

How to claim
R&D tax credits:

a visual guide

RECOUPETAX
YOUR TAX CREDIT EXPERTS

Find a specialist to work with

*Like Recoupe tax, for instance**

Why?

R&D specialists are:
Recoupe Tax is:



Fast



Efficient



Cost-effective

*Don't worry—you don't have to displace your current accountant.

Why don't we do it ourselves?

- ▶ Tax studies are complex, detailed, time-intensive processes
- ▶ Take staff away from core business activities
- ▶ Inaccurate studies = missed opportunities or outright denial
- ▶ Must keep up with new IRS rulings / court cases
- ▶ IRS favors third-party studies

The Recoupe **process**

Working with Recoupe Tax is as easy as...



Estimate

Do you qualify and how much will you get?



Calculate

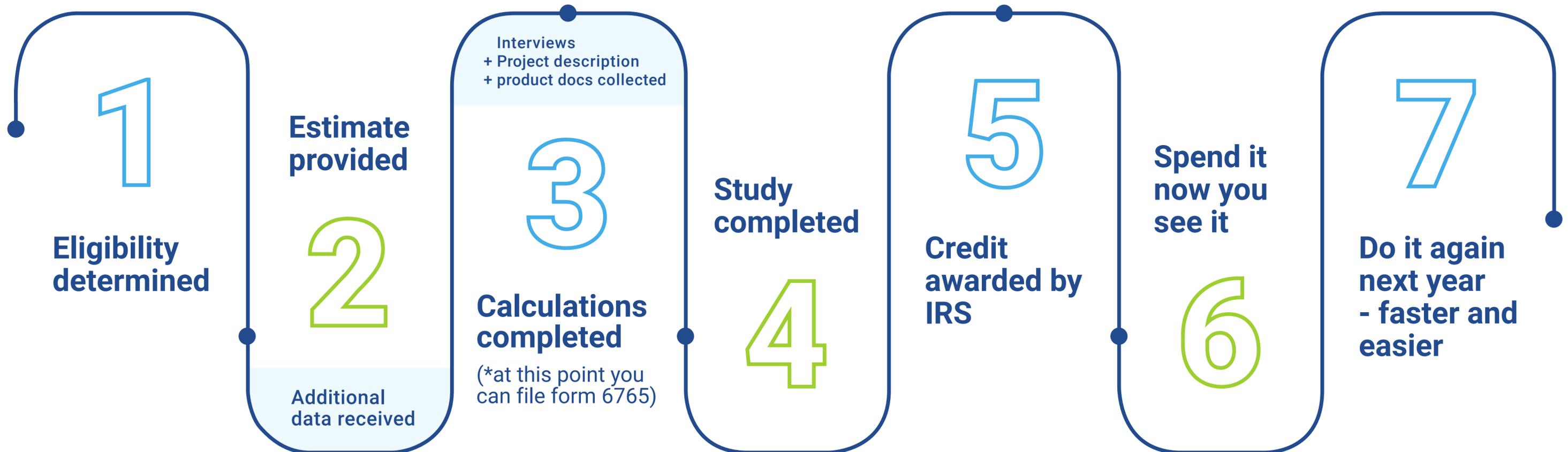
You supply the data, we do the hard work.



File & Smile

File the necessary forms and smile all the way to the bank.

How does the process work?



Eligibility and estimation

03

How is eligibility determined?

We ask a few questions to determine the eligibility of your business, such as:



Do you conduct your innovation efforts in the US?



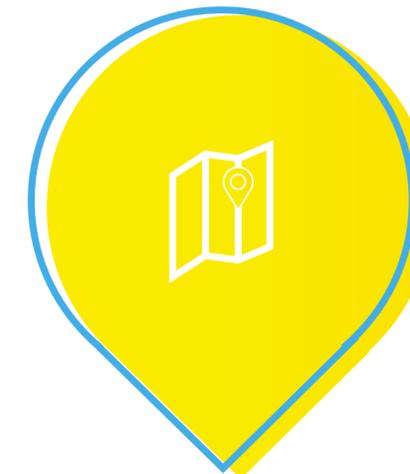
How many employees are involved in innovative (R&D) activities?



What are their estimated average salaries?



What year did your company start operation?



What state is your business located in?

If determined eligible, we will:

- 1** Sign and send a mutual NDA to protect both parties
- 2** Collect a bit more information to provide you an estimate, including:

Company info

- Tax returns
- Project lists
- Patent lists
- Ownership info

Employee info

- List of employees with titles
- W-2 data

Vendor info

- Vendor invoices
- Vendor contracts

Once we collect the data, we'll provide you a 95% accurate estimate of your tax credits.

Calculation

After the estimate, we'll fill out the tax study by collecting more info and calculating accurate numbers, including:

- ▶ Project descriptions
- ▶ Time tracking info
- ▶ Contracts
- ▶ Technical documents
- ▶ Test plan / results
- ▶ Design / development docs
- ▶ Jira / Github

Once calculations are complete, we:

- ▶ Conduct interviews to support the documents and data
- ▶ Complete the study

File & Smile = \$\$\$

Once the study is complete, we'll deliver it to you so you have everything you need to support your claim with no concerns.

Then, you get to sit back and wait for the money you're owed
*—and spend it however you see fit.**



*There are no limitations on how your tax credits are spent. So pocket it, reinvest in your business, or buy yourself a boat! \$\$\$

 RECOUPETAX

Ready to collect what you're *owed?*

Schedule your meeting now and be on your way to collecting some serious extra cash for you or your business.



Schedule Now

