

MasterTax

Modernizing Payroll Tax

For Multi-Jurisdiction Employers,
Service Providers and PEOs



- ✓ **Streamline** Compliance.
- ✓ **Reduce** Risk.
- ✓ **Gain** Full Visibility

A New Era of Payroll Tax Compliance Is Here!

Payroll tax compliance is more complex, dynamic and high-stakes than ever before for all organizations. Federal, state and local rules evolve and shift frequently, demanding constant attention to updated filing requirements and deadlines. And more than 7,000+ payroll jurisdictions and 11,000+ payroll codes continue to introduce new requirements, rates and reporting expectations.

For enterprise employers, service providers and PEOs managing multi-state footprints, the pressure is constant:

- Manual processes waste valuable time
- Multiple deadlines across quarter, month, and year-end cycles and across jurisdictions and organizations
- Filing and data errors may create compliance risk
- Multiple disjointed and disconnected systems limit visibility
- Regulatory changes that demand ongoing monitoring



The Result?

For employers, a function that feels perpetually reactive, resource-intensive and vulnerable to risk — even for strong internal teams. For service bureaus and PEOs, this exponentially increases the challenge.

Automation is no longer optional. It is the only way to keep pace with today's compliance volume and velocity.

THE CHALLENGE

Payroll Tax Complexity, Amplified

Payroll tax compliance has become increasingly demanding for enterprises, payroll providers and PEOs operating across multiple states and jurisdictions: rules and requirements can shift; agencies revise filing formats and schedules; localities introduce their own rules — each with unique deadlines, requirements, and nuances.

For teams responsible for staying compliant, the workload rarely slows.

Manual Effort, High Volume and High Stakes

Daily operations include preparing filings, scheduling deposits, validating data, resolving notices, and managing amendments. Manual steps introduce inefficiencies and increase the potential for error.

Disconnected Systems & Information Loss

Data is often spread across payroll platforms, spreadsheets, and internal records. This fragmentation makes reconciliation difficult and obscures visibility across jurisdictions.

Constant Regulatory Change

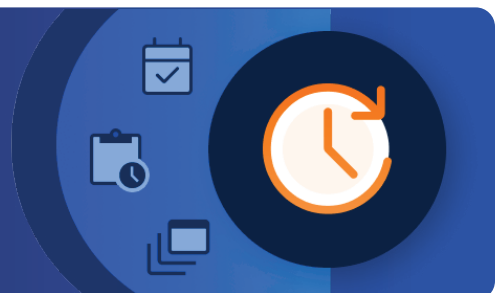
Federal, state and local requirements shift year-round. Staying current demands continuous monitoring — a significant burden for teams already managing recurring deadlines.

Manual Effort, High Volume and High Stakes

- ✓ **Multiple Jurisdictions**
Requirements differ by locality — and change frequently.
- ✓ **Manual Workload**
Repetitive, high-risk tasks such as return preparation and deposits, notice tracking and amendments.
- ✓ **Data Fragmentation**
Information spread across systems increases the likelihood of discrepancies.
- ✓ **Regulatory Complexity**
Requirements shift year-round and must be monitored continuously.
- ✓ **High Operational Stakes**
Mistakes can lead to penalties, interest and additional administrative lift.
- ✓ **Mandatory Electronic Forms and Filing**
Federal thresholds (10+ forms) make digital readiness essential.

The Daily Toll Is Real

High pressure, compressed cycles and limited visibility across jurisdictions. There is a smarter way forward.



THE SOLUTION

Automation + Control with MasterTax

MasterTax software is a purpose-built payroll tax automation platform that simplifies and streamlines compliance for organizations with complex, multi-jurisdiction needs. It replaces manual steps and fragmented workflows with automation, visibility and predictable processes — helping teams operate with confidence every cycle.



Automation That Scales

MasterTax software automates filings, deposits, payment scheduling and recurring tasks across federal, state and local agencies. Routine work runs in the background, reducing manual effort and freeing teams for higher-value responsibilities.



Compliance Confidence Built-In

The platform incorporates current federal, state and local requirements, helping organizations stay compliant without constant internal monitoring. For multi-state or multi-client environments, MasterTax software delivers consistent accuracy even as regulations evolve.



Total Visibility, End-to-End

Dashboards and alerts help provide clear oversight of every filing, deposit, amendment, or notice. Proactive error detection helps resolve issues before they reach an agency — providing the control and transparency they require.

MasterTax software helps transform payroll tax compliance from a reactive, manual process into a predictable, automated, and controlled system — whether supporting your in-house processes or those of your clients.



