

Sales and Use Tax Consulting Service Offerings

Audit Defense Consulting and Representation

Certificate Management (Resale and Exemption Documentation)

Compliance Services – Sales & Use Tax

Customized Sales & Use Tax Training/CPE

Diagnostic Review of your Current Compliance System/Processes

Direct Pay Permit Compliance and Registration

Due Diligence Advisory Services on Sales & Use Tax

Litigation Support - Sales & Use Tax

Nexus Studies – Sales Tax

Refund Studies to Recover Overpaid Sales & Use Tax

Registration and Permitting – Sales & Use Tax

Taxability Guidance, Letter Rulings and Tax Matrix Research

Voluntary Disclosure Agreement Representation



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About Merit Advisors

Merit Advisors, LLC is a full-service provider of property tax, sales and use tax, severance tax, and economic development consulting and compliance. Our seasoned professionals provide a broad range of services to advise and assist companies in minimizing tax liabilities, maximizing tax recovery and reducing administrative burden for businesses of all sizes.

Our 400+ clients range from publicly traded corporations to individual small business owners. All clients are serviced by a team that combines engineers, appraisal and valuation experts and seasoned tax and consulting professionals. These professionals bring together the perfect balance of high quality and diverse solutions of a larger firm while not foregoing the “high level touch” customer service of a smaller firm.



Custom Solutions

Merit’s commitment is to a client-centered focus on all engagements. Different sales and use tax challenges require different, scalable, and flexible solutions to be effective. Therefore, we focus on what our client’s prioritize and give them the information they need to make an informed decision on what is best for their company as each challenging tax situation emerges.

flexible solutions for your business needs

TAX CONSULTING PROVIDES
A TOTAL END TO END SOLUTION.

Service Offerings

- Sales and Use Tax Consulting and Compliance
- Property Tax Consulting and Compliance
- Appraisals and Valuation Consulting
- Severance Tax Consulting and Compliance
- Economic Development and Business Incentives Consulting and Compliance

Sales and Use Tax Consulting

MERIT’s approach to sales and use tax consulting and compliance is focused on developing long-term value for our clients as a collaborative and trusted adviser. We do this by helping our clients build and implement proactive best practices and procedures which serve to reduce their overall tax liability and help mitigate exposure and risk. Our broad range of services can also be on an “as needed” basis as your outsourced tax department.

Industry and Geographical Focus

Merit serves clients in a wide range of industries. These include oil and gas production companies, midstream, well service providers, construction, aviation, healthcare, retailers and manufacturers. Merit professionals have extensive expertise in all 50 states, the District of Columbia, Puerto Rico and Canada.

Principal Sales & Use Tax Services

Refund Studies:

A review to identify and recover overpaid sales and severance taxes. Services include preparing refund claims and working to secure the refunds or credit due.

Compliance Services:

Including preparing returns, registrations, and certificate management. Other services include consulting on structuring transactions, procedures, and responding to exposure issues. By being proactive, Merit is able to assist clients in ensuring that future audits are less expensive and less time consuming.

Audit Defense Consulting:

Consulting, research, negotiation, and argumentation in responding to audits. We can also function as a point of contact with the auditor and develop an audit plan which is fair and reasonable. Our experience means we know and can advise our clients on how to avoid an unfair or unreasonable assessment. We also assist clients in filing protests, redetermination requests, and with hearings.



New Nexus Challenges For Sellers – Merit Is Here To Help

Nexus is when a State can require a company to collect sales tax. Recently, the Supreme Court reversed 30 years of precedent and changed the nexus standard, which previously required a physical presence, to now allow States to impose sales tax collection based on economic activity. The result is that now many companies will be required to collect tax for many other jurisdictions. Merit is at the cutting edge of helping companies manage these new nexus challenges with creative, flexible and affordable solutions.

