

MANAGED INDIRECT TAX COMPLIANCE

Reliable execution. Clear control. Preferred-client access to SALT counsel.

A managed operating layer from client data through filing, payment, and reconciliation.

DISCUSSION DECK

The promise

A compliance operation built for control, not complexity

DEPENDABLE EXECUTION

Brehm Tax Counsel manages the recurring work from data intake through filing and payment confirmation.

CLEAR VISIBILITY

Defined responsibilities, submission windows, exception reporting, and monthly operating visibility.

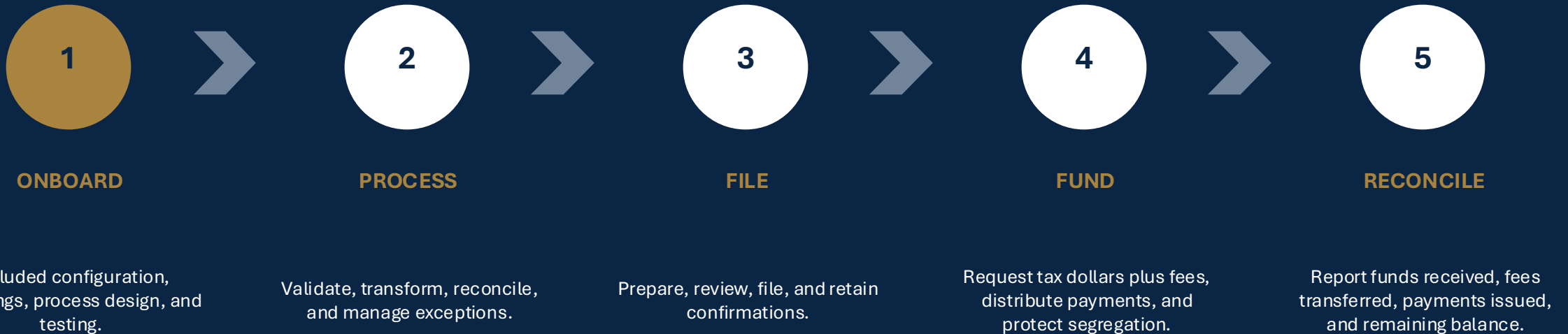
PREFERRED-CLIENT ACCESS

Managed Compliance clients receive 20% off the firm's published standard hourly rate when separate SALT advisory or controversy help is requested.

**Current published standard: \$650/hour | Current preferred rate:
\$520/hour**

What Brehm Tax Counsel runs

One operating model, beginning to end



Onboarding is included in the relationship.

Timing creates options

The earlier the complete data, the more value can be preserved

BY BUSINESS DAY 5

BEST OPPORTUNITY

Roughly 25 states offer some statewide timely filing or payment incentive. A small subset offers additional early or prepayment value. The actual client return matrix controls the states where this will be a benefit.

BY BUSINESS DAY 8

TIMELY-FILING FOCUS

Roughly 25 states may offer some form of statewide timely filing or payment benefit, but early-payment opportunities may already be unavailable.

AFTER BUSINESS DAY 8

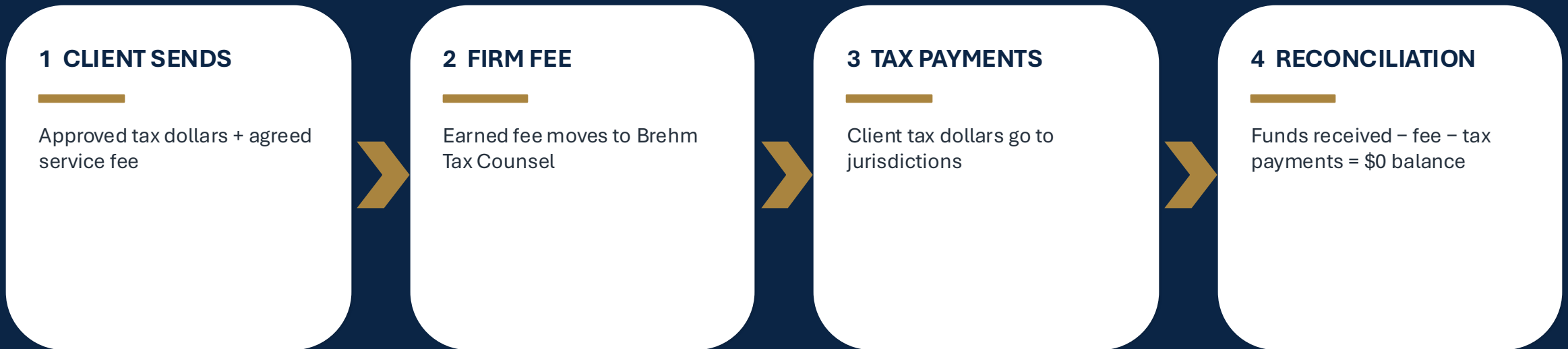
BEST EFFORTS ONLY

No assurance of vendor compensation, timely filing or payment, or avoidance of penalties and interest.

All vendor compensation belongs to the client. No amount is guaranteed.

How the money moves

Tax dollars remain separate from firm revenue



Client tax dollars never become firm revenue and never enter the firm's operating account.

Notice Repository Management

A familiar website entry point to a client-specific SharePoint site

1 NOTICE INTAKE

Dedicated client mailbox

client_name@brehmtaxcounsel.com

Or direct client upload

2 CLIENT PORTAL

Client selects “Client Portal” at brehmtaxcounsel.com and is routed to the branded SharePoint sign-in.

3 SHAREPOINT SITE

Authorized access to securely stored notices and compliance correspondence. Brehm Tax Counsel uploads notices it receives within two business days.

Storage and access only. No daily monitoring, deadline tracking, review, or response unless separately requested.

Clear ownership keeps the model affordable

Brehm Tax Counsel owns the process. The client owns the inputs and decisions.

- Complete, accurate, reconciled data on time
- Prompt exception resolution and business decisions
- Disclosure of system, entity, product, channel, and registration changes
- Timely approval and cleared tax dollars plus fees
- Review of every notice and monitoring of all deadlines
- Secure credentials, records, contacts, and authorizations

THE OPERATING PRINCIPLE

The recurring service covers the defined compliance process. Separate legal and technical issues are handled only when the client requests them, at the preferred-client rate.

Preferred clients receive 20% off the published standard hourly rate.

Why Brehm Tax Counsel

Judgment over volume. Direct accountability. A business lens.

BUSINESS-MINDED

A J.D. and MBA perspective focused on materiality, control, and business impact.

DIRECT RELATIONSHIP

One experienced SALT attorney remains accountable from operating design through issue escalation.

BUILT FOR DECISIONS

When the issue goes beyond filing, the client gets a direct answer sized to what the matter is worth.

Big Four rigor. Private-practice experience. Boardroom perspective.

What we need to learn

No pricing until the actual operating scope is understood

RETURN INVENTORY

Entities, jurisdictions, return types, filing frequencies, local returns, prepayments, and seasonality.

DATA AND PROCESS

Systems, files, reconciliations, exceptions, approvals, funding, notices, and provider roles.

CLIENT-SPECIFIC MODEL

Scope, transition, service calendar, vendor-compensation matrix, security response, and commercial proposal.

Understand first. Price second.



BREHM TAX COUNSEL PLLC

STATE & LOCAL TAX COUNSEL

brehmtaxcounsel.com

A MORE CONTROLLED WAY TO RUN MULTISTATE COMPLIANCE

**Reliable monthly execution • Client-owned savings • Segregated tax dollars • Preferred-client access to SALT
counsel**

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