

NOVATAX

EASY
STEP BY STEP

**QUICK
START GUIDE**

AFFORDABLE.
INTUITIVE.
AI-POWERED.

WWW.NOVATAXINTELLIGENCE.COM

Oct 2025

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CUSTOMIZABLE NEWS ALERTS

We partner with industry leader **Tax Analysts®** to bring you the latest Federal & State Tax news. Our news provides insightful analysis and detailed explanations from industry specialists to keep you informed!

- Federal Tax news consists of 18-20 articles each week focusing on tax topics impacting your small to mid-sized firm or business.
- State Tax news consists of 70+ articles each week covering all 50 States and D.C., including news impacting multiple States.

NOVATAX

Alerts Settings

Weekly News Alerts

Federal Tax News

☐ I don't want to receive the NovaTax Federal News Alert

☒ I want to receive the NovaTax Federal News Alert (recommended)

☐ I want to personalize my NovaTax Federal News Alert ⓘ

State Tax News

☐ I don't want to receive the NovaTax State News Alert

☐ I want to receive the NovaTax State News Alert

☒ I want to personalize my NovaTax State News Alert (recommended) ⓘ

States/Jurisdictions

Tax Topics [Select](#)

Your Weekly E-mail Alerts

Federal Tax News

Selected Tax Topics

✓ All Tax Topics

Selected Code Sections

✓ All Code Sections

State Tax News

Selected States/Jurisdictions

✓ Multi-state Topics

Customize your weekly E-mail alerts through your “Alerts Settings”!

What do we recommend?

- **Set your Federal Tax News alerts to receive ALL the Federal Tax News alerts**
- **Personalize your State Tax News alert to include news from just the States you want and select Multi-state Topics (packed with valuable information)**

TIP! Email alerts are delivered to your inbox each Monday morning, but you can always access news documents on the NovaTax platform. Federal Tax news is published weekly. State Tax news is published daily.

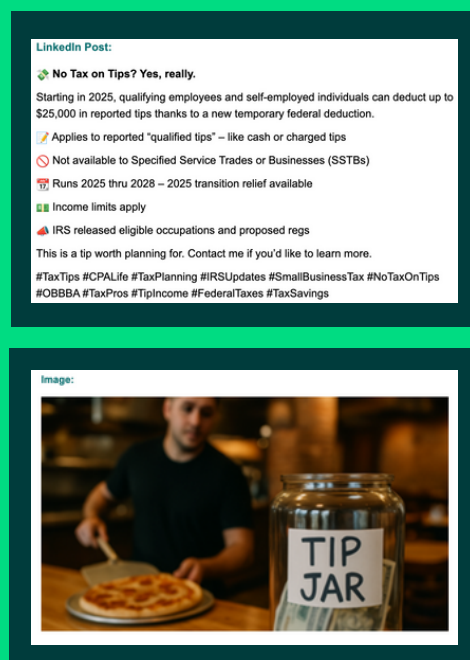
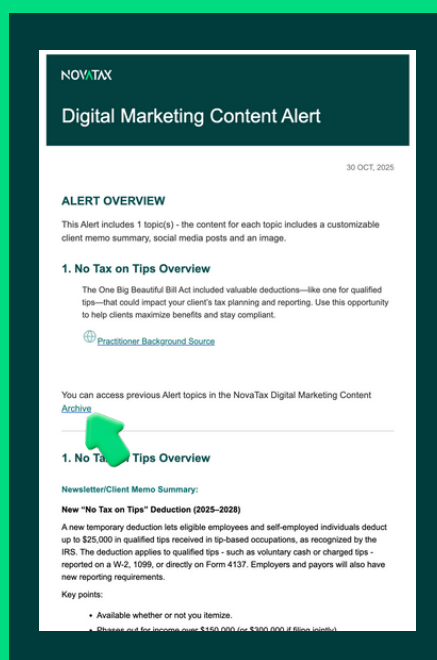
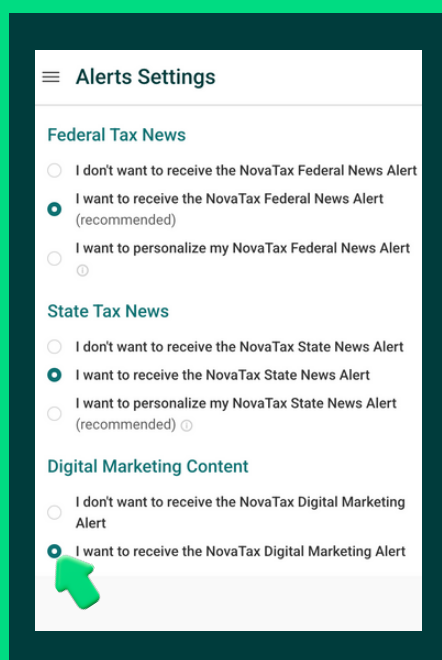
DIGITAL MARKETING CONTENT

