

## ANDERS STATE AND LOCAL TAX (SALT)

# SALES AND USE TAX FOR HEALTH CARE ORGANIZATIONS

A Sales and Use Tax Status Review can assure your medical business operations are in compliance, and that you are taking advantage of tax savings opportunities. Sales and Use Tax reviews provide companies with a benchmark of their current sales and use tax underpayment and overpayment status, as well as associated planning opportunities. State statutes and interpretations change on a continuous basis causing unexpected liability issues to arise and overpayment opportunities to be overlooked.

### REVIEW PROCESS

Our sales and use tax review process includes:

- Preliminary documentation review and research
- Review of exemptions specific to the medical industry
- Presentation of opportunities and/or exposures to client
- Documentation compilation and computation of projected savings
- Preparation of refund and credit requests and applications
- Submission of requests to the state and/or vendors
- Monthly follow-up procedures with state and/or vendors
- Receipt of savings by client
- Preparation of detailed report of findings and recommendations

### PROJECT DOCUMENTATION


We provide a turnkey review as our personnel retrieve and copy all needed documentation. We can assure very minimal interruptions to you and your personnel.

Our refund and credit review and exposure analysis will include the review of the following available documentation:

- Sales and use tax returns and support documentation
- Capital and fixed asset purchase invoices
- General expense purchase invoices
- Chart of accounts
- Prior state sales and use tax audits
- Prior refund claim documentation

### CONTINGENT FEE ARRANGEMENT

Our fee for the review, preparation, and recovery of sales and use tax refunds can be structured as a percentage of all sales and use tax refunds received. In the event refunds are not received, there will be no fee for our services.



“Our advisors can ensure you and your business are taking the proper measures for income, sales and use and personal property tax compliance.”

**TALK WITH AN ADVISOR TODAY.**

Robert V. Willeford, Jr., CPA, Esq  
314-474-0706 | [rwilleford@anderscpa.com](mailto:rwilleford@anderscpa.com)