R&D TAX CREDITS: AUTOMOTIVE

GET TAX CREDITS FOR YOUR RESEARCH

Refunds are available for companies performing research within the Automotive Industry. The research credit provides dollar-for-dollar cash savings each year for companies performing activities related to the development of new or improved products and processes. These benefits could provide much needed cash to hire additional employees, increase R&D, expand production facilities, etc.

Many companies involved with automotive processes are unaware that their efforts within designing and developing their products can yield a large amount of research credits. Examples of R&D activities related to the industry as well as potentially qualifying job titles are listed below.

EXAMPLES OF QUALIFYING R&D ACTIVITIES

- Computer-aided design (CAD), modeling, and simulation of parts
- Designing and testing prototypes such as vehicle body, alternator, battery, serpentine belts, drivetrain system, transmissions, airbags, brakes, tires, windows, and electrical components
- Improving efficiencies in manufacturing processes of the automotive body and internal components
- Improving existing parts to increase performance and reliability
- Testing automotive parts to meet regulatory compliance and safety requirements

POTENTIALLY QUALIFYING R&D JOB TITLES

- Automotive Engineers
- Brake Specialists
- Electrical Engineers
- Engineering Managers
- Production Engineers
- Production Supervisors

AMT OFFSET

For tax years beginning after December 31, 2015, eligible small businesses (those with $50 million or less of gross receipts) may claim the research credit against AMT liability.

UP TO $250,000 IN PAYROLL TAX

Qualified start-up companies may elect to use up to $250,000 of the research credit against payroll taxes. Treasury Regulations have substantially broadened the range of taxpayers who are eligible for the credit. Start-ups to publicly traded businesses who were previously unable to realize a benefit from this lucrative tax credit should reassess their eligibility.

CASE STUDY

DEVELOPER OF AUTOMOTIVE PRODUCTS AND PROCESSES

Annual Revenue: $17 Million

RESULTS:

$350,000

In Federal & State R&D Tax Credits
R&D TAX CREDITS: ARCHITECTURE & ENGINEERING

GET TAX CREDITS FOR YOUR RESEARCH

Refunds are available for companies performing research within the Architecture and Engineering (A&E) Industries. The research credit provides dollar-for-dollar cash savings each year for companies performing activities related to the development of new or improved products and processes. These benefits could provide much needed cash to hire additional employees, increase R&D, expand production facilities, etc.

Many companies involved with A&E are unaware that their efforts within designing and developing their products can yield a large amount of research credits. Examples of R&D activities related to the industry as well as potentially qualifying job titles are listed below.

EXAMPLES OF QUALIFYING R&D ACTIVITIES

- Achieving Leadership in Energy and Environmental Design (LEED) certification
- Considering and evaluating different design alternatives
- Designing foundation and earthwork for site conditions
- Developing new or improved designs for structures
- Developing new software applications to use internally to interact with customers/vendors
- Developing preliminary design, development plan
- Developing preliminary computer-aided design (CAD) modeling and testing
- Developing schematic designs
- Developing unique functional and energy-efficient designs

POTENTIALLY QUALIFYING R&D JOB TITLES

- Civil Engineer
- Construction Manager
- Designer
- Drafter
- Electrical Engineer
- Environmental Engineer
- Mechanical Engineer
- Project Manager
- Project Architect
- Structural Engineer

AMT OFFSET

For tax years beginning after December 31, 2015, eligible small businesses (those with $50 million or less of gross receipts) may claim the research credit against AMT liability.

UP TO $250,000 IN PAYROLL TAX

Qualified start-up companies may elect to use up to $250,000 of the research credit against payroll taxes. Treasury Regulations have substantially broadened the range of taxpayers who are eligible for the credit. Start-ups to publicly traded businesses who were previously unable to realize a benefit from this lucrative tax credit should reassess their eligibility.