Smart shortcuts aren't cutting corners — they're just good strategy. That's why we've created a complimentary Digital Marketing Content feature designed to give you a head start.

We turn complex Federal and State Tax information into clear, customizable content, so you can focus on your clients and growing your practice.

Opt-in on your **Alerts Settings** page to access:

- Customizable summaries perfect for newsletters, emails, and your website
- Ready-to-go social posts for LinkedIn and Facebook
- Images to elevate your marketing materials and keep clients and prospects engaged



What do we recommend?

- **Opt-in to access our FREE Digital Marketing Content.**
- **Copy-Paste. Add your voice. Expand your outreach. It's that simple.**

TIP! Digital Marketing Content Alerts are delivered to your inbox on designated Fridays. Copies of each Alert are stored for 3 months in our Digital Marketing Content Archive. Click on the "Archive" link in an Alert to access.

FEDERAL TAX RESEARCH LIBRARY

Our comprehensive Federal Tax Research Library consists of 300,000+ Federal law documents, including the Code, Regulations, Rulings, Memorandums, Notices, Announcements, Court Cases, Quick Reference Tables, and more!

Premium content, updated daily!

Under “Other Document Types” you can find a complete listing of:

- **Tax-related court cases, by clicking on “Court Cases”**
- **Quick Reference Tables that provide easy access to dozens of tax tables, credits, deductions, rates, plus more**

FEDERAL TAX RESEARCH LIBRARY

Each document in our Federal Tax Research Library is enhanced by **Tax Analysts®** experts - with unique features that allow you to quickly determine those documents that address your specific issue.

- A concise Headline highlights the document's main topic.
- A Summary provides an expert overview of the document's primary points.
- Documents are editorially classified by Tax Topics and key Code Sections.

