Exactera

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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Exactera

L3i

CONTINUOUS MONITORING | FOR CPA & ACCOUNTING FIRMS

Keep Every Client Audit-Ready Every Day. Not the Week They Call.

A live connection to your client's billing and accounting systems that checks every transaction the moment it posts.

A study is only right on the day you deliver it. Between engagements, clients cross new thresholds, change products, and get hit with rule changes, so a nexus study that was correct at delivery quietly drifts out of date. Exposure builds up in the background, from a new state crossed, a product miscategorized, or a certificate left to lapse. By the time the next study catches it, the liability has grown.

Exactera and L3i connect directly to the client's billing and accounting systems and check every transaction as it posts. You see nexus thresholds coming before the client crosses them; taxability is confirmed on every line, and exemption gaps show up before an auditor ever would. The result is an audit-ready record that stays current on its own. If an audit comes, defending it means handing over what you already have, not rebuilding it under pressure. The platform also learns as it watches: every call your team makes on a flagged transaction is captured, so it sharpens over time and one expert judgment becomes knowledge the whole firm keeps.

OUR APPROACH

01
Connect at the Source

Connect directly to the client's billing, purchasing, and accounting systems, including NetSuite, SAP, and Oracle. Every transaction flows in as it happens and lands in one clean, compliance-ready place the moment it posts.

02
Score and Flag in Real Time

Every transaction is checked automatically as it arrives, not a sample. You watch nexus thresholds approach in real time taxability is confirmed on every line, and exemption gaps are flagged before an auditor could ever find them.

03
Stay Audit-Ready

Issues come straight to your firm with an alert, while an audit-ready record builds itself across every state in the background. When an auditor shows up, the documentation is already there, and easy to hand over.

WHO WE SERVE

- Multi-state clients that are growing fast or picking up nexus in new states
- Clients who want exposure caught as it happens, not discovered at audit
- Clients running NetSuite, SAP, Oracle, or similar billing and accounting systems

Exposure caught the day it happens, not the day it's assessed.

Compliance Grade AI, Verified by Design

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L3i

DATA MODELING | FOR CPA & ACCOUNTING FIRMS

Every Tax Answer Starts with the Right Data.

Turn a client's scattered systems into a living foundation that learns from your team and answers questions about the work you've done.

Most indirect tax exposure is really a data problem in disguise. A client's transaction records are usually incomplete, inconsistent, and scattered across different systems like NetSuite, SAP, Oracle, and Dynamics, and the formats drift over years and system changes. Every piece of work that follows, whether a nexus study, an exposure analysis, a VDA, or audit defense, is only as good as the data under it. Build a nexus study on bad data and you have to do it twice.

Exactera and L3i build that foundation first, then make it work for you. The platform connects to the client's systems, pulls the line-item detail from every transaction, and fixes the missing fields, duplicates, and format problems across the client's entire history, not a sample. This is far more than a clean place to store data. It is an intelligent platform that learns as your team works: every answer your professionals give, every correction they make, and every question they ask is captured, so the knowledge that used to live in one expert's head becomes something your whole firm can use. Ask it what you concluded for this client last year, or why, and it answers. Your data goes in once. The knowledge it builds compounds on every engagement after.

OUR APPROACH

01
Unify Transaction Data

Bring the client's raw records from their billing, purchasing, and accounting systems into one organized place. The platform handles the different formats, pulls the line-item detail, and maps every transaction to the fields advisory work needs.

02
Resolve Gaps and Inconsistencies

Find and fix the messy data, missing fields, duplicates, and format problems across every transaction the client has. Nothing is sampled. The full history is reviewed, so nothing is left unchecked.

03
Turn It Into Living Knowledge

Deliver more than clean data: an intelligent layer that powers every engagement after it, from nexus and exposure to VDAs, audit defense, and M&A diligence. It learns from the work your team does and answers questions about it, so your firm builds on what it already knows instead of starting over.

