





## BUSINESS INCENTIVE SOLUTIONS

### Incentive Analysis Agreement

COMPANY NAME: \_\_\_\_\_

COMPANY CONTACT (for BIS Project Mgr to contact!): \_\_\_\_\_

CONTACT PHONE: \_\_\_\_\_ EMAIL: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP: \_\_\_\_\_

Thank you for considering Business Group Resources (BGR) to perform an Incentive Analysis through Business Incentive Solutions (BIS) for your company.

#### **INCENTIVE ANALYSIS OVERVIEW:**

BIS will perform the following in order to evaluate, analyze, and procure your eligible specialized incentives:

- Determine the company’s qualifications for applicable specialized incentive programs
- Collect documentation in order to determine the company’s utilization of incentives
- Establish total fee to procure benefit(s)

#### **SPECIFIC PROGRAMS**

BIS has access to a number of Incentive programs including Commercial Property Cost Segregation, Section 41 Research & Development Credits, Sales & Use Tax Exemptions, Real & Personal Property Tax Mitigation, Energy EPAct 179D, as well as Hiring-based Incentives, Federal HUD Zone Credits, State Location-Based Credit, and Employee Reimbursement Incentives.

#### **AGREED TO & ACCEPTED**

The Company agrees to provide the necessary documentation to generate the Incentive Analysis which will be completed at **NO CHARGE**.

\_\_\_\_\_  
Signature of BGR Representative

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Client

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date



### Business Qualifications

Company Name: \_\_\_\_\_

Brief Description of Business: \_\_\_\_\_

Name on Corporate Tax Returns: \_\_\_\_\_

Is your current Mailing Address different than the Address on your Corporate Returns?  Yes  No  
If Yes, please add it in the area below.

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Does your Corporation file in a Calendar Year?  Yes  No If No, what is your Fiscal Year date? \_\_\_\_\_

How are you structured corporately?  C-Corp  S-Corp  LLC  Sole Prop

Have you or your company paid federal and/or state income tax in the last 3 years?  Yes  No

What are the approximate revenues for each of the past three years? \_\_\_\_\_

Do you have any unpaid tax liabilities?  Yes  No Amount owed? \_\_\_\_\_

Do you own any other businesses?  Yes  No If Yes, please give details on a separate sheet.

How many total employees does the company have? \_\_\_\_\_ W-2 Employees? \_\_\_\_\_ W-9 Employees? \_\_\_\_\_

Do you own your building?  Yes  No If Yes, how many square feet? \_\_\_\_\_ How many stories? \_\_\_\_\_

Have you made any "Green" energy improvements to your building?  Roof  Windows  Lighting

Does the company have locations and/or facilities in other cities or states?  Yes  No If yes, please list additional locations below.

	Location 1	Location 2	Location 3
Street Address			
City & State			
Zip Code			



### R&D Qualified Research Activities (QRA) – CHECKLIST

Company Name: \_\_\_\_\_

Participating?*		Shareholder Name	% of Ownership	Email Address
Yes	No			

\*Participating? is asking if the shareholders listed will be participating or not. If yes, Personal Tax Filings will be requested along with the Corporate Tax Filings.

### R&D Tax Credit

## The Four Part Test

<b>Permitted/Qualified Purpose</b>	<b>Technological in Nature</b>	<b>Technological Uncertainty</b>	<b>Process of Experimentation</b>
Intended to develop or improve a product or processes: <ul style="list-style-type: none"> <li>• Functionality/Performance</li> <li>• Quality/Reliability</li> <li>• Cost Reduction</li> </ul>	Activity must rely on principles of one of the following sciences: <ul style="list-style-type: none"> <li>• Engineering</li> <li>• Physical Sciences</li> <li>• Computer Sciences</li> <li>• Biological Sciences</li> </ul>	Capability or Methodology <ul style="list-style-type: none"> <li>• Uncertainty for developing or</li> <li>• Improving a product or process</li> </ul>	Evaluation of Alternatives Prototyping/Testing/Modeling Simulation

