

Sales and Use Tax Recovery Services

Subjective state-by-state tax laws lead to overpayments. SIB uncovers and secures tax savings on your behalf.

Are you overpaying Sales Tax?

We believe businesses should be free to focus on what really matters without the burden of navigating a complex sales tax environment. We work with businesses of all sizes and industries to provide sales tax departments with top-notch services that aggressively identify major cost savings.

Short of bandwidth to focus time and energy on sales tax?

Our comprehensive auditing process looks well beyond the “low fruit” and identifies complex sales tax refund opportunities that collectively result in substantial savings.

SIB Can Help

Our sales and use tax analysts review your A/P records and then perform custom analysis on your sales tax spend, using data from hundreds of taxpayers around the country as well as our in-depth knowledge of the sales and use tax environment.

- › We understand sales tax and have data and contacts from thousands of A/P vendors from around the country.
- › Our team, which includes former sales tax auditors, have well over 175 years of combined sales tax auditing experience
- › Our tax professionals have worked in every state in the United States that collects sales tax. No issue or situation is foreign to us.
- › SIB is compensated on a contingency fee basis, so we are highly motivated to fight for every dollar that our clients are rightfully owed. You pay us only after we provide you with refunds.
- › We never pass the work down the line. Our seasoned experts are the ones completing the work first-hand and the ones you will have direct contact with throughout the project
- › We identify areas of liability to help avoid unforeseen audit problems in the future.

\$200 Million +
Client Tax Savings

- We keep the time commitment from your staff to a minimum! We only need access to accounts payable invoices, state sales tax returns, a copier and a small work area.
- Through VPN and remote access capabilities, we utilize state-of-the-art accounting and invoice imaging software to conduct reviews on or off site, tailored to your level of comfort and convenience.
- Gain full and indefinite access to our team for ongoing projects and educational support even after the initial field review is complete.

Case Examples

> Large Chain of American Convenience Stores and Gas Stations

\$50 Million in Sales Tax Savings

- 900 locations reviewed.
- 7 states reviewed.
- Continuous multi-year ongoing support with savings generated annually.

> NJ Based Pharmaceutical Company

\$15 Million in Sales Tax Savings

- 7 states reviewed.
- 11 acquisitions reviewed .
- 15 state audits defended.

> Large Provider of Hospitals, Rehabilitation Centers, and Occupational Health Clinics

\$12.4 Million in Sales Tax Savings

- Major core business exemptions found.
- 4,000 locations reviewed.
- Complete Tax Matrix review.
- Worked with dozens of A/P vendors.

Our Process



Collect Data

- Receive signed POA.
- Utilize vendor spend data and tax reports.



Analyze

- Review all spend and tax data.
- Perform full accounting system and AP analysis.



Review

- Gather all proper documentation to build our refund claim to be filed.
- Deliver expected savings range from the new and more accurate assessment.



Appeal

- Initiate appeals process.
- Present to local tax authority and handle 100%



Educate

- Maintain presence to ensure accuracy.
- Provide custom seminar to tax and A/P staff to begin to implement fixes going forward.

A Sample of Our Clients