WHO WE SERVE

- Clients whose financial data is scattered across disconnected systems
- Firms that want their experts' knowledge captured and reusable, not stuck in one person's head
- Teams preparing for nexus, exposure, VDA, audit defense, or M&A diligence

It's not just where the data lives. It's where your firm's knowledge grows.

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EXPOSURE ANALYSIS | FOR CPA & ACCOUNTING FIRMS

First, Put a Number on Your Client's Exposure.

Your client's sales and use tax exposure, counted by state, by period, and by dollar, delivered under your brand.

Knowing a client has a sales and use tax problem is not the same as knowing what it costs. Unregistered nexus, undertaxed sales, interest, and penalties that often run 25% to 50% of the tax all grow every period. Under ASC 450-20, a contingent tax liability has to be booked once it is probable and can be estimated and estimating it is exactly what most companies cannot do. They end up carrying a reserve that is really a guess. Until the number is real, the client cannot resolve it, disclose it, defend it, or book it correctly.

Exactera and L3i let your firm deliver the number, calculated instead of guessed. The platform rebuilds the client's full transaction history and works out tax, interest, and penalties one transaction at a time, with no sampling. You get an exposure register by state with the documentation a VDA filing or audit defense needs. That difference, a real calculation instead of an estimate, is the difference between the state accepting your client's number and replacing it with its own. The judgment behind each number is also captured, so your firm can revisit this work, or answer the next client's questions, without starting from scratch.

OUR APPROACH

01
Reconstruct the Profile

Go through the client's transaction history across every state that matters and every lookback period, applying each state's nexus thresholds, taxability rules, and rates to build a full picture of the uncollected tax.

02
Calculate Tax, Interest, Penalties

Calculate the actual tax, interest, and the likely penalties on every transaction, not a sample. The result is a summary by state with the documentation that VDA filings and audit defense demand.

03
Deliver a Priority-Ranked Plan

You hand the client a riskranked exposure register covering every state, every period, and every dollar, ordered so they know what to fix first. It is a number they can take to the board and book under ASC 450-20.

WHO WE SERVE

- Clients with open nexus or unfiled obligations in one or more states
- Clients getting ready for a VDA or expecting an audit
- M&A targets whose contingent liabilities your firm is putting a number on

Your client's exposure has a number. Let's find it before someone else does.

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EXEMPTION CERTIFICATE MANAGEMENT | FOR CPA & ACCOUNTING FIRMS

An Expired Certificate Is Open Exposure.

Full certificate management. Every certificate . Delivered under your brand.

Exemption and resale certificates are the first thing an auditor asks for, and the messiest records most companies keep. One missing, expired, or incorrectly filled-out certificate can put thousands of transactions the client treated as exempt back on the hook for tax. Requirements vary by state, certificates expire on their own schedules and tracking them in a spreadsheet fails in a predictable way: you find out mid-audit, when it is too late to fix.

Exactera and L3i let your firm manage a client's certificates from start to finish: collecting, checking, storing, and renewing them across every customer, vendor, and state. Each certificate is checked against the rules of the state that issued it, automatic tracking keeps any from lapsing, and the whole library connects to the client's accounting system or tax engine so exemptions are applied correctly at the moment of sale. When the auditor asks, every certificate is already organized and ready to hand over. The platform also captures every validation call your team makes, so it applies your firm's own standards consistently across clients and one expert's judgment becomes everyone's.

OUR APPROACH

01

Audit and Organize the Portfolio

Take stock of the client's certificates across every customer, vendor, and state. Find the ones that are missing, expired, or filled out wrong before an auditor does, and deliver a clean, checked starting point organized by entity, state, and certificate type.

02

Automate Validation and Renewal

Check every certificate against the rules of the state that issued it. Track expiration dates automatically and reach out for renewals early, so no certificate ever lapses without you knowing, all tied into the client's accounting system or tax engine.

03

Maintain Audit-Ready Records

Keep one alwayscurrent library with automatic alerts and auditready reports across every state, so a certificate request becomes a matter of pulling what you already have.

