

Sales & Use Tax Consulting

Initial Review

- Gather & review preliminary documentation
- On-site visit to review manufacturing process
- Review sample of accounts payable invoices
- Review capital asset additions
- Review sales and use tax returns & prior audits

Detailed Analysis

- Calculate potential refund or exposure

Recommendation

- Present & discuss findings
- Discuss tax impact – current and future
- Provide recommendations for filing claims and making changes going forward
- Obtain approval to move forward with reverse audit

Implementation

- Expand A/P review to all periods open under the Statute of Limitations
- Pull and scan invoices where tax was overpaid
- From scanned documentation, create supporting documentation for refund claim
- Prepare and file all forms necessary to recover overpayments from vendors or tax authorities
- Provide any support necessary to resolve issues and secure the refunds on behalf of client

Ongoing Support

- Discuss areas of improvement and provide tax matrix
- Provide audit defense services if necessary
- Provide advisory services
- Periodic review