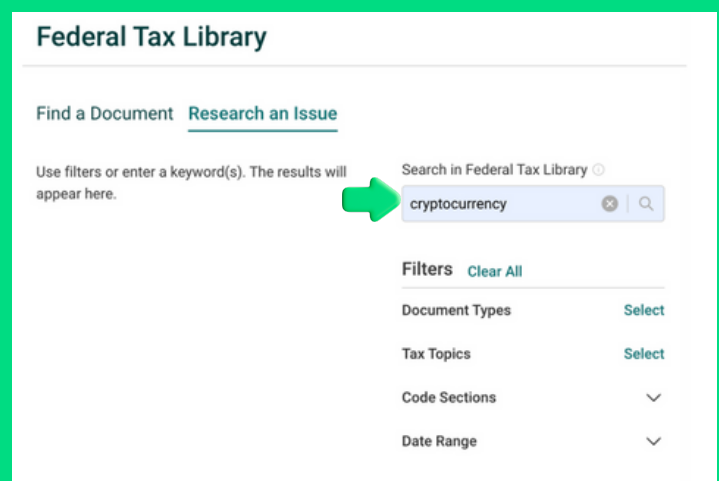
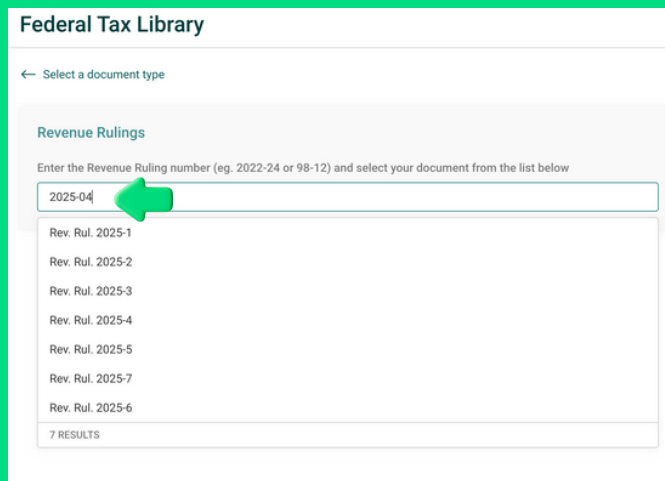
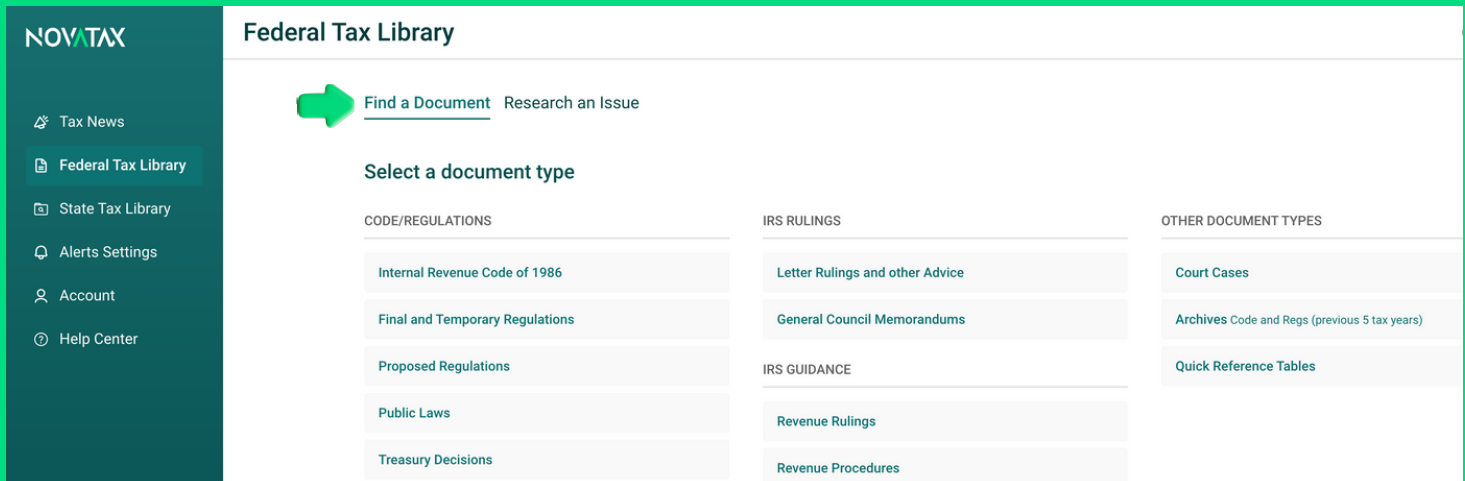
The screenshot displays the NOVATAX Federal Tax Library interface. On the left is a dark sidebar with navigation links: Tax News, Federal Tax Library (highlighted), State Tax Library, Alerts Settings, Account, and Help Center. The main content area is titled 'Federal Tax Library' and shows a document titled 'IRS Releases 2025 Safe Harbors for Commercial Clean Vehicle Credit'. Above the title are filters for 'NOTICE 2025-9', '2025-6 IRB 681', and 'NOTICES'. Below the title is a 'Summary' section with a green arrow pointing to it. The summary text states: 'The IRS has released guidance (Notice 2025-9) providing safe harbors regarding the incremental cost and retail price equivalent of certain qualified commercial clean vehicles for purposes of the section 45W qualified commercial clean vehicle credit. Section 45W allows a credit for a taxpayer's acquisition of each qualified commercial clean vehicle it places in service during the tax year. The credit is limited to the lesser of 15 percent of the taxpayer's basis in the vehicle or the vehicle's incremental cost. The incremental cost is the excess of the purchase price over the purchase price of a comparable vehicle. Prior guidance (Notice 2023-9, Notice 2024-5) established safe harbors for vehicles placed in service during 2023 and 2024. Notice 2025-9 provides that for a qualified commercial clean vehicle not previously placed in service, the IRS will accept a taxpayer's use of the modeled incremental cost published in an analysis by the Energy Department in a January 2025 report to establish the incremental cost of a qualified commercial clean vehicle placed in service on or after January 1, 2025. For a qualified vehicle already placed in service, the IRS will accept the incremental cost of the vehicle when new, as determined by prior safe harbor guidance. Should a taxpayer not use a modeled incremental cost safe harbor, the IRS will accept the taxpayer's use of retail price equivalents from the Energy Department's January 2025 report.' Below the summary, it says 'Clarifies Notice 2023-9 and Notice 2024-5' and 'Section 45W Credit for Qualified Commercial Clean Vehicles and Incremental Cost for 2025'. At the bottom, it says 'Part III - Administrative, Procedural, and Miscellaneous'. On the right side, there is a 'Document Classification' panel with a green arrow pointing to it. It includes 'Tax Topics' (Credits, Energy taxation, Motor vehicle taxation) and 'Code Sections' (Sec. 45W Credit for qualified commercial clean vehicles). At the bottom right, there are navigation buttons: 'DOCUMENT', '← PREV', 'NEXT →', 'TOP OF THE DOCUMENT', and '↑ TOP'.

