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R&D Tax Credit Questionnaire

Employer Data

Full Legal Business Name: _____

DBAs (If Any): _____

Business Address: _____

Address on Tax Returns (if Different): _____

Business Owner Name: _____ Date of Birth: _____

Additional Owner Names / DOB's (if Applicable): _____

Phone #: _____ Email: _____

Industry: _____ SIC Code: _____

Federal Tax ID #: _____

Total Number of Employees: _____ Total Number of Full-Time Employees: _____

State(s) Employees are Physically Located in: _____

Date Business Founded: _____

Owner(s) SSN(s): _____

Tax Info

Company Entity Type (S-Corporation, C-Corporation, Partnership, Sole Proprietorship):

Date Company Incorporated: _____

When Does Your Company's Tax Year End? (Calendar / Fiscal): _____

Month/Date (if Fiscal): _____

What is Your 2024 Tax Return Filing Status? (Filing on Time, Filing an Extension, Already Filed):

Are You Computing a Credit for a Short Year? _____

Are You Part of a Controlled Group? _____

What is the Oldest Entity's Year of Incorporation? (if Yes) _____

What tax years are being filed for? _____

Credit Method Eligibility

In What Year did Your Company Start Making Revenue? _____

In What Year did You Start Your Development Efforts? _____

Did Your Company's Gross Revenue Exceed \$5 Million in 2024? _____

Contracts / Rights

Do You Own Substantial Rights to the Results of Your Development Activities? _____

Are Any of Your Development Activities Completed Under Contract for an Outside Party? _____

What is the Typical Fee Structure for Your Contracts? (Lump Sum/Fixed Fee, Hourly/Materials, Other, N/A) _____



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R&D Project Indicators

- 1. Did you research, develop, streamline, or implement any new processes?**
- 2. Were any products designed, developed, or improved?**
- 3. Did you test new material or concepts?**
- 4. Did you develop or improve any new formulas or manufacturing methods?**
- 5. Did you develop, customize, improve, or update any software technology?**
- 6. Did you develop, design, or improve any prototypes or models for your business?**
- 7. Did you develop, design, or improve any new equipment for material handling or for new/improved tasks?**
- 8. Did you maintain or improve any laboratory equipment?**
- 9. Did you document research activities?**
- 10. Did you complete certification testing?**
- 11. Did you complete any environmental upgrades?**
- 12. Did you develop, design, or improve acoustical qualities for the company or other structures?**
- 13. Did you develop, design, or improve any new alternative electricity or lighting systems?**
- 14. Did you develop, design, or improve any new ventilation systems?**
- 15. Did you develop, design, or improve any new alternative water/plumbing systems?**
- 16. Did you develop, design, or improve any systems for cybersecurity or to combat terrorism and criminal activities?**
- 17. Did you develop, design, or improve any electrical underground infrastructure?**
- 18. Did you develop, design, or improve any value engineering, construction, or landscaping methods?**



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