

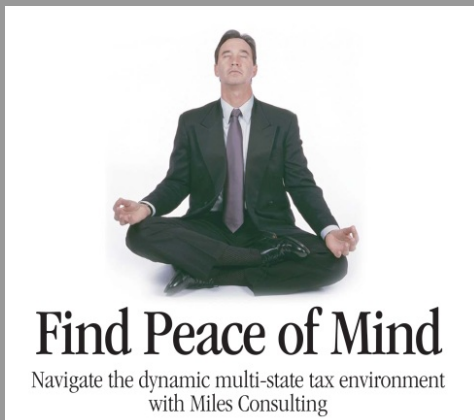


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In This Issue:

- **The Role of Technology in Streamlining Sales Tax Compliance**
- **Navigating Sales Tax Audits with the Help of Sales Tax Consultants**
- **Calculating and Collecting Sales Tax: Tips and Best Practices for Restaurants**
- **Massachusetts & Connecticut and Sales Tax- SaaS, Software & Other**

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Dear Monika,

We hope this finds you having enjoyed a wonderful holiday season – whether you celebrate Christmas, Hanukkah, Kwanzaa, a combination, or something else entirely! As we near the end of the year, it's nice to be able to take some time with family and friends and to reinforce the things that are important to us! And it's also nice to look ahead to the new year and begin to plan some personal and professional goals.

On the Miles Consulting front, we are excited to end the year with a wonderful client base, and a great group of team members. In fact, we are thrilled to welcome 2 new people to the firm, beginning in January. Stay tuned for proper introductions to them, here and on Linked In in the upcoming weeks.

We are also excited to share some baby news! Bill's daughter Nina and her husband Ryan welcomed baby Frank Ryan Hand to the family just before Christmas. And that makes Bill a very happy Grandpa!

On the sales tax side, please enjoy our feature articles on streamlining sales tax compliance for e-commerce companies, utilizing a consultants during a sales tax audit (we're seeing many of these lately), sales tax collection tips for the restaurant industry (speaking of audits – this industry is frequently subject to audit) and finally our monthly "compare and contrast" of the Northwestern states of Massachusetts and Connecticut on their treatment of software, SaaS, and other digital products.

Finally, we ask you to stay tuned for our first annual survey of Leaders in Finance at technology companies, which we plan to share in early January. We'll reach out via this medium as well as email and Linked In



Contact Us

Address: 3150 Almaden
Expressway, Suite 110
San Jose, CA 95118

Phone: 408.266.2259

Email:
info@milesconsultinggroup.com

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to ask for your participation in the survey. This is a major benchmarking survey, the data and insights of which will support finance leaders across the SaaS and technology industry. We have over 1500 LinkedIn connections working across leadership roles in finance - imagine the insights our research could share with even a 20% contribution! So, thanks in advance for your participation. Happy New Year! We'll catch you in 2024!

Fondly,
Monika Miles & Bill Loew
Miles Consulting Group, Inc.

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THE ROLE OF TECHNOLOGY IN STREAMLINING ECOMMERCE SALES TAX COMPLIANCE

It has been over 5 years since the pivotal ruling essentially creating the concept of “economic nexus” thresholds in South Dakota v. Wayfair (US Sup Ct – 2018). And yet, we still field questions from e-

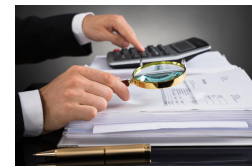


commerce companies daily about how to navigate compliance. Ecommerce businesses operate in a complex landscape where sales tax compliance is of paramount importance. Compliance is not merely a legal obligation; it is a critical component of financial stewardship. Failing to comply with sales tax regulations can lead to financial penalties, audits, and a negative impact on the business's reputation.

To learn more about the role of technology in streamlining ecommerce sales tax compliance, [click here](#).

NAVIGATING SALES TAX AUDITS WITH THE HELP OF SALES TAX CONSULTANTS

Facing an audit can be a daunting experience, and it's important to understand that audits can happen for various reasons. And while that fact doesn't do much to relieve the stress and apprehension that often comes with it, it's crucial to be aware of why you might be audited. Because it's not just about tax compliance; there are numerous triggers for an audit that you may not anticipate, and failing to handle the audit correctly can lead to risks and potential financial consequences. And there's that anxiety again.



To read more about navigating sales tax audits with the help of sales tax consultants, [click here](#).

CALCULATING AND COLLECTING SALES TAX: TIPS AND BEST PRACTICES FOR RESTAURANTS

Restaurants often find themselves under the tax audit spotlight – these businesses can be perceived as havens for a significant amount of cash movement. This notion, while not entirely unfounded, warrants closer examination, as it highlights the importance of meticulous financial management in the sector.



To read more about tips and best practices for calculating and collecting sales tax for

restaurants, [click here](#).

MASSACHUSETTS & CONNECTICUT AND SALES TAX- SaaS, SOFTWARE & OTHER

This month, we continue our blog series with a contrast of a couple of northeastern states –



Massachusetts and Connecticut – specifically their treatment of technology items for sales tax purposes.

To read more about the tax landscape in Massachusetts and Connecticut, [click here](#).

What's Up at Miles Consulting?

Networking:

[NAWBO-SV](#)

Join us for the Product Makers Group. It is on Tuesday, January 2 from 2 pm to 3 pm. Join this group on the first Tuesday of each month on Zoom to chat about your business and use the collective wisdom of the room to talk through any where/how sell ideas, problems and opportunities you have. For more information, [click here](#).

Join us for the NAWBO Empower Hour. It takes place on Thursday, January 4 from 2 pm to 3 pm. Every Thursday at 2 p.m. PST NAWBO Empower Hour is a small-group mastermind webinar that solves 2 business problems each week. Meet and network with other business owners in this national forum. Connect, discuss and work on your business. For more information, [click here](#).

The NAWBO Brushstrokes & Goals event is on Tue. Jan. 16 from 6 pm to 8 pm. Join us for a night of wine, painting and goal setting. For more information, [click here](#).

Join us at the NAWBO leadership Academy January 28- January 30 in Charlotte, NC. For more information, [click here](#).

[AFWA](#)

AFWA events are currently on hold. Stay tuned for more information.

Educating/Speaking:

Our blogs are frequently featured on [Tax Connections](#).

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 & taxability reviews, audit support, voluntary disclosure agreements, and other special projects.

We also specialize in SaaS and other technology industries. For more information, visit

www.milesconsultinggroup.com.

Miles Consulting Group Inc. | 3150 Almaden Expressway, Suite 110, San Jose, CA 95118

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