### The following questions pertain to the IRC §41 – Qualified Research Activities – 4-Part Test:

<b>1</b>	Does the company: <input type="checkbox"/> <b>Designs</b> <input type="checkbox"/> <b>Develops</b> <input type="checkbox"/> <b>Improves:</b> <input type="checkbox"/> <b>Formulation</b> <input type="checkbox"/> <b>Process</b> <input type="checkbox"/> <b>Product</b> <input type="checkbox"/> <b>Software</b> <input type="checkbox"/> <b>Technique</b>
<b>2</b>	The taxpayer incurred the costs directly related to the business activity? <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b>
<b>3</b>	The business activity relies on: (can be more than one) <input type="checkbox"/> <b>Biology</b> <input type="checkbox"/> <b>Computer Science</b> <input type="checkbox"/> <b>Engineering</b> <input type="checkbox"/> <b>Physical Science</b>
<b>4</b>	As a result of the business activity, there is a new or improved: <input type="checkbox"/> <b>Function</b> <input type="checkbox"/> <b>Performance</b> <input type="checkbox"/> <b>Reliability</b> <input type="checkbox"/> <b>Quality of the:</b> <input type="checkbox"/> <b>Formulation</b> <input type="checkbox"/> <b>Invention</b> <input type="checkbox"/> <b>Process</b> <input type="checkbox"/> <b>Product</b> <input type="checkbox"/> <b>Software</b> <input type="checkbox"/> <b>Technique</b>
<b>5</b>	Was there a clear indication of experimentation/testing to discover results? <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <b>Please indicate below the percentage of time spent on the experimentation. (very important)</b> <input type="checkbox"/> <b>5%?</b> <input type="checkbox"/> <b>10%?</b> <input type="checkbox"/> <b>20%?</b> <input type="checkbox"/> <b>30%?</b> _____



## QRA CHECKLIST

Please complete the following questions. **If the answer is “Yes” to any of the questions below, please use the space under each question to elaborate in as much detail as possible.** These questions relate directly to the **IRC §41 4-Part Test**.

1. Has the company established any new product development(s)? \_\_\_ Yes \_\_\_ No

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2. Has the company created any new processes or procedures? \_\_\_ Yes \_\_\_ No

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3. Does the company conduct any testing to conform to regulatory requirements? \_\_\_ Yes \_\_\_ No

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4. Does the company ever perform any environmental or certification testing? \_\_\_ Yes \_\_\_ No

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5. Does the company do any project feasibility analyses? \_\_\_ Yes \_\_\_ No

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6. Do you directly supervise or support any research activities? \_\_\_ Yes \_\_\_ No

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7. Does the company manufacture products? \_\_\_ Yes \_\_\_ No

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8. Has the company completed any type of design work? \_\_\_ Yes \_\_\_ No

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## QRA CHECKLIST

9. Does the company perform any structural calculations?  Yes  No

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10. Does the company develop any architectural solutions?  Yes  No

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11. Do you ever discuss technical concepts with clients or your staff?  Yes  No

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12. Has the company developed any new technology?  Yes  No

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13. Does the company conduct any processes or procedures over the Internet?  Yes  No

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14. Has the company tested new materials, supplies, chemicals, etc.?  Yes  No

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15. Does the company utilize any CAD software for new products or projects?  Yes  No

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16. Does the company utilize any coding and/or programming?  Yes  No

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17. Has the company added and/or purchased any new machinery/equipment in the last three years?  Yes  No

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### QRA CHECKLIST

18. Has the company completed any new work to any of the websites?  Yes  No

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19. Does the company use custom-designed solutions for a customer's request?  Yes  No

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20. Does the company ever experiment to solve a client's needs or problems?  Yes  No

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21. Does the company do any prototyping and/or any computer modeling and simulation?  Yes  No

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22. Does the company bear the economic risk in the event of a failure or loss?  Yes  No

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23. Is there a wholesale component to the business?  Yes  No

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24. Does the company institute any research data compilation?  Yes  No

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25. Does the company generate any lab reports?  Yes  No

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26. Does the company develop or apply for patents?  Yes  No

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### QRA CHECKLIST

27. Does the company automate and/or streamline any internal processes?  Yes  No

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28. Does the company perform any validation testing and/or evaluating whether development meets client's needs?  Yes  No

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29. Has the company had any unsuccessful projects or efforts?  Yes  No

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30. Has the company changed, adjusted and/or improved the e-commerce software?  Yes  No

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31. Has the company ever changed their procedures or processes?  Yes  No

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32. Has the company made any innovations and/or produced any changes to their systems or how business is conducted?  Yes  No

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33. Has the company made any product or process improvements?  Yes  No

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34. Does the company examine, experiment, or brainstorm to improve the product or process?  Yes  No

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35. Does the company create and/or find alternatives to a need or a project?  Yes  No

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### QRA CHECKLIST

36. Does the company design tools, jigs, molds and dies?  Yes  No

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37. Does the company research or implement new concepts or technologies?  Yes  No

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38. Does the company improve or build any new research facilities?  Yes  No

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39. Does the company experiment and/or conduct tests for procedures associated with the business?  Yes  No

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40. Has the company launched any new social media campaigns?  Yes  No

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41. Is the company doing anything differently now than the company was doing three years ago?  Yes  No

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42. Did you have to make any changes to how you do business as a result of the pandemic?  Yes  No

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43. Is there anything about your company that is unique or different from your competitors?  Yes  No

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**Please send all pages to [matt.santen@businessgroupresources.com](mailto:matt.santen@businessgroupresources.com)**