum)	☐ Yes ☐ No	–
Section E requirements response	☐ Yes ☐ No	–
Completed pricing template (Excel)	☐ Yes ☐ No	–
Vendor profile and financial summary	☐ Yes ☐ No	–
Three or more client references	☐ Yes ☐ No	–
SOC 2 Type II (most recent period)	☐ Yes ☐ No	–
ISO 27001 certification	☐ Yes ☐ No	–
Complete geographical coverage list (countries and US states, by product type)	☐ Yes ☐ No	–
Complete coverage list for product tax codes	☐ Yes ☐ No	–
Filing partner list with jurisdictions covered	☐ Yes ☐ No	–
12-month historical uptime data	☐ Yes ☐ No	–
Case studies with documented implementation timelines	☐ Yes ☐ No	–
API documentation or developer portal link	☐ Yes ☐ No	–
Signed vendor certification statements	☐ Yes ☐ No	–

J.2 Glossary of terms

Term	Definition
Sales tax	A consumption tax levied on the sale of goods and services in the US, varying by state, county, and city. Economic nexus thresholds determine when a remote seller must register and collect.
VAT	Value-added tax: a consumption tax applied at each stage of production and distribution in the EU and many other countries. Businesses collect VAT from customers and remit it to the tax authority, deducting VAT paid on inputs.
GST	Goods and services tax is equivalent to VAT in Australia, Canada, India, New Zealand, and other countries. Rules vary significantly by country.
Economic nexus	A sales tax obligation that's triggered by exceeding a revenue or transaction threshold in a US state, even without a physical presence. Thresholds vary from $100,000 in sales or 200 transactions in most states to $500,000 in California, New York, and Texas.
Rooftop-level precision	Tax rate calculation using latitude and longitude to determine the customer's exact location rather than rely on ZIP or postal code alone. This is more accurate, particularly in US jurisdictions where rates vary within a single ZIP code.
Product tax code	A classification code that determines how a specific product or service type is taxed in a given jurisdiction. SaaS, digital goods, and physical goods are often taxed differently in the same jurisdiction.
Reverse charge	A VAT mechanism in B2B transactions where the buyer, rather than the seller, accounts for VAT. It's common in EU cross-border B2B transactions and requires automated VAT ID validation to apply correctly.
OSS	One Stop Shop: an EU simplification scheme that allows businesses to report and pay VAT for all EU member states through a single registration, instead of registering in each country separately. It applies to B2C digital goods and services.

Term	Definition
Economic nexus alert	A proactive notification that a business is approaching or has exceeded a registration threshold in a new jurisdiction. This is the trigger for beginning the registration process.
Obligation monitoring	Automated tracking of transaction volume against registration thresholds in each jurisdiction, providing visibility into where a tax obligation might be approaching before it applies.
Filing remittance	The process of submitting completed tax returns and paying the amount owed to the relevant tax authority. This is distinct from tax calculation and collection—a tax solution must support all three steps.
VIES	The EU VAT Information Exchange System, used to validate VAT numbers for cross-border B2B transactions within the EU. It's required for accurate reverse charge application.
ABN	The Australian Business Number is the identifier used to validate Australian B2B customers for GST purposes, analogous to the EU VAT ID.
No-code setup	The ability to enable tax collection via a dashboard toggle or product configuration, with zero engineering work required.
Low-code setup	The ability to add tax collection to an existing integration with a single line of code, without a full reintegration. The benchmark is one line of code added to an existing Stripe integration.

J.3 Evaluation scoring matrix

Vendor	Vendor A	Vendor B	Vendor C
Setup and integration (20%)	–	–	–

Vendor	Vendor A	Vendor B	Vendor C
Geographical coverage (20%)	–	–	–
Calculation accuracy (20%)	–	–	–
Obligation monitoring (15%)	–	–	–
Registration (10%)	–	–	–
Filing and remittance (10%)	–	–	–
Commercials (5%)	–	–	–
Weighted total	–	–	–

J.4 Requirements quick-reference checklist

For vendor self-assessment before submission.

