

## OTS Tax Consulting Services

Today's transportation companies operate in a complex environment. Changing employment, safety and security regulations require more attention than ever before. New technologies are constantly being introduced. State and federal tax laws can confound even highly experienced accounting staffs.

With costs up and sales down, companies are struggling to find ways to trim expenses while demand for higher service levels from your customers squeeze budgets even more.

OTS, the transportation industry's only full-service tax resource center, provides a full range of tax consulting services and solutions that help find overpayments, reduce exposure and ensure you pay only the legal minimum amount owed. This translates into immediate bottom-line results.

**“Our company has reaped big dividends from using the expertise of OTS. OTS reviewed our records, and presented several tax saving strategies to us.”**

*Doug Brown, VP-Controller  
Catawba Transportation Group,  
Claremont, NC*

OTS consulting services fall into one of the following four categories:

**Recovery**-We help you find overpayments and misdirected payments

*We review returns from the past 36 months*

**Process refund claims**

**Prevent future overpayments (bottom line improvement)**

**Weigh risk (additional exposure) against reward (refund potential)**

*Over 95 percent of all clients reduce tax expenses and achieve future tax savings.*

**Compliance review**-We determine your tax health, identify strengths, weaknesses, exposures and opportunities.

**We ensure you pay the correct and legal minimum owed**

**We eliminate exposure to audits, fines, overpayments, etc.**

**Our on-site review includes examination of all related documents, business processes, policies, procedures and accounting methodologies,**

**Tax planning helps:**

**Contribute to the bottom line by lowering future taxes**

**Identify potential savings**

**Provide a complete legal analysis**

**Manage the implementation process**

**Determine the impact of M/A, new jurisdictions, financing/lease arrangements, spin-offs/reorganizations**

**OTS's audit review/negotiation/representation process can:**

**Reduce assessments from recent or current audits**

**Verify accuracy and legitimacy of past audits within statute of limitations**

**Ensure you pay the correct and legal minimum amount owed**

**Includes:**

**Pre and concurrent audit involvement/preparation**

**Onsite representation, support and counseling throughout audit, review, negotiation and appeal process**

**Recommendations and work with outside counsel**

## OTS Tax Consulting Services

**“What impresses us most about OTS is that they are knowledgeable about all operating taxes in all 48 states. We have dealt with sales tax specialists, property tax specialists, and fuel tax specialists who are all competent in their own fields. None, however, possess the overall knowledge and hands on experience of OTS.”**

*Ron Hailey  
Manager of Operating Taxes & Licensing  
Old Dominion Freight Line, Inc. High Point, NC.*

**“OTS has consulted with Covenant Transport on a wide range of operating tax issues – fuel tax, sales tax, property tax, federal excises, and state franchise taxes. Their knowledge and professionalism is outstanding and they produce results.”**

*Tracy Lea, Tax Director Covenant Transport, Chattanooga, TN*



*Tax Technologies and Tax Solutions  
for the Transportation Industry*

Serving North America

**877-445-2058**

Operating Tax Systems, LLC  
Operating Tax Specialists, Inc.

[www.OTS.net](http://www.OTS.net)

### Why OTS?

- Combined over 70 years of transportation industry experience
- 70% of the top trucking companies trust OTS
- Innovative technology solutions that streamline preparation and ensure accuracy
- Since 1990, OTS has been the only full-service tax resource center for the transportation industry
- Seamless integration/partnership with leading dispatch and accounting systems
- Extensive knowledge of state and federal tax laws

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