



RICHARD CHARGE

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Industries most likely to *benefit* from the R&D Credit



MEDICAL/DENTAL

Development of new or improved medical or dental techniques, processes, or equipment, clinical trials and studies on the efficacy and safety of new medications or therapies, software development, collaboration with research institutions.



ARCHITECTURE/CONSTRUCTION

Reality capture technology, software, improved paints and surface protection, new pavement technologies, architectural designs to save or optimize space, improved insulation, kinetic technologies, use of new materials, design of internal systems LEED, value engineering.



MANUFACTURING

Product and process development or improvement, design of new machines, use of new materials, prototypes, software, certification testing, environmental testing, computer modeling, software development.



UTILITIES

Development of alternative energy sources and equipment (wind turbines, solar, geothermal, hydroelectric, nuclear), grid technology and storage, improved energy consumption engines (hybrid, diesel-electric), thermal storage, improved fuel cells.



FINANCE

New and improved software (both internal use and external), storage technologies, cloud services, new platforms or use of outside platforms for testing, algorithm development, new or improved hardware, mobile platforms, new or improved applications.



INFORMATION

New and improved software, storage technologies, cloud services, new platforms or use of outside platforms for testing, algorithm development, new or improved hardware, mobile platforms, new or improved applications.



PROFESSIONAL SERVICES

Design engineering, new or improved software development, process development, flow engineering, civil engineering.



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Two ways to calculate the *Credit*

Regular Research Tax Credit

Lesser of (QREs – FB) or (QREs x 50% x 20% = *Regular R&D Tax Credit*)

Qualified Research Expenditures (QREs) = Wages + Supplies + (Contract Research x 65%)

Fixed Base Amount (FB) = Average Revenue (prior 4 years) x Fixed Base Percentage (FB%)

Alternate Simplified Method (ASC)

QREs – F3YQRE x 14% = *Alternate Simplified Credit*

Qualified Research Expenditures (QREs) = Wages + Supplies + (Contract Research x 65%)

P3YQRE = Prior 3 years QREs

Four part *Test for Eligibility*

1

Business Component

Development or improvement of a business component for sale or use by a customer

- Product
- Process
- Software
- Technique
- Formula
- Invention

2

Technical Uncertainty

At the onset of the development activity, there must be uncertainty relative to:

- Capability; or
- Process; or
- Appropriate Design

3

Process of Experimentation

Evaluation of one or more alternatives used to eliminate technical uncertainties identified at the beginning of the development activity.

4

Scientific Principles

Principles of physical, biological sciences, engineering, physics or computer science must be inherent in the Process of Experimentation.



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Why use *Origins Group*?

1

In-Depth Industry Knowledge:

Our team of licensed CPAs has extensive experience in navigating the complex world of R&D tax credits. With a deep understanding of the regulations, requirements, and industry-specific nuances, we ensure your R&D tax credit claims are accurate, compliant, and optimized for maximum benefits.

2

Customized Strategies for Your Unique Needs:

We recognize that every business has its unique R&D activities. Our team takes the time to understand your business and tailor an R&D tax credit strategy that aligns with you. Our personalized approach ensures you receive the maximum credit for your qualifying research activities.

3

Comprehensive Documentation & Support:

Our expert CPAs will help you maintain accurate and detailed documentation of your R&D activities, ensuring that your claims are substantiated and audit-proof. We'll guide you through every step of the process, providing ongoing support and advice to make your R&D tax credit journey seamless and stress-free.

4

Maximized Savings & Long-Term Growth:

By partnering with our experienced R&D tax credit firm, you can trust that we will uncover every opportunity to maximize your tax savings. These additional funds can be reinvested into your business, fostering innovation, growth, and long-term success.

Unlock the Full Potential of Your R&D Tax Credits with Our Expert Team of Licensed CPAs!

Don't leave your R&D tax credits to chance! Partner with our expert team of licensed CPAs and experience the benefits of a tailored, comprehensive approach. Contact us today to schedule a free consultation and discover how we can help your business thrive.