

Avalara Managed Returns for Accountants

Extend your practice with sales tax preparation and filing services

With new economic nexus rules coming on top of already complex state and local filing requirements, your clients are challenged to maintain sales tax compliance. Now you can help them meet the challenge as you grow your own sales tax preparation and filing practice.

Avalara Managed Returns for Accountants provides the cloud-based tools, tax content, and support required to efficiently add sales tax return preparation and filing to your firm’s service offerings. Grow your business with the same sales tax technology Avalara uses to file millions of returns each year.

Managed Returns for Accountants is designed for accounting firms. It delivers visibility into process status, manages multiple clients efficiently, and streamlines workflows based on the needs of accounting firms. Accountants can now better serve their clients, scale for firm growth, and reduce risk for themselves and their clients.



Enable business scalability

- Grow your client base with less staff
- Eliminate the manual entry of returns to jurisdiction websites
- View a single status dashboard for all clients



Drive efficiency

- Manage multiple clients and staff assignments for maximum productivity
- Use Avalara filing services for efficient, on-time filing
- Manage prepayments, discounts, and credit carryforwards
- Enable staff to focus on more profitable advisory services



Reduce firm and client risk

- Use built-in rates and forms for the U.S. & Canada
- Calculate gross-down or tax-up balances automatically
- Allocate tax collected to state and local jurisdictions
- Use the same proven technology used by Avalara



Improve client satisfaction

- Remove the burden of preparation and filing tasks from your clients
- Leverage the Streamlined Sales Tax program to lower costs for qualifying clients
- Deliver professional work products to clients
- Reduce client audit risk and exposure

Return preparation and review

Once a filing calendar is set up for your client, Managed Returns for Accountants has the information needed to manage filing operations. Simply import your client's sales data and use the liability worksheet to review and reconcile. After you approve the worksheet, your client's return is ready to file.

- **Omni-channel Data Import:** Managed Returns for Accountants provides robust data import functions to easily assimilate client sales information from multiple channels and marketplaces.
- **Liability Worksheet:** A consolidated view of client liabilities enables reconciliation, review, and approval across all jurisdictions, including state, city and county. Prepayments, discounts for early payment, and credits are easily handled through the dashboard and are part of the audit trail.
- **Practice Management:** Dashboard views enable easy tracking of filing status across all preparers, clients, and returns.
- **Record Retention:** Copies of sales tax returns and confirmations are available to provide to your client for audit or record retention.

Filing and remittance

Focus on your clients and their businesses, not tax filing operations. When it's time to file and remit, we've got you covered. Once you've approved the tax liability worksheet, we'll handle the returns filing, remittances, and related notice management (at your request) on their behalf and keep you up-to-date on filing status.

- **Returns Filing:** Returns are filed directly with the government by Avalara, eliminating the need to spend time mailing paper returns or navigating government filing web sites. Avalara even handles paper-based filing for you when needed.
- **Remittance:** Tax remittance is done with a single secure transfer from your client's bank account to the Avalara Treasury account and then disbursed on your client's behalf to the jurisdiction. This simplifies payment for the client without putting your firm in the funds management business.
- **Notice Management:** At your discretion, Avalara will review applicable tax notices and directly work issues with the government until they're resolved.

Streamlined Sales Tax (SST)

As an SST Certified Service Provider, Avalara can offer calculation and returns services to your qualified clients in SST states. You can manage their returns in non-SST states with full dashboard visibility to both SST and non-SST activity. SST can save money and reduce compliance risk for your clients while you manage the relationship.

Who is Avalara?

We're a team of tax experts and technologists behind one solution for your accounting firm. We live and breathe sales tax and license compliance. We help firms confidently and efficiently provide compliance services to their clients.

From independent operators to midsize businesses and Fortune 100 companies, more than 30,000 customers choose Avalara for tax compliance tools scaled to their needs. You'll find Avalara all around the world helping businesses prepare for growth in the global market.



Learn more at avalara.com

Contact us for a demo and consultation.