



STATES OF AFFAIR

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Greetings!

What is it that's keeping you up at night? I know, you're thinking, "Too cliché a question!" Right?

I shared with some colleagues the other day that we recently added some new team members at Miles Consulting (see below for an introduction to Aly Davidian – a new manager in our group). And the question that came up was "How do you keep so many people busy with sales tax?" Trust me, we've heard that one before! My stock answer is "Well, it's not so much the sales tax you PAY, it's understanding when and where you need to collect sales tax!" So, what keeps our clients up at night...until they call us? Here are some examples of clients we've recently added, and how we're allowing them to rest a little easier and keep from having to count those sheep once their heads hit the pillow:

- A retail client that sells products online: They are selling both through their own website and also through Amazon. Their sales tax software somehow erroneously collected sales tax on all of these sales, rather than just the ones made from their website to end consumers. (As a marketplace facilitator, Amazon is responsible for collecting tax on the sales through their portal.) So, we're helping the client by filing amended returns in a number of states to secure credits for overpayment of sales tax. Sheep...resting pretty!
- A SaaS company with revenue streams from both subscription to the software and also a feature for payment processing. The company, based abroad, wasn't previously aware of the sales tax ramifications of either of these revenue

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streams. We are assisting with exposure analysis, retroactive remediation, outreach to customers, and ultimately getting them caught up with all filings. It's a process that will likely take several months to complete, but with our assistance and guidance, they will become compliant, limit penalties and retroactive exposure and put themselves on a path to filing returns properly. Sheep...still jumping, but sees the light at the end of the pasture and will ultimately be at rest.

- A CA company with online sales, and has been working with the state of California on an audit. Before hiring us to assist, the company was "going it alone" and found themselves with a preliminary liability of...well...a lot! (In fact, we have at least 4 clients that we are helping with similar situations!) DIY is great when you're talking about a gardening project or some light home improvement – but not when dealing with departments of revenue or the CDTFA in California. Sheep... there may be some shearing...but it'll get to keep more of its fleece by working with us! Stay tuned.

We also help with nexus reviews, taxability studies, ruling requests, voluntary disclosure, and sales tax compliance. If any of those are keeping you up, give us a ring.

Before you think of sleeping some more, check out our articles below about the benefits of outsourcing compliance, a comprehensive guide to sales tax exemptions, and an introduction to Aly.

Hope you're enjoying your summer!

Monika Miles & Bill Loew
Miles Consulting Group, Inc.

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BENEFITS OF OUTSOURCING SALES TAX COMPLIANCE

Sales tax compliance is a crucial but complex aspect of running a business in the United States.



But it's tax, and so it comes with constantly evolving regulations and varying rules across states that make it a daunting task for many businesses. However, there is a solution that can help you navigate these complexities efficiently: outsourcing sales tax compliance. Let's talk about that here – we have some practical insights into the benefits of outsourcing and how to choose the right partner for your business.

To read more about the benefits of outsourcing sales tax compliance, [click here](#).

SALES TAX EXEMPTIONS FOR BOTH SELLERS AND PURCHASERS: A COMPREHENSIVE GUIDE

Properly collecting sales tax is a fundamental component of



selling goods that impacts pricing and financial outcomes for businesses. Understanding and utilizing sales tax exemptions is crucial for optimizing financial performance and ensuring compliance. We've put together this short guide as an overview of sales tax exemptions.

For more information on sales tax exemptions for sellers and purchasers, [click here](#).

MILES CONSULTING WELCOMES ALY DAVIDIAN

We are excited to welcome Aly Davidian to our manager group. She has over 10 years of experience in sales and use tax, specializing in



multi-state consulting. Her journey began as a California local tax specialist, where she honed her skills for 4 years. Following this position, she transitioned to a Big 4 firm, dedicating over 6 years to assisting clients navigate complex issues around nexus, taxability, calculating exposures and remediation. Her expertise is in the retail/manufacturing industries and the ever-evolving technology sector—from ticketing to gaming and startups. As a Certified Member of the Institute for Sales and Use Tax (CMI), She brings a strong analytical mindset to her work. She enjoys her spare time with her young family in Southern California.

To read more about Aly or reach out and connect with her on Linked In here, [click here](#).

What's Up at Miles Consulting?

Networking:

[NAWBO-SV](#)

Join us on August 6 from 2 pm to 3 pm for the Product Makers Group. Join this group 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](#).

[AFWA](#)

Join us at the annual Women Who Count national conference. Monika will be a speaker again this year, joining her AFWA colleague Kay Gotshall in a presentation about both state sales tax and income tax things to know. For more info, [click here](#).

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.

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