



TaxValet
SALES TAX DONE FOR YOU



Vivid Vision 2025

The following is our 2025 Vivid Vision, an exciting glance into our future. It is a detailed overview of what our business will look like, feel like, and act like three years out—by December 31st, 2025.

| Snapshot

It's **December 31st, 2025**, and TaxValet is dominating the sales tax space for multi-million dollar organizations worldwide.

We're not just in the tax business; we're in the business of emotional transformation. **Like modern-day alchemists, TaxValet transforms negative emotions into positive experiences for our clients, partners, and employees** by completely eliminating the hassle and stress of dealing with sales tax. There's a right way and a wrong way to do this job, and we're constantly in pursuit of finding the *right* way.



Core Values



Feel It

We have authentic empathy for the human beyond the task and actively listen to understand their emotional perspectives.



Shape It

We're the masters of our destiny, creating the outcomes we want and never waiting for others to hand them to us.



Own It

We take responsibility for the outcomes, both good and bad. We may not be able to control everything, but we always play a leading role by controlling how we respond in a situation.



Crush It

We create our own standard of excellence by relentlessly pursuing exponential improvements to build extraordinary lives.



| CULTure

Our culture is not just how we treat others but an extension of how we treat and value ourselves. Our work can be challenging, but we're choosing a hard and fulfilling life over an unexamined and easy one. **Each person takes the initiative to make their lives more intentional, impactful, and enjoyable—never sitting around for someone else to do it.** We're not impressed with working overtime. We're impressed with creating a scalable system so we can get the job done and live incredibly fulfilling lives outside of work.

Our cross-cultural identity comes from a place of genuine curiosity and openness to really understand each other. We might only interact with our webcams over a computer screen, but we still foster deeply authentic

relationships. Weekly team meetings ask: *"How are you feeling and tell us why,"* because we want to know what's going on and how we can better it. **The best ideas come from the people that are closest to the work, not from the top.** All team members have an opportunity to provide input in quarterly and annual planning. If there's ever a problem, we talk about it. **The people in this business are more important than the business itself,** and we recognize that the person is usually not the problem—the process is. With introspection and reflection, we examine what led to the issue, get to the core essence of it, and focus on how to make it right moving forward. **What we're really going for is personal growth, and the only way we can get that is by learning from our mistakes.**

Everyone has an opportunity to be positively called out, seen, and recognized with frequent daily shoutouts and quarterly core value awards. If projects call for extra effort, we support those team members with tokens of sincere appreciation like paid meal deliveries or sending a massage therapist to their home to let them know **we'll take care of them as they take care of business.** Birthdays and life milestones are celebrated with heartfelt letters and gifts, and the holidays are commemorated with a company-funded night out. Our annual retreat is a true celebration of life. **We create and expand the cultural heart of our company in the cultural heart of a new destination each year.**

Success doesn't come by accident.

Individuals are hired based on their core value fit, attitude, and potential over direct

industry experience, *then trained on the technical skills of the job.* All employees conduct 20 hours of education a year, while managers rack up 40 hours annually. Team leads work towards their CMI designation with complete support from the company and provide professional development opportunities through webinars, training, and upskilling programs for their teams. **We recruit, train, and hire the best people we can afford wherever they are in the world and prefer to promote from within.** Internal mentorship programs between team members ensure structured growth, a clear sense of progression within a single track or between tracks, and succession plans for every role. We owe it to our employees to create as many opportunities for our team as possible—that's how we transform their lives.





| Team

Alex Oxford, Founder, commits his energy to brainstorming marketing and strategy, cultivating external relationships, and revealing excellence in people. Our **CEO** shepherds the direction of our organization by growing the company, developing our people, serving the team, and understanding the dynamics of the business and its clients.

Teams live up to our core values with leaders who are the center of excellence in training, support, documentation, and developing people. The **Onboarding Team** is the bottleneck of our growth, managing new client onboarding before handing new business off to the Filing Team. Our **Sales Team** works closely with Onboarding in a consulting and advisory capacity. The **Filing Team** conducts ongoing operations while forecasting and predicting business needs. The **Marketing Department** creates engaging stories of current events both internally and externally to spur new client growth. As a matrixed organization, our executional teams are cross-functional to best deliver for our clients.

The **People and Culture Operations Team** maintain psychological safety, create hiring and career pathing strategies, and develop learning and development plans. The **Legal Research and Advocacy Team** is our resource for staying up to date and understanding the latest tax changes while they lobby to make America's taxation systems better for everyone.





I Core Business Activities

*You know that feeling you get when you have to file taxes each year? Imagine having that feeling every single month—that's what dealing with sales taxes is like for business owners. **TaxValet eliminates the hassle, stress, and risk of domestic and international businesses dealing with sales tax and VAT by doing it for them.** We handle every single step for our clients, and we do it all for one, all-inclusive fee. Traditional firms work off billable hours and retainers, obscuring the final cost until it's too late. We communicate transparently from the get-go, so clients can accurately plan and predict what they're in for.*

At TaxValet, we completely take the wheel. We know our clients' needs and guide them through the process. Our flagship, done-

for-you service is our sole offering because mix-and-match options won't put our clients in full compliance and make them outrageously happy. *If we can't deliver an excellent experience, we won't hesitate to waitlist prospective clients or refer them to a competitor. **We're the white-glove service of sales tax, and we stand behind our work:*** If there's ever a missed filing or late payment, we'll cover the penalties or interest incurred—*that's on us*. Every client is catered to individually, with one dedicated sales tax accountant as their point of contact. We're essentially humans powered by software. Technology may support the work we do, but there's always a person answering questions. **We focus on the emotions, and software alone will never be able to get rid of that emotional pain.**



| Sales & Marketing

Our marketing efforts put new business growth on autopilot by attracting the *right* leads that qualify for our service. We work with businesses selling physical or digital products, like e-commerce or SaaS companies, in the US, Canada, and the UK. **Expansion is our trajectory, and we have begun to expand into new markets.** While we mainly focus on the \$1-50M annual revenue segment, we have created a service offering for companies just getting started under that threshold.

