

**MEMO# 31919**

August 23, 2019

## **Tax Outsourcing Survey - Response Due September 16, 2019**

[31919]

August 23, 2019 TO: ICI Global Tax Committee

Tax Committee RE: Tax Outsourcing Survey - Response Due September 16, 2019

Each ICI member firm is requested to complete the [Tax Outsourcing Survey](#) no later than September 16, 2019. The responses provided should be answered based on your organization's fund tax model as of June 30, 2019.

The purpose of this survey is to gather information about members' use of third-party service providers to assist the tax function. The outsourcing of these functions raises important issues, including:

- Best practices for overseeing third-party providers;
- Considerations when engaging your auditor to perform non-audit services (e.g., tax function);
- Reporting to the Board about tax services provided by third parties, including auditors;
- How to transition to a tax outsourcing model;
- Choosing a service provider and managing risk.

Note that your individual responses, consistent with ICI antitrust compliance policies and protocols, will be maintained as confidential by ICI and survey results will be aggregated to ensure that confidentiality and maintain the anonymity of respondents. Please also note that, consistent with the purposes of the survey:

- Your responses need not and should not indicate the tax service providers (if any) that your firm uses.
- Your responses need not and should not indicate fees paid for tax services.
- Your responses need not and should not express preferences for, or criticism of, any tax service providers.

Any questions regarding the tax outsourcing survey should be directed to Katie Sunderland at [katie.sunderland@ici.org](mailto:katie.sunderland@ici.org) or 202-326-5826 or to Keith Lawson at [lawson@ici.org](mailto:lawson@ici.org) or 202-326-5832.

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