

THE POWER OF BEING UNDERSTOOD  
ASSURANCE | TAX | CONSULTING



# RSM POLAND

We support our clients  
at every stage of running  
a business



# WHO WE ARE

RSM Poland is part of RSM – a leading network of auditing and consulting firms that supports entrepreneurs around the world. Our international structure includes:



**120 countries**



**900 offices**



**65 000 specialists**

We are wherever your business may need us, providing the highest quality services in the field of:

- accounting, reporting and payroll outsourcing;
- audit;
- transaction advisory (M&A);
- tax advisory;
- IT consulting regarding ERP Oracle NetSuite and Microsoft Dynamics 365 F&O;
- establishing and providing legal services for companies.

Our team includes over 300 specialists: accountants, statutory auditors, tax advisors, lawyers and consultants. We support our clients at every stage of their business. We communicate fluently in Polish, English and German.





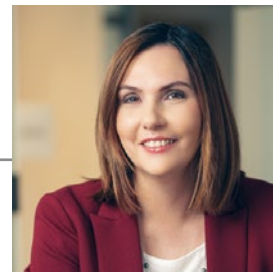
# OUTSOURCING

We provide comprehensive services in the field of accounting and HR and payroll outsourcing. Our modern and flexible approach and many years of experience allow us to constantly improve our competences, which translates into the provision of services at the highest level.

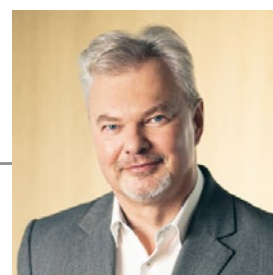
## FINANCIAL AND ACCOUNTING OUTSOURCING, WITHIN WHICH WE OFFER:

- Bookkeeping, also on the client's accounting systems;
- Preparation of financial statements, including for clients for whom we do not keep accounting books;
- Preparation of reports in accordance with Polish and international regulations (IAS / IFRS, US GAAP);
- Verification of accounting books;
- Accounting consultations;
- Supervision of accounting books;
- Replacement of accountants/chief accountants/financial directors;
- Payment management;
- VAT compliance;
- CIT compliance.

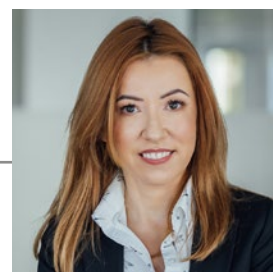
We provide a wide and comprehensive range of financial and accounting services tailored to the individual needs of our clients. We guarantee business security and timely settlements in accordance with current regulations. Our team of specialists has experience in handling client matters from many industries and jurisdictions. As a global network, we provide consistent service to our clients in 120 countries.



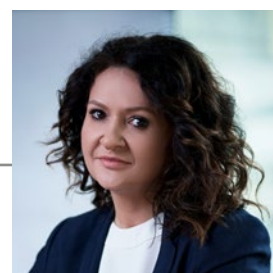
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**Barbara BIRYŁO**  
Accounting & Payroll Partner  
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## HR AND PAYROLL OUTSOURCING, WITHIN WHICH WE OFFER:

- Payroll calculation and related services (also for employees employed in Poland by foreign companies);
- Comprehensive HR services;
- Outsourcing of salary payments;
- Audit of payroll calculations and correctness of settlements with the Social Insurance Institution and the tax office;
- Supervision of the HR and payroll department;
- Replacement of staff responsible for payroll calculation;
- Consultations on labour law;
- Cooperation during the Social Insurance Institution or National Labour Inspectorate inspections;
- Consultations related to global mobility: settlements of foreigners working in Poland and Polish employees delegated to work abroad;
- Support in creating internal regulations and documents.

We guarantee professional service of the highest standard, provided by a team of qualified specialists who constantly update their knowledge. We take care of the confidentiality of employee data and compliance with applicable legal regulations. Our specialists have extensive experience in servicing both small Polish companies and foreign corporations.

**WE HAVE  
EXPERIENCE IN  
WORKING ON  
THE FOLLOWING  
SYSTEMS:**



ORACLE  
**NetSuite**



*PRO* **ALPHA**







# AUDIT

We are a team of statutory auditors specialising in International Financial Reporting Standards and national accounting regulations and standards. By carrying out our auditing tasks, we help our clients to recognise potential risks and find solutions that support the development of their businesses.

