



# KPMG Asset Management Platform

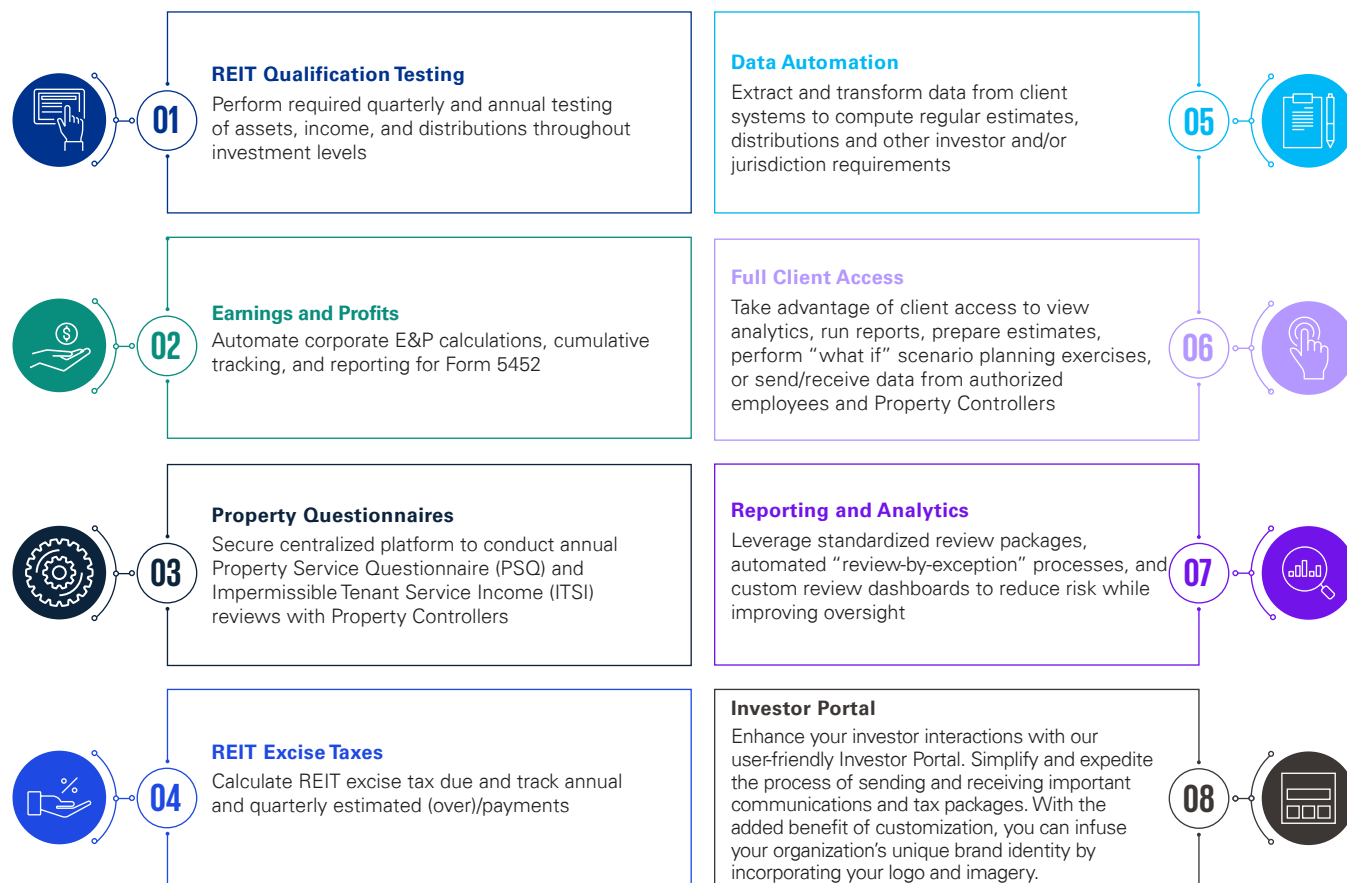
Reimagine Tax Compliance for REITs



KPMG Asset Management Platform's REIT module is an advanced solution for simplifying real estate tax compliance. It accommodates all REIT investment strategies and structures, including residential, retail, hospitality, mortgage/debt, and more. Our platform enables seamless data integration and transfer among REITs, taxable REIT subsidiaries, blocker corporations, and partnerships. This single platform allows for efficient, consistent tax compliance and reporting for all your entities.