Premium content, updated daily!

A document's Headline, Summary, and Document Classification (Tax Topics, Code Sections) allow you to quickly identify the documents that address your specific issue.

FEDERAL TAX RESEARCH LIBRARY

There are two ways to find the documents you need in our Federal Tax Research Library - you can “Find a Document” or “Research an Issue”.



Premium content, updated daily!

To Find a Document:

- Select the document type, enter the document number, citation, or party name (for cases), and select your document

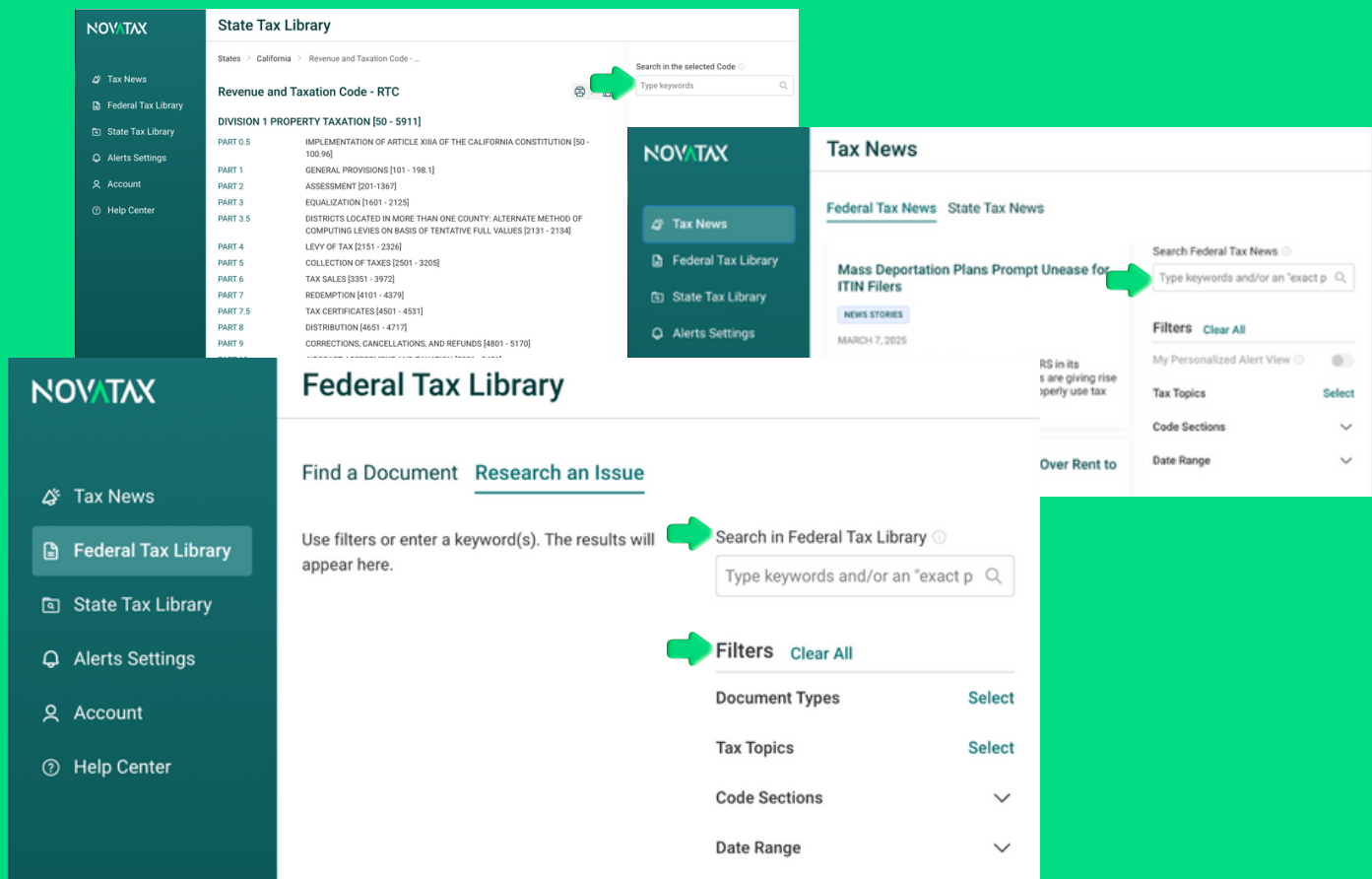
To Research an Issue:

- Enter your keyword or exact phrase and/or use one or more Filters to narrow your search, as explained in more detail below

TIP! Use “Find a Document” when you know the document you need. Use “Research an Issue” when you don’t know the document name or citation and/or you want to retrieve a broader set of documents.

AI-ASSISTED SEARCHING (KEYWORDS)

NovaTax is **AI-Powered!** Easily find the documents you need with our proprietary AI-assisted search technology. Enter your keywords and/or select Filter options to tailor your searches. NovaTax quickly retrieves and ranks all relevant documents!



Leverage the power of AI-Assisted Searching:

- Enter one or more keywords in the search box, click the search icon, and let NovaTax do the rest
- You can also select one or more Filters to tailor your search

TIP! Use double quotes around a phrase - "employee retention credit" - or code subsection - "3134(n)" - for exact phrase searching.

AI-ASSISTED RANKING (BEST MATCH)

Once you input your keywords and Filter selections, NovaTax uses AI technology to rank documents based on relevancy. The documents most likely to be relevant appear at the top of your Results list. Searching our comprehensive libraries is easy, fast, and effective!

The screenshot displays the NovaTax Federal Tax Library search results page. On the left is a dark sidebar with navigation links: Tax News, Federal Tax Library (highlighted), State Tax Library, Alerts Settings, Account, and Help Center. The main content area is titled 'Federal Tax Library' and has two tabs: 'Find a Document' and 'Research an Issue' (selected). Below the tabs, it shows 'Results (1000+)' and a dropdown menu set to 'Best Match'. A search bar on the right contains the text 'employee retention credit'. Below the search bar are filter options: Document Types, Tax Topics, Code Sections, and Date Range. The results list shows three documents, each with a title, tags (e.g., NOTICE 2021-65, 2021-51 IRB 880, NOTICES), a date, and a brief description. The first document is 'Guidance Implements Termination of Employee Retention Credit' dated December 5, 2021. The second is 'IRS Issues Q&A Guidance on Employee Retention Credit' dated February 28, 2021. The third is 'Court Amends Opinion in Katrina Tax Credit Dispute' dated July 30, 2013. Red arrows point to the 'Best Match' dropdown and the search bar.

Research made simple!

