

AUDIT WORKPAPERS | FOR CPA & ACCOUNTING FIRMS

Audits Are Won on Documentation. Your Firm Brings All of It.

Workpapers built from every transaction, not a sample. Every position cited. Built on your client's own facts.

A sales and use tax audit is won or lost on documentation, not good intentions. Believing something was not taxable is not a defense. Auditors usually test a small sample, then apply that error rate to the whole audit period, so one unusual transaction can turn into a six-figure bill.

Your firm runs the defense. L3i gives your team the tools to build it on every one of your client's transactions, not a sample. The platform sorts the transaction detail, applies the rules of each state, and produces workpapers grounded in the client's own facts with the authority behind every position. When an auditor projects a large assessment from a small sample, your team answers with the complete numbers and the documentation that supports them. Audit prep time drops significantly, and every position in the file is one your firm can defend. The platform also keeps what your people work out: the positions and reasoning your team builds in one audit are recorded, so what one person figures out here, your whole firm can draw on in the next.

OUR APPROACH

01

Build the Complete Record

Pull in and organize every one of the client's transactions, with no sampling and no guesswork. Every line item is sorted, checked, and matched to the rules of the state it belongs to, building the complete record an audit demands.

02

Document the Positions

Your team works the exposure state by state, applying the client's own facts to the statutes, regulations, and rulings that govern them. The result is a documented position built for this client, not a generic argument with citations an auditor can follow and accept.

03

Produce the Defense File

Generate a finished workpaper package: transaction detail, exemption support, exposure by state, and the authority behind every position. Your people walk the auditor through it and negotiate on numbers they can stand behind.

WHO WE SERVE

When a client is under audit or facing an assessment, your firm stands between them and the state. L3i gives your team the complete transaction record, the documented positions, and the citations to answer every sample-based projection with real numbers.

Auditors test assumptions. Your firm shows up with the file that proves the numbers.

Compliance Grade AI, Verified by Design

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