

Sales Tax Filing Manual

Welcome to RJM Tax Exemption services. We're here to help and hope you have a great experience with us.

FIRST SECTION:

- Please fill out your basic details regarding yourself and your business.

- Finally, please fill out your bank details; this should be a full US bank account, with the ability to conduct ACH Debit transactions with it, and have funds available on this account for our team to be able to pay the sales and use tax fees you are owed on your tax accounts. **If you do not have a full US bank account** such as the one described above, please fill in your credit/debit card details, and have funds available on your credit/debit account for our teams to be able to pay the sales and use tax fees you are potentially owed on your tax accounts.

SALES TAX FILING INFORMATION REQUIREMENTS TABLE:

- In this section, we will outline where you can find the specific details required to fill in within this table, showing you which specific documents you have received from the states contain the information we require.

- **Please do not fill out the 'Checklist' column of this section**, as this is for office use only by our sales tax filing team.

FLORIDA:

- Business partner number: This will be located in your very first mail received from the state of FL.

- Permit number: This number will be displayed on the top of your Sales and Use Tax permit, also known as form DR-13. It is also displayed on form DR-11. Both forms will have been sent to you via mail by the state of FL.

- Username / Password: This will be issued to you by the state of FL itself, and will be clearly displayed on a document that will have been sent to your mailing address by the state via mail.

CONNECTICUT:

- PIN Number: This will be located in your second mail received from the state of CT and will be amongst the lines of a bigger body of text, on the top half of the page.

- Certificate number: This number will be displayed on the bottom of your Sales and Use Tax permit, and this form will have been sent to you via mail by the state of CT. This document most often has a blueish colour to the entire page.

CALIFORNIA:

- Account Number & Limited Access Code: Both of these will be located in an e-mail received from the state of CA confirming your Sales and Use Tax account application, on the email address used during said application process. **(We will have this for you if we did you tax exemption service)**

DISTRICT OF COLUMBIA:

- Certificate number: This number will be clearly displayed under 'Account ID' on your 'NOTICE OF TAX REGISTRATION' letter sent to you via mail by the state of DC.

MASSECHUSSETS:

- Log in details were made when the account was first registered (We will have this for you if we did you tax exemption service)

MARYLAND:

- Certificate number: This number will be clearly displayed above the 'Sales and Use Tax Registration Number' section on the bottom of your Sales and Use Tax License, sent to you via mail by the state of MD.

MISSISSIPPI:

- Log in details were made when the account was first registered (We will have this for you if we did you tax exemption service)

NEW YORK:

- Log in details were made when the account was first registered (We will have this for you if we did you tax exemption service)

TENNESSEE:

- Account ID & Letter ID: Both of these will be clearly displayed on the top right corner of the page on both your 'Resale Authorization' and 'Sales and Use Tax Certificate of Resale' documents, sent to you via mail by the state of TN.

VIRGINIA:

-Log in details were made when the account was first registered (We will have this for you if we did you tax exemption service)

HOME STATE:

- ***If your business address is not located within any of the above states, but it is located within another state of the USA***, then please send us a photocopy or scanned version of all correspondence you have received by mail on your mailing address from this state.

- Alternatively, if you have already created an online account with your specific 'Home State' yourself, then please simply provide us with you login details (username/password) so our team can access your online account to conduct your sales tax filing processes as requested.

Thank you for choosing RJM Tax Exemption. We look forward to working with you.