

Sales & Use Tax Consultation Questionnaire

Please fill this survey out as completely as possible. The accuracy of this evaluation is directly related to the thoroughness of your answers.

Company Name: _____ Contact Name: _____

Website: _____ E-mail: _____

Address: _____ Phone: _____

What does your company do? _____

What states are you registered to collect tax in? _____

What products/services do you provide? (Please be as specific as possible) _____

How does your customer receive their purchase? _____

Does your company provide labor, repair or installation? _____

Do you ever offer coupons/discounts/rebates? _____

Do you take trade-ins or offer financing? _____

Nexus determination – Please individually list every state your company performs these operations in:

1) “Brick and mortar” stores _____

2) Warehousing of products _____

3) Employees, sales people, outside contractors _____

4) Affiliates (commissioned referrals) _____

5) Delivery via non-commercial means _____

6) Mail sales catalogs _____

7) Warranty repairs _____

8) “Engaging in business” including internet sales _____

What are your gross annual sales? _____ Average number of transactions weekly? _____

Do you have online sales through a web site? _____ Name of shopping cart? _____

What software/system do you use to keep track of sales/bookkeeping? _____

How are you filing sales tax returns currently? _____

Have you ever been audited? _____ When? _____

Do you make any business purchases that you have not paid sales tax on? _____

Do you make tax exempt purchases? _____ How do you manage exemption certificates? _____

Do you make tax exempt sales? _____ How do you manage exemption certificates? _____

Our research department will evaluate your current business practices and provide you with an assessment of sales and use tax compliance with an alert to areas of possible concern. This evaluation will be completed and returned within 48 – 72 hours normally.

Please return this form by clicking the "Submit Form" button in the upper right of Adobe Reader, attach it to an e-mail and send it to info@zip2tax.com, or print and fax it to (866) 488-6481.