



Employment Tax Lookback Services

Employment Tax is a primary revenue source for both the Federal and state governments. In fact, the IRS collected approximately \$1.26T of revenue from employment tax sources in 2020, which constitutes 45.8% of all tax revenues (2020 IRS Pub 55-B). However, many employers are unable to give payroll the attention it demands and, as a result, frequently leave room for tax refunds and cost saving opportunities. **Experian's employment tax lookback services** are designed to broadly identify and help secure such benefits.

Potential Triggers

- Recent M&A activity
- Recent employee transfers
- Temporary "away from home" assignments
- Temporary "remote work" arrangements
- Recent layoffs or furloughs
- Numerous employing entities
- Numerous reporting jurisdictions
- Recent penalty / interest assessments
- Organic employee growth
- Recent or expected payroll tax nexus expansion
- Complex earning & deduction code structure
- Complex fringe benefit structure
- Recent SUI tax rate increases or decreases
- Frequent / significant payroll tax notices
- Recent change in third-party payroll provider
- Recent federal, state, or local payroll audit

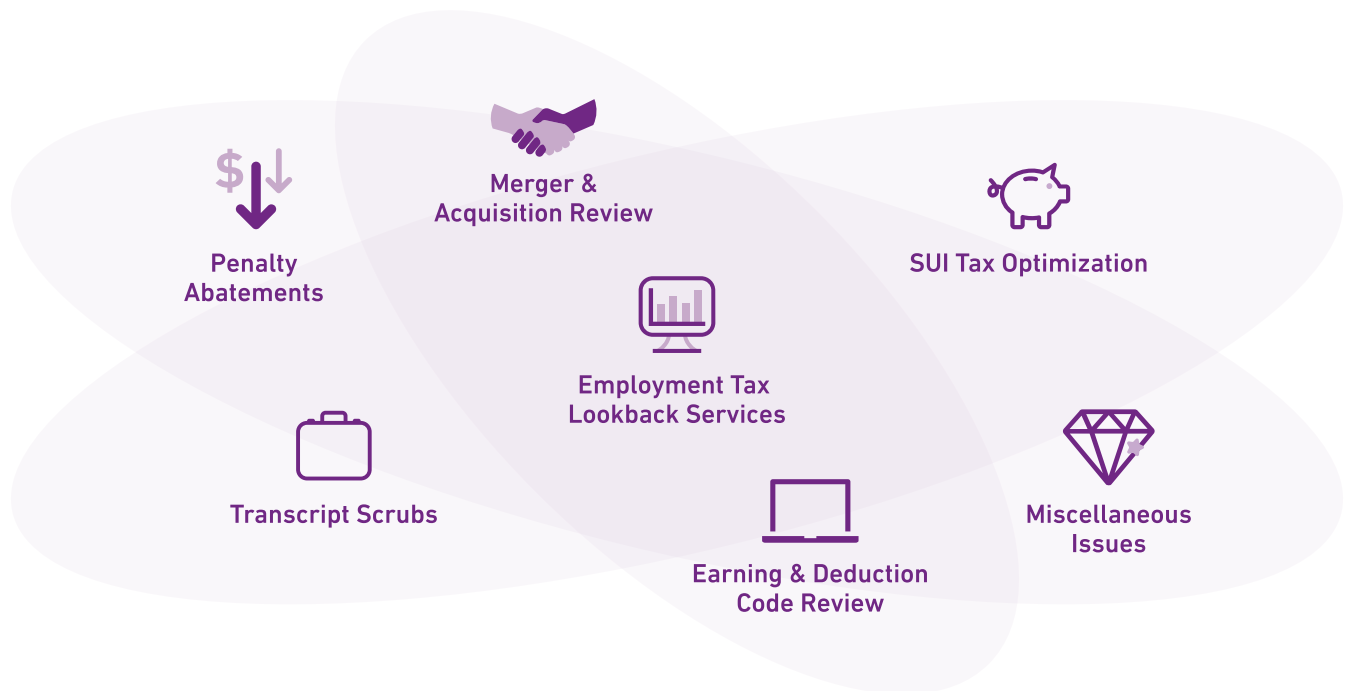


Process Overview

- 1 Collect and analyze **preliminary information**.
- 2 Meet to jointly determine which **broad areas** to target during the lookback study.
- 3 Collect and analyze **comprehensive information** to identify, qualify, & assess specific opportunities.
- 4 Meet to jointly determine which **specific opportunities** to pursue.
- 5 Take the necessary steps to recover the applicable overpayments and / or secure the applicable tax reductions.
- 6 Meet to discuss results and recommendations.

Client Involvement Key: Navy: Low, Violet: Moderate

Potential Areas Of Focus



Project Deliverables

At the conclusion of each lookback study we provide the following project deliverables: **project workpapers, detailed calculation (where applicable), and final report**. These deliverables are designed to provide necessary background, substantiate the resulting benefit(s) where applicable, and recommendations on how to avoid future overpayments.

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