



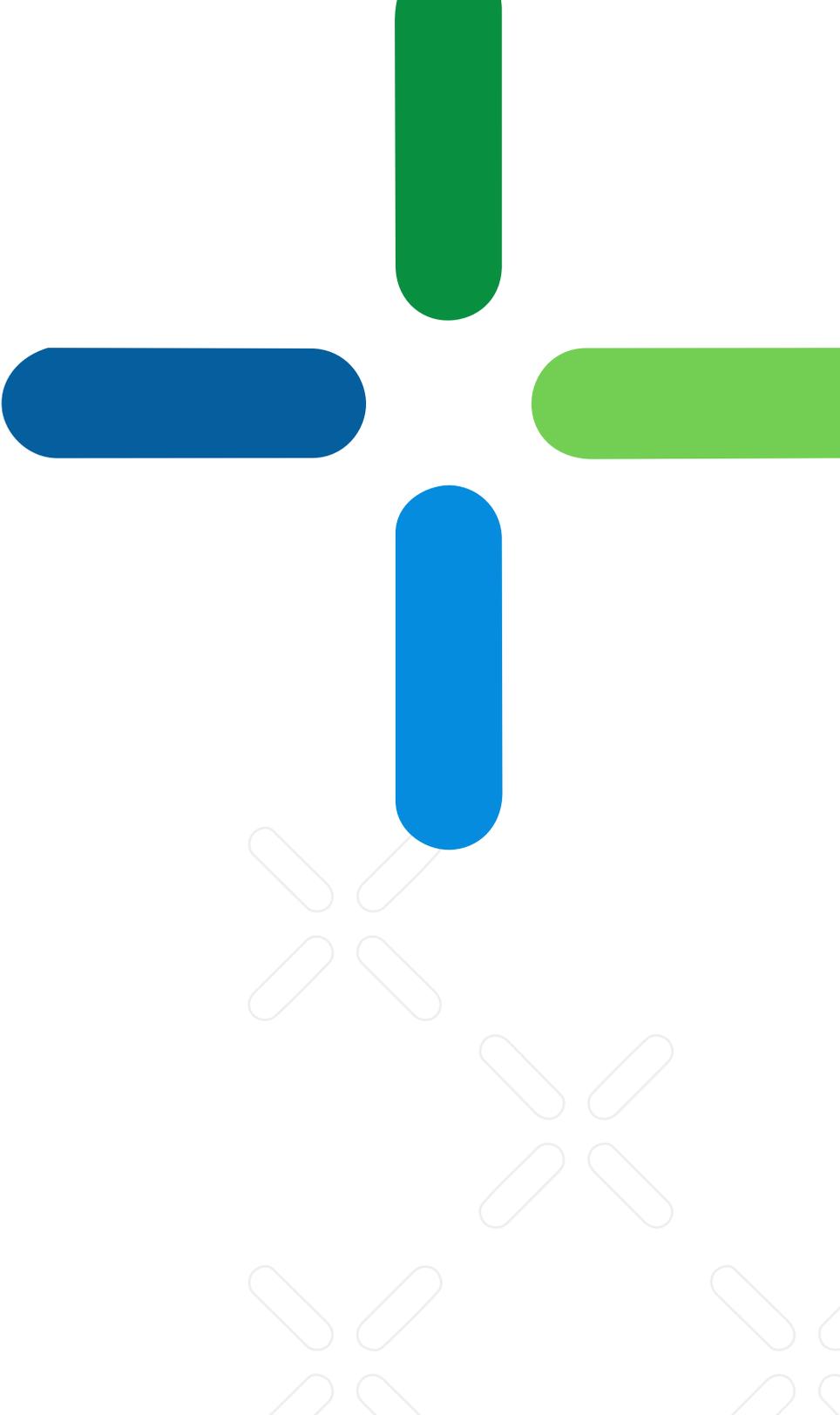
Vertex Global Partner Program

Where partners and providers connect to deliver results



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Welcome

Dear Valued Partner,

At Vertex, we've spent over 40 years helping organizations manage the complexity of indirect tax. Our technology supports tax determination, compliance, and reporting, and integrates with the systems that power global commerce. But what makes our business strong isn't just technology – it's the ecosystem around it.

Our partners play a critical role in helping customers solve real challenges, implement solutions successfully, and stay compliant as tax requirements continue to evolve. Whether you are exploring a partnership with Vertex or you are already part of our partner network, we see you as a key part of our long-term success. That's why we built this program: to make it easier for you to grow your practice, strengthen credibility with customers, and deliver results you can stand behind.

This guide provides an overview of how the program works, what benefits are available, and how we can build success together.