CASE STUDY

DEVELOPER OF A&E PRODUCTS AND PROCESSES

Annual Revenue: $15 Million

RESULTS:

$400,000

In Federal & State R&D Tax Credits
R&D TAX CREDITS: AEROSPACE

GET TAX CREDITS FOR YOUR RESEARCH

Refunds are available for companies performing research within the Aerospace Industry. The research credit provides dollar-for-dollar cash savings each year for companies performing activities related to the development of new or improved products and processes. These benefits could provide much needed cash to hire additional employees, increase R&D, expand production facilities, etc.

Many companies involved with aerospace are unaware that their efforts within designing and developing their products can yield a large amount of research credits. Examples of R&D activities related to the industry as well as potentially qualifying job titles are listed below.

EXAMPLES OF QUALIFYING R&D ACTIVITIES
- Computer-aided design (CAD), modeling, and finite element analysis (FEA) simulation of aerospace products
- Designing and testing of prototypes of aerospace products
- Designing of new concepts of aerospace products to increase performance and reliability
- Optimizing manufacturing processes for aerospace products
- Testing aerospace components to meet regulatory standards and safety requirements

POTENTIALLY QUALIFYING R&D JOB TITLES
- Aerospace Engineer
- CAD Designer
- Chemical Engineer
- Electrical Engineer
- Engineering Manager
- Engineering Director
- Mechanical Engineer
- Project Manager
- Systems Engineer
- Software Engineer
- Structural Engineer

AMT OFFSET
For tax years beginning after December 31, 2015, eligible small businesses (those with $50 million or less of gross receipts) may claim the research credit against AMT liability.

UP TO $250,000 IN PAYROLL TAX
Qualified start-up companies may elect to use up to $250,000 of the research credit against payroll taxes. Treasury Regulations have substantially broadened the range of taxpayers who are eligible for the credit. Start-ups to publicly traded businesses who were previously unable to realize a benefit from this lucrative tax credit should reassess their eligibility.

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CASE STUDY
DEVELOPER OF AEROSPACE PRODUCTS AND PROCESSES
Annual Revenue: $30 Million

RESULTS:
$1,000,000
In Federal & State R&D Tax Credits
R&D TAX CREDITS: BREWERY INDUSTRY

GET TAX CREDITS FOR YOUR RESEARCH

Refunds are available for companies performing research within the Brewery Industry. The research credit provides dollar-for-dollar cash savings each year for companies performing activities related to the development of new or improved products and processes. These benefits could provide much needed cash to hire additional employees, increase R&D, expand production facilities, etc.

Many companies involved with brewing are unaware that their efforts within designing and developing their products can yield a large amount of research credits. Examples of R&D activities related to the industry as well as potentially qualifying job titles are listed below.

EXAMPLES OF QUALIFYING R&D ACTIVITIES RELATED TO THE DEVELOPMENT OF NEW OR IMPROVED:

- Bottle conditioning
- Filtration methodologies or wastewater methods
- Hopping techniques and styles
- Manufacturing technology in efforts to improve manufacturing flexibility and agility due to increased product volume and diversity
- Packaging designs to ensure shelf life longevity
- Product formulations or recipes (e.g. dry hopping, fermentation methods)
- Product formulations or improved ingredient mixing methods or testing of product ingredient combinations relative to new flavors or enhancements
- Prototype product samples for testing and validation of new recipe formulations
- Quality assurance testing processes
- Testing of prototype samples for analytical and microbiological qualities

POTENTIALLY QUALIFYING R&D JOB TITLES

- Assistant Brewer
- Head Brewer
- Lab Assistant
- Lab Manager
- Production Operations Manager
- Regional Brewer

AMT OFFSET

For tax years beginning after December 31, 2015, eligible small businesses (those with $50 million or less of gross receipts) may claim the research credit against AMT liability.

