

PRIYANSHU BHATNAGAR

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PROFESSIONAL SUMMARY

Results-driven U.S. Sales & Use Tax professional with 3.5+ years of experience across Big 4 advisory (Deloitte) and in-house compliance (Windy Street), specializing in end-to-end VDA lifecycle management, nexus exposure analysis, multi-state compliance, and state tax credit projects. Hands-on expertise in taxability of SaaS, software development services and staff augmentation arrangements, Sales & Use Tax GL reconciliations, use tax accrual reviews, and notice resolution. Experienced with Avalara, Anrok, Vertex and OneSource, and an active user of AI tools (Claude Code, n8n) to speed up data validation, reconciliation and client-ready reporting, with automation that reduced processing time by 72%.

EXPERIENCE

Senior Tax Consultant, Sales & Use Tax

May 2026 - Present

Windy Street | Gurgaon

VDA Lifecycle Management & Nexus:

- Managed end-to-end Voluntary Disclosure Agreement (VDA) lifecycle, from nexus exposure calculation and state selection through filing, state negotiation and closure.
- Calculate historical nexus exposure (physical and economic nexus) across states, quantifying tax, interest and penalty to prioritize disclosure strategy.
- Prepare and file VDAs, liaising directly with state tax authorities and VDA agents; track state and agent responses to keep every filing on schedule.
- Prepare and backfile historical returns for look-back periods as required under executed VDAs.
- Handle tax registrations, permit renewals and state tax notices, researching and resolving notices to closure.
- Own the end-to-end preparation, processing, analysis and quality review of historical returns for complex multi-jurisdiction voluntary compliance engagements.
- Serve as primary liaison with clients, project managers and state taxing authorities, handling sensitive negotiations and providing clear status updates on open cases.

Compliance, Reconciliation & Controls:

- Manage Sales & Use Tax compliance across multiple U.S. states, preparing and filing monthly, quarterly and annual returns.
- Perform monthly reconciliation procedures, reconciling Sales & Use Tax GL accounts against returns and filings to ensure accurate financial reporting.
- Conduct use tax accrual reviews on purchase and expense transactions to identify and accrue unpaid tax.
- Manage complex reconciliations and variance analysis between client transactional data, prior filings and proposed disclosure returns, maintaining clear audit trails throughout.
- Handle compliance escalations including notices, penalty and interest abatement requests and nexus questions across multi-jurisdiction return portfolios.
- Review revenue streams, contracts and invoices to determine sales tax applicability, and maintain taxability matrices for products and services.

Tax Credits & Advisory:

- Worked on state tax credit projects including Job Tax Credits, Quality Jobs Tax Credits and Georgia Investment Tax Credits, analyzing eligibility, payroll and investment data to support credit claims.
- Monitor changes in state tax laws, assess business impact, and identify opportunities to automate tax processes and strengthen compliance controls.
- Drive operational efficiency by building AI-driven workflow enhancements (Claude Code, n8n, Excel/Python) for data validation, document retrieval and exposure reporting.
- Maintain and improve standard operating procedures for data intake, nexus validation, reconciliation and notice handling in line with jurisdictional rules.

Tax Senior, Sales & Use Tax Advisory

May 2021 - Aug 2024

Deloitte Tax Services India Pvt. Ltd. | Hyderabad

Advisory & Consulting:

- Prepared and managed Voluntary Disclosure Agreements (VDAs) for clients seeking compliance remediation, coordinating with state tax authorities to negotiate favourable settlement terms and minimize penalty exposure.
- Conducted comprehensive nexus analysis and nexus studies to determine state tax filing obligations, evaluating physical presence, economic nexus thresholds and affiliate nexus implications across multiple jurisdictions.
- Handled Power of Attorney (POA) filings and business registrations, enabling client representation before state tax authorities for audits, appeals and compliance matters.
- Managed reverse audit and defense projects for sales and use tax, proactively identifying compliance optimization opportunities.

Tax Operations & Transformation:

- Managed tax operations transformations for Fortune 500 technology companies, overseeing indirect tax compliance and enhancing month-end consolidation processes.

