



Issue 6

June 2015

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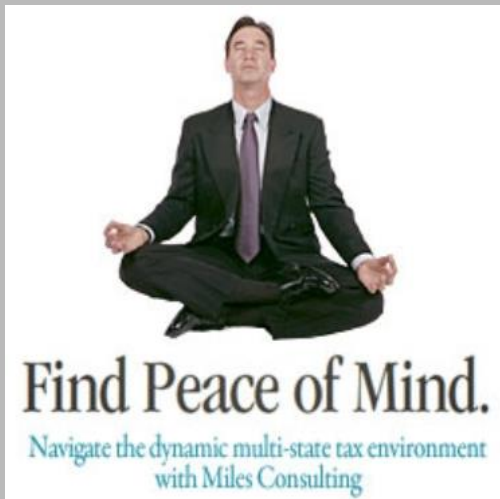
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### Download Our Brochure



Dear Monika,

Summer is here! Hope everyone is enjoying the weather, and either planning for an upcoming vacation, or basking in "recent-vacation-glow," like me. (Check out the article about my recent vacation to France, below.) While relaxing and sipping some lemonade, feel free to read a few articles we have for you below about the Upward Mobility Act, Partnering for Client Success, and the recent recipients of the CA Competes Credit funds.

All of us at Miles Consulting wish you a happy upcoming 4th of July weekend. Happy Birthday America!

If you want to know more about any of the items in this month's e-newsletter or what we do at Miles Consulting, please [contact us](#).

All the best,  
Monika Miles  
Miles Consulting Group, Inc.



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## Contact Us

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## Hot News

### A New CA Sales Tax Solution? The Upward Mobility Act

Is California's sales tax system working as well as it could? The state currently generates two-thirds of its revenue from income taxes; 65 years ago only 12% came from income taxes and 60% was generated by sales taxes.



#### About The Upward Mobility Act

[Former Assembly Speaker Bob Hertzberg](#), now a member of the state senate, recently proposed what he calls the Upward Mobility Act, which focuses on:

- Expanding CA sales taxes to include more services
- Lowering the state's base rate from 7.5% to 4%
- Getting rid of local add-on taxes

He claims this would, "Generate billions of extra dollars that he says the state could use to fund schools, local government and the university systems while providing tax credits to protect the poor." He also says this would encourage entrepreneurs by reducing corporate tax burdens on small businesses. [Click here to read more.](#)

### Partnering for Client Success Stories

As consultants in a very specialized field, people ask us all the time – "How do you get new clients?" The truth is, much of our work comes from referrals from other professionals, like fellow CPAs, bookkeepers, temp-CFOs, and attorneys.



Those professionals are the ones in the trenches and they are the ones that will be able to identify situations where their clients are beginning to expand into other states, hire employees outside their home state, or hold inventory or other property in various states. They, like us, are trusted business advisors, looking to add value to their clients' businesses and are uniquely positioned to identify scenarios where our services can assist their clients.

But we need to be able to help them to know when it makes sense to bring us to the table!

Following are a few questions that we recommend other professionals keep in mind as they assist their clients with financial and legal matters across state lines. To the extent any are strong YES answers, it might be a good time to check in with us at Miles Consulting Group. [Click here to read more.](#)

## The California Competes Tax Credit Program [Update]

Now that all three application periods for this fiscal year have passed and we wait for the State's office of economic development, Go-Biz, to release data for the upcoming fiscal year, we thought this would be a good time to look at the program and provide a quick update. As we previously [explained](#), the program was implemented to offer California-based businesses an income tax credit if they're looking to expand, or for non-California organizations looking to relocate to the Golden State.



Curious who ended up taking advantage of and benefiting from the program? [Click here to read more.](#)

## A French Vacation is Just Like State Tax Consulting

Bonjour! I just got back from an amazing vacation to France. Great, you say! And what in the world does that have to do with multi-state tax consulting? Well, it depends on how you look at it. Here are some things I learned in France that might relate a little bit to state tax consulting:



[Click here to read more.](#)

## What's Up at Miles Consulting?

### **New Employee:**

We are excited to welcome Emmanuel (Nino) Crisostomo to the Miles Consulting team! Nino joins us as a summer intern. He is currently a student at San Jose State University.

### **Speaking:**

Monika just presented on "**How to Avoid or Navigate a Sales Tax Audit**" for CPA Academy on 6/25/2015. See an [archived version of the session here](#).

Monika also presented a state tax program at the SJSU / IRS Small Business Tax Institute on June 23rd.

### **Networking:**

[NAWBO SV](#) - As the National Association of Women Business Owners President, Monika invites you to check-out their next program: "**Why Your Words Matter**" with Gary Purece (Tuesday, June 16th 5:30 - 8:30pm) [Click here](#) for a list of calendar events.

[AFWA](#) - As the Accounting and Financial Women's Alliance President, Eileen invites you to check out their next upcoming event: "Employment Law" with Rona Layton. (Tuesday, July 28th 6:00pm - 9:00pm)

[Click here](#) for a list of calendar events.

### **Educating:**

Don't forget - we do customized multi-state tax presentations for local accounting firms; invite us to do one at your firm! Stay tuned for upcoming webinars!

**For more information, please call us at 408-266-2259.  
About Miles Consulting**

*Miles Consulting Group is a professional services firm specializing in multi-state tax solutions. We address state and local tax issues for our clients, including general state tax consulting, nexus reviews, credits and incentives maximization, income tax and sales/use tax planning, and other special projects. We also specialize in California tax credits and incentives. For more information visit, [www.milesconsultinggroup.com](http://www.milesconsultinggroup.com).*

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