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**PRODUCT & SERVICE GUIDE**

# 5 Networking Tips for State and Local Tax (SALT) Practitioners

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**Gail Perry, CPA** • Oct. 10, 2014



You probably know the income, sales, and use tax rules in your own state and local jurisdictions without having to do much research. But what if a new client walks in the door and presents you with a tax situation in a state where you have not practiced before?

You don't have to turn the client away. You know taxes in general and know how your own state and local taxes work. You already know the questions to ask and the types of forms you'll likely need to help the client file. If you've got lots of time on your hands, you can take a deep dive into the tax laws of the new state.

Or, you can do what many people do and seek help from your colleagues in other states. Here are some tips for getting answers to your tax questions when you're

dealing with a new taxing jurisdiction.

## **Turn To the People You Know**

Head over to LinkedIn and search among your connections for someone in the new state. Here's how to do a state search:

- Enter the state name in the Search field at the top of the page and click the Search button (the blue magnifying glass), or just press Enter.
- Click the Advance option. At the top of the window that appears, it should say "Advance People Search." If something else appears, click People on the left side of the screen.
- Check the 1st Connection box.
- Scroll down to the bottom of the search window and click the "Search" button.

All of your first degree connections associated with that state will appear. Note that some of the search results will be people who aren't necessarily in that state now but who have listed that state somewhere in their profile.

## **Post a Question in a LinkedIn Group**

Stay on LinkedIn and search for a group that relates to the state or locale where your client is doing business. For example, if I do a LinkedIn search for Missouri, I find there is a Missouri State & Local Taxes group. You can browse the commentary in a group like this or post a question asking for information.

## **Find a Q&A Forum**

Many states have Q&A forums of their own where you can post questions. Search for the name of the state followed by "Q&A" or "Forum" to find areas online where users can ask questions and make connections.

In groups of this sort or the groups on LinkedIn, you can ask for contact information and connect with an expert outside of the group.

## **Search for a Specialist**

Most if not all states have accounting firms that specialize in state and local taxes. A search for a state and local tax expert within your state is likely to produce one or more first that provide services that you can find useful.

State and local tax accountants are not unfamiliar with the concept of providing services to other accountants. They know they possess expertise in specialized areas and typically they are willing to provide services without your having to fear they will poach your clients. You would work with the accountants directly on behalf of your client and you would still maintain your professional relationship with your client throughout the project.

You can use social media forums such as Twitter to search as well. Try searching for the state and the word tax and see who comes up in your search. Depending on the state, it's quite possible you'll find an expert in state and local taxes who is willing to work with you to answer questions or even work on projects.

### **Contact State CPA Societies and Other Professional Organizations**

Many state CPA societies have a "Find a CPA" page on their website where you can seek out assistance within that state. You can also contact the CPA Society directly and ask for a referral.

In addition to the state CPA societies, there are organizations like the National Association of Tax Professionals, the Institute for Professionals in Taxation, and others, that you can contact regarding referrals or posing questions.

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