Setup and implementation

- Documented implementation timeline from comparable businesses
- No-code setup via dashboard toggle
- Low-code setup via single line of code
- API integration for custom workflows and external processor payments
- Native integration with existing payments or billing platform
- Sandbox testing with production parity before going live
- Self-serve documentation with code snippets and examples

Geographical coverage

- 100+ countries supported in production today
- All US states and DC covered
- Coverage confirmed by product type within each jurisdiction (e.g., digital goods, SaaS, physical goods, services)
- Rooftop-level location precision
- Dynamic rate selection based on precise customer location
- Ability to add a new country in seconds after registration
- Registration support (directly within the US and via a named partner outside of it)

Calculation accuracy and tax content

- 600+ product tax codes—full coverage list provided
- Automatic tax content updates—no action required from your team
- B2B VAT ID validation and reverse charge—accuracy rates from production
- Two-piece location evidence collection for EU-bound digital goods
- Exemption certificate handling
- Checkout tax display using available location signals before full address is entered
- Prorations, discounts, and credit notes handled accurately

Obligation monitoring

- Automated threshold tracking across all jurisdictions
- Proactive alerts before thresholds are exceeded
- Obligation dashboard—real-time threshold status without manual queries
- Historical transaction lookback for prior obligation identification
- Alert delivery via dashboard, email, and webhook

Registration support

- US registration automated with prefilled applications
- Non-US registration via named partner (e.g., Taxually)
- Prefilled applications for subsequent registrations
- Registration status tracking in platform dashboard

- Post-registration activation in seconds

Filing and remittance

- Jurisdiction-specific report formats with no reformatting required
- Automated due date reminders per jurisdiction
- Filing partners listed with jurisdictions covered
- Handoff can be completed from vendor dashboard without a separate data export or upload
- Self-filing support with instructions per jurisdiction

Platform integration and developer experience

- Single platform—no separate login or API key
- 99.999%+ uptime—12-month historical data
- Automatic tax content updates with zero action required
- Webhook support for tax events
- External processor API access
- No-code configuration for Finance and Tax teams

Reporting and analytics

- Unified dashboard for obligations, collections, registrations, and filings in one view
- Transaction-level tax detail with rate, code, and location
- Jurisdiction-level aggregate reporting
- Data warehouse export (e.g., Snowflake, BigQuery, Redshift)
- Complete audit trail

Commercials

- Usage-based pricing that scales with transaction volume
- All fees disclosed (calculation, monitoring, registration, filing partners, and support)
- No hidden fees for upgrades or additional jurisdictions
- Data portability on exit (filing history, registration records, and transaction data)

J.5 Vendor submission certification

I certify that this submission is complete and that all information provided is accurate to the best of my knowledge. [Your company] reserves the right to verify any claims made in this response. This submission doesn't constitute tax or legal advice.

Company name: ________________________

Authorized representative: ________________________

Title: ________________________

Signature: ________________________

Date: ________

How Stripe Tax can help

Stripe Tax reduces the complexity of tax compliance so you can focus on growing your business. Stripe Tax helps you monitor your obligations and alerts you when you exceed a sales tax registration threshold based on your Stripe transactions. In addition, it automatically calculates and collects sales tax, VAT, and GST on both physical and digital goods and services—in all US states and in more than 100 countries.

Start collecting taxes globally by adding a single line of code to your existing integration, clicking a button in the Dashboard, or using our powerful API.

Stripe Tax can help you:

- **Understand where to register and collect taxes:** See where you need to collect taxes based on your Stripe transactions. After you register, switch on tax collection in a new state or country in seconds. You can start collecting taxes by adding one line of code to your existing Stripe integration or add tax collection with the click of a button in the Stripe Dashboard.

- **Register to pay tax:** Let Stripe manage your **global tax registrations** and benefit from a simplified process that prefills application details—saving you time and simplifying compliance with local regulations.
- **Automatically collect tax:** Stripe Tax calculates and collects the right amount of tax owed, no matter what or where you sell. It supports hundreds of products and services and is up-to-date on tax rules and rate changes.
- **Simplify filing:** Stripe Tax seamlessly integrates with **filing partners**, so your global filings are accurate and timely. Let our partners manage your filings so you can focus on growing your business.

Learn more about Stripe Connect, or **get started** today.