



STATES OF AFFAIR

A PUBLICATION OF MILES CONSULTING

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Dear Readers:

As we move into the fourth quarter and the final months of the year, our team at Miles Consulting Group has been focused on helping clients prepare for year-end compliance. This time of year is a natural opportunity to review and reflect on nexus exposure, update taxability positions, and ensure your systems are structured correctly heading into 2026. If you haven't reviewed your sales tax footprint recently, there's still time. We're here to help you navigate the details before deadlines sneak up.

Over the past several weeks, we've continued seeing increased activity in the SaaS and AI space, particularly around sourcing rules, digital product taxation, and evolving state positions on software-based services. While sales tax automation tools can streamline calculations, filings, and reporting, they can't replace the strategic judgment needed to interpret varying state laws. For many companies, the most effective approach is a blend of reliable software paired with knowledgeable consulting support to ensure accuracy and reduce risk.

We're also keeping a close eye on legislative developments, including Washington's recent changes to its Business & Occupation (B&O) tax. New rates, surcharges, and taxability rules—especially around digital services—will require careful attention as we head into the new year.

In addition, we're excited to welcome Jennifer Jackson to the Miles Consulting team as our new Accounting & Administrative Manager. Her deep experience with QuickBooks Online, financial restructuring, and multi-state bookkeeping integrations adds even more support for businesses navigating sales tax compliance across jurisdictions. Feel free to connect with us if you'd like to explore how her expertise can support your organization.

We're also proud to share that Monika recently presented at the Women Who Count Conference in Mesa, AZ, hosted by the Accounting & Financial

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Women's Alliance (AFWA). Her session covered state tax audits, common pitfalls, and best practices as states continue to increase enforcement efforts. It was a great opportunity to connect with industry peers and contribute to the professional community.

Additionally, we're thrilled to celebrate a milestone from this year's American Cancer Society "Making Strides Against Breast Cancer" Walk in San Jose. Thanks to generous support from clients, colleagues, partners, and friends, Miles Consulting exceeded our fundraising goal and raised over \$14,000, placing us among the top three fundraising teams for the event. We're grateful for everyone who helped support this important cause. You can check out the event results [here](#).

If you'd like to discuss your year-end readiness or have questions specific to your business, we're always happy to connect.

Fondly,
Monika & Bill



WHAT SALES TAX SOFTWARE CAN'T DO AND WHY THAT'S NOT THE PROBLEM

At Miles Consulting, we know that understanding sales tax laws can be complex, especially for SaaS and technology



companies operating across multiple states. With different taxability rules, economic nexus thresholds, and filing requirements, it's no wonder that companies turn to automation to help them keep up.

And the good news is: tax automation software does work. Tools like Avalara, Anrok, and TaxJar are

essential for managing high-volume calculations, filings, and reporting.

To read more about what sales tax software can't do and why that's not the problem, [click here](#).

WASHINGTON'S B&O TAX

As of October 1, 2025, Washington is tackling some major changes to the State's Business & Occupation tax, also known as B&O tax, including changes to rates, additional surcharges, and new rules to taxability of digital services.



To read more about Washington's B&O tax, [click here](#).

MILES CONSULTING WELCOMES JEN JACKSON

Jennifer Jackson has joined Miles Consulting Group as the new Accounting & Administrative Manager. She is a advanced Quickbooks ProAdvisor and a recognized expert in Quickbooks



online. She specializes in cleaning up and restructuring financials, setting up new company files, and training clients and their teams to use Quickbooks online effectively. Her skill set also includes integrating third-party applicants to streamline operations and improve financial visibility for her clients.

For businesses working with Miles Consulting on multi-state tax issues, Jennifer's Quickbooks expertise ensures their financial systems are properly structured to support accurate sales tax reporting across jurisdictions, creating a seamless connection between daily bookkeeping and complex compliance requirements.

Jennifer holds a Master's Degree in Accounting and is an Enrolled Agent (EA), the highest credential awarded by the IRS.

Outside of work, Jennifer has been happily married to her husband for 20 years and is the proud mother of three daughters. She enjoys camping, boating and traveling with her family.

To read more about Jen, [click here](#).

IDAHO & WYOMING AND SALES TAX-SaaS, SOFTWARE AND OTHER

This month, we continue our blog series with a contrast of western states— Idaho and Wyoming – specifically their treatment of technology items for sales tax purposes.



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

Networking:

[NAWBO-SV](#)

Join us on Tuesday, November 18 from 9 am to 10 am for the monthly virtual connection. Rebecca Maxwell will be your host and guide as you build relationships that will strengthen your network during small group conversations in safe, welcoming spaces. For more information on this event, [click here](#).

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

[AFWA](#)

Monika gave a presentation about state tax audits at the Women Who Count Conference in Mesa, AZ from Oct. 21 to Oct. 25, 2025.

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.

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