

**\$78 MILLION**  
IN TAX SAVINGS

**45** STATES  
WORKED  
+ CANADA



**THE BRENNAN GROUP**  
*Strategic Tax & Cost Management*

OVER **16,500**  
CASES REVIEWED

**30**+ YEARS OF  
EXPERIENCE

**THE BRENNAN GROUP**

## **Sales & Use Tax Analysis**

- Refund & Exposure Review
- Return Preparation & Filing
- Audit Defense / Review
- Nexus Study & Evaluation

## **Real Estate Tax Analysis**

- Assessment Analysis
- Appeals at Informal,  
Local, & State Levels

## **Personal Property Tax Analysis**

- Compliance Review & Analysis
- Annual Compliance Reporting
- Inventory Analysis
- Fair Market Value Appeals

**You Don't Pay Unless  
We Save You Money!**

[www.TheBrennanGroup.com](http://www.TheBrennanGroup.com)

314-966-2800  
888-821-2772

12221 Big Bend Rd.  
St. Louis, MO 63122

# THE BRENNAN GROUP

Strategic Tax & Cost Management

## Sales & Use Tax Refund & Exposure Review

You may be paying more in taxes than you know

Identified savings  
for **86%** of our  
clients

**OVER**  
**\$10 MILLION**  
IN TAX SAVINGS



CPAs & former  
state auditors  
on staff

**45** STATES  
WORKED  
+ CANADA

### How we work:



Our experts visit your location and gather all invoices, returns, & reports.



We then qualify and quantify any sales & use tax over-payments and under-payments which fall within the state's statute of limitations period.



We compile all of our findings in a report detailing refunds, exposures, statutory support, lists of all transactions, & administrative recommendations.



We manage all aspects of the process including filing refund claims with vendors or states, amending any sales & use tax returns, and following up monthly until you have received your refunds or credits.



We become your go-to resource for ongoing sales & use tax questions.

You don't pay a fee unless we save you money!

Audit Defense/Review • Return Preparation & Filing • Nexus Study & Evaluation

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“The Brennan Group’s tax experts did a great job saving Murray Energy a significant amount of money in state & local tax over-payments and property tax savings. They did not require much of our time and energy, so the ROI for engaging The Brennan Group was truly substantial. They did exactly what they said they would do, in the time frame they said they would do the review, and the project was completed at the highest level of professionalism and accuracy. In addition, we gained the peace of mind knowing that our systems are correct moving forward. It has been a pleasure working with The Brennan Group.”

*-Murray Energy Corporation*

“The Brennan Group's technical advice and service delivery rates among the best in our SALT professional network.”

*-Graham Packaging Company*

“We hesitated because we assumed that our taxed purchases were so minuscule that we wouldn't find enough mistakenly taxed expenditures to justify the hassle. What we found was that there was NO hassle. We simply gave The Brennan Group a green light and they came back to notify us of several thousand dollars worth of refunds coming back from our suppliers. The service is very professional and absolutely worthwhile.”

*-Alpha Foundry Company*

"I don't know much about Sales and Use Tax - All I know is that I got \$35,000 in refunds on my hotel."

*-Devault Operations: Crown Plaza Hotel*

"The staff at The Brennan Group is very professional, friendly and has exceptional customer service. They are extremely knowledgeable and helpful in resolving all my use tax related questions. And they always returned my phone calls and or email messages the same day. Their service was very beneficial to our company because we not only received thousands of dollars back in refunds but were educated along the way."