Thank you for your partnership and continued commitment. We're excited about what we can achieve together.

Warm regards,

Your Vertex Team



Overview

The Vertex Global Partner Program provides the tools, resources, and support to help grow your business and deliver value to customers. Your success is important to us, and we are committed to supporting you throughout our partnership. Whether you are exploring partnership opportunities or learning about the opportunities available to you as a partner, this guide explains how our program is structured and how to make the most of it.

In the guide, you'll find:

- Your Role in the Ecosystem

A clear overview of how Implementation Providers, Solution Providers, and Technology Providers contribute to customer success and help bring Vertex solutions to market.

- Program Benefits

A breakdown of partner benefits such as training, certifications, co-marketing opportunities, referral incentives, and Market Development Funds (MDF) for supporting joint marketing and pipeline growth.

- Resources & Support

Information on partner hubs, enablement tools, and technical support that help reduce delivery risk and accelerate partner success.

- Partner Tracks and Tiers

An explanation of how each partner track is structured and how partners can progress over time through clear tier requirements.

- Partner Responsibilities

An overview of what partners can expect from Vertex and what Vertex expects from partners to maintain good standing.



Why Partner with Us?

Partnering with Vertex is an opportunity to expand your business and deliver customer outcomes that matter. Indirect tax complexity continues to grow, and enterprise customers need technology and expertise they can trust. Vertex solutions help to support tax compliance from calculation through reporting, returns, and audit readiness – and our partners help customers put that technology into action.

Here's what makes the Vertex partner opportunity strong:

- Trusted Leadership

We have decades of experience helping organizations manage indirect tax requirements across industries and regions.

-Enterprise Grade Technology

Our solutions integrate seamlessly with major platforms, empowering businesses to tackle challenges with confidence and ease.

- Strong Partner Support

From access to our partner management team to training, certifications, and co-marketing opportunities, we offer resources designed to support your success.

- Ways to Differentiate

Specializations in areas like ERP integrations and e-invoicing allow you to showcase your expertise, differentiate your business, and lead in a competitive market.

- Shared Growth Potential

Through referral incentives, Market Development Funds (MDF), and co-branded marketing, you're perfectly poised to expand your reach, generate leads, and drive revenue.



Your Role with Vertex

As a partner, you're a vital part of the Vertex ecosystem. Each partner type plays a unique role in solving complex tax challenges, driving growth, and creating success for our shared customers. Here's how you contribute to the bigger picture:

Implementation Providers



You're the experts in deploying and integrating Vertex solutions for customers. As system integrators, consulting firms, or technical specialists, you ensure seamless implementation and help businesses unlock the full potential of our products. Your role is critical in delivering tailored solutions that meet customer needs while maintaining the highest standards of quality and customer satisfaction.

Solution Providers



You're the trusted advisors who recommend Vertex products and guide customers through the sales and onboarding process. As agencies, managed service providers, or industry-specific consultants, you ensure businesses have the right tools to manage complex tax requirements and achieve growth. Your ability to deliver expert guidance and tailored solutions makes you an invaluable partner in the customer journey.

Technology Providers



You're the innovators who develop and maintain integrations with Vertex solutions. As independent software vendors (ISVs), ERP platform providers, or technology companies, you enhance the value and reach of our products. Your work creates seamless technology experiences that drive innovation and mutual business growth.

Implementation Providers

This section outlines the distinct requirements, exclusive benefits, and strategic opportunities designed for Implementation Providers. You are essential to customer success, and your ability to deliver high-quality services directly impacts customer satisfaction and long-term adoption.

Tiers

Standard, Premium, and Elite tiers are offered to Implementation Providers. Each includes specific requirements and escalating benefits. This tiered approach provides a scalable framework that supports you at every stage of your journey with Vertex.



Standard Tier

This is the foundational level for partners beginning their journey with Vertex. It provides access to the core resources, training, and support needed to build a successful practice around our solutions. It's designed to help you establish your expertise and start delivering value to customers.

Premium Tier

This level is for partners who have demonstrated a strong commitment to growing their Vertex practice through consistent performance and deeper engagement. Premium partners gain access to enhanced benefits, including financial incentives like Market Development Funds (MDF), greater marketing support, and higher discounts on training and certifications.

Elite Tier

The highest level in our program, the Elite Tier is reserved for partners who have achieved exceptional results and have become strategic contributors to the Vertex ecosystem. Elite partners receive our most comprehensive suite of benefits, including dedicated resources, the highest financial rewards, first right of refusal for premier event sponsorships, and executive-level engagement to drive strategic alignment and joint success.

