

# REFUND REVIEW



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## REFUND REVIEW SERVICES

Since 1991 Dan Martinez & Assoc. LLC (M&A) has provided our clients with tax savings strategies for state and local taxes. Our Refund Review and Recovery serves as the foundation of our tax savings strategies and is a core competency.

This best practice benefits taxpayers by leveraging the Texas four-year statute of limitations to keep our clients current on the refunds and not lose statute. The tax refunds captured by M&A's team of tax professionals can help our clients increase cash flow and minimize expenses.

M&A assumes the financial risk of the refund review by conducting the service on a performance-based fee structure (contingency-fee). Taxpayers benefit with no upfront out-of-pocket costs and ultimately incur zero costs if no refund is successfully obtained.

M&A's unique focus in Texas has allowed us to develop a very in-depth understanding of Texas sales and use tax laws, regulatory history, and case hearings that can support a refund claim.

Our clients receive the following benefits from a tax Refund Review:

- Zero upfront out of pocket cost
- Comprehensive analysis of tax refund opportunities
- Refund claims can be defended by M&A
- Financial risk is shifted to M&A vs. client
- Issues uncovered during refund review are leveraged by our clients for years to come
- Performance-based service creates increased value for our clients

"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*