Our number one sales driver is referrals. We deliver a customer experience that turns current clients into our biggest promoters. They submit countless reviews, case studies, and video testimonials that highlight the emotional transformation we created and

communicate the relatability of their pain points to others. **We *only* have five-star reviews.** So much so that prospective clients think it's too good to be true until they begin working with us and realize it's simply who we are. We nurture deep relationships with our partners to build and sustain our growth. Referrals from accounting firms, CPAs, and bookkeepers pour in as a result of our network of trust and co-marketing initiatives. We flex traditional lead streams and funnels of digital content, SEO, email marketing campaigns, and online advertising to fit our capacity. TaxValet regularly tops the Google search results with well-researched and curated content from our in-house thought leaders, while our Tax Bytes and educational roundups keep everyone updated on the latest changes in tax policy.

Media & Awards

Our skyrocketing media presence amplifies our success, celebrating the true and authentic reflection of who we are as a company and where we've come from.

We've ranked in the **Inc. 5000 Fastest-Growing Companies**, **Quartz's Best Companies for Remote Workers**, and **Forbes Small Giants Hall of Fame** lists for dominating within our industry while aligning with our core purpose and becoming a vehicle for positive change in the world. Recognition for our diversity in backgrounds, cultures, and countries of origin continuously highlights the spirit and soul of who we are. But we don't see the praise and awards as the true prize; the real trophy is the affirmation that we're valuable enough to be considered. **External validation only illuminates that we're doing the right work, the right way—our way.**



Financials

This year we've achieved **\$6M top-line revenue**, amassed **500 active clients**, and established a **40% year-over-year growth rate** that allows us to expand aggressively while still having fun. We have no long-term debt and operate with enough cash on hand for sizable investments and a line of credit for possible emergencies. We are a **100% bootstrapped** company, having financed our own growth and created all of the money we need without relying on

external investors. **We cannot have full control of our destiny without maintaining complete sovereignty** to shape and make the decisions necessary for our future.

All financials are transparent and simple so that we can close them out quickly, forecast into the future, and be understood by all team members. Everyone has the opportunity to share in the success by participating in our profit-sharing model.



| Virtual Headquarters

As a fully remote team, we're pioneers in leveraging technology to come together, and the world is learning from our example. **Our home offices are where we come to do our life's greatest work, but our virtual headquarters are where we see and interact with one another to plant the seeds of that work.** We may be a collective of individuals informed by various cultures, religions, and backgrounds, but we share one identity and one aesthetic when we access our simulated office space via virtual reality.

TaxValet's singular identity, ethos, and perspective writes the code of our digital fortress. Casual elegance sets the tone with primary materials of glass, marble, and steel erecting future-modern designs. We keep things as simple as they need to be, allowing form to follow function while ensuring the function remains elegant. Our virtual museum is our favorite feature. **Within it lay catalogs of the people, projects, events, and all the crazy shit that has gone down since day one. It is the archive of our most significant mementos, showcasing the thumbprints our people have left on the work they've done and honoring the stories behind it all.**



| Giving Forward

Our philanthropic efforts are focused on the things that matter most to us: the environment, education, and human health. **As a 1% organization, we are committed to donating 1% of our people, profit, product, and equity to nonprofit initiatives.** We provide free tax services to not-for-profit businesses, give every employee several days off to volunteer, and donate a portion of our profit annually. Every year we vote on the causes we're most passionate about and allocate our time and funds where they're most needed.

Internally, we support employees who want to start their own company in achieving that dream. TaxValet isn't going to be their last job, so **we're proud to help them on their path to entrepreneurial success with mentorship, seed money, training, tools, network connections, encouragement, and trust.** By serving as an incubator and springboard of resources, we can make everyone's time with TaxValet worthwhile.



Founder Feeling

In the beginning, it was just me and Jen, with this crazy idea, doing literally everything. With a lot of luck, the right people showing up at the right time to provide the right support, and all the circumstances aligning, we were able to live an authentic life and work out this business. *I get choked up just thinking about it.* I have such a deep sense of gratitude for still being alive and having the opportunity to *create* opportunities for others and to have been so lucky with mentors, advisors, employees, and clients. **In some ways, everything happened by design, but it still requires a healthy bit of luck.**

Our team consists of insatiable, relentless warriors who are completely fired up. Not just about the work, but for who they are and who they've become along the journey. **We set big goals—not just for the glory of accomplishing them, but to trigger the transformative process of personal growth needed to succeed.** Because if we change ourselves, we can change and create the world that we want. *What's the highest and best use of our spirit?* If we can figure that out and continue realizing our greatest potential as *it unfolds*, then we're crushing it. *That's spiritual growth.* It's not about religion, but the human spirit being in total alignment with a higher purpose.

We've worked really hard to create this healthy nucleus. Now we can blow it up and maintain all of the things that are right and special about TaxValet. By focusing on the emotional quality of each person, client, and project, we accomplished what we set out to do—the money simply followed. **We planted the seeds and created our own destiny.** But we're not done. The sky's the limit in this space: There are a lot of businesses with a lot of pain that we can help resolve, and we *will* solve all of these problems. **We won't stop fighting to make sales tax easier for all businesses.** If we legislate ourselves out of the job, then great—there are other problems to work on.

We're looking for diamonds. If you think you are one, call us up. We're hiring.