Implementation Provider Benefits

We are committed to fueling your growth with resources that matter. Our tiered benefits structure rewards your investment in Vertex with financial incentives, marketing firepower, and elite technical support. Below you will find just a few highlights of the benefits we offer our partners.

Benefit	Standard	Premium	Elite
STRATEGIC			
Partner Portal access*	✓	✓	✓
Pre-sales and Solution Engineering support	✓	✓	✓
Dedicated Partner Manager	–	✓	✓
Partner Success Manager	–	✓	✓
Consideration for Implementation Services referrals from Vertex Sales	–	✓	Priority
FINANCIAL			
Education/Certification discounts	✓	✓	✓
MDF eligibility based on Closed Qualified Customer Referrals	–	✓	✓

*Vertex Partner Portal will launch in late 2026/early 2027. Until then, the Vertex Partner Hubs will act as source for GTM materials.

Benefits continue >>>

>>Benefits Continued

Benefit	Standard	Premium	Elite
TECHNICAL			
Technical support (pre sales / solution engineering)	✓	✓	✓
MARKETING			
Partner Marketing Support	Programmatic Marketing Support	Discretionary Marketing Support	Dedicated Partner Marketer
Co marketing opportunities	–	✓	✓
Implementation of success case studies	✓	✓	✓
Vertex Exchange / other event sponsorship	✓	✓	First right of refusal

Implementation Provider Requirements

Ascending through the Vertex Global Partner Program tiers is a direct reflection of your expertise and market impact.

Requirements

Our top-tier partners are expected to consistently deliver exceptional results and uphold high standards of customer satisfaction.

Performance is evaluated across several key areas, including certifications (the credentials individuals hold), experience (project work completed within the past 24 months, with lower-scoring engagements flagged for follow-up), overall performance (progress toward revenue or influence goals), and governance (active participation in planning and regular business reviews).

Expectations across these areas may vary by tier.



Solution Providers

This section outlines the requirements, exclusive benefits, and strategic opportunities designed for Solution Providers.

Tiers

Standard, Premium, and Elite tiers are offered to Implementation Providers. Each includes specific requirements and escalating benefits. This tiered approach provides a scalable framework that supports you at every stage of your journey with Vertex.



Standard Tier

This is the foundational level for partners beginning their journey with Vertex. It provides access to the core resources, training, and support needed to build a successful practice around our solutions. It's designed to help you establish your expertise and start delivering value to customers.

Premium Tier

This level is for partners who have demonstrated a strong commitment to growing their Vertex practice through consistent performance and deeper engagement. Premium partners gain access to enhanced benefits, including financial incentives like Market Development Funds (MDF), greater marketing support, and higher discounts on training and certifications.

Elite Tier

The highest level in our program, the Elite Tier is reserved for partners who have achieved exceptional results and have become strategic contributors to the Vertex ecosystem. Elite partners receive our most comprehensive suite of benefits, including dedicated resources, the highest financial rewards, first right of refusal for premier event sponsorships, and executive-level engagement to drive strategic alignment and joint success.

Solution Provider Benefits

We are committed to helping Solution Providers grow with resources that matter. Our tiered benefits structure rewards your investment in Vertex with referral incentives, marketing visibility, and technical enablement. Below you will find just a few highlights of the benefits we offer our partners.

Benefit	Standard	Premium	Elite
FINANCIAL			
Year 1 referral commission	✓	✓	✓
Year 2 referral commission	–	✓	✓
MDF Eligibility	–	✓	✓
MARKETING			
Partner Marketing Support	Programmatic Marketing Support	Discretionary Marketing Support	Dedicated Partner Marketer
Marketing Events/activities per year	–	1	2
Co-branded materials	Vertex guidance & templates	Vertex guidance & templates	Custom (Vertex created)
Co-marketing opportunities	–	✓	✓
Co-hosted webinars or roundtables	–	✓	✓

Benefits continue >>>

>>Benefits Continued

Benefit	Standard	Premium	Elite
STRATEGIC/ADDITIONAL			
Vertex Exchange / other event sponsorship	✓	✓	1st right of refusal
Joint annual business planning	–	✓	✓
Partner Portal access*	✓	✓	✓
TECHNICAL			
Technical Sales (Pre-sales/solution engineering support)	✓	✓	✓
Innovation briefings/Early access to features	✓	✓	✓
Training and Certification (technical enablement)	✓	✓	✓
Implementation eligibility (provided certification requirements met)	–	✓	✓

*Vertex Partner Portal will launch in late 2026/early 2027. Until then, the Vertex Partner Hubs will act as source for GTM materials.

