



State & Local Tax (SALT) Strategic Consulting & Audit Defense

Managing the State and Local Tax (“SALT”) burden is a challenge for every business. Tax agencies are stepping up audit activities to close budget shortfalls, and their multiple jurisdictions and authorities make tax requirements both confusing and conflicting. Ignoring the unique nuances of state tax requirements and opportunities can result in potentially negative impact on your business’s financial statements. How do you keep your SALT to a minimum and still comply with all state and local tax requirements?

Comprised of professionals across 20+ offices, Cherry Bekaert’s SALT Services Group has extensive experience in guiding companies through handling multistate tax complexities. We’re dedicated to monitoring significant changes in the multistate tax environment that impact your business.

Cherry Bekaert Offers Expertise in the Following State & Local Taxes

- ▶ Income/Franchise Tax
- ▶ Gross Receipts/Margin Tax
- ▶ Sales and Use Tax
- ▶ Business Credits and Incentives
- ▶ Personal Property Tax
- ▶ Payroll and Unemployment Tax
- ▶ Unclaimed Property

Is Your Company Interested In:

- ▶ Increased profitability and cash flow?
- ▶ An entity structure that aligns with both your business and tax objectives?
- ▶ Strategic advice concerning large transactions to minimize exposure & cash outlay?
- ▶ Reduction of risk and liability of your management team?
- ▶ Improved efficiencies within your organization?

Cherry Bekaert's SALT Team Can Assist Your Business With:

Cash Recovery Services

Cherry Bekaert will review your past transactions and filing positions for refund opportunities for all state and local tax types. We also assist you in preparing amended returns, refund claims and other required documentation for obtaining any identified overpayments.

Strategic Planning

To effectively manage your increasing tax burden, Cherry Bekaert offers structure alternatives and provides valuable transaction planning to keep up with your company's growth.

Multistate Transaction Services

When your business considers forming an entity, buying or selling assets, or acquiring or merging with another company, Cherry Bekaert can help identify important tax implications and offer potential solutions and alternatives.

Nexus Consulting

To navigate your company through an evolving marketplace, Cherry Bekaert is experienced in identifying nexus considerations, constitutional protections and exposure quantification. We can also help your business resolve any exposure issues through voluntary disclosure and amnesty opportunities.

Credits & Incentives Consulting

Through the use of site selection, grant writing, incentive modeling, and negotiated incentives and tax credit reviews, Cherry Bekaert's experienced SALT team assists your business in obtaining economic and tax benefits resulting from past investments, future expansion, job creation and training, research and development activities, and other qualifying expenditures.

Compliance Services

Cherry Bekaert offers a variety of services designed to handle your compliance needs in the most cost-effective manner, including outsourcing services, ASC 740 and ASC 740-10 (FIN 48) analysis, reporting positions and elections, combined/consolidated filing, allocation and apportionment, and cost of performance reviews.

Audit Advisory & Dispute Resolution

Is your business feeling the pressure to find new income sources or increase your audit defense efforts? Cherry Bekaert's SALT team has proven success in audit representation, managing audits, negotiating settlements, tax controversies and litigation support.

Process Optimization

Our process optimization services can help your company not only pay the appropriate amount of tax, but reduce any associated internal costs. To reduce your overall compliance costs, we design a process map to assist in streamlining, automating and/or outsourcing your business's key tax function processes.

Let us be your guide forward



Catherine Shaw Stanton, CPA
Partner, National Leader – State & Local Tax
cstanton@cbh.com
703.506.4440 | 240.396.1076