



TaxValet
SALES TAX DONE FOR YOU

Vivid Vision 2027

It's December 31st, 2027, and TaxValet is the industry's most trusted tax compliance service.



Welcome To The Story of Our Future



We transform the frustrations of sales tax into an act of confidence by putting people first. **Clients don't just love us—they champion us.** Their loyalty and referrals drive our growth as we continue to deliver unmatched care. With over 90% five-star reviews and 400+ active clients, our impact extends far beyond the numbers.

We've proven that great business starts with great relationships. And that extends beyond our client roster. We've cultivated a culture of connection where our remote team feels deeply united and empowered to grow personally and professionally. Our B-Corporation certification and advocacy for simpler taxation systems for all businesses continue to demonstrate our commitment to **purpose over profit.**



At TaxValet, we're not just managing taxes; we're shaping the industry's future with heart, fearless innovation, and a relentless commitment to excellence—and we're just getting started.

Core Values

Own It



We take full responsibility for our actions, decisions, and outcomes. We use both successes and failures as opportunities for growth, openly sharing lessons learned.

Shape It



We proactively contribute our ideas and talents by speaking up, challenging the status quo, and taking calculated risks to shape our future.

Feel It



We value connecting with the real emotions and experiences of others. We also value respectfully sharing our own real emotions and experiences with others.

Question It



We remain curious, ask questions, and seek clarity in the pursuit of continuous improvement and excellence. We are a culture of fearless inquiry.

Crush It



We relentlessly pursue exponential impact in our business and life.

Culture



Our culture isn't built by one person or team—it's created by all of us, actively shaping a workplace where we're doing our best work and having a great time in the process. **We've built a remote culture where connection and trust thrive.** Tools like Slack and voice messages make collaboration seamless, while overlapping work hours ensure decisions are swift and communication is natural. Whether you're in the Philippines, South Africa, or the U.S., when we meet in person, the energy is electric, deepening the bonds we've carefully nurtured virtually and reinforcing the sense that we're one team, no matter the distance.

We OWN IT by turning every success and setback into opportunities to improve. For example, if a project goes off course, we don't point fingers—we jump in, fix the problem, and share what we've learned to strengthen the entire team. We **SHAPE IT** by challenging outdated practices, bringing fresh ideas to the table, and taking thoughtful risks that drive the industry forward—whether it's refining a client onboarding process or rethinking how we leverage technology. When challenges arise, we **QUESTION IT** with curiosity and courage, digging deep to find the root cause and working together to uncover creative solutions that leave no stone unturned.



Our high-performance culture balances ambition with intentional rest. Work here isn't a grind; it's a fulfilling part of life. **Mondays are exciting, Fridays are milestones, and every day offers opportunities for continuous growth.** Team members chart personalized paths that match their aspirations, whether advancing in their roles, exploring new expertise, or contributing across departments.

We celebrate wins in ways that matter to our people. From client success stories to team breakthroughs, every contribution is met with thoughtful gratitude, meaningful rewards, and shared celebrations. We **FEEL IT** in how we honor and support one another, ensuring every effort is seen and valued.

At TaxValet, culture is more than a buzzword—it's the foundation of everything we do.



Team

Organizational Structure

Alex Oxford, Founder & Chairperson, sits at the helm of our **Board of Directors**, a diverse team of experts and thought leaders who function as the leadership team's primary advisory, accountability, and mentorship resource. Our CEO ensures we have happy team members, happy clients, and a happy Board. They remain focused on the future, shaping the strategy to bring our vision to life while maintaining a thriving culture. Our leadership team, directors, and managers all excel at growing and developing their teams into confident, trusted advisors who deliver unparalleled client care. **Because of the support and guidance provided by our leaders, we see the best ideas come from the people who are closest to the work, not from the top.**

Matrixed Organization

Our hub structure is flourishing. The framework drives seamless collaboration across departments, breaking down silos and accelerating the flow of information. Team members receive support in real-time, amplifying their sense of confidence and calm in providing solutions. This translates to clear updates and fast resolutions for clients, reinforcing our reputation as the most trusted advisors in tax compliance. **Clarity, speed, and collaboration aren't just goals—they're our standard.**



Core Business Activities

TaxValet eliminates the hassle, stress, and risk of domestic and international businesses dealing with sales tax and VAT by doing it for them. All compliance work is burdensome, stressful, and overwhelming. Our role is to eliminate those negative emotions from that experience as much as possible. Traditional firms work off billable hours and retainers. We offer transparent pricing structures—from flat-rate monthly subscriptions to limited one-time fees for add-on services—so our offerings can be as inclusive as possible.

