

Avatax for Communications Questionnaire

1. Please provide the names, phone numbers, and email addresses for the primary tax and technical contacts at _____. These contacts will be sent all the setup information, and will be added to our monthly email distribution to notify you of updates to the software and services we provide.

Tax Contact Name:

Phone Number:

Email Address:

Technical Contact Name:

Phone Number:

Email Address:

2. Please provide the name, phone number, email address, and office address for your Accounts Payable contact.

Accounts Payable Contact Name:

Office Address:

Phone Number:

Email Address:

3. Please add all contacts you will want to receive access to the AFC web portal and our monthly email distribution to notify our clients of updates to the software and services we provide.

Additional Contact Name:

Email Address:

Additional Contact Name:

Email Address:

Additional Contact Name:

Email Address:

4. We will bill and collect sales tax as required by law based on the billing address provided.

Do you have a different Ship-to address for sales tax purposes? Yes No

If yes, please provide the appropriate shipping address:

Are you exempt from sales tax? Yes No

If yes, please provide a current valid exemption certificate:

5. What is your billing provider / payment platform?

6. When would you like to GoLive with Avatax for Communications?

Do you want Avalara to file Returns for you? If yes, please complete the following:

1. Are you currently filing taxes today? Yes No
 - a. If yes, can you please provide Avalara with your current filing calendar, login credentials for returns that you are filing online, and the most recent copies of your returns? Yes No
2. Will you be using Avalara to complete any registrations as part of the setup process? Yes No Maybe
3. Will you have any backfilling requirements that you would like to utilize Avalara for? Yes No Maybe
4. Please provide the month and year to start filing returns: