

OUR SERVICES AND SOLUTIONS

- ▶ Sales Tax Audit Defense
- ▶ Multi-State Sales Tax Research
- ▶ Obtaining Advisory Opinion Rulings
- ▶ Sales Tax Penalty Abatements
- ▶ Disputing Responsible Person Assessments
- ▶ Bureau of Conciliation and Mediation Services (BCMS) Representation
- ▶ Sales and Use Tax Due Diligence
- ▶ Sales Tax Check Up and Help Line
- ▶ Bulk Sale Filings
- ▶ Sales Tax Payment Plan (IPA)
- ▶ Voluntary Disclosure Agreement (VDA)
- ▶ Offer-In-Compromise (OIC)
- ▶ Reverse Audits/Refund Claims
- ▶ Nexus Studies
- ▶ Streamlined Sales Tax Project (SSTP)
- ▶ Amnesty

CONTACT US

We are a dedicated team of sales and use tax professionals who have committed our careers to helping businesses and fellow professionals with sales and use tax problems. Since the only work we are focused on is sales tax consulting, businesses never have to be concerned that we will try to sell them other services they do not need. And professionals never have to be concerned with us encroaching on their client relationships, because we view you, our fellow professional, as our client.

Our team consists of former state tax auditors, certified public accountants, tax attorneys, and sales tax professionals. Please contact our managing partner if you have a question or need help with a sales tax issue.



**When You Have a
Sales Tax Problem,
We Are Your Solution**



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WHAT IS SALES AND USE TAX?

Sales and use tax laws are often confusing, at times cryptic, and can vary from state to state. Failure to comply with a state's sales and use tax rules can lead to tax assessments, interest, and penalties – *and* a company's officers and owners can be held personally liable.

SALES TAX: DID YOU KNOW?

- ▶ Imposed on gross receipts, not net income
- ▶ You might owe a use tax if the seller did not charge the sales tax
- ▶ You can be charged interest and penalties on a sales and use tax assessment, even if you never collected the tax
- ▶ You can be held personally liable for sales tax assessments, including penalties and interest
- ▶ Every state has the right to make its own unique and different set of sales tax laws and rules

OUR MISSION

At Sales Tax Defense, our sole mission is to help businesses, fellow professionals, accountants, attorneys, and their clients understand and comply with applicable sales and use tax laws. When there is a problem, our goal is to defend your tax position, to minimize the amount of money you may owe, and to provide you with solutions to avoid similar problems in the future.

CASE STUDIES

- ▶ Successfully reached a settlement before the state's Bureau of Conciliation and Mediation Services (BCMS) for \$25,000, *saving* a Long Island catering hall client more than \$150,000.
- ▶ Obtained a formal tax ruling which concluded a client's purchases were not taxable – thereby securing a \$40,000 sales and use tax *refund* and prospectively saving \$10,000 annually.
- ▶ Effectively negotiated a *settlement* with the state of 10 percent on a proposed \$1 million responsible person assessment for the majority stockholder of a publicly traded company who was assessed for the business's unpaid sales and use tax.



We are frequent speakers for several prominent professional organizations including:

- ▶ The New York State Society of Certified Public Accountants (NYSSCPA)
- ▶ The National Conference of Certified Public Accountant Practitioners (NCCPAP)
- ▶ The Nassau Bar Association
- ▶ The Society of Independent Accountants
- ▶ ADP & TaxWare
- ▶ The National Business Institute
- ▶ Lorman Education Services
- ▶ The Tax Institute at CW Post University
- ▶ And at more than a dozen of the country's most respected and recognized professional firms