The ROI of Managed Services for Licensing and Property Tax Compliance

November 2025

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Safe harbor

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Meet your presenters

Meet your presenters

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Compliance Specialist*

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*Senior Director of Professional
Services, CPA*

Agenda

CPE POLL QUESTION #1

How many locations does your company operate?

A 1-10

B 11-25

C 26-50

D 50+

Current compliance challenges

Three types of business licenses

A one-stop shop for your end-to-end international compliance needs

Business Licenses

Issued by the government to grant permission to conduct operations within their borders.

Permits

Certifies that safety and health requirements are met, generally issued for a physical site or a specific parcel of land.

Tax Registrations

First step the government requires to begin collecting taxes from a business.

Business license compliance is challenging

There are **50** states, **3,000** counties, and over **35,000** municipalities in the United States.

Each one of these can set and enforce their business license requirements. Maintaining compliance in all these jurisdictions takes time, resources, and money.

Different Requirements

Different jurisdiction, different licensing requirements

Different Processes

- Online vs manual submission
- Different timing
- Different payment methods

Changing Requirements

- Any jurisdiction can change their requirements at any time
- Notice is not guaranteed

Impacts of Business Changes

Any change to your business can impact your business licenses: **new locations, new products, new officers**

Real vs. personal property tax

Real property

- Land (e.g. golf courses or parking lots)
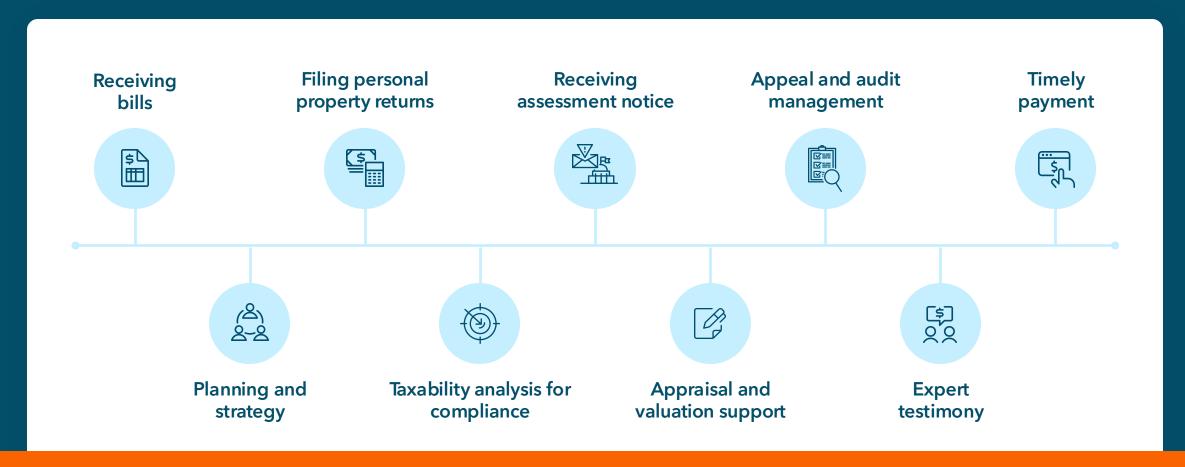- Buildings (e.g. warehouses or hotels)

Personal property (movable assets)

- Machinery
- Computers
- Supplies
- Copiers

- Tools
- Furnishing or shelving
- PoS devices

- Equipment
- Medical devices
- Etc.

The property tax compliance cycle

Receiving bills

Filing personal property returns

Receiving assessment notice

Appeal and audit management

Timely payment

Planning and strategy

Taxability analysis for compliance

Appraisal and valuation support

Expert testimony

Amidst all these necessary processes, there are different rules and regulations in every jurisdiction. Business events like M&A, expansion, etc… add complexity.

> **Real-world risks**

CPE POLL QUESTION #2

What is an example of a consequence for licensing or property tax non-compliance?