- Conducted multi-state audit reviews and reconciliations, identifying over/under-payment risks totalling \$2M+ and supporting refund claims worth \$500K+.
- Developed and maintained taxability matrices and compliance trackers for manufacturing, retail and technology sectors.

Tax Research & Process Automation:

- Conducted in-depth taxability research using Thomson Reuters OneSource, Bloomberg Tax and CCH, delivering client-ready tax analyses and position memorandums.
- Led automation initiatives using SAP, Alteryx and Excel VBA, reducing manual processing time by 72% (360 to 100 hours annually) and increasing operational efficiency by 260%.
- Managed high-volume data processing and reconciliation of 100,000+ transactions monthly with 99.8% accuracy.

Career Break - UPSC Civil Services Preparation & Data / AI Upskilling

Aug 2024 - Apr 2026

Hyderabad

- Took a planned career break to prepare full-time for the UPSC Civil Services Examination (Aug 2024 - 2025), developing rigorous research discipline, statute and policy interpretation, and structured analytical writing under strict timelines - capabilities that translate directly into tax research and position memorandums.
- On concluding the attempt, redirected focus to finance and tax technology (2025 - Apr 2026), building expertise in no-code and AI-assisted workflow automation (n8n, Claude Code), SQL and data analytics to enhance finance and tax process efficiency.
- Developed AI-driven reporting prototypes and automation solutions aligned with digital finance transformation and modern tax compliance requirements, and completed certifications in SQL, AI-powered analytics and n8n AI automations.
- Returned to full-time indirect tax practice in May 2026, applying this AI and automation skill set directly to VDA delivery, reconciliations and exposure reporting at Windy Street.

SKILLS

- **Sales & Use Tax:** VDA Lifecycle Management | Nexus Exposure Analysis | Taxability Research (SaaS, Software Services, Staff Augmentation) | Registrations & Permit Renewals | Notice Resolution | Reverse Audit & Defense | Audit Coordination
- **Compliance & Accounting:** Multi-State Return Filing (Monthly/Quarterly/Annual) | Backfiling | Sales Tax GL Reconciliation | Use Tax Accrual Reviews | Taxability Matrices | Refund Claims
- **Tax Credits:** Job Tax Credits | Quality Jobs Tax Credits | Georgia Investment Tax Credits
- **Tax Technology:** Avalara | Anrok | Vertex | Thomson Reuters OneSource | Bloomberg Tax | CCH | SAP Tax Management
- **AI & Automation Stack:** Claude Code | Claude / ChatGPT for tax research & drafting | n8n AI Agents & Workflow Automation | AI-Assisted Data Validation, Document Retrieval & Exposure Reporting | Prompt Engineering
- **Data & Reporting:** Advanced Excel (complex formulas, pivot tables, large data sets) & VBA | SQL | Alteryx | Power BI | Variance Analysis & Reconciliation
- **Leadership:** Stakeholder Management | Client Advisory | Cross-functional Collaboration | Project Management | Training

EDUCATION

Executive Post Graduate Certification in AI and Machine Learning <i>IIT Roorkee and Intellipaat Pursuing</i>	2025 - 2026
Master of Business Administration - Corporate Finance & Accounting <i>ICFAI Business School, Pune CGPA: 8.32 (Top 15%) Best Performer Award</i>	2019 - 2021
Bachelor of Commerce: Accounting - Taxation and Finance <i>National P.G. College, Lucknow Top 15% of batch</i>	2014 - 2017

CERTIFICATIONS

- Alteryx Foundation Micro-Credential (2023) | Financial Modelling & Forecasting, LinkedIn (2022)
- SQL for Data Science, Coursera (2025) | AI-Powered Data Analytics Mastery, Udemy (2025)
- n8n - AI Agents, AI Automations & AI Voice Agents, Udemy (2025)

AWARDS & ACHIEVEMENTS

- **Deloitte:** Outstanding Professional Behaviour, Applause, Spot Award (2022 - 2024)
- 1st Prize - Inter-College Business Case Study (Kotak Mahindra Bank Live Project)
- Amul Vidya Shree Award - Academic Excellence

ADDITIONAL INFORMATION

Languages: English, Hindi | **Interests:** Reading, Startups, Product Thinking, Cricket, Psychology