



STATES OF AFFAIR

A PUBLICATION OF MILES CONSULTING

In This Issue:

- Sales Tax Basics for SaaS Companies
- A Buyer's Guide to Sales Tax and Successor Liability in M&A Transactions
- State Nexus Cheat Sheet for SaaS
- North Dakota & South Dakota and Sales Tax- SaaS, Software and Other

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Dear readers:

As we send out this newsletter, it feels like summer is winding down—even if the calendar says we still have a few weeks left! Kids are back in school (including many of our team's children and grandchildren heading off to college), pumpkin spice has returned, and Halloween ads are already creeping in. Still, I'm all for hanging on to the sunshine a little longer.

Our team made the most of the season with travels near and far—Spain, Italy, Alaska, the East Coast, Palm Springs, and more. And as our group continues to grow, we're now proud to have team members in every contiguous U.S. time zone. That may not sound like much, but for us state tax geeks, it all comes down to nexus—which, of course, means new filing responsibilities. Fortunately, we know exactly who to call when it comes to navigating multi-state tax matters!

This month, we welcome McKenna Aymard and Jennifer Jackson to the Miles Consulting Group team! McKenna joins us as a Tax Associate and is based in the LA area. Jennifer joins us as Accounting/Operations manager and is based out of Oklahoma. Read more about them in upcoming newsletters when we can more fully share their stories! Meanwhile check them out on our [website](#).

Additionally, find some articles attached about a sales tax basics checklist for SaaS companies, a buyer's guide to sales tax and successor liability in M&A transactions and a state nexus cheat sheet for SaaS. This month, our state tax spotlight is a comparison between North and South Dakota.

We continue to stay active in the community. Miles Consulting will again sponsor and participate in the Making Strides Against Breast Cancer walk on Oct. 5th. We've been a sponsor for over 20 years, and helping to make progress in the fight.

Hope you are enjoying summer and have a fantastic Labor Day holiday!

Contact Us

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

Phone: 408.266.2259

Email:
info@milesconsultinggroup.com

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Monika & Bill



SALES TAX BASICS FOR SaaS COMPANIES

Running a SaaS business means juggling product development, customer success, and growth strategies. But there's one thing that quietly sneaks up on even the savviest teams: tax compliance.



Whether you're just getting started or scaling across borders, tax rules for SaaS can feel like a puzzle. The good news? You don't need to be a tax guru to put the pieces together and stay compliant—you just need the right checklist. And some [help from Miles Consulting](#) – this is what we do. We simplify it in this article.

To read more about the SaaS Tax Basics Checklist, [click here](#).

A BUYER'S GUIDE TO SALES TAX AND SUCCESSOR LIABILITY IN M&A TRANSACTIONS

Here at Miles Consulting Group, we understand how critical it is for companies negotiating mergers and acquisitions



(M&A) to stay ahead of complex tax obligations, including successor liability. When acquiring a

business, there are tax liabilities that should be considered during the due diligence process, yet buyers often overlook these and are caught off guard after the purchase. They can then face unexpected, and sometimes hefty, financial penalties as a result.

To read more about sales tax and successor liability in M&A transactions, [click here](#).

STATE NEXUS CHEAT SHEET FOR SaaS

Nexus refers to the connection between a business and a state that obligates the business to collect and remit sales tax on taxable sales within that state.



For SaaS (Software as a Service) providers, nexus can be established through and physical and economic presence.

To read more about the State Nexus Cheat Sheet, [click here](#).

NORTH DAKOTA & SOUTH DAKOTA AND SALES TAX- SaaS, SOFTWARE AND OTHER

This month, we continue our blog series with a contrast of a couple of states in the northern plains – North Dakota and South Dakota – specifically their treatment of technology items for sales tax purposes.



To read more about the tax landscape in North Dakota and South Dakota, [click here](#).

Networking:

[NAWBO-SV](#)

Join us on Thursday, September 4 from 10 am to 1 pm for the Plan it Like a Pro: Everyday Project Management Skills workshop. In this virtual interactive session, you'll discover how applying core project management principles to your daily routine can boost productivity, reduce stress and bring structure to your business and personal life. For more information on this event, [click here](#).

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

[AFWA](#)

Monika Miles will be speaking about state tax audits at the Women Who Count Conference in Mesa, AZ

from Oct. 21 to Oct. 25, 2025. For more information on the conference, [click here](#).

Stay tuned for more updates on AFWA events. For more info on AFWA, [click here](#).

Educating/Speaking:

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 US

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