## THE WIDE RANGE OF SERVICES PROVIDED BY OUR TEAM INCLUDES:



**Marcin KAWKA**

Audit Partner  
Statutory Auditor (11864)

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**Monika SKÓRKA**

Audit Partner  
Statutory Auditor (11488)

[monika.skorka@rsmpoland.pl](mailto:monika.skorka@rsmpoland.pl)



**Piotr STASZKIEWICZ**

Audit Partner  
Statutory Auditor (11245)  
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### AUDIT AND REVIEW OF FINANCIAL STATEMENTS:

we provide comprehensive audit services related to fulfilling statutory obligations imposed on companies;

### AUDIT OF EU PROJECTS:

we prepare a comprehensive report and issue a professional opinion confirming that the expenses incurred as part of an EU project are eligible and the method of its implementation is in accordance with the contract;

### VERIFICATION OF COMPLETENESS DECLARATION (LUCID, VERPACKG):

we help entities delivering goods to Germany fulfil the obligation to have an auditor verify the information contained in the so-called Completeness Declaration submitted to the LUCID register;

### ADVICE ON RESTRUCTURING AND TRANSFORMING COMPANIES:

we support companies in their development and facilitate adaptation to dynamic changes in the market environment through financial, legal and tax analysis and preparation of a reorganisation plan;



## OTHER SERVICES PERFORMED BY STATUTORY AUDITORS:

we provide consultations in the field of accounting and balance sheet law, provide assurance services, offer support in the implementation of new standards and conduct training;

A reliable financial report builds trust and confidence not only of shareholders and stockholders, but also of external entities interested in the condition of the company. It is worth entrusting financial auditing to experienced specialists.



## RISK MANAGEMENT:

we support entrepreneurs in developing an optimal risk management strategy:

- **RISK ADVISORY:**  
we help to effectively reduce strategic, financial and operational risks;
- **INTERNAL AUDIT:**  
we assess internal control standards, eliminate irregularities, implement procedures and mechanisms that are optimal for the company;
- **SOC REPORT (ISAE 3402):**  
we confirm the credibility of outsourcing companies by checking their services in terms of quality and compliance with international standards. We produce the SOC report.

Proper risk management and process and procedure optimisation are key to running a successful business. The support of experienced advisors from our team allows for a better understanding of the challenges that managers and business owners face.





# TRANSACTION ADVISORY (M&A)

Our support covers a full range of professional merger and acquisition services: we advise investors and businesses in the process of targeting a company or enterprise they find worth acquiring, help to find an acquirer, streamline negotiations and conduct an independent business valuation and due diligence.

**WE SUPPORT OUR CLIENTS AT EACH AND EVERY STAGE OF THE DEAL, PROVIDING COMPREHENSIVE ADVISORY ON MERGERS, DEMERGERS AND SALES OF BUSINESSES.**

## **VALUATION:**

we draft professional and all-encompassing valuations of business entities, regardless of their size, that allow to estimate their market potential.

## **FINANCING:**

we assist clients in the process of obtaining funds from equity investors and offer debt financing advisory.

## **DUE DILIGENCE:**

we investigate the status of acquired companies and prepare flash or full reports providing insight into potential risks and problems that might affect the course of the deal.



**Marcin KAWKA**

Audit Partner  
Statutory Auditor (11864)

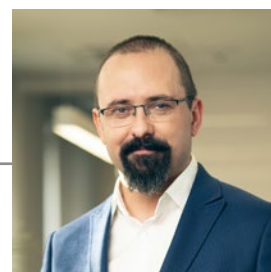
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**Piotr LISS**

Tax Partner  
Tax Advisor (10240)

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**Bartosz MIŁASZEWSKI**

Managing Partner  
Tax Advisor (11251)  
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## OUR DUE DILIGENCE INCLUDES:

- **FINANCIAL DUE DILIGENCE:**  
involves the review of financial standings and key company performance indicators;
- **TAX DUE DILIGENCE:**  
allows to pinpoint potential tax risks and assess both their materiality levels and probability;
- **LEGAL DUE DILIGENCE:**  
enables the assessment of the validity of contracts and acts signed by the party, the accuracy of data entered into relevant registers and the analysis of other legal aspects;
- **VENDOR DUE DILIGENCE:**  
it is carried out at the request of the vendor and allows to mitigate the risk of transaction failure and obtain the best deal;

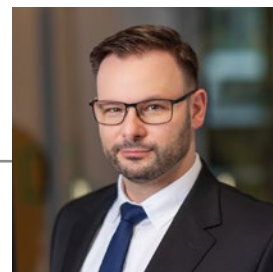
Our team has run numerous M&A projects in Poland as well as abroad. We are ready to support investors and stakeholders throughout the entire transaction process, either representing the acquirer or the target business.



