

TRUSTED

EXPERIENCED

ADVISOR

Carl Roscoe Biography

Carl Roscoe is an independent tax attorney with over 30 years of experience. He is the president and founder of ROSCOEtax, Inc., a specialized multistate corporate tax consultancy based in the Boston, Massachusetts area.

He possesses extensive knowledge in most forms of multistate taxation, including income, franchise, gross receipts, sales, use, and property tax. He has collaborated with over 300 clients across diverse industries such as adtech/martech, high-technology, bioscience, consulting and other services, manufacturing and retail. His clientele has ranged from start-up and pre-profit companies to large closely held organizations and both U.S. and multinational inbound public companies.

Carl is dedicated to providing practical, feasible solutions to business clients, regardless of the complexity of their tax issues or business operations. Service examples include:

- Tax exposure determination and remediation, including sales/use tax and ASC 740-10 uncertain multistate income tax positions
- On-demand trusted advisor to CPA and other consulting firms, providing deep supplemental multistate tax knowledge to address their client needs as well as staff training
- Identification and recovery of overpaid tax amounts
- Tax audit management, defense and appeals
- Nexus analysis
- Transactional tax due diligence and minimization planning
- Product/service code mapping for sales tax automation applications
- Complex sourcing of service sales and other income apportionment determinations
- Management and preparation of state amended returns following federal changes

Early in his career Carl managed large-scale corporate restructuring projects for Fortune 50 clients of PwC. He later became a founding employee of internationally recognized Boston multistate specialist tax firm FandlGagnon (f/k/a GAGNONtax) where, during his 20+ year tenure, he served both as a partner and as general counsel.

Personal interests include jazz piano and designing and making furniture.

EDUCATION

Juris Doctor, Albany Law School

Bachelor of Science, Hartwick College, *summa cum laude*

BAR MEMBERSHIP

New York State

Commonwealth of Massachusetts

AFFILIATIONS

American Bar Association

Boston Bar Association

New York State Bar Association

American Mensa, Ltd.

Intertel, Inc.

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