A   Fines and penalties

B   Resource drain

C   Operational disruption

D   Reputational damage

E   All of the above

Possible consequences for property tax non-compliance

Costly Penalties

Late or inaccurate filings can result in financial penalties.

Overpayment Due to Errors

Misreporting asset values or classifications can lead to paying more than necessary.

Resource Drain

Employee burnout and dissatisfaction due to constant corrections from inadequate tools.

Operational Disruption

Tax liens or disputes with assessors can affect business operations, credit ratings, or asset management.

Missed Appeal Opportunities

Without timely review of assessments, businesses may miss their opportunity to dispute overvalued property taxes.

Possible consequences for business license non-compliance

Fines and Penalties

Jurisdictions may impose significant monetary penalties for operating without the proper licenses or for late renewals.

Business Disruption

Authorities can suspend or revoke licenses, leading to temporary shutdowns or inability to operate in certain areas.

Delayed Expansion

Missing or incomplete licensing can delay store openings, product launches, or entry into new markets.

Reputational Damage

Non-compliance can erode trust with customers, partners, and regulators.

Resource Drain

Resolving compliance issues often diverts time and resources away from strategic initiatives.

Englewood
80113

80237

Greenwood Village
80111

80121

Centen

> Why Managed Services?

What are managed services?

Managed services for business licenses and property tax are outsourced solutions that handle all or part of your compliance function, meeting the requirements and maintaining compliance for all your locations and facilities across all the jurisdictions in which you do business.

These services are typically powered by a combination of solution experts and technology platforms that streamline workflows and provide real-time reporting.

Rather than adding headcount or investing in costly in-house systems, managed services let you tap into experienced specialists who stay up to date on local rules, deadlines, and best practices.

Why managed services?

BUSINESS LICENSES

- Accelerate growth by scaling license compliance
- Reduce noncompliance risks through expert management
- Gain peace of mind with improved accuracy
- Free internal teams to focus on core business functions
- Collaborate with experienced licensing specialists
- Maintain strategic oversight while offloading day-to-day administrative burdens

PROPERTY TAX

- Streamline the property tax life cycle
- Centralization of dashboards, automated data capture, secure digital document storage
- Real-time tracking of deadlines, assessments, and tax bills
- Reduction of manual work
- Better forecasting, reporting, and decision-making
- Scalability and redundancy for staffing and expertise

What problems does a managed services solution solve?
Property Tax

Inaccurate asset valuation

Avoid overpayment or audit risk caused by misreported or outdated property records

Resource-intensive compliance work

Free internal teams from the burden of valuation analysis, assessor correspondence, and return preparation.

Missed filing and appeal deadlines

Ensure timely returns and identify opportunities for strategic appeals.

Inconsistent tax treatment across locations

Standardize reporting and valuation methodologies across your footprint for more predictable costs.

Disorganized asset tracking

Replace siloed, outdated records with organized, jurisdiction-ready documentation.

Audit exposure and response gaps

Get expert support during audits and confidence that filings are accurate and defensible.

What problems does a managed services solution solve?
Business Licenses

Missed renewals and filing deadlines

Avoid late fees, penalties, or suspension of operation due to overlooked due dates.

Complexity from business growth

Manage license needs seamlessly during expansion into new regions, locations, or verticals.

Tracking requirements across jurisdictions

Eliminate the need to manually monitor thousands of ever-changing rules at the local, county, and state level.

Staff bandwidth constraints

Offload time-consuming tasks like form research, submissions, and status tracking. Headcount.
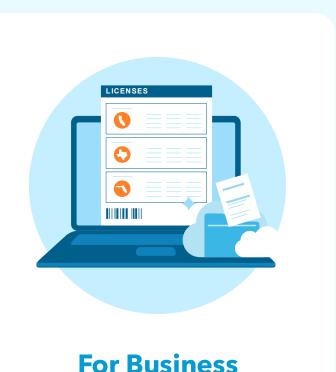
Decentralized compliance data

Replace spreadsheets and email chains with a centralized, auditable license portfolio.

