

# Renew your beverage alcohol licenses for the new year

**Avalara**  
Tax compliance done right





# Renew your beverage alcohol licenses for the new year



## Disclaimer

While we hope you'll find this discussion helpful, this session is for informational purposes only and is not legal or tax advice.



# Avalara

## Safe harbor statement

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# Continuing Professional Education (CPE)



## Qualifying for credit

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Meet your presenters



## Shannon Fahey

Indirect Tax Researcher

Avalara

Prior to serving in her current role as an Indirect Tax Researcher, Shannon worked as a Reporting Specialist in the Returns department of Compli, gaining knowledge and experience about the unique tax policies of each state.

In her current position with Avalara, Shannon follows and reports on tax policies and legislative changes that affect wineries, breweries, and distilleries in the United States.



## Tiffany Schoeck

Senior Compliance Analyst

Avalara

Tiffany began her journey in wine compliance in 2006, joining Avalara's Beverage Alcohol team in June of 2022. Prior industry exposure includes working with wineries and distilleries, with a focus on licensing, brand registration and COLA/ formula submissions. Utilizing an umbrella of industry experience, covering compliance to barrel production, she enjoys applying this experience to navigate the regulatory waters, so you don't have to.





## Jennifer Blackner

Sr. Tax Accountant

Avalara

Jennifer has been a member of the Avalara for Beverage Alcohol team for five years and brings seven years of prior industry experience working for wineries, breweries, and distilleries. She enjoys helping businesses of all sizes manage compliance needs, expand in their market with licensing and product registrations, and work through distributor changes. Jennifer earned her B.S. in Wine Business from Sonoma University.

