

MANAGED AUDIT



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MANAGED AUDIT PROGRAM

The Texas Comptroller of Public Accounts offers a managed audit option only for sales tax and direct pay audits. This self-audit or managed audit must be requested within **30 days of the date** that the Audit Notification Letter was sent in order to be considered. If the managed audit request is approved, the Comptroller may waive penalties and some or all of interest due.

However, only taxpayers with the resources necessary to perform the audit will qualify for this highly technical program. Many taxpayers will outsource the managed audit because it requires an audit plan, timeline, and taxability knowledge, making this program one of the most challenging to project manage.

Since 1991, M&A has defended and represented the clients noted throughout the managed audit process, obtaining refunds or credits of Texas sales and use taxes, completed the preparation and substantiation of claims for refund or credit and assisted our clients throughout the refund presentation and audit process. We have saved our clients millions of dollars in this process.

M&A's proven methodology includes:

- Managing the entire audit lifecycle including both audit and refund review and recovery
- Interfacing with the State to determine population criteria, obtain data downloads and specific documents
- Reviewing samples for errors to ensure a correct sample is utilized to improve accuracy and efficiency
- Integrating the refund review with the audit to improve efficiencies and reduce redundancies
- Performing research and reviews support documentation to reduce any assessment

"M&A State Tax Specialist, LLC strives to consistently provide the highest level of services and representation to its clients through the effective use of technology, communication, and experience. Quality, integrity, detail, and perseverance are why we succeed."

Dan Martinez