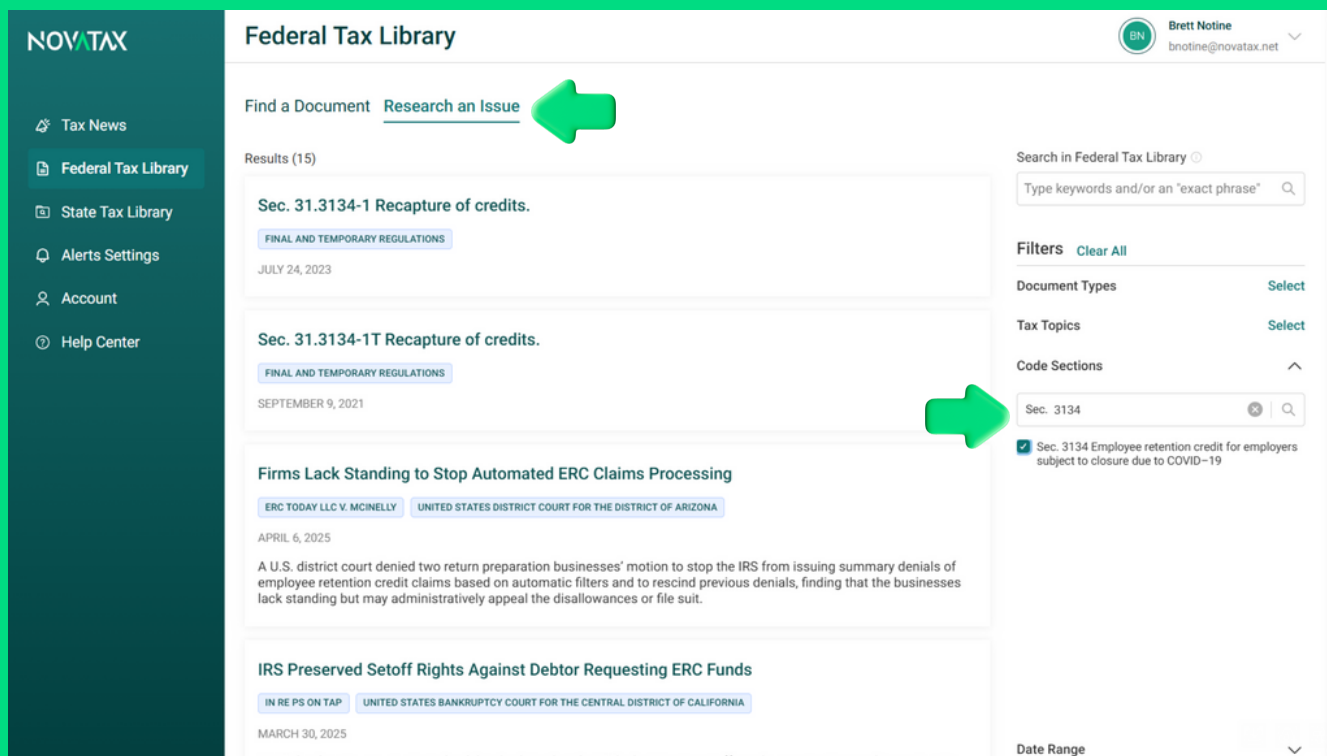
Leverage the power of AI-Assisted Ranking:

- NovaTax's Best Match feature retrieves and ranks your documents, starting with the most relevant, based on how many times your keyword occurs, how close the occurrences are, and where they are in the document - like Google
- You can also sort documents in reverse chronological order

CODE SECTIONS FILTER

Every document in the Federal Tax Library and Federal Tax News is enhanced by **Tax Analysts®** experts to include unique and powerful search Filters like Code Section, Tax Topics, and Document Type - to help you quickly locate the documents and answers you need!

If you have narrowed your research to a Code Section - you can quickly retrieve only those documents with that Code Section at issue.



Filter by Code Sections!

Code Section filtering is an easy way to find the documents you need!

- Click on the "Code Sections" filter on the right panel
- Type in your main Code Section number
- Click the box for the Code Section you want - you've instantly narrowed 300,000+ documents to just those with your Code Section at issue

TAX TOPICS FILTER

Federal Tax Library

Find a Document Research an Issue

Results (36)

IRS Provides Relief From Digital Asset Identification Regs

NOTICE 2025-07 | 2025-5 IRB 524 | NOTICES

DECEMBER 30, 2024

The IRS has issued guidance (Notice 2025-7) providing temporary relief to taxpayers selling, disposing, or transferring digital assets, allowing them to use additional methods for making adequate identification of the assets for purposes of the final regulations (T.D. 10000) under section 1012.