**Krzysztof WARAKOMSKI**

Corporate Advisory Manager  
Radca Prawny / Legal Counsel

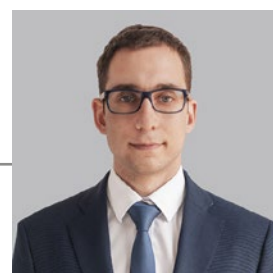
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**Zbigniew JAWOROWSKI**

Audit Supervisor

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**Bartosz KABACIŃSKI**

Corporate Finance Manager

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# TAX ADVISORY

Our experienced tax advisory team helps businesses operating in Poland navigate their way through convoluted and frequently amended regulations. We offer a comprehensive support enabling clients to keep up with the changes and plan their tax settlements accordingly, thanks to the use of available mechanisms and reliefs.

WE OFFER A COMPREHENSIVE SUPPORT THAT FACILITATES BUSINESS OPERATIONS, IN COMPLIANCE WITH RELEVANT TAX LAW, AND MITIGATES THE RISK OF DISPUTES WITH TAX AUTHORITIES.



**Tomasz BEGER**

Tax Partner  
Tax Advisor (10197)

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## OUR SERVICES COMPRISE:

### CORPORATE TAX COMPLIANCE:

we review income tax computations based on the existing accounting records as well as verify and draw up tax returns;

### VAT COMPLIANCE:

we support the implementation of Polish regulations on the goods and services tax and help clients meet their statutory obligations by providing VAT settlement outsourcing services;

### TRANSFER PRICING:

we assist clients in the process of devising transfer pricing policies, drafting tax documentation and fulfilling their reporting obligations;



**Piotr LISS**

Tax Partner  
Tax Advisor (10240)

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**Przemysław POWIERZA**

Tax Partner  
Tax Advisor (11204)

przemyslaw.powierza@rsmpland.pl



#### **GLOBAL EMPLOYER SERVICES:**

we determine the impact of foreign revenues and remote work performed from a foreign country on tax settlements in Poland, empowering businesses to select an optimal manner of rewarding their management board members, supervisory boards and proxies and enabling effective management of tax issues related to global mobility;

#### **TAX LITIGATION:**

we represent taxpayers in the course of litigations and checks carried out by tax authorities with the aim of investigating the accuracy of their tax returns;

#### **APPLICATION OF TAX RELIEFS:**

we help clients devise and implement solutions that allow them to minimise their tax bill and make the most of simplifications envisaged in Polish law.

The support offered by certified tax advisors significantly facilitates business operations and guarantees peace of mind in the event of a tax audit, so that taxpayers can focus on their operational activities and company development.





# IT CONSULTING

We offer comprehensive support in cloud ERP systems. We are the biggest Oracle NetSuite Partner in Poland and the creator of the Oracle NetSuite Polish Localisation Package, a set of modules that complement the NetSuite financial system and is aligned to meet Polish legal and tax requirements. As an official Microsoft Partner, we provide our clients with technical and IT support to optimise Microsoft Dynamics 365 Finance & Operations processes.

# ORACLE NETSUITE

NETSUITE IS A LEADING CLOUD ERP SOFTWARE SYSTEM BASED ON MODULES WHICH CAN BE EASILY CUSTOMISED TO YOUR CURRENT NEEDS, REGARDLESS OF THE SIZE AND GROWTH RATE OF YOUR COMPANY.



**Hubert SKRUKWA**

Head of IT Consulting

hubert.skrukwa@rsmpland.pl

As part of the NetSuite Solution Provider Partner Program, we offer:

## ORACLE NETSUITE IMPLEMENTATION:

our certified NetSuite developers and consultants help both small and medium companies as well as large enterprises from various industries to effectively implement and expand the system. We provide comprehensive solutions finely tailored to the needs of our clients.

## POLISH LOCALISATION PACKAGE:

implementation of a set of modules which provide an extension of the NetSuite financial system and ensure compliance with Polish legal and tax requirements. In response to changing regulations and new requirements, our team updates and expands the functionalities of the package on an ongoing basis, and we regularly inform our clients about all latest developments in our Release Notes.

## SUPPORT IN ADMINISTRATION OF ORACLE NETSUITE APPLICATIONS:

depending on the selection of the package: BASIC, STANDARD, or PREMIUM, our helpdesk provides support in administrative tasks, settings customisation, and troubleshooting. We also offer consultations with experienced NetSuite specialists.

## INTEGRATION WITH OTHER APPLICATIONS:

support in integration of Oracle NetSuite with external systems and databases, facilitating optimisation and automation of processes as well as smooth flow of information.

