

# Five years after the sale the BOE billed him \$31,000 for a boat he'd already sold! We got the paperwork right and fixed the problem. Zero tax!

Rob J. admits it was love at first sight. "She was a lovely thing," he recalls, "and for me, absolutely irresistible. Fine lines, beautifully finished ... I couldn't wait to take her home."

The object of Rob's affection is a 50 foot Mikelson, 45,000 pounds of ocean-going beauty and speed. Fitted out with state of the art sat-nav and staterooms customized in fine woods, she's the ultimate fish/cruise vessel. With twin Cummins diesels and 1000-gallon tanks, the Mikelson is capable of cruising at around 42 knots over a range of some five hundred miles a day.

Rob's love affair with the San Diego-built Mikelson lasted some five years. "This is one beautiful piece of work," he says. "It has an exceptionally wide beam and a huge flybridge. She's very comfortable. For people who know yachts, the Mikelson 50 Luxury Sportfisher is considered the sea-going equivalent of a Rolls Royce."



"In fact, I had no problems at all until after I'd sold the Mikelson to focus on business and family," continues Rob, who runs a large, state-of-the-art meat processing facility in Vista, California. Rob's meat company has markets across the United States and overseas. "It was then, about five years after the purchase, that the California Board of Equalization told me I had not qualified for a Sales and Use tax exemption. They were billing me \$31,000 for a boat I'd already sold!"

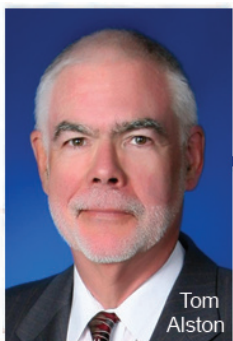
Rob tried to resolve the tax issue himself. "On the advice of the broker, I'd organized offshore delivery in Mexican waters, and left it there for a 90 day period. Even though I thought I'd covered all the bases, it just wasn't working with the tax people.

"They disputed the delivery information; it was an argument I just couldn't win. Eventually I called Mikelson company itself and explained the dilemma. Who did they recommend to get me out of the situation? There was no hesitation: they said Aero & Marine are the best."

Tom Alston, president of Aero & Marine Tax Professionals, is familiar with Rob's case. "This kind of slip-up happens more often than you'd think," he says. "That's why we look after everything, right down to the smallest detail."

"In Rob's case, it turned out to be a real simple thing, too," continues Alston. "The company that did the delivery in Mexican waters had used the wrong form. That was it! We were able to get the paperwork right and fix the problem. Zero tax was payable."

Today, Rob is thinking about Mikelson again. "You know," he smiles, "Mikelson's coming out with a 57 footer. If I do decide to go for it, Mikelson will be my first call. The second will be to Aero & Marine."



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