



STATES OF AFFAIR

A PUBLICATION OF MILES CONSULTING

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Dear Readers:

As technology businesses continue to scale, the stakes around sales and use tax compliance have never been higher. In this issue, we shine a spotlight on a risk that often flies under the radar at the closing table: unexpected six- and seven-figure sales tax liabilities that can derail even the most carefully negotiated tech company sale. If you're contemplating an exit and have surpassed \$10 million in revenue, you'll want to read our lead story on how to assess and mitigate your sales tax exposure before due diligence begins.

We also bring you state-specific developments you can't afford to miss. Indiana's Department of Revenue has just announced a limited amnesty program running from July 15 through September 15, 2026 which is an opportunity for retailers and marketplace facilitators to resolve past liabilities with reduced penalties. Then, in the latest installment of our blog series, we compare how Missouri and Louisiana treat SaaS, software, and other technology products for sales tax purposes. These insights matter whether you're expanding into new markets or preparing for a potential acquisition.

As a reminder, we offer customized multi-state tax presentations tailored for local accounting firms. Invite us to present at your firm to equip your team with actionable guidance on complex nexus rules and compliance strategies. And stay tuned for details on our upcoming webinars—your go-to resource for staying ahead of ever-evolving sales tax landscapes.

Read on for details and links to each story, plus registration for info for a NAWBO event that promises to be an inspiring networking session. We hope you find this edition both informative and actionable. Enjoy!

Fondly,
Monika & Bill

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WHY YOUR SALES TAX CHECKLIST ISN'T ENOUGH: WHAT M&A ADVISORS NEED TO KNOW ABOUT DUE DILIGENCE

You're advising a client through an exit. The due diligence checklist comes out, and somewhere between insurance

policies and employee agreements, there's a line about sales tax. You ask your client: "Do you think you have your sales tax handled?" They say yes. You check the box and move on.



That answer, however well-intentioned, could be costing your client hundreds of thousands of dollars at the closing table, and putting your reputation on the line in the process.

To read more about what M&A advisors need to know about due diligence, [click here](#).

SELLING YOUR TECH COMPANY? HOW SALES TAX EXPOSURE COULD COST YOU AT THE CLOSING TABLE

If you've built a tech or SaaS company to \$10 million or more in revenue and you're considering a sale, there's a good chance

your sales tax exposure is larger than you think. We say this not to alarm you, but because we've seen it



play out dozens of times. The seller is confident their tax house is in order. The buyer's due diligence team runs their own analysis. And a six- or seven-figure liability appears that nobody anticipated.

If you are thinking of selling your tech company and want to read more, [click here](#).

INDIANA'S 2026 SALES AND USE TAX AMNESTY PROGRAM

Indiana Department of Revenue announced a limited duration amnesty program on March 11, 2026. Taxpayers may participate in



the amnesty program from July 15 through September 15, 2026. The program is tailored assist taxpayers like retailers and marketplace facilitators in remediation for outstanding sales and use tax liabilities.

To read more about Indiana's 2026 sales and use tax amnesty program, [click here](#).

MISSOURI & LOUISIANA AND SALES TAX- SaaS, SOFTWARE AND OTHER

This month, we continue our blog series with a contrast of a Midwest state and a Southern state – Missouri and Louisiana – specifically their treatment of technology items for sales tax purposes.



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

Networking:

[NAWBO-SV](#)

Join us on Thursday, May 20, from 9:00 a.m. to 10:00 a.m. for the Spring Global Link Up. Join NAWBO, in collaboration with its Mexican counterparts with AMEXME, for a dynamic and engaging virtual networking hour designed for women business owners who think—and do business—on a global scale. 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:

Monika spoke at the ABA-IPT Conference on Wednesday, March 18 in New Orleans. She was a panelist on a seminar titled "Steering Automation with a Firm Hand: Crafting Strategy, Selection, and Oversight in True New Orleans Style." For more information on the conference, [click here](#).

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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