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## Sales & Use Tax Compliance Review:

As a new Controller to a mid-size business, understanding existing processes and ensuring compliance with state and federal laws was a top priority. I had read sales and use tax publications and felt our existing processes were fairly strong. To ensure we were on the right track, I brought in Baker, Shore and DiLorenzo Consulting for a sales and use tax compliance review.

The Compliance Review was quick to prepare for, very professional, and offered significant value to the company. In advance of the review, we pulled together several pieces of shelf data, specifically pertaining to recent fixed asset acquisitions and the prior couple months of AP invoices. Joe DiLorenzo came onsite for a day. After a quick tour, he began reviewing the information provided. Joe provided feedback as he worked through items, giving us a chance to take notes, ask questions, and ensure our processes were up to par. Joe offered to meet with our purchasing team to field questions and help provide guidance. It was very worthwhile and will certainly pay dividends going forward.

As a result of the compliance review, I now have significantly greater confidence in our processes and our purchasing team's ability to make the right decisions regarding when to provide exemption forms. I would certainly recommend a review for any company looking for education on sales and use tax treatment. Thank you Baker, Shore and DiLorenzo.

A handwritten signature in cursive script that reads "Tom Starin".

Tom Starin  
Controller  
Optimax Systems