

Retail

Case Study

Uncovering Millions In Overpayment for Retail Clients



KeyTax Retail Clients

AT A GLANCE

Challenges

- Limited visibility into tax liabilities
- Difficulty in identifying potential overpayments
- Managing tax complexities across multiple acquisitions

Benefits

- Uncovered large amounts of money in overpayments
- Optimized operational efficiency and risk mitigation
- Enhanced visibility and control over tax liabilities

THE CHALLENGE

Given the complexity of multi-state operations and the constantly evolving tax landscape, our retail clients sought assistance in identifying potential overpayments. With continued expansion and new store openings, leadership required enhanced visibility into sales tax exposure and payroll liabilities.

SOLUTIONS

KeyTax conducted a comprehensive review of our retail clients' sales and use tax processes, leveraging advanced analytical tools and deep industry knowledge to identify discrepancies and potential overpayments.

Through close collaboration with our retail client's finance and accounting teams, KeyTax developed a tailored solution to rectify the identified issues and optimize tax compliance processes. Implementing strategic adjustments and proven methodologies, KeyTax ensured accuracy and efficiency in our retail client's tax reporting moving forward.

RESULTS



As we expanded our Planet Fitness Franchise to over 120 locations across 14 states, KeyTax became indispensable. Their expertise in tax compliance minimized liabilities, ensuring our success. Their proactive guidance and tailored solutions were crucial in navigating our growth.

Stephen Kindler
CEO
Planet Fitness



Law Firm

Case Study

Uncovering Millions In Overpayment for Law Firm Clients

Duane Morris®

faegre drinker

Morgan Lewis

COZEN
O'CONNOR

KeyTax Law Firm Clients

AT A GLANCE

Challenges

- Limited visibility into tax liabilities
- Difficulty in identifying potential overpayments
- Managing tax complexities across multiple acquisitions

Benefits

- Uncovered large amounts of money in overpayments
- Optimized operational efficiency and risk mitigation
- Enhanced visibility and control over tax liabilities

WHY IT MATTERS

For multi-office law firms, tax inefficiencies quietly erode partner distributions and increase regulatory risk. Proactive oversight ensures compliance while protecting profitability.

THE CHALLENGE

Given the complexity of evolving tax regulations and increasingly sophisticated partnership structures, our law firm clients sought assistance in identifying potential overpayments. With continued growth, leadership required enhanced visibility into tax exposure and partner compensation reporting.

SOLUTIONS

KeyTax conducted a comprehensive review of our law firm clients' sales and use tax processes, leveraging advanced analytical tools and deep industry knowledge to identify discrepancies and potential overpayments.

Through close collaboration with our law firm client's finance and accounting teams, KeyTax developed a tailored solution to rectify the identified issues and optimize tax compliance processes. Implementing strategic adjustments and proven methodologies, KeyTax ensured accuracy and efficiency in our law firm client's tax reporting moving forward.

RESULTS



KEYTAX

Manufacturing

Case Study

Uncovering Millions In Overpayment for Law Firm Clients



KeyTax Manufacturing Clients

AT A GLANCE

Challenges

- Limited visibility into tax liabilities
- Difficulty in identifying potential overpayments
- Managing tax complexities across multiple acquisitions

Benefits

- Uncovered large amounts of money in overpayments
- Optimized operational efficiency and risk mitigation
- Enhanced visibility and control over tax liabilities

WHY IT MATTERS

For growing manufacturers, tax inefficiencies quietly erode margins and increase regulatory risk. Proactive oversight ensures compliance while protecting profitability and supporting operational growth.

THE CHALLENGE

Given the complexity of the constantly evolving tax landscape, our manufacturing clients sought assistance in identifying potential overpayments. With continued expansion and facility investments, leadership required enhanced visibility into sales and use tax exposure, payroll liabilities, and jurisdictional compliance requirements.

SOLUTIONS

KeyTax conducted a comprehensive review of our manufacturing clients' sales and use tax processes, leveraging analytical tools and industry knowledge to identify discrepancies and potential overpayments.

Through close collaboration with our manufacturing client's finance and accounting teams, KeyTax developed a tailored solution to rectify the identified issues and optimize tax compliance processes. Implementing strategic adjustments and proven methodologies, KeyTax ensured accuracy and efficiency in our manufacturing client's tax reporting moving forward.

RESULTS