UP TO $250,000 IN PAYROLL TAX

Qualified start-up companies may elect to use up to $250,000 of the research credit against payroll taxes. Treasury Regulations have substantially broadened the range of taxpayers who are eligible for the credit. Start-ups to publicly traded businesses who were previously unable to realize a benefit from this lucrative tax credit should reassess their eligibility.

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CASE STUDY

DEVELOPER OF BREWERY PRODUCTS AND PROCESSES

Annual Revenue: $12 Million

RESULTS:

$140,000

In Federal & State R&D Tax Credits
R&D TAX CREDITS: CHEMICAL & FORMULA

GET TAX CREDITS FOR YOUR RESEARCH

Refunds are available for companies performing research within the Chemical & Formula Industries. The research credit provides dollar-for-dollar cash savings each year for companies performing activities related to the development of new or improved products and processes. These benefits could provide much needed cash to hire additional employees, increase R&D, expand production facilities, etc.

Many companies involved with chemicals & formulas are unaware that their efforts within designing and developing their products can yield a large amount of research credits. Examples of R&D activities related to the industry as well as potentially qualifying job titles are listed below.

EXAMPLES OF QUALIFYING R&D ACTIVITIES

- Automation of internal processes by developing and implementing new hardware and software systems
- Development and evaluation of new, improved, or more reliable raw materials, products, or formulas
- Experimentation to increase product yield, improve shelf-life, or discover new applications for existing chemicals
- Generating pilot batches of new products for testing and validation
- Refining manufacturing methods to improve efficiency or reduce environmental impact
- Support of direct research activities, such as quality testing, maintaining lab equipment, data collection, and regulatory compliance work

POTENTIALLY QUALIFYING R&D JOB TITLES

- Analytical Chemist/Scientist
- Chemical Engineer
- Formulation Chemist/Scientist
- Lab Assistant, Lab Technician
- Quality Assurance/Control (QA/QC) Analyst, Associate, Chemist/Scientist, Manager
- Research Associate, Research Scientist

AMT OFFSET

For tax years beginning after December 31, 2015, eligible small businesses (those with $50 million or less of gross receipts) may claim the research credit against AMT liability.

UP TO $250,000 IN PAYROLL TAX

Qualified start-up companies may elect to use up to $250,000 of the research credit against payroll taxes. Treasury Regulations have substantially broadened the range of taxpayers who are eligible for the credit. Start-ups to publicly traded businesses who were previously unable to realize a benefit from this lucrative tax credit should reassess their eligibility.

CASE STUDY

DEVELOPER OF CHEMICAL & FORMULA PRODUCTS AND PROCESSES

Annual Revenue: $6.5 Million

RESULTS:

$110,000

In Federal & State R&D Tax Credits
R&D TAX CREDITS: FABRICATION

GET TAX CREDITS FOR YOUR RESEARCH

Refunds are available for companies performing research within the Fabrication Industry. The research credit provides dollar-for-dollar cash savings each year for companies performing activities related to the development of new or improved products and processes. These benefits could provide much needed cash to hire additional employees, increase R&D, expand production facilities, etc.

Many companies involved with fabrication are unaware that their efforts within designing and developing their products can yield a large amount of research credits. Examples of R&D activities related to the industry as well as potentially qualifying job titles are listed below.

EXAMPLES OF QUALIFYING R&D ACTIVITIES

- Automating machining processes to optimize fabrication times
- Designing, developing, and testing prototypes
- Developing operational efficiencies with the welding process
- Developing safety measures within the fabrication process
- Drafting new parts on computer-aided design (CAD) programs to model product specifications and functionalities
- Improving machining processes to ensure consistency among products
- Testing alternative or new raw materials to work with to improve product performance and useful life

POTENTIALLY QUALIFYING R&D JOB TITLES

- AutoCAD Drafter
- Computer Numerically Controlled (CNC) Programmer
- Machinist
- Manufacturing Engineer
- Mechanical Engineer
- Quality Assurance (QA) Technician
- Welder

AMT OFFSET

For tax years beginning after December 31, 2015, eligible small businesses (those with $50 million or less of gross receipts) may claim the research credit against AMT liability.