Final Regs Address Decentralized Finance Reporting Requirements

T.D. 10021 | 89 F.R. 106928-106960 | TREASURY DECISIONS

DECEMBER 29, 2024

The IRS has published (T.D. 10021) final regulations on information reporting by brokers that regularly provide services effectuating digital asset sales and exchanges, specifically those providing front-end services in decentralized finance transactions, requiring the brokers to file information returns and furnish payee statements.

Transitional Relief Provided for Decentralized Finance Brokers

NOTICE 2025-3 | 2025-4 IRB 488 | NOTICES

Search in Federal Tax Library

Type keywords and/or an "exact phrase" 🔍

Filters Clear All

Document Types Select

Tax Topics Select

Code Sections ▾

Date Range ▾

Selected Filters

Tax Topics

Cryptocurrency ✕

☐ Tax technology	☐ Net investment income tax	☐ Exempt organizations
☐ TAXPAYER TYPES	☐ Personal holding companies	☐ Exemption applications
☐ Cooperatives taxation	☐ INSURANCE	☐ Hospitals
☐ Corporate taxation	☐ INTERNATIONAL TAXATION	☐ Political organizations
☐ Domestic relations and divorce	☐ Base erosion and antiabuse tax (BEAT)	☐ Private foundations
☐ Exempt organizations	☐ Base erosion and profit shifting (BEPS)	☐ Tax-exempt bonds
☐ Farm and ranch taxation	☐ Common reporting standard (CRS)	☐ Unrelated trade or business
☐ Financial institutions	☐ Controlled foreign corporations (CFCs)	☐ SALES AND EXCHANGES
☐ Individual income taxation	☐ Cross-border mergers and acquisitions	☐ Basis
☐ Limited liability companies	☐ Currency transactions and issues	☐ Gains and losses
☐ Marketplace facilitators	☐ Domestic international sales corporations	☐ Like-kind exchanges
☐ Native American (Indian) taxation	☐ Expatriate taxation	☐ Sales and exchanges
☐ Nonresident taxation	☐ FATCA	☐ TAX CUTS AND JOBS ACT
☐ Partnerships	☐ Foreign tax credit	☐ TAX POLICY
☐ RICs, REITs, and REMICs	☐ Foreign-source income	☐ Amnesties
☐ Subchapter S corporations	☐ Global intangible low-tax income (GILTI)	☐ Budgets
☐ Trusts and estates taxation	☐ Information exchange	☐ Digital economy
☐ BANKRUPTCY AND INSOLVENCY	☐ International taxation	☐ Federal and state conformity
☐ EMPLOYMENT TAXES	☐ Nonresident taxation	☐ Fundamental tax system structure
☐ Employment tax-related penalties	☐ Passive foreign investment companies (PFICs)	☐ Politics of taxation
☐ Employment taxes	☐ Permanent establishment	☐ Social welfare taxation
☐ FICA and SECA	☐ Residency	☐ Tax history
☐ FUTA	☐ Trade	☐ Tax policy
☐ Withholding	☐ Transfer pricing	☐ Tax reform
☐ Worker classification	☐ Treaties	☐ Tax system administration
☐ FINANCIAL PRODUCTS AND BANKING	☐ Withholding	☐ Transparency
☒ Cryptocurrency		