As the white-glove service of sales tax and VAT, 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. We keep a finger on the pulse

of the industry, staying vigilant of potential risks and challenges for our clients. We don't leave anything up to chance. **Our clients value our support as a trusted advisor so much they wish we could take over other services, too.** While we'd love to expand our offerings, we prefer to limit our focus to what we do best. We'd rather be specialists than generalists.

The value of TaxValet is the human touch. Technology can enhance or support that, but it can't replace it. We stay five steps ahead of the game by leveraging the power of technology to consistently improve our processes. Our people will always be at the forefront; technology empowers them to do their best work.

Sales & Marketing

Our reach is deliberate. We only expand in directions that make the biggest impact, choosing to focus on opportunities that value our expertise and allow us to deliver an exceptional client experience.

We're fanatical about the experience our clients have—and our industry-leading 60+ NPS speaks for itself. Our glowing testimonials, client stories, and partner referrals are potent tools that fuel our growth. Each channel we invest in—from thought leadership and strategic partnerships to targeted campaigns—delivers immeasurable returns. Exploration fuels innovation. Our team is always tuned in, refining strategies based on client feedback and market insights. With sales surging, our New Client Onboarding Specialists set a sustainable pace by maintaining a packed waitlist. **If a potential client is filling one of those coveted spots, it means we're certain they're the best fit for us, and we're the best fit for them.**



Buzz Around Town



Over 90% of our reviews are five stars, showcasing our reputation for exceptional service. Clients value our trusted relationships, consistently referring others and driving a significant portion of our new business.

Team members constantly rave that this is their dream job. They speak so highly of their experiences here that we've

amassed over 90% of our reviews on Glassdoor being five stars. Our team members are our best source of finding new talent, always eager to refer qualified candidates for open positions.

TaxValet is transforming the sales tax landscape, sparking meaningful conversations across the media and industry. We advocate relentlessly for our clients and business owners nationwide, pushing for simpler, more efficient tax systems at both state and local levels. Our team's expertise shines through as many are **Certified Members of the Institute of Professionals in Taxation**, where they actively lead through volunteering, committee roles, and thought leadership—all while reinforcing TaxValet's reputation for excellence.

Financials

This year, we've achieved over **\$8M in top-line revenue**, surpassed **400 active clients**, and maintained a **combined growth and profit annual total of 40%**. Consistent and predictable growth allows us to scale without outpacing our exceptional service commitments. We keep our financials tight to make accurate projections but honor that **numbers are not our ultimate goal**. Our sense of success comes from the quality of our relationships—from our team members to our clients and beyond. The results are evident in how our people show up: feeling happy, cared for, and growing.



Giving Forward

As a certified B-Corporation, we prioritize purpose over profit in every facet of our business. It's simply our way of being and doing. Our commitment to this mission has positioned us as a sought-after partner among other B-Corps who align with our values and vision.

Leading with a heart of service is a strong value we all share. As a 1% organization, we are committed to donating 1% of our people, profit, product, and equity to nonprofit initiatives every year. We offer discounted tax services to nonprofits and maintain an active volunteer presence, with team members using company-supported volunteer hours to contribute to causes they're passionate about.

We also champion the entrepreneurial dreams of our team members. TaxValet might not be their final career stop, and we're okay with that. In fact, we celebrate it. We provide mentorship, seed funding, training, tools, and network connections to help employees take the leap toward launching their own ventures. By serving as both a launch pad and a supportive resource, we ensure that every person's time with TaxValet is not only an investment in our future – but an investment in their future as well.



Team Success

We don't just dream big—we make it happen. From our early days as a startup turning heads in the sales tax space to becoming a trusted staple in the industry, we've proven that bold vision paired with diligent execution creates extraordinary results. Today, we're shaping the future of tax compliance, one relationship at a time.

Our approach is simple but meaningful: **There's a right way to do this work, and we're committed to finding it, every single day.** Guided by our purpose and core values, we deliver exceptional experiences that redefine what's possible in our industry.

We set big goals—not just for the glory of accomplishing them, but to trigger the transformative process of personal growth needed to succeed. We pursue ambitious targets to challenge ourselves and unlock our full potential.

TaxValet is a space where inspiration thrives. Those who share our values and vision join us, knowing they'll meet a better version of themselves in the process. The future of tax compliance starts here—with bold ideas, fearless execution, and a world-class team. Ready to be part of this journey? Reach out, and let's build it together.