

Sales Tax Recovery Process

Maximize Savings with Expert Guidance

With a history of conducting thousands of comprehensive reviews, our skilled team has assisted countless corporate and institutional clients in reclaiming millions of dollars in sales taxes, grants and incentives.

INITIAL MEETING

Purpose: Gain a comprehensive understanding of your business operations.

Key Activities: Identify potential areas of overpayment and recovery opportunities and provide a clear overview of the recovery process, timeline, and deliverables.

Benefits: Establish a tailored approach to your business's unique needs.

DATA COLLECTION

Purpose: Gather the necessary financial data to begin the recovery process.

Key Activities: Collect specific accounting data (accounts payable, sales tax liability accounts, and tax returns) for the review period and collaborate with your IT team to ensure a seamless and efficient data transfer while offering on-site support for added convenience.

Benefits: Hassle-free data gathering with expert guidance.

ANALYSIS

Purpose: Identify and quantify opportunities for tax recovery and compliance improvement.

Key Activities: Perform an in-depth analysis using advanced tools to detect overpayments, missed exemptions, and non-compliance areas and validate findings through collaboration with in-house legal counsel.

Benefits: Establish a tailored approach to your business's unique needs.

REPORTING

Purpose: Deliver actionable insights based on our findings.

Key Activities: Prepare a comprehensive summary of recoverable amounts and identified exposures. Provide tailored recommendations to enhance your tax processes.

Benefits: Clear and actionable insights to guide strategic decisions.

SUBMISSION

Purpose: Expedite your refunds and resolve inquiries with tax authorities.

Key Activities: File refund claims and manage communications on your behalf and address any inquiries to ensure a swift resolution. Guarantee compliance with all legal and regulatory requirements.

Benefits: Stress-free refund process handled by experts.

CLIENT SUPPORT

Purpose: Ensure long-term compliance and prevent future overpayments.

Key Activities: Provide post-recovery training tailored to your team. Keep you updated on changing tax regulations and offer ongoing consultations to sustain compliance and savings.

Benefits: Continuous support for sustained financial benefits.