Solution Provider Requirements

Category	Requirement	Standard	Premium	Elite
Revenue/Influence	Referred ACV or closed won opportunities	✓	✓	✓
Sales Enablement	Vertex Partner Sales Enablement course completions	✓	✓	✓
Marketing	Vertex branding on website; named marketing contact	–	✓	✓
Governance	Business planning; quarterly/biannual reviews	–	✓	✓

Technology Providers

You're the innovators who develop and maintain integrations with Vertex solutions. As independent software vendors (ISVs), ERP platform providers, or technology companies, you enhance the value and reach of our products. Your work creates seamless technology experiences that drive innovation and mutual business growth. This track is designed to support your go-to-market strategy, deepen technical collaboration, and create shared success.

Tier & Requirements

Ascending through the Technology Provider tiers reflects a deepening strategic alliance and market impact. The following requirements ensure our joint efforts are aligned to drive innovation, customer value, and significant revenue growth.



Technology Provider

You are an organization with active integrations to Vertex products. These integrations can be developed and maintained by Vertex, your team, or a third party. This tier is ideal if you are looking to leverage Vertex's technology to enhance your offerings and provide seamless solutions to your customers.

GTM Technology Provider

(By Invitation Only)

You represent a deeper level of collaboration with Vertex. Participation in this tier is by invitation only and based on mutual strategic alignment. Your integrations, developed either by Vertex or your team, are supported by a shared interest in activating a joint go-to-market strategy. To support this partnership, you will allocate dedicated resources to focus on joint initiatives. In turn, Vertex will commit dedicated resources, such as a Partner Manager and Marketing counterpart to ensure the success of our joint initiatives. Advancement to this tier is not automatic and requires approval from Vertex.

Global Strategic Technology Provider

(By Invitation Only)

You represent the highest level of partnership with Vertex. Participation in this tier is by exclusive invitation and reflects your critical role in influencing customer decisions early in the deal lifecycle. As a market leader, you serve as a lighthouse partner, setting an example for others in the ecosystem. This tier is designed for you to establish deep technology integrations with Vertex, supported by your dedicated Alliance or Partner Manager and alignment from your product and engineering teams to maintain Vertex-managed connectors. Advancement to this tier is not automatic and requires approval from the Vertex Product team, ensuring alignment with strategic goals and market leadership.

Technology Provider Benefits

We are committed to helping Technology Providers grow with resources that matter. Our tiered benefits structure rewards your investment in Vertex with strategic alignment, marketing visibility, and technical enablement. Below you will find just a few highlights of the benefits we offer our partners.

Benefit	Technology Provider	GTM Technology Provider	Global Strategic Technology Provider
STRATEGIC			
Relationship management	–	–	Dedicated Partner Manager
Executive sponsorship	–	–	✓
Rev share / referral commissions	–	✓	✓
Joint annual business planning	✓	✓	✓
Partner Portal access*	–	✓	✓
TECHNICAL			
Technical Sales (Pre-sales/solution engineering support)	Self-Serve	Self-Serve	Priority
Innovation briefings/Early access to features	✓	✓	✓
Free sandbox access	✓	✓	✓
Training & certification (technical and sales enablement)	✓	✓	✓

*Vertex Partner Portal will launch in late 2026/early 2027. Until then, the Vertex Partner Hubs will act as source for GTM materials.

Benefits continue >>>

>>Benefits Continued

Benefit	Technology Provider	GTM Technology Provider	Global Strategic Technology Provider
MARKETING			
Partner Marketing Support	Programmatic Marketing Support	Discretionary Marketing Support	Named Partner Marketer
Co-branded materials	Vertex Guidance and Templates	Vertex Guidance and Templates	Custom
Client success case studies	–	✓	✓
Co-hosted webinars or roundtables	–	✓	✓
Vertex Exchange / event sponsorship	✓	✓	First right of refusal

Technology Provider Requirements

Ascending through the Technology Provider tiers reflects a deepening strategic alliance and market impact. The following requirements ensure our joint efforts are aligned to drive innovation, customer value, and significant revenue growth.

Technology Provider

- Any technology partner with active integrations to Vertex product(s).
- Integrations can be developed and maintained by Vertex, the partner, or a third party.

GTM Technology Provider

(By Invitation Only)

- Vertex or partner-developed integrations.
- Mutual interest from both partner and Vertex in activating a joint GTM motion.
- Dedicated capacity allocation from the partner for strategic pursuits (e.g., Partner Manager, Marketing counterpart).
- Dedicated capacity allocation from the Vertex partner organization for joint GTM.

