SOURCE ADVISORS

Sales & Use Tax Solutions

Partnering with your CPA or Sales Tax automation platform to provide comprehensive sales tax consulting.

WHAT WE DO

Nexus & Taxability Determinations

We assess your business activities to determine where you have sales tax obligations. Our deliverable demystifies your historic and current sales tax exposure and filing requirements, providing sensible and actionable recommendations for total compliance.

Liability Mitigation and VDAs

We provide solutions to reduce historic liability wherever possible, and subsequently assist with filing, managing, and negotiating Voluntary Disclosure Agreements with the states.

Registration and Ongoing Compliance

We help you identify which states to register for sales tax in, and subsequently manage the required filings – whether they be monthly, quarterly, or only needed on an annual basis.

Tax Software Implementation Partner

Considering a sales tax automation software to manage your compliance? Our team can implement, test, and manage the technology for you.

HOW WE CAN HELP

We provide businesses with consultation services aimed at identifying and dealing with historic sales tax liabilities and maintaining ongoing compliance. This prepares them for growth, M&A activities, or if selected for a sales tax audit.

Ad Hoc Sales Tax Consulting

Nuanced sales tax compliance questions and issues can arise frequently for many businesses. We offer "as-needed" consulting services to address these matters in a timely and effective manner.

Sales Tax Audit Defense

Been selected for a sales tax audit? Our team can guide you through the audit process, and help you put your best foot forward with the relevant state authority.

Refund Recovery

Sales & Use Tax Recovery involves the review of purchases to find where sales or use tax has been paid unnecessarily or incorrectly. Our experts leverage our proprietary software to accurately identify all overpayments, secure a refund and suggest process improvements to avoid such overpayments going forward.