

# RITA G. PEREIRA

## TAX & LEGAL

### EXPERIENCE

#### INDIRECT TAX LEAD FOR EMEA&APAC @BOSE

Since July 2024

- Provide strategic advisory on VAT/GST and other foreign tax matters across EU and APAC, ensuring compliance while optimizing tax efficiency.
- Act as a key consultant for VAT-related controversies, operational developments, and strategic business planning.
- Guide the business on tax implications of legislative changes, ensuring seamless adaptation to new regulations.
- Oversee and refine tax technology systems (SAP/S4Hana, OneSource/Vertex, Power BI, etc.) to enhance reporting accuracy and operational efficiency.
- Collaborate cross-functionally with Controllers, Trade Compliance, and external tax advisors to drive informed decision-making and cost optimization.

#### SENIOR MANAGER – EMEA - INDIRECT TAX @MEDTRONIC

Sep 2021 - June 2024

- Provide timely advice to Medtronic businesses & recommend potential planning alternatives to minimize VAT liabilities in various EMEA countries.
- Primary responsibility for VAT planning, advisory, audit & project work across EMEA.
- Lead & manage VAT audits and controversy in the EMEA region; liaison with country tax inspectors while also working closing with local finance and the VAT Compliance BPO on filed return positions to ensure a successful outcome for Medtronic.
- Support the M&A Tax Group and Business Tax Planning Group on VAT due diligence for EMEA acquisitions and divestitures, as well as strategic alliances/JVs. Support integration activities including entity combinations, supply chain product flow and coordinating with the VAT Compliance BPO on how resolve pre-closing VAT liabilities for acquired entities.
- Collaborate with IT, Supply Chain, Transfer Pricing, Accounts Payable, Customs/Trade Compliance & other departments on SAP changes that affect VAT invoicing on all intercompany and customer sales of product and services, including VAT codes and product coding.
- Advise EMEA Controllers on VAT technical rules and work with controllers to establish proper SOX & tax control procedures so that the controllers can determine and record proper tax accounting (and tax reserves) related to VAT in the company's financial books and records.
- Assist in the setting of correct VAT rates on all company products & services in each country in the EMEA region and obtaining tax rulings (when appropriate) from tax authorities to minimize VAT risk on Medtronic products and services.
- Promote & drive continuous improvements using the Lean methodology in line with the Medtronic Operating System (MOS). Lead process changes in the VAT-related areas.
- Training and development of VAT team members
- Increasing the profile of the VAT department (and the importance of VAT) within Medtronic.
- Such other duties and responsibilities as may be assigned from time to time by the EMEA VAT Director,

Tax Department management team, country controllers or EMEA Finance leaders.

## SENIOR MANAGER – EUROPE - INDIRECT TAX @TEVA PHARMACEUTICALS

Sep 2020 – Sep 2021

Reason for leaving: Teva's VAT strategy was subject to material changes, and I was proposed a relocation to Croatia, which I did not accept.

My role was newly created and, for that reason, not clearly defined.

In a nutshell, the below tasks have been my focus:

- Supervising and coordinating the implementation new VAT reporting software. Teva is undergoing a process change, starting with one of its legal entities, which implies the implementation of a new software. My role in the process is to contribute to the implementation from a technical VAT perspective and to coordinate all the teams, from IT to Accounting, and external service provider to ensure a smooth go-live and the accuracy of reports, moving forward;
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- Managing and coordinating external service providers in regards to Indirect Tax. This includes, not only the management of existing relationships and overseeing routine work, but also to implement cost reduction initiatives.
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- Standardization of VAT processes across Europe. Teva's VAT processes in Europe are very diverse, due to the growth of the company mainly based on M&A. Achieving a higher level of standardization is one of the projects I kicked off.
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- VAT support to accounting teams across Europe. I have become a focal contact for daily VAT queries from Teva's teams across Europe, namely in regards to the correct VAT treatment of transactions.
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- Teva's supply chain is very complex one. I am part of the team that continuously works on supply chain improvement and optimization. One of the more recent work in regards to our supply chain was due to adjustment to Brexit.
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- Improving processes overall, in order to reduce costs, optimize resources and improve key factors visibility, among other goals, always ensuring quality and accuracy.

## INDIRECT TAX CLIENT MANAGER @KPMG GLOBAL SERVICES (HUNGARY)

Dec 2015 – Sep 2020

Management of client Indirect Tax obligations, keeping clients updated and ensuring full VAT compliance, whilst seeking to mitigate the administrative and financial costs relating to VAT and indirect taxes, where possible. Currently managing a portfolio of 18 clients across industries – from Pharma to Energy, through retail and e-Commerce. Namely:

- Overseeing day-to-day compliance services of my clients and seeking for opportunities to improve and optimize VAT/GST management.
- Being the main point of contact for Indirect Tax compliance and knowing my clients' business and their needs.
- Working closely with the clients and our member firms for indirect tax advice.
- Monitoring and keeping client informed about legal changes related to Indirect Tax, as well as advising on any needed action.
- Assisting client and internal teams in the development of tech solutions, namely related with invoice reporting across EU.