# CPE POLL QUESTION 1

## Have you read the Avalara Tax Changes for Beverage Alcohol?



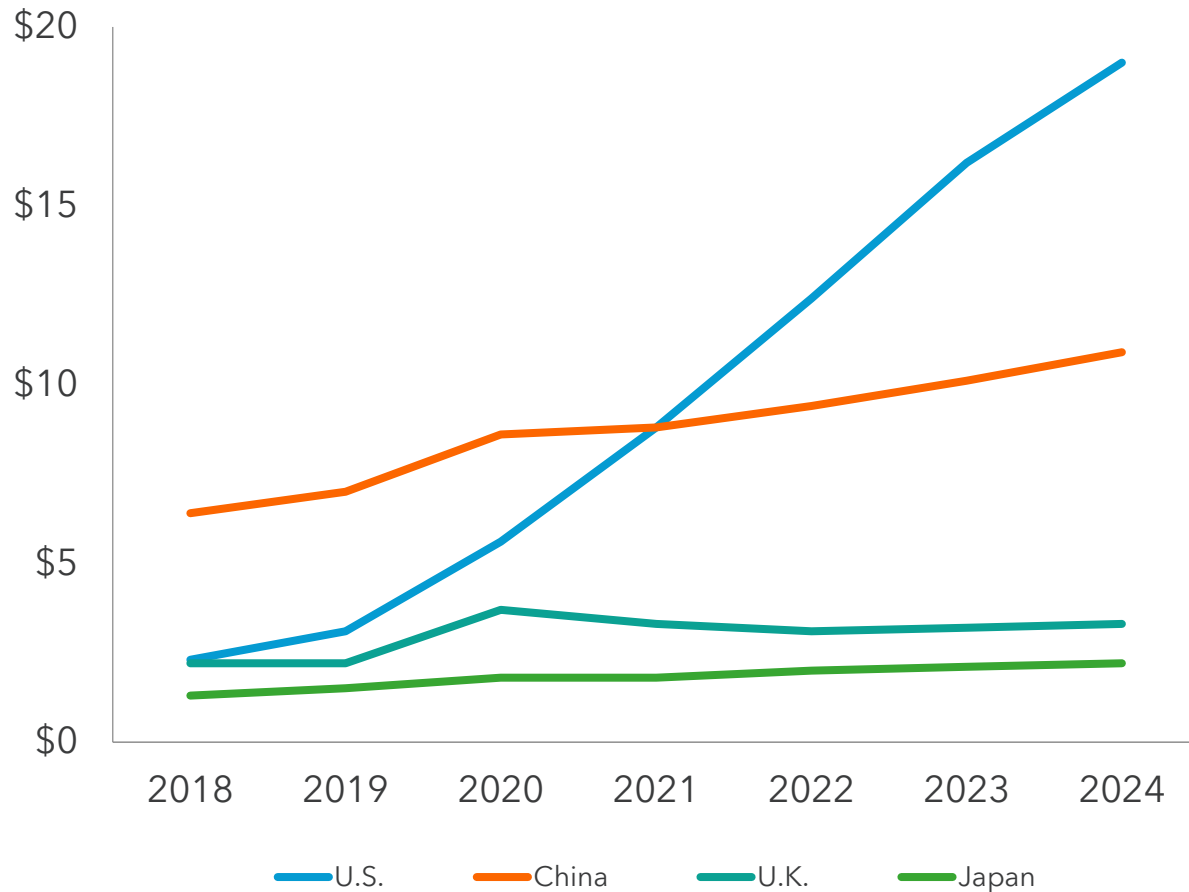
# Agenda

- 1 > The beverage alcohol industry, at a glance
- 2 > 'Tis the season...for license renewals
- 3 > 'Tis the season...for product registration renewals
- 4 > How Avalara can help
- 5 > Q&A

The beverage alcohol  
industry, at a glance



# Ecommerce sales of alcohol (in billions)



**\$283B**

Revenue of the U.S. alcohol sales market



**5.55%**

The market's expected annual growth

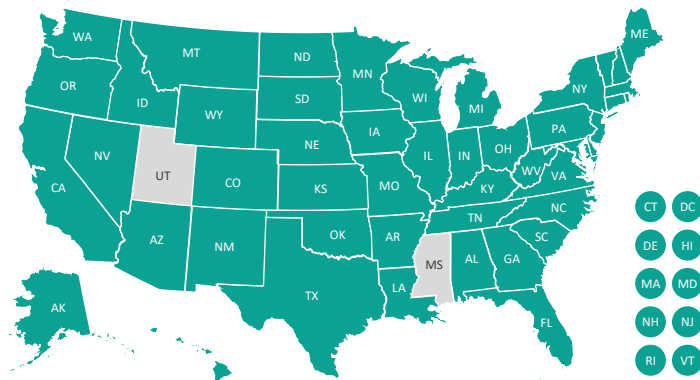
# Wine, beer, spirits, and retail DTC availability by jurisdiction

DTC alcohol shipments

## Wineries

**97%**  
of population

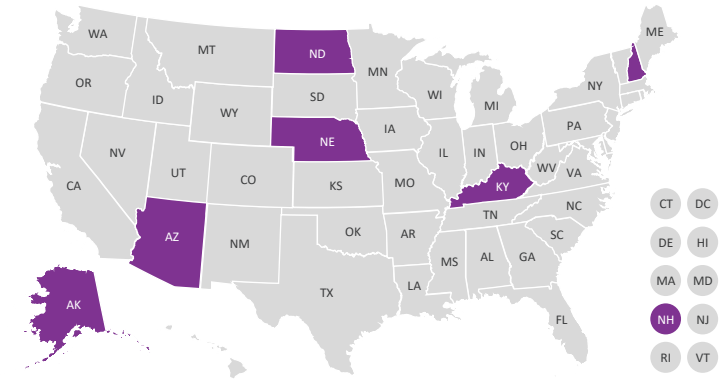
- DTC shipments allowed
- DTC shipments prohibited



## Distilleries

**11%**  
of population

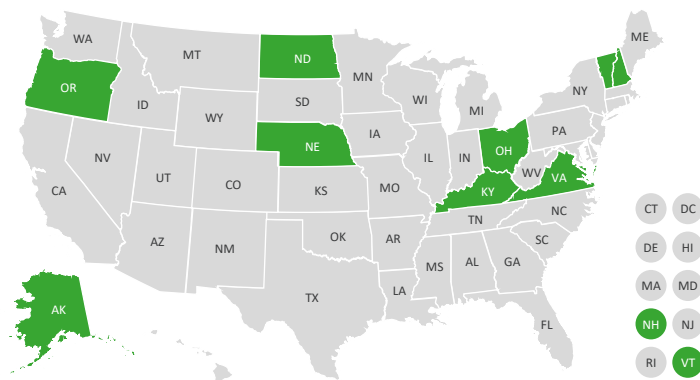
- DTC shipments allowed
- DTC shipments prohibited