Lack of visibility and accountability

Gain real-time status updates, reporting tools, and alerts through a single managed platform.

When should you consider a managed services solution?

For Business Licenses

You operate in **multiple jurisdictions** with varying licensing requirements

You've **missed renewal deadlines** or struggled to track licensing obligations

You **lack centralized visibility** into your full license portfolio

Your **compliance data is scattered** across spreadsheets, emails, or local systems

You're **expanding into new locations** or launching new business lines

Your team **spends too much time** researching forms, deadlines, or filing procedures

You've **received notices, penalties, or compliance warnings** from government agencies

You **need a scalable solution** that can support future growth or M&A activity

When should you consider a managed services solution?

For Property Tax

You **have significant real or personal property** across multiple jurisdictions

You've **faced audit scrutiny or disputes** with assessors over asset values

Your **asset records are outdated**, incomplete, or hard to reconcile across systems

You want **better visibility into your liabilities** and cash flow for property tax

You **lack internal resources** to track deadlines, assess values, and prepare returns

You've **missed appeal windows** or paid property tax bills without review

You're unsure if you're o**verpaying due to misclassified** or depreciated assets

Your **finance or tax team is stretched** thin and needs support for non-revenue tasks

The ROI of a managed services solution

The ROI impacts of managed services

Reduced Labor Costs

Access to Industry Expert

Improved Accuracy and Compliance

Scalability During Growth

Process Efficiency and Automation

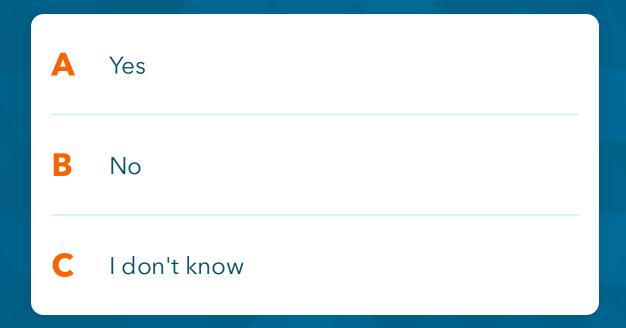**Improved Visibility and Reporting**

Cost Avoidance from Non-Compliance

Opportunity Cost Reduction

CPE POLL QUESTION #3

Have you ever been penalized for business license or property tax non-compliance?

A Yes

B No

C I don't know

> **Avalara managed service options**

Avalara Property Tax Managed Services

Data accuracy

Avalara thoroughly reviews raw and historical data, transforms and reconciles it, and reclassifies assets to reduce risk.

Simplified filing

Avalara handles preparation, printing, and mailing of personal property tax returns, helping ensure accurate, timely compliance across jurisdictions.

Appeal opportunity

Avalara manages incoming mail and assessment review to identify appeal opportunities on your behalf.

Timely payment

Avalara offers property tax bill mail, tracking, payment, and custom reporting services – giving your team confidence that bills will be paid on time, with real-time insight and visibility across payments.

Avalara License Managed Services

For the ongoing maintenance of business licenses for your company

Avalara business licensing services are designed for companies that need help managing license applications, maintenance, and renewals. The trained experts at Avalara can bring order to chaos and keep you organized and up to date.

Optimize internal resources

Offloads business license management to a trusted partner on an ongoing basis.

Utilize licensing experts

Empowers professionals to engage licensing authorities on your behalf.

Reduce compliance risk

Assists in calendaring and renewing business licenses on time.

Enhance trackability

Includes 24/7 access to a portal to track the work done on your behalf.

CPE POLL QUESTION #4

Would you like a follow up
from Avalara?

A Yes

B No

Q&A

Learn more/contact us…

- Visit the Avalara website: **www.avalara.com**
- Contact **Lauren** or **Andrea** directly:

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Tax compliance done right