



CLIENT CHECKLIST FOR R&D TAX CREDIT SERVICES

Before you sign your client's tax return, please make sure you have reviewed their eligibility for the credits, incentives, and tax-saving possibilities described below.

DOES YOUR CLIENT:	YES	BENEFIT
Design, develop or improve products, processes, techniques, formulas, inventions, or develop software?		Your Client may qualify for federal and state R&D Credits
Design or customize equipment used in the production process?		Your client may qualify for federal and state R&D Credits
Experiment with new materials?		Your client may qualify for federal and state R&D Credits
Engineer to advance the product's design to the point of manufacture?		Your client may qualify for federal and state R&D Credits
Have manufacturing operations in the United States?		Your client may qualify for various federal and state manufacturing incentives

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Industry	R&D Activities
Adhesives	Formulation development, V.O.C requirements, prototypes, testing
Aerospace	High tolerance, design and prototyping, testing
Apparel	Process engineering, design, fade resistance after washing, fabric strength and durability
Automotive	High tolerance, design and prototyping, customer specifications, testing
Agriculture	Seed coating/development, equipment development, organics and organic pesticides
Biomedical/Medical Device	Design, development, bioengineering, clinical engineering, prototyping, testing, process, improvements
Biotech/Pharmaceuticals	Listed and generic drugs, clinical trials, FDA requirements, testing prototyping, inactive and active ingredient determination
Defense	High tolerance, software development, engineering, design, development, prototyping, testing
Energy/Alternative Fuels	Resource processing/extraction technologies, formulations, development, testing, prototyping
Engineering	Structural design, abatement, remediation, waste disposal, disposal, infrastructure design, and development
Equipment	Design, development, prototyping, testing, engineering
Food Processors/Mg	Formulations, process improvements, ingredients, shelf life, pH,
Furniture	Engineering, materials development, process improvements
Healthcare Products	Formulations, pH, process improvements, prototyping, testing
High Tech	Engineering, process improvements, design, prototyping, testing
Life Science	Development, genetics, testing, biological testing, cell theory, process engineering
Lubricants	Formulations, VOC, Viscosity, pH, Prototyping, testing, process improvements
Paper Products	Materials development, process improvements, design, development, prototyping, testing, packaging
Software Developers	Concept/idea generation, programming, alpha and beta testing, functional enhancements/development, version changes, not debugging