## Breweries

**17%**  
of population

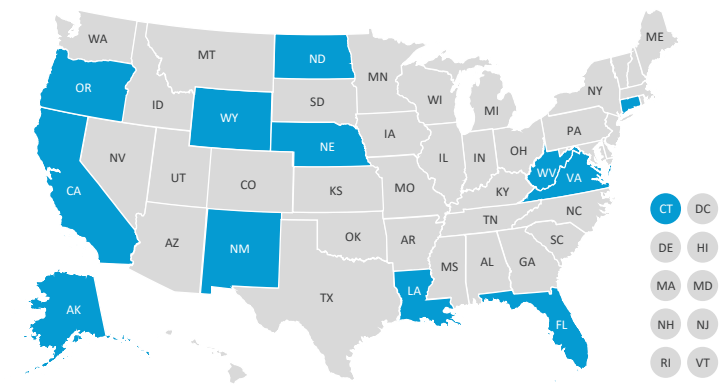
- DTC shipments allowed
- DTC shipments prohibited



## Wine Retail

**28%**  
of population

- DTC shipments allowed
- DTC shipments prohibited



## CPE POLL QUESTION 2

What products do you sell?

'Tis the season...  
for license renewals



# How to prepare for renewal season

Q4 – Harvest & the Holidays



Trust fund  
balances



Timeline to coordinate  
Owner / Officer  
Signatures



Early submissions aid in  
smooth renewal  
transitions

# What you need to know about renewals



Process begins **90**  
**days** ahead of  
expiration

- Bonds must be signed by both surety and policy holder
- FDA Registration (MA) – Biennial requirement
- Ownership - (ME) States are dialing in to individual level



# End of year renewals

## Dates to watch

**Oct 30**

Maryland

**Nov 30**

Arizona

**Dec 31**

Georgia, Hawaii (all 4 counties),  
Kentucky, Louisiana, Massachusetts,  
Oregon, Tennessee

\*Multiple states renew on an "application" date cycle

# What to do if your license paperwork / forms have changed

- Contact your account CAM
- Discuss changes within organization and develop plan to process
  - Mailing / Physical address
  - Officer Updates
  - Ownership changes / % adjustments





## CPE POLL QUESTION 3

What is the hardest part of managing tax compliance for your business?

'Tis the season...  
for product registration  
renewals



# End of year product renewals

## Dates to Note

**PA, AK, RI, GA**  
Renewal Spreadsheets

**Oct 11**

Sent to Clients



**Oct 25**

Due back to BevAlc

**§NJ, SD, LA**  
Renewal Spreadsheets

**Nov 1**

Sent to Clients



**Nov 17**

Due back to BevAlc

\*If a response is not received by Avalara, all listed products will be renewed\*

# How to prepare for product registration renewal season



Be sure to retire any products that you no longer have inventory of

## **Expiring** – Pending Client Decision

Waiting for client to send spreadsheet back

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## **Expiring** – Client Declined

Received spreadsheet back, client selected no, do not renew that product

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## **Expiring** – Renew

Received spreadsheet back and client selected yes, renew that product



# Scenarios



States that are included in **mid-year** renewals

- TN, AR, FL, OK, KS
- Spreadsheets will also be sent out during this time
- Depending on the state products expire 5/31 and 6/30



Some states also renew **randomly** through the year

- CT, MN, ME, ME-DEP, WV

## CPE POLL QUESTION 4

What topics would you like us to cover  
in future webinars?

How Avalara can help

# How we do it – Avalara for Beverage Alcohol

Simplifying regulatory compliance for suppliers, distributors, and retailers



Mitigates compliance risk



Reduces time and resources needed



Increases efficiency and ease of use via streamlined systems



# Avalara for Beverage Alcohol renewals support



Coordinating required items to ensure a compliant renewal



Working with the various state branches to advocate respond to updates or additional requests

Q&A

# Contact Us:

Avalara Beverage Alcohol team

[BevAlc@avalara.com](mailto:BevAlc@avalara.com)



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# Upcoming events

[avalara.com/webinars](https://avalara.com/webinars)

## Events Calendar

- > 10/5 Overcoming financial management challenges in today's digital economy
- > 10/10 Mergers and acquisitions, from start to finish (1 CPE credit)



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