ORACLE  
**NetSuite**

Solution Provider  
Partner

 Polish Localization  
Package for NetSuite

# MICROSOFT DYNAMICS 365 FINANCE & OPERATIONS

MICROSOFT DYNAMICS 365 F&O IS FOR MANY COMPANIES AN INDISPENSABLE TOOL FOR OPTIMISATION OF MANY BUSINESS PROCESSES. BEING ABLE TO MAKE THE MOST OF THIS ECOSYSTEM MAY, HOWEVER, REQUIRE PROFESSIONAL ASSISTANCE.

We are an official Microsoft Partner offering the following services:

## SUPPORT IN DATA MIGRATION:

smooth and safe transfer of data from other systems to Microsoft Dynamics 365, ensuring complete integrity and security of information;

## INTEGRATION WITH OTHER SYSTEMS:

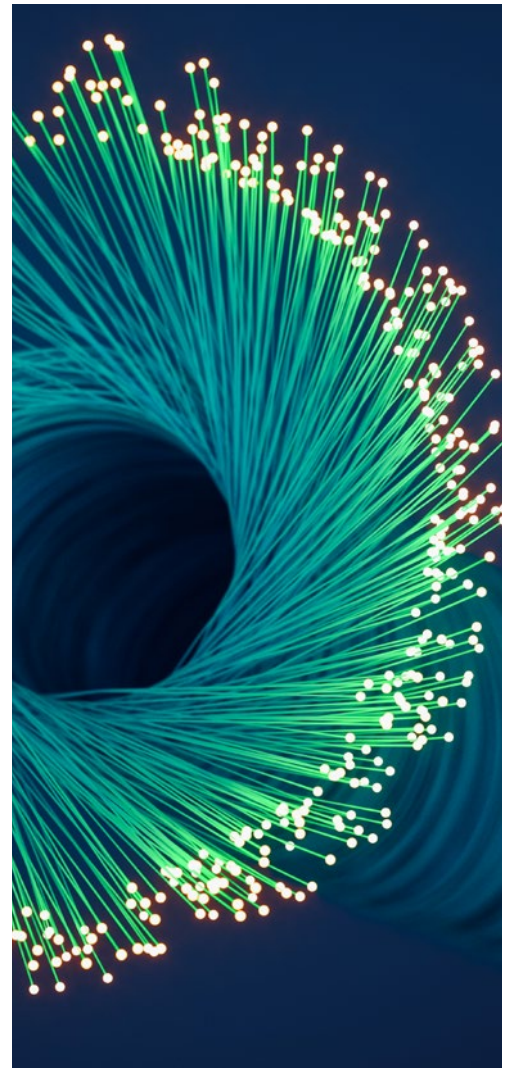
support in designing and implementing integration, enabling seamless exchange of data between various platforms;

## IT SUPPORT:

adjusting Microsoft Dynamics 365 F&O to individual requirements and processes run in the company;

## TECHNICAL SUPPORT:

ongoing support in troubleshooting all technical issues, guaranteeing the continuity of operation within the platform.



**Microsoft  
Partner**





# **CORPORATE ADVISORY AND COMPANY FORMATION**

Our Corporate Advisory Department assists entrepreneurs in setting up business in Poland and offers comprehensive legal support, helping to comply with the most important corporate obligations.

OUR CORPORATE SERVICES INCLUDE BOTH AD HOC AND CONTINUOUS SUPPORT OF ENTREPRENEURS STARTING OR ALREADY RUNNING BUSINESS IN POLAND.

## OUR RANGE OF PROFESSIONAL CORPORATE SERVICES:

### SETTING UP AND REGISTRATION OF COMPANIES:

assisting companies which enter the Polish market in choosing the right form of business activity, drawing up articles of association and other registration documents;

### SALE OF SHELF COMPANIES:

ready-made limited liability companies with no prior business activity but with all the registration numbers: KRS, NIP, REGON, for entrepreneurs who are looking for a fully incorporated entity;

### MERGER, REORGANISATION, DEMERGER, AND LIQUIDATION OF COMPANIES:

carrying out reorganisation of entities and entering the changes into relevant registers, assisting entrepreneurs who wish to cease operations in complying with all the obligations;

### LEGAL ANALYSES AND OPINIONS:

preparing legal analyses and opinions in the areas of civil, commercial, and economic law;



**Anna LEHMANN**

Corporate Advisory Partner

[anna.lehmann@rsmpoland.pl](mailto:anna.lehmann@rsmpoland.pl)

## DRAFTING AND ANALYSING COMMERCIAL CONTRACTS:

creating draft contracts, holding legal consultations, and assisting in drawing up, analysing, and negotiating the terms of commercial contracts;