- ✓ REIT Platform
- ✓ WNT Real Estate Expertise
- ✓ Collaboration and Tracking
- ✓ Analytics & Decision-Making

## Our Asset Management Platform includes the following features and modules:



# Dive into the Asset Management Platform

## Data Automation Center

Automate Inflows

Financial Data

Property Data

Investor Data



## Real Estate Specifics

- Integrated waterfall allocation models
- Deal-specific and/or special allocations
- Automated K-1/K-3 scanning and aggregation of K-1/K-3 pickups, including footnotes
- Customizable workflow for the collection of K-1/K-3 pickups and other documents from third parties
- Book, Tax, 704(b) basis tracking of investments, and E&P tracking for 1120 and 1120-REITs
- Integration with fund administrators for automated consumption and validation of book data
- Basis tracking for GAAP, Tax, 704(b), and E&P
- REIT asset & income testing and reporting

## Asset Management Platform® | Key Features

- Automated consumption of book data
- Data mapping/validations
- Book to tax walk
- Investment and basis tracking
- Allocations & Tiering
- State sourcing, withholding, apportionment & composite
- Federal & State Tax Returns
- Schedules K-1/K-2/K-3
- US Withholding (1042/1042-S)
- Dynamic report writer
- Structure charts
- Full Client Access

### Data analytics

- What-if scenarios & planning
- Estimates & data visualizations
- REIT quarterly asset & income testing review and comparison

### Workflow/ collaboration

- Collaborate with Property Controllers
- Milestones & resources
- Shared document workpapers
- Investor Portal

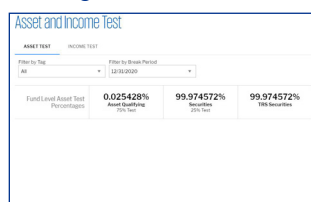
### Compliance & investor deliverables

- Annual excise, and quarterly tax estimates
- Tax Reports & calculations for 1099 & NRA
- Tax Return & K1 Packages

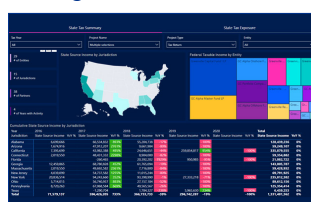
### Tax Return Software

- Integrated mapping with GoRS/CCH
- Federal, State & Local forms
- Electronic filing

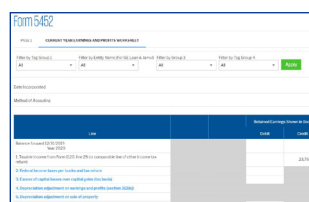
### Asset & Income Testing



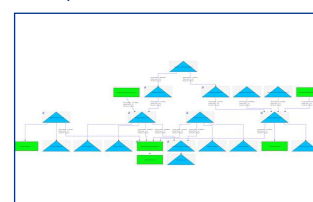
### Business intelligence



### Earnings and Profits Automation



### Multilevel tiering and complex allocations



Private Equity, Hedge, Real Estate, Funds of Funds, RICs, Energy, Credit, Infrastructure, Family Office, **REIT**, Operating Partnerships

For additional information including a demonstration of the KPMG Asset Management Platform, take a tour of our interactive website at [visit.kpmg.us/AMP](https://visit.kpmg.us/AMP). For insights from our Asset Management practice, visit us at [home.kpmg/us](https://home.kpmg/us).

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