WHO WE SERVE

Distributors with heavy resale volume, manufacturers claiming raw-material and equipment exemptions, and any B2B client whose sales are mostly exempt and who needs solid backup documentation the moment it is asked for.

Invalid certificates cost your clients money. Missing ones cost more. Your firm fixes both.

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ECONOMIC NEXUS STUDIES | FOR CPA & ACCOUNTING FIRMS

Run Every Client's Nexus Footprint Before an Auditor Does.

State-by-state economic nexus studies your firm delivers under its own brand.

Since South Dakota v. Wayfair, 45 states and D.C. can charge sales and use tax based on sales activity alone, with no physical presence required. The thresholds vary and keep moving: $100,000 or 200 transactions in most states, $500,000 in California, Texas, and New York, and more states are dropping the transaction count test through 2026. Clients cross these lines without noticing, through a new warehouse, a marketplace, or a few large orders. States now buy data from marketplaces and payment processors, so they often know before the client does. By the time the notice arrives, the unregistered exposure has piled up with interest and penalties.

Exactera and L3i let your firm deliver a complete, defensible nexus register for every client. The platform reads all of a client's sales and physicalpresence data and applies every state's current thresholds and measurement periods at once. This is not a dashboard of what might happen. It is a clear read on where the client has already crossed the line and now owes. Your firm delivers it under its own brand, on a fixed fee, in days. Each study also feeds the platform, so the facts and conclusions your team reaches become knowledge the whole firm can search and reuse, not a file that lives with one person.

OUR APPROACH

01

Map Every Jurisdiction

Measure the client's sales against the economic nexus thresholds in all 45 states and D.C.: revenue, transaction counts where they still apply, and product-specific tests, plus physical triggers like inventory, employees, and contractors. Each state's measurement period is applied the right way.

02

Quantify and Prioritize

Calculate the uncollected tax by state and rank it by dollars and risk. That ranking shows which states are worth the deeper work of sorting out what is taxable, and which carry too little exposure to bother with. Your firm spends effort only where it pays off.

03

Deliver a Defensible Register

Every finding lands in an audit-ready nexus register: the threshold analysis for each state, notes on how you got there, and conclusions you can defend, including documented proof for the states where the client owes nothing.

WHO WE SERVE

- Clients selling across multiple states with open nexus questions
- International sellers entering the U.S. with economic nexus but no physical presence
- M&A targets whose nexus exposure your firm is checking in diligence

Nexus isn't a gray area. It's math. Let's run your clients'.

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L3i

M&A CONTINGENT TAX LIABILITIES | FOR CPA & ACCOUNTING FIRMS

The Tax Liability in Your Client's Deal Won't Find Itself.

Buy-side and sell-side indirect tax diligence, with ASC 450-20 contingent liabilities counted under your brand.

Unresolved sales and use tax liabilities do not disappear at close. They transfer. Successor-liability laws in most states make the buyer responsible for a target's pre-deal tax, even in many asset deals. Under ASC 450-20, contingent liabilities that are probable and can be estimated have to be booked, and the ones found within a year of the acquisition usually flow into purchase accounting and goodwill. Whatever diligence misses, the buyer inherits and pays for.

Exactera and L3i let your firm put a real number on what is there before the deal closes, and clean it up after. The platform reviews the target's full transaction history to find nexus, unfiled obligations, and successor-liability exposure, and delivers a risk-tiered, diligence-ready report inside deal timelines. On the buy-side, it prices the risk. On the sell-side, it clears the liabilities before they knock down the deal value. What your team learns on one deal is captured too, so the next diligence starts from your firm's knowledge, not a blank page.

OUR APPROACH

01
Identify the Exposure

Review the target's transaction history to surface nexus, unfiled obligations, and successor-liability triggers, and put a dollar figure on the exposure by state before the deal closes.

