



STATES OF AFFAIR

A PUBLICATION OF MILES CONSULTING

In This Issue:

- Avoiding Common Exemption Certificate Mistakes
- What You Need to Know About the Taxation of Streaming Services
- Illinois & Indiana and Sales Tax-SaaS, Software and Other

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Greetings!

Hard to believe, but when we're not helping clients with their sales tax needs, our team members are also busy with outside networking, sports, and other items. For me, Monika, it's been all about tennis lately. USTA, league, practice - you name it. Tennis and sales tax compliance have more in common than you might think—both require preparation, the right partner, the right tools and continuous improvement. Just as a skilled tennis player studies the game, anticipates challenges, and refines their technique, businesses must stay ahead of ever-changing sales tax regulations to avoid costly missteps. In doubles, a strong partner helps cover the court, just as the right sales tax provider ensures smooth compliance and minimizes risk. And just like top athletes upgrade their gear and sharpen their skills, businesses must leverage automation and stay informed to keep their tax strategy in top form. With the right preparation, partner, and tools, you can turn sales tax into a winning match. That's where we come in.

For instance, a colleague in a networking group of mine sent around a question recently asking about which sales tax software to recommend to a client – and she listed a few. My answer, of course, was to say that while finding the right software tool is important, it's more important to lay out your strategy first. Has the company completed a nexus study to determine WHERE it needs to file? Has it looked at the taxability of its products? Have they determined whether any retroactive exposure exists (and therefore remediation which might impact where to register, file, etc.) Going straight to the software provider question is like a tennis player going out and buying all the pretty outfits – skirts, visor, matching shoes – before learning how to hold the racket, or hit the groundstroke!

Once you relax from your exercise or game of choice, check out this month's sales tax topics, including how to avoid common exemption certificate mistakes and what you need to know about the taxation of streaming services. Finally, we

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compare and contrast Illinois and Indiana and their treatment of different software products.

Enjoy your spring forward this weekend and that extra hour of sunshine, for more tennis, of course!

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

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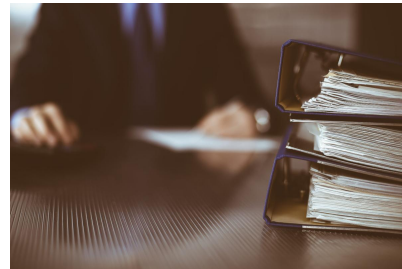


AVOIDING COMMON EXEMPTION CERTIFICATE MISTAKES

If you're a manufacturer, wholesaler, or a reseller, you know that collecting resale and tax exemption

certificates is par

for the course. Like most things tax-related though, it's often not as simple as collecting a document and calling it a day. Rules for collecting certificates can vary based on the state, products involved, business relationships, and a variety of other factors.



To read more about common exemption certificate mistakes, [click here](#).

WHAT YOU NEED TO KNOW ABOUT THE TAXATION OF STREAMING SERVICES

When it comes time to relax with your favorite show, where do you go to find it? Over the last decade, more and more people have chosen to look online and utilize



streaming services like Netflix and Hulu instead of relying on traditional cable or satellite TV.

To read more about the taxation of streaming services, [click here](#).

ILLINOIS & INDIANA AND SALES TAX-SaaS, SOFTWARE AND OTHER

This month, we continue our blog series with a contrast of a couple of Central North states – Illinois and Indiana – specifically their treatment of technology items for sales tax purposes.



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

Networking:

[NAWBO-SV](#)

Join us on Saturday, March 8 from 9:00 am to 10:00 am for the Why NAWBO? webinar. Learn why NAWBO is the “go-to” premier women’s organization for thousands of women business owners across the U.S. and how to harness it to power your dream! For more information on this event, [click here](#).

To find out more about NAWBO, [click here](#).

[AFWA](#)

Stay tuned for more updates on AFWA events. For more info on AFWA, [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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