

CROSS-SELLING GUIDE

Cross-selling at Amplēo is about helping our clients unlock their full potential by providing the right expertise at the right time. Many businesses face challenges beyond their initial engagement—whether it's financial strategy, marketing leadership, tax compliance, valuation insights, or business restructuring. By proactively identifying client needs and introducing them to our specialized teams, we create more value, strengthen relationships, and drive better outcomes. A simple conversation can reveal gaps that our experts can fill, making referrals seamless and ensuring that clients receive comprehensive support tailored to their growth and stability.

This guide is designed to provide a simple way to (1) identify whether your clients need additional services and (2) make those introductions. In addition to building Amplēo and supporting clients, you will be eligible for referral commissions for 12 months.





Sales tax is complex, but compliance doesn't have to be painful. The Sales Tax People take the stress out of sales tax management, providing expert services for compliance, audits, and risk mitigation—ensuring that businesses stay compliant while minimizing costs and liabilities.

SYMPTOMS & QUESTIONS

Are you . . .

- . . . unsure where you have nexus?
- . . . lacking confidence that your business is fully compliant with sales tax regulations across ALL the states in which you operate or sell?
- . . . struggling with changes to the sales tax laws?
- . . . concerned about the taxability of your products/services?
- . . . preparing for an audit or managing sales tax disputes?
- . . . struggling with your current sales tax solution/provider or process?

SOLUTION

For growing companies, navigating complex and ever-changing sales tax regulations can lead to compliance risks, unexpected liabilities, and costly penalties that distract from growing your business.

We bridge that gap by offering the following:

- **Nexus and Taxability Analysis** – Identifying your nexus footprint and determining if your products or services are subject to sales tax
- **Registrations and Voluntary Disclosure Agreements (VDAs)** – Managing your current status and mitigating potential liabilities by handling state registrations and VDAs
- **Tax Calculation Platform** – Real-time and accurate sales tax rate and taxability calculations connected to your billing system/ERP
- **Sales Tax Return Services** – Ensuring compliance by managing the preparation and filing of sales tax returns, allowing you to focus on your business
- **Sales Tax Audit Defense** – Providing support and representation during state and local tax audits to protect your interests and minimize liabilities
- **Overpayment Recovery** – Identifying and recovering overpaid sales taxes to improve your company's cash flow

INCENTIVE

\$200 for referring a **qualified** lead
Up to 5% of billed revenue for 12 months when the deal is closed
Amplifier Club trip for top goal makers, sales leaders, and cross-sellers

NEXT STEPS

- Step 1:** Email the referral introductions to Danny Wright at dannyw@sales.tax and copy bd@amplēo.com.
- Step 2:** The Amplēo partner adds the lead to HubSpot.