02
Apply ASC 450-20

Put a number on the probable and estimable sales and use tax liabilities under ASC 450-20, covering tax, interest, and penalties by state, with documentation ready for the diligence data room and purchase accounting.

03
Deliver the Diligence Report

Risk-tiered findings, liability summaries by state, and clear paths to resolution, including post-close VDAs, built for the deal team, the general counsel, and the post-close integration.

WHO WE SERVE

- Private-equity and strategic buyers running buy-side diligence
- Sell-side clients clearing indirect tax liabilities before going to market
- Corporate M&A teams managing post-close ASC 450-20 compliance

What your client doesn't find in diligence, they inherit at close. Let's look before they sign.

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PRODUCT TAXABILITY REVIEWS | FOR CPA & ACCOUNTING FIRMS

Give Every Client's Product Catalog a Defensible Answer.

A taxability answer for every product in the catalog, across every state, delivered by your firm.

Whether a product is taxable depends on the state, the product category, and how the item is described or bundled, and the rules change constantly. SaaS is taxable in some states, exempt in others, and partly taxable in the rest. Bundle a taxable item with an exempt one and the answer can flip. Manufacturing and resale exemptions ride on getting the classification right. Most clients do not catch a misclassification until an auditor does, and by then it carries years of back tax, interest, and penalties.

Exactera and L3i let your firm deliver a complete, defensible taxability matrix for a client's entire catalog. The platform checks every product and service against the rules of more than 10,000 jurisdictions, flags mixed-use, bundling, and exemption situations on its own, and ties every answer to the state law behind it. The finished matrix loads straight into the client's tax engine, so the answers your firm signs off on are the answers the client actually charges. The matrix is not static: every determination and every expert correction is captured, so it sharpens each time your team uses it and the whole firm draws on the same answers.

OUR APPROACH

01

Catalog the Full Universe

List every product and service the client sells, from individual items and bundles to software licenses and digital goods, and match each one to the taxability rules in every state where the client has obligations.

02

Apply Jurisdiction-Specific Rules

Taxability is never one-size-fits-all. The platform applies each state's statutes, exemption categories, and rulings item by item, accounting for bundled sales, the SaaS differences, manufacturing exemptions, and resale rules.

03

Deliver a Defensible Matrix

Every answer is documented in an audit-ready taxability matrix: the classification for each item, the exemptions, the statutory citations, and notes on how you got there, formatted to load straight into Avalara, Vertex, or whatever tax engine the client runs.

WHO WE SERVE

Any client that sells goods or services across several states and needs accurate, defensible answers. SaaS and digital-goods sellers dealing with shifting state rules, along with manufacturers and distributors carrying exemption-heavy catalogs, get the most out of it.

Every product has a taxability answer. Do your clients have theirs?

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REVERSE AUDIT | FOR CPA & ACCOUNTING FIRMS

Your Clients Have Been Paying Tax They Never Owed.

Recover overpaid sales and use tax across every one of a client's purchases, paid for out of what you recover, under your brand.

Most tax attention goes to amounts that were undercollected. The quieter leak runs the other way: tax paid to vendors that was never owed, use tax self-assessed on exempt purchases, and incorrect rates that drain cash over time. Even a small error rate across high-volume purchasing can produce a material overpayment. A reverse audit limited to a narrow or poorly designed sample may miss errors dispersed across the long tail of accounts payable. Meanwhile, each state's refund window continues to close.

Exactera and L3i review every line item across the client's full purchase history, with no sampling, apply each state's exemption and taxability rules, and surface every recoverable dollar with the documentation that state needs to approve the refund. The client pays out of the cash you recover, not billed hours, and the recovery often pays for the rest of their compliance work. The recovery patterns your team finds are also captured, so the platform gets better at surfacing overpayments for the next client.

OUR APPROACH

01
Analyze Every Purchase

Pull in the client's full accounts-payable and purchase history and go through every line item, with no sampling. Every payment is matched to the vendor, the state, and the product detail to test whether the tax was actually owed.