- Managing all issues related to the client, namely client satisfaction, billing, new services opportunities and client specific matters.
- Attending regular and governance meetings and calls. Liaising with local Office and Tax Administration and representing KPMG in external meetings.
- Keeping track of KPI related to the engagement management Auto-assess risk and quality indicators
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- On the delivery side:
- Delivering Indirect Tax reporting, ensuring Indirect Tax compliance and identifying risk;
- Reviewing Indirect Tax returns and other tax related reports all across Europe and also Singapore, UAE, Korea, New Zealand and Australia;
- Monitoring changes in Indirect Tax legislation and interpretation to identify potential impact on the business;
- High-level VAT technical advice and assisting in developing and maintaining indirect tax accounting policies and procedures;
- Liaison with tax authorities and local offices;
- Pursue best practices and improved compliance quality in the area of VAT.

## TAX STATE ATTORNEY @NATIONAL TAX AND CUSTOMS AUTHORITY 2011-2015

- Litigation – Independently responsible for handling court cases above EUR 1,000,000 or regarding listed large taxpayers;
- Mainly dealing with Corporate Taxation, VAT, Fraude and tax evasion, DTA's, etc, with a high level of responsibility.
- As a tax inspector: examining accounts and researching background documents; investigating fraud; reviewing, in detail, aspects of the business accounts to ensure that tax law has been applied correctly; Besides the technical skills, working as a state lawyer and facing large corporations and law firms in the courthouse, developed my communication and public speaking skills, quite useful when having to do presentations and to be convincing when exposing my ideas.

## JURIST AND COUNSEL TO THE BOARD @OPORTO STATE PRISON & STATE PRISON ADM 2009-2011

- Managed all aspects of legal and compliance functions regarding the management of the prison and of the prisoner population;
  - Counseled the management team on legal matters regarding all aspects relevant to the prison management, as, for instance, contractual, financial, HR, criminal and administrative.
  - Legal Aid in the implementation of new prison legislation; Preparation of studies, reports and legal information.
  - Responsible for managing a team of 4-5 officers, including mentoring and training.
  - Drafting legal instruments; Preparation of legal studies and legal opinions; Public procurement; administrative appeals and complaints; preparation of pleadings and other formal court
- From this work experience I took with me great people skills and conflict management given the sensitivity of the handled groups, colleagues and inmates.

## JURIST@ NORGARANTE – MUTUAL GUARANTEES 2009

- Legal review of contracts and financial documentation
- Preparation of final proposal regarding state supported avail to loans and private investments
- Commercial and Banking regulation analysis

## LEGAL AND TAX ADVISOR @CP CONSULTORES

2007 – 2009 (rejoined)

- SME advisory – Legal and Tax
- Audit and Tax Compliance
- VAT Planning and optimization

## JURIST @NATIONAL TAX AUTHORITY – VAT REFUNDS

DEPARTMENT 2006 – 2007

- Working mainly with VAT and in the implementation of the plan for the modernization of the services, for instance, in respect of the coordination of shared information in the EU and foreign states.
- Acting as a lawyer in the litigation section of VAT Refund Division, including: Drafting legal instruments; Preparation of legal studies and legal opinions; Public procurement; administrative appeals and complaints; Drafting legal opinions and proposals; Collaboration in the preparation of proposals for legislative changes in the field of VAT refunds

## LEGAL AND TAX ADVISOR @CP CONSULTORES

2005 – 2006 (Suspended due to incompatible activity)

- SME advisory – Legal and Tax
- Audit and Tax Compliance
- VAT Planning and optimization

## JURIST @NATIONAL HOUSING ADMINISTRATION SERVICES 2005

- Approval of state subventions related to housing programs
- implementation of state housing policies

## LAWYER @JTA ADVOGADO (Trainee)

2003 – 2005

- Lawyer internship held at a law firm.
- Intervention cases with its focus on tax and customs law.

# EDUCATION

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## MBA - MASTER IN BUSINESS ADMINISTRATION (2012-2014)

@AESE/IESE Business School\*

\*FT Ranking - Top Executive MBA

## MASTER IN LAW AND ECONOMICS (2012-2013)

@Lisbon University - Faculty of Law

Suspended during Master Thesis on VAT Grouping

## POST-GRADUATION – TAX (2007-2008)

@ISAG/PWC

## POST-GRADUATION – EUROPEAN STUDIES (2006–2007)

@European Instituto - Lisbon University

## LAW DEGREE (1997–2003)

@UCP – Portuguese Catholic University - Faculty of Law

# OTHER SKILLS

## ■ LANGUAGES

Portuguese: Native

English: Proficient

Spanish: Basic

## IT

Independent user of Windows tools