

# 5 Quick questions for referrers: How specialty tax adds value for your clients

Want to know where specialty tax providers can plug in to help your clients—and where they don't? These frequently asked questions provide clarity for accountants, attorneys, investment professionals and other advisors. Gain a better understanding of what makes specialty tax work different from what you already do and how Kaufman Rossin's team can complement your expertise to add value for your clients.

## **Q: Isn't this just tax work? What makes it "specialty" tax?**

Not quite. Specialty tax work goes beyond standard compliance, planning, or structuring. These services are typically high-stakes, highly technical, and high-risk if mishandled. They often require deep expertise in highly focused areas—like multistate taxation, IRS controversy, or transfer pricing—and depend on well-documented strategies.



## **Q: What are the four specialty areas you support—and what does each one actually involve?**

**State & Local Tax (SALT):** Kaufman Rossin's SALT professionals focus on multistate income and sales tax exposure, nexus studies, voluntary disclosure agreements, apportionment planning, and state credits/incentives strategy.



### **We often help when:**

- A business is expanding across state lines or a high-net-worth individual is moving to or from a high-tax jurisdiction
- A client has remote workers or sales in multiple jurisdictions
- There's confusion about what the client owes—or where they owe it

**Tax Credits & Incentives:** We help clients identify and document R&D tax credits, cost segregation opportunities, and energy-efficient building incentives (e.g., 179D).

### **We often help when:**

- A client is investing in innovation, new facilities, or certain capital improvements
- They're leaving money on the table, often due to incomplete or improper documentation

- Their CPA knows the credit exists, but doesn't have the specialized expertise (including an engineering background) to pursue it

**Transfer Pricing:** We help clients document and support pricing between related entities across borders or business units.

**We often help when:**

- Clients have foreign affiliates, a foreign parent, or related-party transactions
- They need compliance documentation to satisfy IRS or international regulators
- A deal or audit is uncovering transfer pricing risk
- Changes in business strategy or operations require a review of existing pricing arrangements

**Tax Controversy & IRS Resolution:** We manage audit defense, notice resolution, penalty abatement, collections, and tax appeals.

**We often help when:**

- A client receives an IRS or state tax notice they're not prepared to resolve on their own
- They're facing back taxes, penalties, or compliance risk and need urgent assistance
- They want to be proactive to avoid future issues

**Q: How is this different from what my firm or team already handles?**

We're not here to compete— we're here to make you even more valuable to your client. Kaufman Rossin's specialty tax team can expand your capabilities, enabling you to better serve your clients when they have complex tax issues.



**For CPA firms:** You manage tax compliance and client advisory. We step in when your client is growing, expanding, getting audited, or asking questions you can't answer with 100% confidence

**For attorneys:** You structure the deal, assist with the transaction, and/or advise on the expansion. We address the tax implications behind it—whether that's cleaning up SALT exposure, preparing for due diligence, or performing transfer pricing analysis and documentation.

**For PE professionals:** You manage the portfolio. We help you improve EBITDA, uncover tax risks during diligence, implement strategic and optimal tax strategies and strengthen your advisory bench.

### **Q: What kinds of businesses typically need specialty tax services?**

We work most often with mid-market and growth-stage businesses that are:

- Expanding into new markets
- Launching new products, operations, or subsidiaries
- Facing IRS or state audit risk
- Going through a transaction or reorganization
- Looking for missed savings opportunities in credits or depreciation
- Trying to understand the impacts of specific tax law changes



### **Q: Why does this kind of work matter to my clients—and to me?**

The work you're already doing and the relationships you have built with your clients are too important to be derailed by an overlooked tax issue.

#### **Bringing us in early can:**

- Mitigate your client's risk of costly mistakes, penalties, or audit exposure
- Unlock meaningful tax savings that strengthen your relationship
- Help you look proactive, not reactive
- Strengthen your role as their go-to advisor
- Add value—without adding risk to your reputation or relationship



**Clients today expect more from their advisors than ever before. We're here to help you deliver it.**