02
Identify Overpayments

Apply each state's exemption, exclusion, and taxability rules to flag tax paid in error, vendor overcharges, use tax on exempt purchases, and wrong rates. Every recoverable dollar is counted by state and period before the refund window closes.

03
Recover the Cash

Put together refund-ready claim packages with the invoices and statutory backup each state requires and manage the filing through approval with vendors and tax authorities. The client pays out of the tax you recover.

WHO WE SERVE

- Manufacturing, technology, and distribution clients with use-tax exposure on purchases
- Clients paying high volumes of vendor-charged tax across many states
- Finance teams that want to fund their compliance work from recovered cash

Your clients may be owed more than they think. Let's find it.

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INDIRECT TAX ADVISORY FOR CPA & ACCOUNTING FIRMS

Outperform the National Firms on Sales & Use Tax.

A complete U.S. sales and use tax practice your firm delivers under its own brand, powered by Exactera and L3i.

Since Wayfair, economic nexus rules have created sales and use tax obligations for thousands of companies, and your clients are turning to you to tell them where they stand. Most firms cannot afford to staff a national, multi-state sales and use tax bench. Exactera and L3i let your firm deliver nexus studies, exposure numbers, VDAs, and audit defense across every U.S. jurisdiction, on a fixed fee and under your own brand, without building the practice yourself.

COMPLIANCE GRADE AI

An AI platform built for what compliance actually demands: accuracy, completeness, and answers you can defend (but that's only part of how we can change your workflow). Our platform is built to learn from your team as they work. Unleash their encapsulated expertise to become knowledge the whole firm can use, instead of starting from scratch every time someone opens a spreadsheet.

01
Accuracy

The platform applies the rules of more than 10,000 jurisdictions to your client's real data, so each answer is right for this client in this state, not just close.

02
Completeness

Every transaction is reviewed at the line-item level, not just a sample, so issues across the full population can be identified and addressed before they surface in an audit.

03
Defensibility

Every answer is tied to the state law behind it, with your method documented. When the support is thin, it stops instead of guessing, so a confident wrong answer never goes out.

04
Knowledge that compounds

Every answer, correction, and question your team adds is captured, so one professional's expertise becomes knowledge the whole firm can use, and every answer gets sharper over time.

WHO WE SERVE

We work with CPA and accounting firms that want to offer sales and use tax advisory but do not have a national team to staff it. From regional firms keeping their best clients from going elsewhere, to growing practices adding a high-margin service line, your firm does the work and owns the relationship, while Exactera and L3i provide the platform, the data, and the expert backup.

HOW WE SERVE

Our platform was built around AI from the ground up, not old tax software with AI added on later. That shows up in three ways that make every answer one you can defend:

Built on your client's data, not generic knowledge. Every answer is custom built from real client information: your client's actual transaction details, exactly who they are, where they do business, and a library of tax rules and rates from more than 10,000 jurisdictions. Answers are tailored to your client, exact to every detail of their situation and built for them alone.

Reasoning you can defend. Every answer shows the exact state law or ruling behind it, so you can check it yourself. When the tool is not certain, it does not guess. It stops and hands the question to a human expert. The answer your client sees is either backed by a source you can check or cleared by an expert, never a guess.

It compounds with every engagement. Every time one of your experts approves, rejects, fixes, or asks a question, the platform learns from it and sharpens every answer that comes after. The know-how that used to live in one person's head (and walk out the door when they left) now belongs to your whole firm, and any user can draw on it. Ask the platform what your team concluded on a past engagement, and why, and it answers. It is not just a place to store data. It is where your firm's knowledge lives and grows.

SERVICES YOUR FIRM CAN DELIVER

Sales & Use Tax

01 Economic Nexus Studies

Find out exactly where you have sales and use tax obligations before an auditor does, state by state, with a risk-ranked action plan.

02 Product Taxability Reviews

Confirm which of your products and services are taxable in each state, and document your position with analysis you can defend.