*-South Holland Metal Finishing*

# THE BRENNAN GROUP

Strategic Tax & Cost Management

## Personal Property Tax Analysis

- Compliance Review & Analysis
- Annual Compliance reporting
- Inventory Analysis
- Obsolescence Studies

90% of companies are paying more in taxes than they should

**19%**  
AVERAGE  
SAVINGS

ALL P.P.  
STATES  
**38** WORKED



**OVER**  
\$15 MILLION  
IN TAX SAVINGS

ACCREDITED  
ASA APPRAISERS

### How we work:

-  We gather copies of previous year's rendition, additions and deletions to your fixed asset listing, and most recent personal property tax bill.
-  We perform a desk review and tour your facility in order to verify your asset listings.
-  We review invoices in order to report the correct asset value and ensure you are taking advantage of all available exemptions.
-  We complete your current rendition and work with local assessors to clarify all classifications & exemptions.
-  We educate you by explaining our methodologies, leaving you with the tools and strategies needed to carry these savings forward.

You don't pay a fee unless we save you money!

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“I have enjoyed working with all involved with The Brennan Group. I have found them to be very helpful and responsive to all requests for assistance. When I have needed any questions answered, all have been quick to respond to answering them.”

*-Murray Energy Corporation*

“GKN Aerospace and The Brennan Group have had a mutually successful relationship for almost 5 years. In that time, TBG has saved GKN over \$2M in both real and personal property taxes. To complement Mike Brennan’s executive guidance and trusted years of tax experience, TBG’s effective resource pool of accountants, appraisers, and other key business specialists ensured that outsourcing several of our non-core business processes would be met with the highest level of professionalism and swift execution, while and at the same time delivering the maximum earned value to our company. Having a resource like TBG to turn to allows me and my team to focus our efforts where our skills are best suited, and allow Mike and his team to do exactly the same. I look forward to our continued relationship with The Brennan Group.”

*-GKN Aerospace St. Louis*

# THE BRENNAN GROUP

Strategic Tax & Cost Management

## Real Estate Tax Analysis

Success at Informal, Local, & State Levels

Nationwide Network of Real Estate Experts

OVER  
\$50 MILLION  
IN TAX SAVINGS



20.6%  
AVERAGE  
REDUCTION

30+ YEARS  
OF EXPERIENCE

OVER 13,300  
CASES WORKED

### How we work:

-  We gather specifics of your property such as physical description, income & expense statements, tax bills, rent rolls, & deferred maintenance items.
-  Our expert analysts will perform a summary appraisal of your property to determine if you are fairly assessed or overvalued and if an appeal is necessary.
-  We then file an appeal, attend the hearing, & negotiate a reduction in your value. If we don't feel the local results are fair, we will continue the case to the state level.

You don't pay a fee unless we save you money!

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“WOW!! The Brennan Group continues to amaze me! Even if we don’t think we can save anymore they always seem to get the job done! We have worked with them for the last 10 years and hope to continue for many more!”

*-J.R. Mayer Management, Inc.*

“The Brennan Group has been successfully handling real estate tax appeals for the St. Louis office of First Industrial Realty Trust, Inc for years. My experience with The Brennan Group started when Mike Brennan approached me asking if it was okay to review properties that other companies had passed up on, just to see if there was any opportunity to reduce the real estate taxes. I gave The Brennan Group the data on four or five properties where I had been told the assessment was fair and reasonable; two months later, we received reductions on 2/3 of those properties. Now when we bring a new property on line, The Brennan Group is tasked to review the taxes and file our appeals.”

*-First Industrial Realty Trust*

“The Brennan Group is a must-have partner of any real estate investors! They were extremely great to work with and brought us property tax savings that we never could have imagined. Thanks.”

*-TTG Properties*

“The Brennan Group has been routinely saving us money for years. We have properties in several different states and their professionals in each location know the local market as well as the local individuals responsible for setting the values. They achieve results beyond the competition due to their in-depth knowledge of the market and their detailed analysis of each property. They treat each case as if it were their own property.”

*-White Company*

"I've been working with The Brennan Group since 2003 and it's a great relationship. In 2010 I purchased a hotel and over the last 6 years they have saved me over \$350,000 on just this one property with very little time or effort on my part."

*-Devault Operations: Crown Plaza Hotel*