



The Home of  
International Taxation

## Global Roll-Out, Localized Detail: How RSM Global and IBFD partnered to create the 'RSM Fundamentals Tax Academy'

How IBFD scaled RSM Global's international learning to strengthen their workforce's capabilities.



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# The challenge



## Who are RSM Global?

RSM Global provides audit, tax, consulting, risk advisory, IFRS, restructuring, transaction and financial advisory services, along with specialist offerings such as wealth management, IT consulting, legal advisory and forensic accounting worldwide.

RSM Global's previous strategy of in-person training for its global network of tax professionals was becoming difficult to maintain, presenting issues such as:

- **Rising travel costs**, as well as time and resource-intensive processes.
- **Sustainability concerns**, pertaining to the environmental footprint that comes with in-person trainings.
- Difficulty keeping pace with the **frequency of regulatory, policy, and technical tax changes** at the speed of evolving requirements.
- **Logistical demands** such as travel or venue coordination, instructor availability, and aligning time zones made repeated in-person training difficult to sustain.

Additionally, global talent shortages, with more senior tax practitioners entering retirement and leaving behind a knowledge gap, intensified the need for scalable, high-quality training that could reach employees anywhere in the world. RSM needed a future-proof solution that could unify learning, strengthen technical capabilities, and support long-term workforce development.

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# IBFD's solution

Expanding training capacity  
through consistent, expert-led  
content

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IBFD partnered with RSM to design the RSM Fundamentals Tax Academy, a two-year, online programme aligning with RSM's global learning strategy.

Our approach combined deep tax expertise, instructional design excellence, and cross departmental collaboration, resulting in a solution that is both high-quality and globally accessible.

- **17 live online seminars** (over 2 years) delivered by renowned IBFD experts.
- **100% attendance** required.
- **Sessions held twice a day** to accommodate global time zones
- A **branded learning experience** with a dedicated RSM community forum
- Interactive **Q&A, networking** opportunities and instructor led discussions
- **NASBA CPE certification** for each seminar, plus an RSM programme certificate for full completion
- A **scalable, sustainable format** that eliminates travel and expands access



**Rudolf Winkenius**, Global Tax Leader  
RSM International



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*The collaboration with IBFD made it possible for our mostly younger tax professionals from all around the world to participate in a real-time online global tax academy, in which they were taught the basic skills of international tax.*

*The cooperation during the preparations and the training sessions was extremely pleasant and professional.*

*IBFD has provided a fully tailored program for us.  
The participants praised the comprehensive content.*

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# A measured approach

IBFD rolled out RSM's global tax academy through tailored design and careful planning.

## Needs Assessment:

Joint exploration of RSM's global learning goals and training challenges.

The main goal was to foster a global community and encourage cross-regional learning.

## Programme Design:

Creation of a two-year curriculum, with 17 structured courses.

## Technical Setup:

Online Academy configuration, branding, scheduling, and community forum integration for live participant inquiries and instructor response.

## Content

### Development:

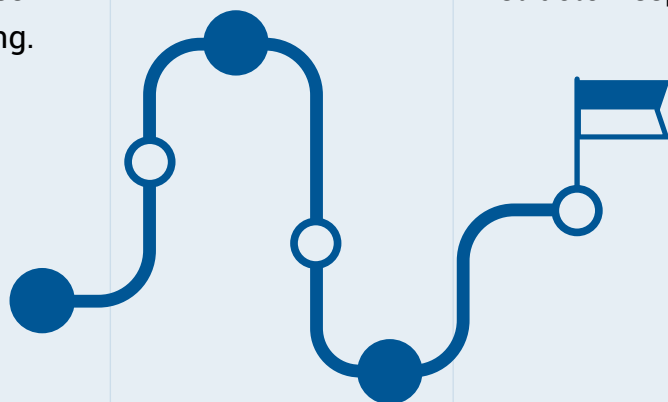
Coordination with IBFD's tax-technical subject matter experts to prepare live and subsequently recorded sessions. The interactive sessions enable real time Q&A, and practical application of the content, like ability to address specific client needs.

## Roll-out:

Launch of the first 8 courses in 2025, followed by 9 courses and interactive breakout sessions in 2026. Topics included the Basics of International Taxation, Permanent Establishment, Transfer Pricing, OECD Model Convention, Corporate Taxation, and more.

## Ongoing Support:

Continuous collaboration with RSM and optimization based on participant feedback.





**Sandra Guoth**, Manager, Tax Advisor

RSM Ebner Stolz

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*International tax law holds so many unique aspects and nuances. In the first phase of the RSM Tax Academy, we have already had the opportunity in the lectures to strengthen our knowledge and connect essential dots in the international tax context.*

*We listeners are located on all continents. For valuable networking with colleagues in our international RSM teams and practical depth of what we have learned, we have wished for an additional case study assignment within defined study groups to fulfil precisely these goals.*

*Thank you RSM International and IBFD for making this wish a reality.*

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# Impact



After implementing the Online Fundamentals Tax Academy, RSM achieved a scalable, organizationally sustainable, and globally consistent learning model within one year.



4.4 / 5

Participants agree the programme met learning objectives



110 participants from 36+ countries



100% attendance required



4.4 / 5

Participants that agree that instructors effectively delivered content



**CPE CREDITS  
& RSM CERTIFICATION**

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# Value for RSM Global

- A unified, strongly aligned **global learning community**: participants from RSM offices in the Americas, Europe, Africa, Middle East, China, Australia, New Zealand, and more.
- **Reduced travel costs** and environmental impact
- **Accessible, tax technical learning** provided to all employees seeking to upskill.



## Before IBFD Online Tax Academy

## After IBFD Online Tax Academy

High Travel Cost

Zero Travel Required

Limited Capacity

Up to 100 participants per seminar

Regional Inconsistencies

Standardized Global Curriculum

Sustainability Challenges

Environmentally Responsible Model

Upon completing the programme, participants are required to complete a final assessment on the Online Tax Academy. To receive an RSM Certification, students must receive a passing percentage higher than 60%. This ensures deep learning, consistent attendance, and active engagement throughout.

*“Attending the first year of the RSM Fundamentals Tax Academy, delivered by IBFD, was a very enriching and memorable experience.*



*The many [aspects] that stood out include:*

- The sheer range of topics, which included the OECD Model Tax Treaty, Permanent Establishments (PEs), the Attribution of Profits to PEs, Transfer Pricing, Pillar Two, and Value Added Taxes.*
- The knowledgeable and engaging instructors, each of whom was an expert in their field.*
- The very professional way the training was delivered and the high quality of presentations and slides.*
- The very lively & interactive Question & Answer sessions.*
- The quizzes! I was lucky to win one prize – an IBFD publication on Pillar Two – which I refer to very often & which is very valuable in my day-to-day work, and*

- Of course, the assessment; I was concerned about how much material I would remember and how I would fare. As it turned out, I should not have been so concerned.*

*Thus, an illuminating, edifying and engaging experience from which I acquired very relevant information, which I'm applying in my everyday work. I'm really looking forward to the second year of the RSM Fundamentals Tax Academy and am very thankful to both IBFD and RSM.”*

**Tuhin Chaturvedi**, Tax Partner  
RSM Kuwait



**Inspired by  
RSM Global's  
success story?**

Get in touch with us to start your journey toward outstanding tax training.

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