

INDIRECT TAX ADVISORY · U.S. & CANADA

Clarity Where It Matters Most.

Tech-enabled indirect tax advisory for companies navigating U.S. and Canadian obligations.

Indirect tax exposure doesn't announce itself. Economic nexus thresholds trigger silently, M&A deals close with unquantified sales tax liabilities, and exemption certificates expire unnoticed. **Exactera's indirect tax advisory practice combines AI-powered analysis with expert verification to give you definitive answers — and a clear path forward.**

OUR APPROACH

01

Outcomes, Not Hours

We price and measure by results. Every engagement ends with a deliverable you can act on — not a timesheet you have to justify.

02

Verified by Design

AI accelerates our work. Expert review validates every finding. You get the speed of technology with the accountability of experienced practitioners.

03

Transparent Pricing

You know what you're paying before work begins. Fixed-fee engagements tied to defined outcomes — no scope creep, no billing surprises.

WHO WE SERVE

U.S. companies with multi-state sales tax exposure

- European businesses entering the U.S. market with economic nexus obligations
- Cross-border companies navigating Canadian GST, HST, PST, and QST obligations

01	Economic Nexus Studies	Determine exactly where you have tax obligations before an auditor does — jurisdiction by jurisdiction, with a risk-ranked action plan.
02	Product Taxability Reviews	Confirm which of your products and services are taxable in each state or province — and document your position.
03	Exposure Analysis	Quantify your uncollected tax liability with the specificity required to take action: amounts, lookback periods, and prioritized next steps.
04	Voluntary Disclosure Agreements (VDAs)	Resolve past exposure through state-administered VDA programs — often with penalty waivers and limited lookback periods.
05	M&A Contingent Tax Liabilities (ASC 450-20)	Identify and quantify indirect tax exposure on both buy-side and sell-side transactions. Liabilities written off to goodwill; identified within one year of acquisition.
06	Audit Defense	Respond to state and provincial audits with experienced representation, documented positions, and a strategy built on your specific facts.
07	Data Modeling	Build the data infrastructure to support ongoing compliance, strategic tax planning, and audit readiness.
08	Exemption Certificate Management	Managed services to collect, validate, store, and renew exemption certificates at scale — reducing audit risk and manual burden.
09	Letter Rulings	Obtain formal written determinations from tax authorities confirming the taxability of your products or services. These rulings carry equal legal weight regardless of the size of the firm that files them.

WHY EXACTERA

Our advisors bring full-circle experience spanning audit, tax technology, consulting, and audit defense — across domestic and international markets. That depth is what every engagement is built on.

Ready to know exactly where you stand?

Let's start with what you don't know yet.

Verified by Design.

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