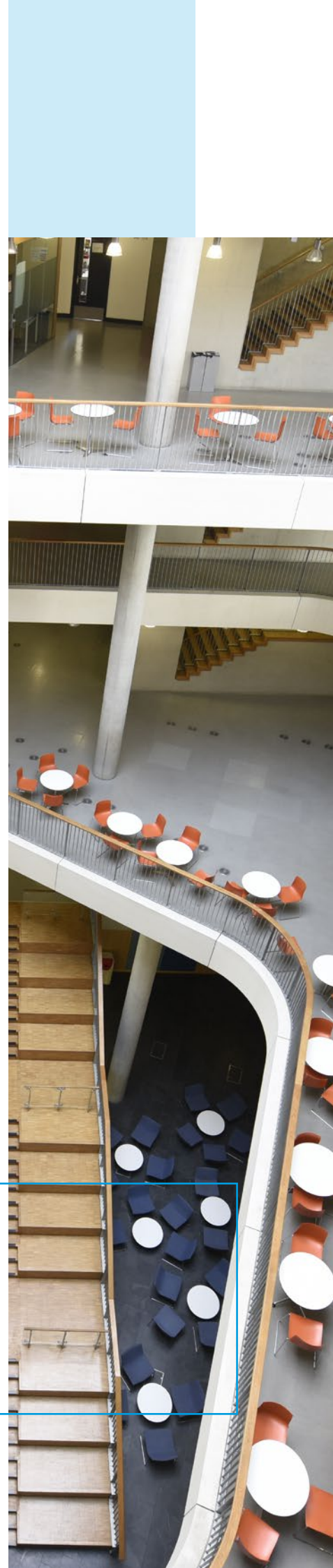
## LEGAL SUPPORT IN APPROVING AND FILING FINANCIAL STATEMENTS:

preparing necessary minutes of meetings for the approval of annual financial statements and filing the financial statements along with other documents required by law;

## CORPORATE SECRETARIAL SERVICES:

- establishing the addresses of:
  - agent for service,
  - registered office,
  - Polish branch of international entities,
- supporting companies in complying with the obligation to update the data and information in the Central Register of Ultimate Beneficial Owners,
- providing administrative support to management board members in:
  - obtaining and registering PESEL numbers,
  - acquiring and renewing qualified electronic signatures

Our corporate services can greatly assist top managers in performing their tasks and allow corporate authorities to effectively fulfil the requirements imposed by Polish law.







# CROSS-FUNCTIONAL TEAMS

Sometimes joint ventures fall flat because the involved parties, although unanimous, speak different languages. In RSM Poland, we know how to handle such challenges thanks to our specialised teams that are capable of accommodating the needs of clients from specific countries.

## GERMAN DESK

Our German Desk comprises:

- tax advisors;
- statutory auditors;
- accounting and corporate governance experts;
- specialised translators (including sworn translators);
- attorneys-at-law.

Thanks to a close, cross-functional collaboration, we are competent to devise a comprehensive response to all needs of businesses from the German-speaking countries.

At each and every meeting with German-speaking entrepreneurs there is at least one expert that is well acquainted with the nitty-gritty of the economy and law of the given country. This makes us capable of getting to the core of our client's needs. We steer clear from misunderstandings, and thus save the time and money of businesses relying on the services provided by RSM.

## CHINA DESK

Our cross-functional team supports Chinese investors willing to break into the Polish market.

We offer comprehensive assistance in:

- incorporating and taking over businesses;
- all matters related to audits, tax, accounting and law.

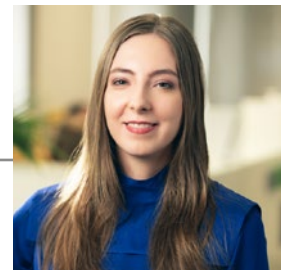
We have a great comprehension of the Chinese business culture and speak Chinese fluently. Our collaboration will foster smooth operation of Chinese businesses in Poland.



**Przemysław POWIERZA**

Tax Partner | Tax Advisor (11204)  
Head of German Desk

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**Michalina NIEDROSZLAŃSKA**

BD & China Desk Specialist

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## OUR OFFICES:

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[www.rsm.global/poland/en](http://www.rsm.global/poland/en)

RSM Poland is a member of the RSM network and trades as RSM. RSM is the trading name used by the members of the RSM network.

Each member of the RSM network is an independent accounting and consulting firm, each of which practices in its own right. The RSM network is not itself a separate legal entity of any description in any jurisdiction.

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