



STATES OF AFFAIR

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Greetings!

Thank you for allowing us to drop into your mailbox once a month to talk about state tax issues. We appreciate you taking the time to find out what we're sharing about things in the sales tax world and also at Miles Consulting. This month, as an introduction to the newsletter though, we wanted to talk not about sales tax, but about marketing. That's been on our mind quite a bit lately because we are trying to draw more viewers to our website, our LinkedIn feeds and our blog articles in the interest of continually adding great companies to our client base. And in these efforts, we'd like to enlist your help as well!

So, if you've read this far, and have thought, *"Hmmm, I'd love to give a recommendation to Miles Consulting (or Bill or Monika directly),"* we'd humbly love to receive them! How to do it? Consider writing a recommendation for either of us on our LinkedIn pages: [Monika's page](#) or [Bill's page](#). Or if you have something you'd like to say that we can share in some of our upcoming marketing, please drop us a line at info@milesconsultinggroup.com or our individual emails.

And, if you're just here to find out about sales tax matters, well, please read on! This month, we talk about sales tax compliance and the intersection of people and technology – why you need both. We also have a detailed article about sales tax and due diligence in an M&A transaction. And finally, we have a compare/contrast article about the taxability of SaaS, software, etc. in the states of California and Washington.

Thanks in advance for your help and Happy Spring!

Sincerely,
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SALES TAX, SOFTWARE, SAAS & CONSULTING- HOW THEY WORK TOGETHER

At Miles Consulting Group, we love software companies. They make up a significant part of our client base (both on-premise software and SaaS companies), our vendor base (of course we license it!), and even strategic partners. And yet, we recognize that sometimes, you just need a person to talk to. On the sales tax compliance side, that's where we come in.



To read more about sales tax, software, SaaS, consulting and how they work together, [click here](#).

SALES TAX AND DUE DILIGENCE IN AN M&A DEAL

The fast-paced world of private equity investment, mergers and acquisitions (M&A) and the art of aligning business interests in the perfect deal certainly sounds glamorous. It's often where Wall Street meets Hollywood and depicts people reaping lots of money in the process! There are so many components in the making of a successful merger, including synergies between the companies' cultures and employees, financial aspects, logistics, and other important areas. Tax matters (and in our world, state tax matters) are often the last pieces of the puzzle to be brought to the deal process. And while taxes are rarely the things making the headlines in a transaction, they really are an important piece of the overall transaction – both on the state income tax side (which we'll discuss briefly below) and the sales tax side. And all the things that we discuss regularly here in our blog – nexus, taxability, look-back, exposure and remediation – they all come up in an M&A transaction. And if the exposure is big



enough, it can derail a deal. Unfortunately, we've seen it happen!

To read more about how sales tax applies to M&A Deals, click [here](#).

CALIFORNIA & WASHINGTON AND SALES TAX- SAAS, SOFTWARE & OTHER

If you're a regular reader of our blogs, you know that we have, for the last few years, featured a different state of the month, and have profiled a number of things about that state. After running through the 50 states at least once, we thought we might try something a little different. We'd still like to feature our fabulous United States, but maybe do some compare and contrast in the areas that many of our readers and clients find to be the most useful. We look forward to your feedback.



This month, we contrast a couple of west coast states – California and Washington – specifically their treatment of technology items for sales tax purposes.

To read more about taxes in California and Washington, [click here](#).

What's Up at Miles Consulting?

Networking:

[NAWBO-SV](#)

Join us for the NAWBO X Macy's Fashion Show. It is a business women's empowerment event. NAWBO is hosting a fashion show and a Q&A session with the women who are leading in today's business industries, with guest speakers within technology, fashion, & more. It will be on Friday, May 5 at 4 pm at Macy's Westfield Valley Fair. For more details, please [click here](#).

The Propel Your Business Conference 2023 will be held on May 15 and 16 in Sacramento. This is an opportunity to connect with business owners, leaders, and executives from around the state. For more details, [click here](#).

The Latinas in Tech Summit will be May 18 and 19 at the Palace of fine arts in San Francisco. The Summit brings together Latinas in the tech community and allies to speak about the issues that impact the Latina workforce. For more details, [click here](#).

AFWA

All AFWA events have been postponed due to the Pandemic. Stay tuned for upcoming events!

Educating/Speaking:

Our blogs are frequently featured on [Tax Connections](#).

Don't forget- We do customized multi-state tax presentations for local accounting firms; invite us to do one at your firm! Stay tuned for upcoming webinars!

For more information, please call us at 408-266-2259

About Miles Consulting

Miles Consulting Group is a professional services firm specializing in multi-state tax solutions. We address state and local tax issues for our clients, including general state tax consulting, nexus & taxability reviews, audit support, voluntary disclosure agreements, and other special projects. We also specialize in SaaS and other technology industries. For more information, visit www.milesconsultinggroup.com.