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The McNees State & Local Tax Group



STATE & LOCAL TAX

State and local taxes represent a substantial expense even when things are going smoothly. When a state or local tax auditor shows up at the door, matters may go downhill in a hurry. An employee may encounter personal problems and overlook an important exemption, causing a significant tax overpayment. The revenue department may, out of the blue, adopt an interpretation of the tax law that impacts your company in a way never expected. A tax bill may be introduced in the legislature that could potentially cost your company or organization tens or hundreds of thousands or millions of dollars.

The members of the State and Local Tax (“SALT”) Group of McNees Wallace & Nurick are dedicated to helping you solve your state and local tax problems, whether through audit representation, an administrative or court appeal, obtaining a favorable letter ruling, developing a legislative strategy to change the law or preserve a provision you support, or another approach designed to address your specific problem.

Pennsylvania State Tax Audits and Appeals

Based in Pennsylvania’s capital city, the current members of the McNees SALT Group have handled more than 1,000 appeals involving Pennsylvania sales and use taxes, corporate net income taxes, capital stock and franchise taxes, gross receipts taxes, insurance premiums taxes, fuels taxes, personal income taxes and other state taxes. We have argued cases before the Department of Revenue’s Board of Appeals, the Board of Finance and Revenue, the Commonwealth Court and the Pennsylvania Supreme Court.

The McNees SALT Group also works with companies in dealing with auditors before an assessment is issued – at times successfully heading off issues before they result in assessments and lead to appeals. In addition, we work with companies to improve their tax compliance processes and to identify and pursue refund opportunities – either in concert with assessment appeals or separately. The Group has been instrumental in obtaining substantial tax refunds for many clients.

Real Estate & Other Local Pennsylvania Taxes

Members of the McNees SALT Group have authored the leading treatise on Pennsylvania real estate tax law and represented clients in 66 of Pennsylvania’s 67 counties – before county boards of assessment appeals, county courts and the state appellate courts. We also have represented numerous businesses in contesting local mercantile, business privilege (gross receipts), amusement and other local Pennsylvania taxes across the state.

Multistate Tax Issues

In addition to our substantial experience in dealing with Pennsylvania state and local tax issues, the McNees SALT Group assists clients with many multistate issues.

Abandoned & Unclaimed Property (Escheat)

We have advised many companies on abandoned and unclaimed property (escheat) issues and have represented companies in Treasury Department appeals and in Pennsylvania’s appellate courts.

Trade Associations, Legislation, Regulations & Rulings

A tax appeal is not always the answer. We have worked with many trade associations to solve industry-wide tax problems through legislation. And, we have even worked successfully with individual companies to cost-effectively and successfully develop legislative proposals and strategies to address state tax issues of concern to them. In addition, we have often “nipped an issue in the bud” through skillful presentation of an issue to the revenue department to obtain a favorable letter ruling for an individual company or to advocate for adoption of a regulation, publication of a bulletin or the issuance of other administrative guidance.

Charitable Organizations

The McNees SALT Group has assisted many hospitals, YMCAs, economic development organizations and other nonprofits to obtain exempt status for local real estate tax, local gross receipts tax and state sales and use tax purposes.

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