FALCON SC TAX INTELLIGENCE

Falcon Sample Report Catalogue

Twenty worked reports across the service portfolio

Version 1 | 3 October 2026 | English edition

This suite gives Falcon staff concrete examples of professional service delivery beyond transfer pricing. Each report contains a fictional engagement, an executive assessment, a tailored scope and method, three substantive findings, a transparent calculation schedule, alternatives, a delivery plan and technical review requirements.

Use the presentation PDFs to inspect the finished layout and the Word documents to adapt the structure. All figures and evidence are fictional; the suite demonstrates report quality and judgement boundaries rather than certifying tax outcomes. It does not claim to exhaust every possible bespoke advisory assignment.

Transfer pricing and dispute reports

Code	Report	Primary use
01	Transfer Pricing Local File	Transfer pricing
02	Transfer Pricing Master File	Transfer pricing
03	Country by Country Reporting Readiness	Transfer pricing
04	SP2DK Response and Evidence Report	Tax dispute
05	Tax Audit Defence Report	Tax dispute
06	Objection and Appeal Strategy Report	Tax dispute
07	MAP and APA Feasibility Report	International dispute prevention

Each individual report has six pages. The full portfolio PDF contains this catalogue followed by all twenty reports, with bookmarks for direct navigation. The ZIP contains individual PDFs and editable Word documents using the same numbered filenames.

Compliance and advisory reports

Code	Report	Primary use
08	Monthly Tax Care Report	Compliance retainer
09	Tax Health Check Report	Tax health check
10	VAT Reconciliation and Refund Readiness	VAT and refund
11	Payroll and Expatriate Tax Review	Payroll and expatriate
12	Mergers and Acquisitions Tax Due Diligence	M and A due diligence
13	International Structuring Advisory	International advisory
14	Tax Incentive Feasibility Report	Incentives
15	Customs and Trade Tax Review	Customs and trade
16	Global Minimum Tax Readiness	Minimum tax applicability
17	Tax Cash Flow Planning Report	Cash flow planning
18	Tax Technology and Controls Roadmap	Tax technology
19	Annual Corporate Income Tax Review	Corporate income tax compliance
20	Withholding Tax Reconciliation Report	Withholding tax compliance

The suite covers the service names already present in Pajak365, including Tax Care, Tax Health Check, VAT and Refund, Payroll and Expatriate, M and A Due Diligence, International Advisory and Tax Technology. Incentives, Customs and Trade, Minimum Tax and Cash Flow Planning extend the advisory scenario catalogue.

How to adapt a report for a real client

Start with the engagement purpose

Select the report whose decision and service scope match the authorised work. Replace the fictional entity, period and fact pattern; do not simply change the name on the cover. Reconcile the report scope to the quotation, engagement letter and actual deliverables. A report model does not confer an additional regulated or professional capability.

Build the evidence before the conclusion

Replace every E reference with an actual original and a stable index. Keep the distinction between facts, client assertions, calculations, assumptions and legal interpretation. The worked scenarios intentionally contain unresolved issues so that staff can practise a balanced recommendation rather than a prematurely confident conclusion.

Complete the technical work

Verify the current original law, amendments, treaty and period applicability. The reference lists are research starting points. Numerical rates in the annual tax, withholding, customs, incentive and minimum-tax scenarios are explicit modelling assumptions; they must not be reused as prescribed client rates. Obtain licensed comparables and actual screening evidence for transfer pricing.

Use AI within the existing workflow

AI may help organise supported facts and prepare an internal draft within an enabled route. Interpretation uses the dedicated workflow and applicable qualification controls. Template quality does not qualify a model, resolve a source gap or replace independent Falcon judgement. Preserve review notes and current source versions, and monitor cost and blocked-call states.

Issue only after professional review

Obtain independent review by a suitably qualified professional, confirm client authority and remove fictional material. Review any Bahasa Indonesia version substantively before statutory use. These English reports are management-oriented sample deliverables; the dispute report is a strategy report and is not an objection petition or appeal filing.

Design and quality standard

A consistent professional system

The suite uses a restrained Falcon identity, generous margins, readable body text, clear black headings and navy financial tables with alternating pale rows. Every report follows the same navigation rhythm while its analysis remains specific to the service. Pagination, repeatable table headers and numerical alignment keep long reports readable in print and on screen.

Broader engagement variants

Service family	Variants to tailor from the worked model
Transfer pricing	Goods, services, financing, royalties, restructuring and intangible contribution analysis
Disputes	SP2DK response, audit defence, objection, appeal and further-remedy assessment; actual pleadings need separate counsel review
International	Bilateral adjustment relief, prospective APA, treaty and operating-model advice
Compliance	Monthly retainer, annual corporate computation, withholding, payroll and VAT completion
Advisory	Acquisition and disposal, incentive eligibility, customs review, minimum tax, cash planning and data controls

What completion means

A finished report should explain the client's decision, substantiate the findings, reperform the numbers and state the conditions that could change the recommendation. Design cannot compensate for missing evidence. The final file must have an approved audience, source version, reviewer and issue record; external submission and receipt remain separate events.

Suggested staff exercise

Choose a service, challenge one unsupported assertion, reperform a financial bridge and identify the evidence that would change the conclusion. Then adapt the findings and delivery plan to a supervised fictional case. Staff should be able to explain the limits of the report before using its structure with real client material.