

MEMO# 32016

October 21, 2019

Tax Services Outsourcing Survey Results

[32016]

October 21, 2019 TO: ICI Global Tax Committee

Tax Committee RE: Tax Services Outsourcing Survey Results

We are pleased to provide you with the results from the ICI tax outsourcing survey we conducted with respect to members' use of third-party service providers engaged to assist the tax function.

The survey was conducted in August and September 2019 and responses provided were based on members tax models as of June 30, 2019. Thirty-six fund complexes completed the survey.

For each question, we indicate the number of complexes that answered the question. The questions specific to members that fully outsourced the tax function received insufficient responses (i.e., fewer than 5) and therefore will not be shared pursuant to ICI's survey protocols. These survey results should be used solely for members to consider as they assess their individual policies and practices internally and independently from other fund complexes, and for no other purposes.

Please contact Katie Sunderland (at 202-326-5826 or katie.sunderland@ici.org) if you have any questions.

Katie Sunderland
Assistant General Counsel

[Attachment](#)