PEO Advantage: Scaled Compliance for Multi-Client Operations

✔ A single, centralized system — built for multi-client efficiency

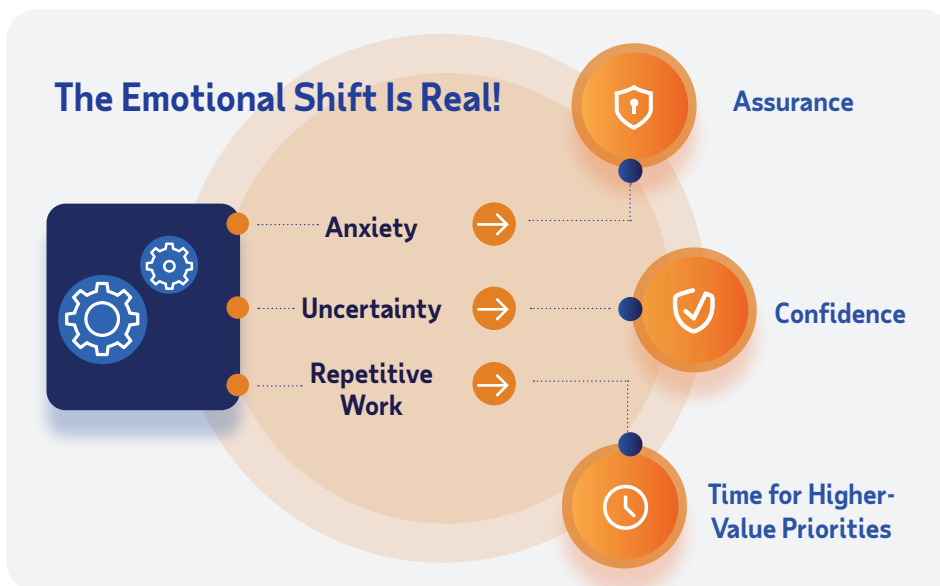
PEOs rely on MasterTax software to centralize and automate payroll tax processes across diverse client groups and geographic footprints. The platform supports accurate, consistent compliance for clients while giving the PEO complete visibility into every filing and payment across states and jurisdictions.

HOW MASTERTAX WORKS

A Streamlined Compliance Lifecycle

MasterTax software modernizes every stage of payroll tax management through a unified, automated system.

- 1 Integrate**
API connections and recurring data imports allow MasterTax software to receive payroll information from most payroll systems.
- 2 Automate**
MasterTax software automates:
 - Payment scheduling
 - Return preparation
 - Amended returns
 - NACHA/EFT credit file creation
 - W-2 and 1099 forms
 - Refund tracking
 - Notice management
 - Year-end reporting packages
- 3 Validate**
Comprehensive error detection identifies issues before deposits or filings occur. Dashboards, alerts and audit trails support real-time oversight.
- 4 File & Confirm**
Electronic submissions to federal, state and local agencies follow required formats and timelines — with confirmations and tracking throughout.



Why MasterTax: Purpose-Built for Complexity

MasterTax software is not an add-on, not a module, and not dependent on any specific payroll system. It is a comprehensive automation platform designed exclusively for payroll tax operations.

- ✓ **Specialized Expertise**
Unlike general HCM or payroll platforms, MasterTax software focuses on payroll tax remittance, filing and reporting — delivering deep, expert-driven automation built for enterprise complexity.
- ✓ **Comprehensive Coverage**
Supports federal, state and local requirements — including 7,000+ jurisdictions nationwide.
- ✓ **Technology You Control**
Maintain ownership of your payment processes with full visibility — without outsourcing or losing control.
- ✓ **Consistency & Predictability**
Automated workflows help reduce risk, eliminate redundant tasks and standardize processes.
- ✓ **Transparent Pricing**
No confusion about what's covered.

MasterTax software delivers the depth, reliability and automation required for long-term compliance across employers, service providers and PEOs.

WHO MASTERTAX SERVES

Multiple Complexities, One Solution

MasterTax supports three distinct customer types with unique operational demands — all through one centralized, automated payroll tax platform. For every client, MasterTax empowers teams to:

- **Reduce** manual workload
- **Eliminate** process gaps
- **Maintain** visibility
- **Meet** every deadline
- **Elevate** compliance operations
- **Free** experts for strategic work



Enterprise Employers

Who they are

Organizations with multi-state or multi-jurisdiction obligations who need automation, accuracy, and visibility — without outsourcing payroll tax.

Challenges

- Fragmented workflows
- High manual workload
- Risk exposure across jurisdictions
- Limited visibility into filings, deposits, and notices

How MasterTax helps

Automates filings and deposits across jurisdictions, reduces manual effort, increases accuracy and restores full internal visibility and control.

Service Bureaus

Who they are

Third-party payroll processors responsible for managing compliance across and on behalf of multiple clients and organizations.

Challenges

- Scaling manual processes across diverse client needs
- Inconsistent rules per jurisdiction
- High potential client impact from errors

How MasterTax helps

Enhances your service delivery with technology that supports scalable, accurate payroll tax operations for diverse client populations by providing one unified platform for multi-client payroll tax operations with automated workflows, jurisdictional intelligence and real-time visibility across all clients and actions.

Professional Employer Organizations (PEOs)

Who they are

Organizations supporting clients as an extended or outsourced HR organization, complete with staffing and other employee services across multiple industries, states and jurisdictions.

Challenges

- Multi-client, multi-entity complexity
- Variability in requirements across locations
- Bank reconciliation, impounds and audits
- High-volume, high-churn processing pressure

How MasterTax helps

Centralizes filings and deposits, delivering scalable, accurate, high-volume compliance with complete visibility into notices, deposits and deadlines.

Take Control of Your Payroll Tax Compliance

Let's simplify your payroll tax operations — and give your team the automation, accuracy and visibility they deserve.

Talk to a **MasterTax** compliance automation expert today.

mastertax.com



ABOUT MASTERTAX, LLC

Decades of payroll tax compliance expertise

MasterTax is a developer of payroll tax management technology designed for employers, third-party payroll tax service providers, and professional employer organizations (PEOs) to help schedule, remit deposits, balance and file multi-jurisdictional payroll taxes.

MasterTax

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