

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.

Dean Henderson

GM, Indirect Tax Advisory

dean.henderson@exactera.com