



Avalara Managed Returns for Accountants

Extend your practice with sales tax preparation & filing services

With the *Wayfair* Supreme Court ruling instituting new economic nexus rules coming on top of the already complex state and local filing requirements, your clients are challenged to maintain sales tax compliance. Accounting firms have struggled trying to profitably assist their clients with the ongoing challenge of complying with state and local filing requirements.

Avalara Managed Returns for Accountants provides the cloud-based tools, tax content, and support required to efficiently add sales tax return preparation to your firm's service offerings. Designed for accounting firms, Managed Returns for Accountants leverages the same technology that Avalara uses for its own compliance operations, currently handling over one million returns and preparing \$36 billion of taxes for remittance annually.

Avalara Managed Returns for Accountants:

- **Supports state and local returns in the U.S. and Canada** – Managed Returns for Accountants has all the rates, forms and filing requirements built-in, eliminating the need to track each jurisdiction's compliance requirements.
- **Puts you in control** – Track the filing process for all your clients and their returns from a single dashboard. There's no need to juggle spreadsheets or log in and out of multiple systems or state websites.
- **Enables focus on higher value services** – Once you approve the liability worksheet on behalf of your client, your prep work is done. Avalara takes care of the filing and remittance, and related tax notice management if requested. This allows your firm to focus on your client's strategic consulting needs.
- **Supports business scalability** – Managed Returns for Accountants automates the manual process of logging into jurisdictions with multiple credentials. Firms can scale-up their business by adding new clients to the platform.

Avalara Managed Returns for Accountants Workflow



Designed for accountants

- Automates the preparation and filing process
- Enables a firm's compliance staff to work anywhere, anytime via the cloud
- Provides a single dashboard view of status for all clients
- Supports tax jurisdiction liability reports for review and approval
- Leverages Avalara filing services for filing in all state and local jurisdictions
- Remits payments directly to departments of revenue
- At the firm's discretion, Avalara manages tax notices related to our services on behalf of your client

Supports business scalability

- Eliminates the manual process of logging into jurisdictions with multiple credentials to file
- Enables you to scale and easily add clients
- Provides volume pricing discounts

Enables focus on strategic services

- Enables focus on your client's strategic consulting needs while Avalara handles the tactical preparation and filing
- Allows you to spend time on client inquiries around sales tax requirements and marketplace facilitator laws

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 transactions 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.
- **Professional Work Products:** Once your client's data is uploaded, sales tax liability reports enable review and approval of liabilities across all jurisdictions, including cities and counties as needed. Prepayments, discounts for early payment, and credits are easily handled through the dashboard and are part of the audit trail. Certified sales tax returns and confirmations are available at the end of each filing cycle.
- **Return Preparation:** Managed Returns for Accountants automatically creates the return based on government forms and requirements, eliminating the need for you to track each state and local jurisdiction.

Filing and Remittance

Managed Returns for Accountants allows you to focus on your clients and their businesses, not tax filing operations. When it's time to work with government departments of revenue, we've got you covered. Once you've approved the tax liability worksheet for your client, we'll handle the return filing, payment, and related notice management (at your request) on their behalf and keep you up to date on filing status.

- **Electronic Filing:** When available, returns are filed directly with the government electronically by Avalara, eliminating the need to spend time mailing paper returns or navigating government filing web sites. Hard copy or pdf returns are prepared and accessible to provide to clients as work product.
- **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 firm's discretion, Avalara will review applicable tax notices and directly work issues with the government until they're resolved.
- **Past Returns Available:** Easily access previous and current year returns that you can provide to your client for audit or record retention.

Supports efficient preparation & filing

- Provides multi-client views and multi-return operations to facilitate preparer productivity
- Enables dashboard customization by firm and preparer
- Manages credit carryforwards
- Uses Avalara filing services for efficient, on-time filing

Helps reduce client compliance risk

- Covers U.S. and Canadian sales and use forms
- Updates rates and forms automatically
- Supports gross-down or tax-up balancing for filing consistency
- Allocates tax collected to the appropriate state and local jurisdictions
- Reports and optionally remits tax on marketplace sales



Get started with Avalara
Managed Returns for
Accountants today!

Email: A4A@avalara.com