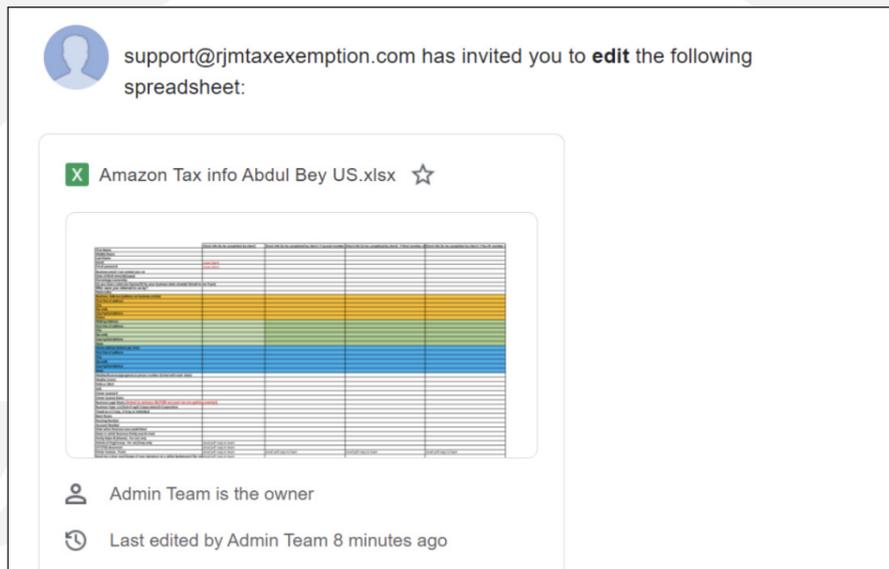


# RJM Tax Exemption Instructional Document

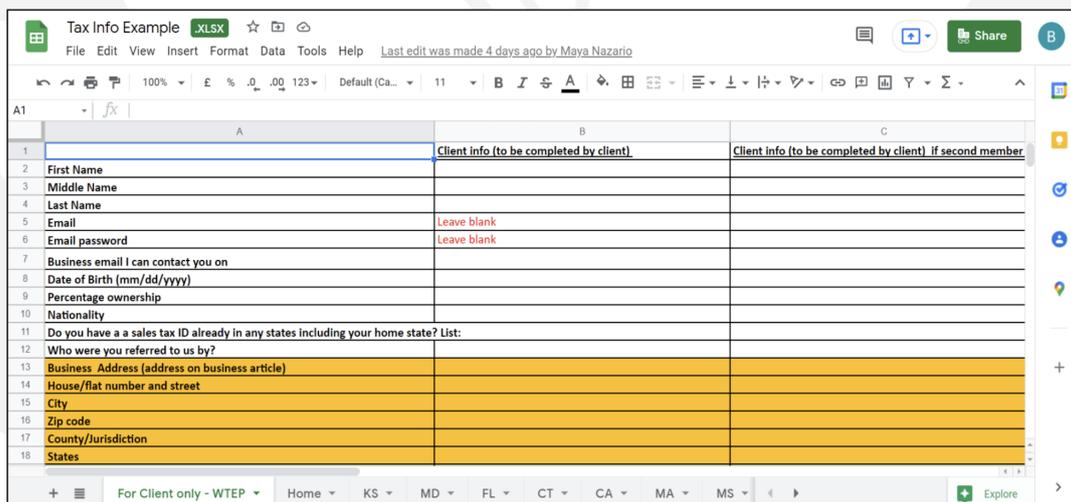
Welcome to RJM Tax Exemption services. Kindly follow the below 5 steps on how to fill out the necessary information for your business in order to begin the tax exemption process.

## Step one - Opening your Business Info template spreadsheet

If your email is a Google email, open the shared Google Drive spreadsheet by clicking open on your shared email which will look like this:



Your Google Sheet will look like the below:



The sheet will automatically save as you fill it out & our RJM staff members will be able to access your information via the Google Drive - you do not need to download or email the sheet back to us. The sheet is private and secure & can only be accessed by you and our team.

If the sheet wasn't shared to a Google email, you will need to click on the link emailed to you; We advise that you log into a Gmail account - or make one if necessary - to access and fill out the spreadsheet securely via the Google Drive.

Please ask support to send through the video for guidance on how to complete this if needed.

### **Step two - Filling out your Business Info Spreadsheet**

Please click on the appropriate boxes and type in the information required. If you are unsure or have any questions regarding the information needed, please contact support we will be happy to help.

### **Step three - Emailing Required Documents**

The spreadsheet outlines what documents/files need to be emailed - These are as follows:

- A scan/clear image of the front of your driver's license
- A scan/clear image of your Article of Organization or Incorporation for your US LLC or Corp
- Your EIN CP575 or 147C confirmation letter from the IRS
- A scan/clear image of your signature on a fully white background (for resale certificates)
- Signed and dated data protection agreement
- Any sales tax documents/resales you already have for states, particularly your home/business state.

### **Step four - Receiving Documents from states and emailing them to our team**

Once a member of our team has submitted your Sales Tax Applications, you will receive your reseller permits from a variety of states - kindly scan/take a clear image of these letters & email them to your assigned member of staff.

These are some of the documents you should look out for:

- MD - A sales and use tax license
- ME - Resale certificate
- LA - Resale certificate
- MS - Seller's use tax permit
- FL - Resale certificate

Please note - you may receive additional paperwork from other states, depending on your specific requirements; If that is the case, kindly send all letters to your assigned member of staff.

### **Step five - Activating and filing for states**

Please be aware - once your Sales Tax Accounts with these states are active, you will be liable to submit your Sales Tax Returns regularly EVEN WHEN NO SALES HAVE BEEN MADE. You must activate the accounts and file for them appropriately. Some states require Zero-Filings, others Gross Filings with Deductions and others with full filings.

***If you are considering our Sales Tax Filing monthly service & would like to know more about our monthly prices, kindly contact [support@rjmtaxexemption.com](mailto:support@rjmtaxexemption.com) for a quote.***

If you are taking on your tax returns yourself, please refer to the filing instructions document, which explains how to activate the accounts.

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