Reset Filters Cancel Apply Filter

**Filter by the
Tax Topics at
issue!**

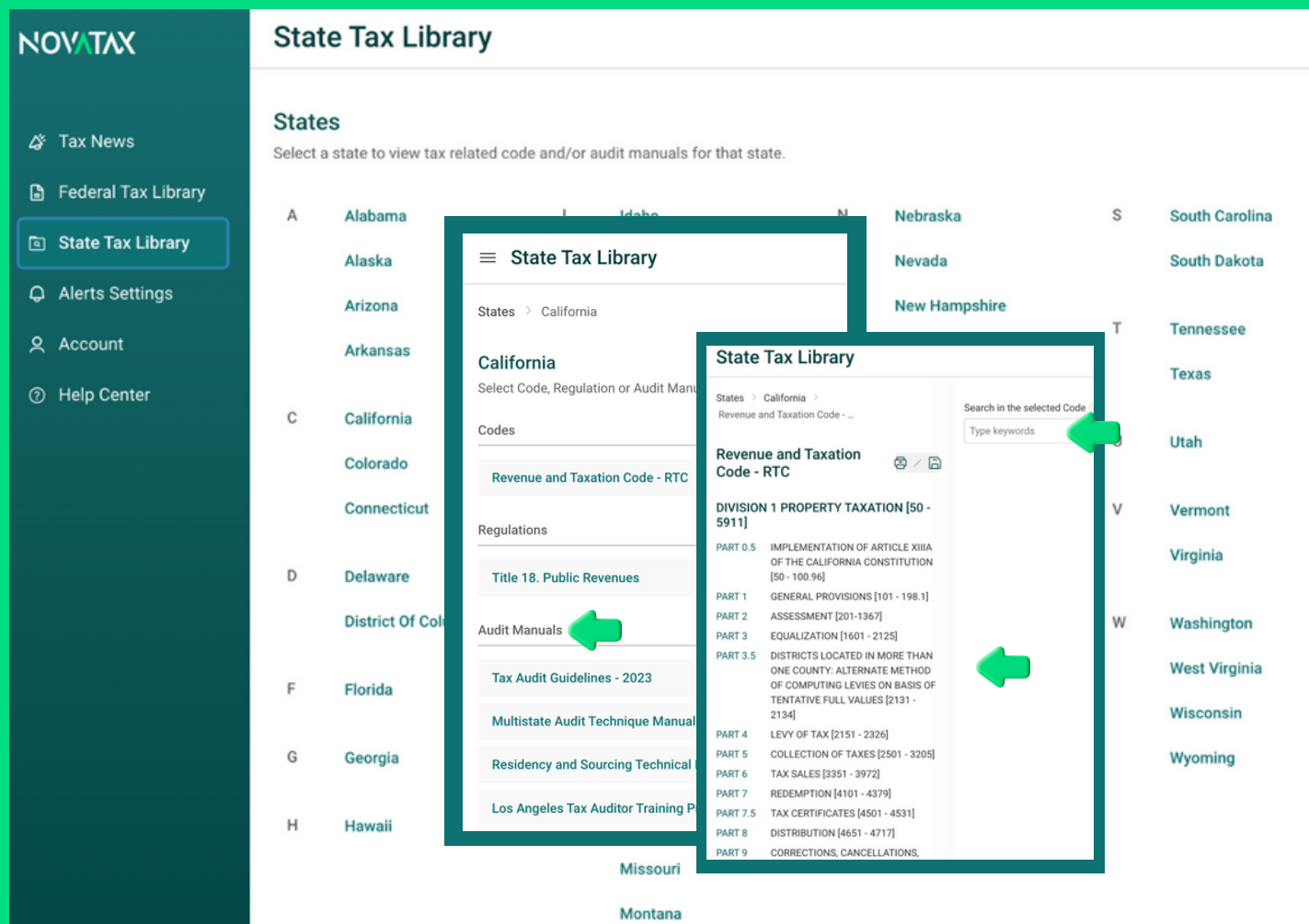
It's easy to find relevant materials using the Tax Topics filter!

- Click on "Tax Topics" and select from among the extensive table of Tax Topics to narrow down your search
- Click "Apply Filter" and NovaTax quickly retrieves documents discussing your tax topic

TIP! You can press CTRL+F to keyword search for a topic name within the Tax Topics table.

STATE TAX RESEARCH LIBRARY

Our State Tax Research Library gives you access to the Tax Codes & Regulations of all 50 States and D.C. plus access to State Tax Audit Manuals of 40+ States and D.C.!



Updated monthly!

Our State Tax Research Library is presented in a clean, uniform, and user-friendly format.

- Keyword searching and enhanced Table of Contents make locating the materials you need easy

Be prepared for a State Tax audit with our unique collection of audit manuals that auditors themselves use.

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**For further training, please visit
our Help Center.**

THANK YOU!

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