Global Strategic Technology Provider

(By Invitation Only)

- Partner presence early in the deal lifecycle, with essential influence on customer choice.
- Market leader that can serve as a lighthouse partnership, influencing others.
- Intent to establish deep technology integrations with Vertex.
- Partner has a dedicated Alliance/ Partner Manager for Vertex.
- Alignment from product/engineering to establish and maintain Vertex-managed connectors.
- Clear path to high ACV impact in approximately 2-3 years.

Support and Resources

The Vertex Global Partner Program equips you with tools, knowledge, and expert support to help you deliver excellence for your customers.

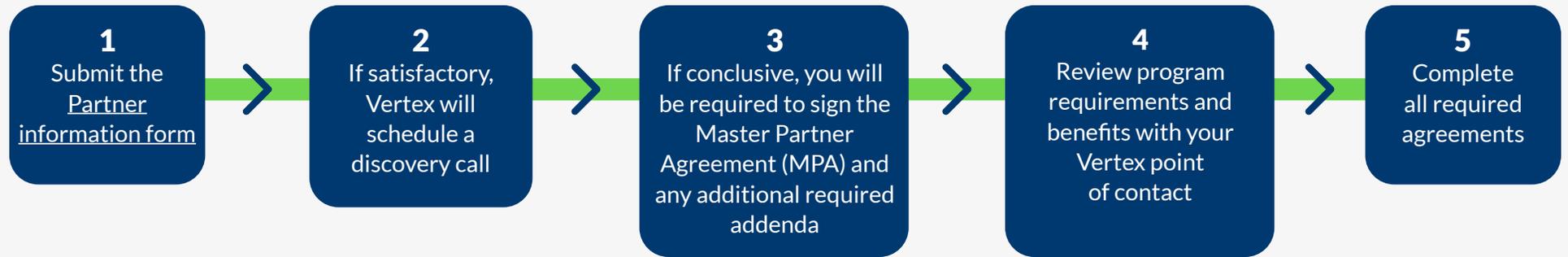


Training & Certification	Marketing Resources	Technical Support
Partner Sales Enablement (PSE) 101 A foundational course covering Vertex's solutions and market positioning.	Co-Branded Materials Premium partners may use professional Vertex templates; Elite partners can request custom, Vertex-led asset creation.	Sandbox Access Develop, test, and refine your solutions in a safe, real-world environment.
Onboarding Material Resources are available to ensure new partners quickly gain familiarity with program tools and processes.	MDF Premium and Elite partners can access joint marketing funds for approved activities.	Pre-Sales & Solution Engineering Support for accurate product scoping and solution design.
Technical Certifications Specialized certifications for Implementation Providers, such as ERP integrations and e-Invoicing. <i>This is a paid offering.*</i>	Campaigns & Events Opportunities to participate in co-hosted webinars, roundtables, and major industry events.	Innovation Briefings Access to early product updates and roadmap sessions to align technical strategy.

**Discounts: Premium and Elite partners receive significant savings on eligible training and certifications.*

Application and Onboarding Process

Embarking on your partnership journey with Vertex begins with a straightforward application process designed to set you up for long-term success.



Conclusion

At Vertex, we don't just build tax technology; we build ecosystems where innovation and expertise thrive together. This program is more than a framework, but rather an invitation to co-create value, solve complex challenges for our shared customers, and drive significant growth for your business.

Take the Next Steps

The opportunity to differentiate your business and accelerate your revenue is right in front of you. Don't let the momentum fade.

For new partners

Explore more details and fill out the partner inquiry form here: www.vertexinc.com/partners/become-partner.

For existing partners

Access the full range of Vertex benefits, resources, and opportunities for co-marketing and co-selling available to you.

How to Get in Touch

We are here to support you at every stage of your partnership journey. If you have questions about the application process, require information on program benefits, or wish to discuss partnership details, please reach out to your designated partner contact by email: partnerprogram@vertexinc.com.



Thank You

Thank you for your interest and commitment to the Vertex Global Partner Program. We recognize that partnership is a choice, and we are honored that you're considering or have chosen Vertex as your strategic ally. Your industry expertise, combined with our tax technology leadership, creates a powerful force in the market. We are excited to embark on this journey with you and look forward to the success we will achieve together.

Learn more or join our partner ecosystem to amplify your impact by visiting <https://www.vertexinc.com/partners/become-partner>.

Vertex may update the Partner Program Guide from time to time to adapt to changes in Vertex's business and portfolio of Products and Services.

About Vertex

Vertex, Inc. is a leading global provider of indirect tax solutions, delivering trusted tax technology that helps businesses transact, comply, and grow with confidence. Vertex's cloud-based and scalable solutions support major lines of indirect tax, including sales and consumer use tax, value added tax

North America | Latin America | Europe | Asia Pacific

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