

# Trade Profiler – Trade Advisory Services

Many internationally active middle market companies lack full visibility into their cross-border trading activities. The sheer volume of imports and customs entries leads to blind spots that exacerbate compliance risks and missed opportunities for cost savings. Taking control requires seeing the whole picture.

RSM created Trade Profiler to enable dynamic processing and visualization of critical import data. Trade Profiler can analyze years of an importer’s information, converting trade data into actionable intelligence. By revealing inconsistencies, inefficiencies and redundancies, Trade Profiler enables companies to identify and quantify opportunities to lower tariff costs, reduce trading risks and improve supply chain performance.

### Data, data everywhere

Forty-three. That’s how many data elements are required on every CBP Form 7501 – otherwise known as an Entry Summary – that’s filed with Customs and Border Protection (CBP). That’s how much detail a company must disclose when goods are imported into the United States. Internationally active businesses can file dozens, maybe hundreds – or more – customs entries each week. The sheer volume of required information and documentation can overwhelm middle market companies, compelling them to engage customs brokers to help manage the burden and keep pace. External support can all too easily transform into dependency when other demands take precedence. And when a company isn’t managing or measuring a part of its business, it is not controlling it.

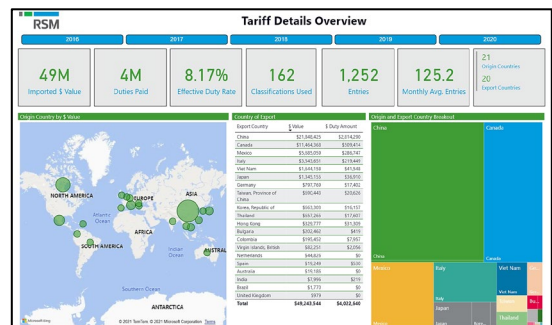
### Transforming data into intelligence

The volume of import transactional information and documentation creates several key challenges: organizing data, analyzing it and reporting it. RSM’s Trade Profiler does all three.

The process begins with the company requesting that its broker retrieve its entry summary data from the CBP’s Automated Commercial Environment (ACE) portal. The data is then loaded into RSM’s Trade Profiler to standardize and analyze. RSM’s Trade Advisory team applies their extensive experience and skills to review the data and create a summary report that drives a conversation to identify cost savings, recover cash and control risks.

The report analyzes information such as quantity, origin country, Harmonized System classifications, value, foreign sources, customs duties and fees, and other details of a company’s U.S. imports. This establishes a fact-based foundation from which RSM can engage corporate leadership to review trading activity, co-develop outcomes, and deliver immediate and enduring value.

### See the whole picture



The Trade Profiler dashboards help to quickly assess the what, when, where, who and how of the company's international trade activities. Trade Profiler effectively illuminates issues such as inconsistencies in classification codes and supply chain inefficiencies related to the country of origin. By highlighting vendors by dollars, countries, and entries, RSM's team can identify whether a company can reduce costs by concentrating on sourcing to different or fewer countries. The automated presentation of imported value, duties paid and effective duty rates spotlight import measures that are often unknown or seen only in isolation.

RSM can pair origin-country data with trade agreements and special programs such as foreign-trade zones to help lower, defer, recover, or even exempt customs duties.

Finally, Trade Profiler offers three delivery options to fit each client's respective complexity and interest in reviewing its data:

- **Static report** – screenshots of the dashboards are provided, highlighting key points and areas of interest. This deliverable helps serve as a high-level snapshot of the organization's current customs and trade profile and can be used as a springboard for future discussions about trade optimization.
- **Interactive report** – the full dashboards are provided, enabling filter and drill-down capabilities. This option allows the user to interact with the data and review specific source countries, classifications, etc. even after the final presentation and discussion with RSM's subject matter experts.
- **Online access** – Similar to the interactive report, the full dashboards are made available as an

online report that can be revisited at will, as well as refreshed with updated data monthly or quarterly. RSM's Trade Advisory team provides a review and summary report each period to continue supporting the organization.

### Benefits summary

If a company imports goods, RSM's Trade Profiler dashboards can deliver:

- **Business insights, targeted risk reduction, and opportunity and savings identification** – the dashboards provide actionable insights into the import data, helping improve overall supply chain performance.
- **Time and cost savings** – manual analysis and data manipulation is no longer needed to evaluate import data in a meaningful way. The company's time and resources can be focused entirely on addressing risks and opportunities.
- **Tailored delivery** – RSM's Trade Advisory team can address a wide variety of questions relating to the import data provided – and will incorporate the results visually in the dashboards.

### Why RSM?

Our strong, client-centric approach differentiates us. We strive to understand you, your business, and your aspirations. By sharing the ideas and insights of our experienced professionals, we bring our local and global knowledge and resources to your environment, so you feel empowered to move forward with confidence.

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