



## TOO BIG TO IGNORE-SALES TAX REFUNDS



The recent Federal Reserve meeting and the discussion surrounding raising interest rates for the first time since the financial crisis reminded us of a term born during the financial crisis: too big to fail. Here at Sales Tax Defense LLC, we want a more optimistic term to be born during our time and that term is "too big to ignore". As in, refund opportunities that are too BIG to ignore.

Refunds stem from tax which was overpaid. This should not be confused with tax which was over-collected from customers and then remitted to New York State. We're talking about tax which you paid and shouldn't have.

A major area of overpaid sales tax is items purchased for resale. Have you paid sales tax on tangible personal property resold? Have you paid sales tax on services which resold to your customer? If so, you might be due a refund of the sales tax paid!

Another common area where people tend to pay tax when they shouldn't is on printed promotional materials. Have you paid sales tax on printed promotional materials mailed to customers or prospective customers? Have you paid sales tax on promotional materials shipping to customers or prospective customers outside New York State? Have you paid sales tax on mailing lists used in the mailing of promotional materials? If so, you might be due a refund of the sales tax paid!

Anything else... of course! Have you paid sales tax on machinery and equipment used in the manufacturing process? Have you paid sales tax on materials used in construction for exempt organizations? Have you paid sales tax on utilities used in research and development? If so, you might be due a refund of the sales tax paid!

There are more sales tax exemptions than most people realize and definitely more than we listed here. If you think you might be due a refund or want us to look into it, Sales Tax Defense can review your purchases and determine if you are entitled to a sales tax refund. We often do refund claims on a contingent fee basis so do not hesitate to contact us!

### SUCCESS STORY: REFUND CLAIMS



A client came to Sales Tax Defense and they were assessed penalties on their sales and use tax returns for late filings. The client had already paid the penalties so we requested a refund for the penalties already paid. Reasonable cause was proved and the penalty abatement was granted. The client received all of the money paid towards penalties back from the tax department!

In a different situation, a client paid a \$100,000 assessment for an audit. After the assessment was paid, they came to us stating that they thought the assessment was wrong. We filed a refund claim and the initial claim was denied. We then file for an Administrative Law Judge hearing for the refund claim denial. After going back and forth with the tax department several times, the client was granted a refund of \$75,000!! Sometimes the tax department actually gives money back!



### ABOUT OUR FIRM



We are a dedicated team of sales and use tax professionals who have committed our careers to helping businesses and fellow professionals with sales and use tax problems.

Since the only work we are focused on is sales tax consulting, businesses never have to be concerned that we will try to sell them other services they do not need. And professionals never have to be concerned with us encroaching on their client relationships, because we view you, our fellow professional, as our client.

### UPCOMING SEMINARS

There are 8 chances to hear Mark L. Stone speak while earning 1+ CPE Credits. Click [here](#) for more information.



WHEN YOU HAVE A SALES TAX PROBLEM, *WE ARE THE SOLUTION!*

CALL: **631-491-1500**

**CONTACT US!**

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"LIE held a sales tax update class recently. Mark and Jessica from Sales Tax Defense did a great job in updating us on recent sales tax law changes; when a sales tax under reporting becomes fraud; and practice management strategies related to managing through sales tax issues with clients. Thank you Mark and Jessica for a job well done!"

**-Robert S, CPA**

**MORE TESTIMONIALS**

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