

TX | Tax Services

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Scope of services will vary by each Client Engagement. The service descriptions below are intended to be used as a guide and are not to be construed as an extension of a contract or agreement.

TX01 | Monthly Sales & Excise Tax Filing

Service Tier	Frequency	Estimated Delivery	Software Requirements
Essentials	Monthly	10th	Online Account Access

Service Description: Each month we will audit your sales records for completeness and accuracy prior to reporting sales to the various tax agencies to ensure proper filings. We will calculate, adjust for, balance, file, and remit payment for your sales, excise, gross receipts, etc. taxes that are due to the various local, state, and federal agencies.

Client Responsibilities: To provide accurate sales figures or access to your POS system of choice. To notify us of any backdated changes being made to sales entries in case of the need to file an amended return. To inform us of any sales taking place in new states or local jurisdictions and specify if we need to collect, file, and remit sales tax in these new areas.

TX02 | Tax Document Tracking

Service Tier	Frequency	Estimated Delivery	Software Requirements
Optional	Monthly	15th	N/A

Service Description: To monitor for common business changes that would have a major or minor effect on year-end tax filings. Keep records of tax documents for end of year tax filings/audits including fixed asset purchase.

Client Responsibilities: Provide access to required documents upon request.