03 Exposure Analysis

Quantify exposure and get details, including owed prioritized Quantify your uncollected tax exposure and get the details you need to act, including amounts owed, lookback periods, and prioritized next steps.

04 Voluntary Disclosure Agreements (VDAs)

Settle past U.S. exposure through state VDA programs, often with penalty waivers and a limited lookback.

05 M&A Contingent Tax Liabilities (ASC 450-20)

Find and quantify indirect tax exposure on both sides of a deal. Liabilities found within a year of the acquisition can flow to goodwill.

06 Audit Defense

Answer state sales and use tax audits with experienced representation, documented positions, and a strategy built on your own facts.

07 Reverse Audit

Recover sales and use tax you overpaid on exempt purchases. We review every purchase, quantify what is recoverable, and file the refund claims with vendors and states.

08 Data Modeling

Build a clean, intelligent data foundation that learns from your team's work and answers questions about it, across every U.S. jurisdiction.

09 Exemption Certificate Management

We collect, check, store, and renew your exemption certificates at scale, cutting audit exposure and manual work.

10 AI-Powered Knowledge Base

Ask plain questions and get cited answers across more than 10,000 jurisdictions and your firm's own past work. It draws on the knowledge your professionals have already built, so what one expert figured out is available to everyone, and it gets sharper every time your team uses it.

WHY EXACTERA + L3i

U.S. indirect tax is our home turf. Exactera brings practitioners who have built, audited, and defended sales and use tax programs in every state. L3i brings a platform built for the individual transaction, covering every line across more than 10,000 jurisdictions. The platform learns from every engagement, so the expertise your team builds stays with your firm and compounds instead of walking out the door. In your firm's hands, that combination delivers accuracy that matches or beats a national firm, at the speed of AI. It is a new standard for indirect tax advisory, and your firm delivers it.

Ready to add Sales & Use Tax to your practice?

Let's talk about delivering it under your brand.

Verified by Design.

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Exactera

L3i

VOLUNTARY DISCLOSURE AGREEMENTS | FOR CPA & ACCOUNTING FIRMS

Settle Your Client's Back Tax on Their Terms.

State voluntary disclosure programs, with reduced penalties and a limited lookback, managed end to end under your brand.

A voluntary disclosure agreement is a deal: the client comes forward and pays the back tax, and in return the state usually waives all the penalties and caps the lookback at three to four years, instead of the unlimited lookback that applies when no return was ever filed. That option disappears the moment the state makes audit contact. Depending on the state's rules, receiving a nexus questionnaire may constitute the contact that closes the voluntary disclosure window. Clients who wait give up the waivers and the cap.

Exactera and L3i let your firm put a number on a client's exposure, confirm they still qualify, and manage the full VDA process across every state at once, anonymously where the state allows it. The workpapers carry good-faith liability estimates built on the client's actual transaction detail, so every submission is complete and credible. Your firm settles the exposure on the client's terms, before the state gets to set them. The estimates and outcomes from each VDA are also captured, so every future filing starts from your firm's proven work, not a blank page.

OUR APPROACH

01
Confirm Eligibility and Quantify

Before anything is filed, confirm the window is still open in each target state, meaning no audit contact and no existing registration. Once that is confirmed, calculate the full back-tax exposure by state: tax, interest, and likely penalties.

02
Prepare and Submit Anonymously

Prepare the VDA workpapers each state expects, including the liability estimates, lookback calculations, and penalty waiver analysis, and submit anonymously where the state allows, keeping the client's identity protected through the negotiation.

03
Negotiate, Settle, and Close

Manage each state's negotiation through to a final settlement: penalty waivers, shorter lookbacks where available, payment terms, and a documented resolution your firm hands the client, with registration in place going forward.

WHO WE SERVE

- Clients with unregistered nexus and unfiled obligations
- Clients carrying unresolved back-tax exposure
- Clients heading into or coming out of an M&A deal

A state doesn't offer amnesty. A VDA does. The difference is who moves first.

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