Exactera

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.

Compliance Grade AI, Verified by Design

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