



Simplify the complexity of partnerships using advanced technology solutions

KPMG Partnership Transactions Group (PTG) Solution

At KPMG, we understand that partnerships can be a valuable source of growth for your business. However, we also recognize that the complex analyses and calculations required to maintain partnership structures can be a source of frustration and inefficiency. Introducing the PTG Solution – a cohesive technology package designed to simplify complex calculations which would otherwise require hundreds or thousands of excel worksheets.

Our technology solutions are designed to address common client headaches, such as difficult and time-consuming efforts required due to high volumes of data, a significant number of capital events or preparing various “what-if” analyses. Additionally, our solutions provide useful dashboards that show the results of the analyses and easy-to-follow work papers or summaries that support audit trail purposes.

Experience the benefits of our technologically advanced partnership, transaction, and compliance solutions.

Discover the value of our PTG solution

Our suite of technology solutions for partnership transactions was designed by partnership tax specialists to create scalable, flexible, traceable, auditable, and user-friendly models that can streamline complex calculations for taxable income allocations, basis adjustments, Tax Receivable Agreements and K-1 reporting. Our technology solutions offer unique value drivers, including a centralized data repository and processing engine, an integrated and auditable process that can scale to address specific transaction needs, and the use of next-generation technology such as Power BI to host client accessible online dashboards.

But what sets KPMG apart is our application and maintenance of our PTG Solution. Our partnership tax specialists within PTG offer nimble tax engagement teams to support new business operations and strategies that align with client priorities. Additionally, our technology professionals provide end-to-end technology support and continuously improve on our existing platforms.

Work with KPMG and experience the power of our technology solutions, combined with the expertise of our partnership tax specialists and technology professionals.



Take a closer look at how the PTG suite of technology tools can transform your business processes.

Capital Account Maintenance Module

Accurate capital accounts are crucial for planning purposes and anticipating significant transactions such as acquisitions, dispositions, mergers, and debt-financed distributions.

Effective partnership tax compliance also requires the careful maintenance of capital accounts under Section 704(b) and the corresponding tax capital accounts. PTG's Section 704(b) Module, part of the PTG Solution, streamlines this process by maintaining these capital accounts in an efficient manner.

Section 704(c) Module

Section 704(c) allocations can be complex and time-consuming. That's why we offer a Section 704(c) module that uses technology tools, including third-party licensed software, to help distill large data sets and summarize complex allocation workpapers into an easy-to-understand output.

PTG's Section 704(c) module streamlines the allocation process and provides clients with the necessary tools to manage Section 704(c) allocations for tax compliance and tax planning purposes. Our Section 704(c) module ensures increased efficiency and accuracy in your allocations, leading to a streamlined and transparent process that reduces risk of errors and saves you time.

Section 743(b) module

The Section 743(b) module uses third-party licensed software and other advanced technological tools to summarize transaction-related data, such as purchase price and the seller's tax profile, and provide transparent outputs that clients can review and use for both tax compliance and tax planning purposes.

Our Section 743(b) module streamlines the calculation process and provides clients with the necessary tools to manage Section 743(b) calculations efficiently and accurately. Our Section 743(b) module empowers you with enhanced transparency and control over your calculations, saving you time and resources.

The Tax Receivable Agreement (TRA) module

We understand that Tax Receivable Agreements (TRAs) can create unique challenges for umbrella partnership C Corporation (UP-C) clients. That's why we offer a TRA module that provides visibility into the calculations and reporting required by TRAs, as well as the cash flow and financial statement reporting requirements that TRAs create.

Our TRA module is designed to streamline the TRA process and provide UP-C clients with the necessary tools to manage TRA-related calculations and reporting. With our module, you can expect increased visibility and control over TRA-related cash flows and financial statements, resulting in a more efficient and transparent TRA process.

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