UP TO $250,000 IN PAYROLL TAX

Qualified start-up companies may elect to use up to $250,000 of the research credit against payroll taxes. Treasury Regulations have substantially broadened the range of taxpayers who are eligible for the credit. Start-ups to publicly traded businesses who were previously unable to realize a benefit from this lucrative tax credit should reassess their eligibility.

CASE STUDY

DEVELOPER OF FABRICATION PRODUCTS AND PROCESSES

Annual Revenue: $12.5 Million

RESULTS:

$100,000

In Federal & State R&D Tax Credits
R&D TAX CREDITS: FOOD & BEVERAGE

GET TAX CREDITS FOR YOUR RESEARCH

Refunds are available for companies performing research within the Food & Beverage Industry. The research credit provides dollar-for-dollar cash savings each year for companies performing activities related to the development of new or improved products and processes. These benefits could provide much needed cash to hire additional employees, increase R&D, expand production facilities, etc.

Many companies involved with food & beverages are unaware that their efforts within designing and developing their products can yield a large amount of research credits. Examples of R&D activities related to the industry as well as potentially qualifying job titles are listed below.

EXAMPLES OF QUALIFYING R&D ACTIVITIES RELATED TO THE DEVELOPMENT OF NEW OR IMPROVED:

- Food product formulations to achieve specified analytical requirements, including those related to pH level, brix level, acid content, and product viscosity
- Ingredients and/or formulations
- Packaging, canning, or redesigning existing packaging (e.g., eco-friendly: biodegradable, recyclable; portable: grab-and-go, drinkable, increase shelf-life)
- Production process specifications and techniques for new food products, including mixing times, batching sequences, and cooking temperatures
- Production processes for efficiency and waste reduction
- Testing product designs to reduce costs, meet new federal/state/local health regulations, ensure consistency, or improve shelf life

POTENTIALLY QUALIFYING R&D JOB TITLES

- Biologist
- Chemist
- Enologist
- Food Scientist
- Food Technologist
- Food/Beverage Formulator
- Manufacturing Engineer
- Packaging Engineer
- Product Development Associate
- Quality Assurance (QA) Technician

AMT OFFSET

For tax years beginning after December 31, 2015, eligible small businesses (those with $50 million or less of gross receipts) may claim the research credit against AMT liability.

UP TO $250,000 IN PAYROLL TAX

Qualified start-up companies may elect to use up to $250,000 of the research credit against payroll taxes. Treasury Regulations have substantially broadened the range of taxpayers who are eligible for the credit. Start-ups to publicly traded businesses who were previously unable to realize a benefit from this lucrative tax credit should reassess their eligibility.

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CASE STUDY

DEVELOPER OF FOOD & BEVERAGE PRODUCTS AND PROCESSES

Annual Revenue: $15 Million

RESULTS:

$150,000

In Federal & State R&D Tax Credits
GET TAX CREDITS FOR YOUR RESEARCH

Refunds are available for companies performing research within the Foundry Industry. The research credit provides dollar-for-dollar cash savings each year for companies performing activities related to the development of new or improved products and processes. These benefits could provide much needed cash to hire additional employees, increase R&D, expand production facilities, etc.

Many companies involved with foundries are unaware that their efforts within designing and developing their products can yield a large amount of research credits. Examples of R&D activities related to the industry as well as potentially qualifying job titles are listed below.

EXAMPLES OF QUALIFYING R&D ACTIVITIES

- Designing for tight tolerances new to the company
- Designing for harsh climates
- Improving the metal casting process including melting, coating and heat treatment; casting, molding and welding techniques; pollution control, waste and furnace charging systems; new gating and riser designs; reduce or recycling excess coating
- New product development including improving strength, stress tolerances, durability or service life
- New technologies related to filtration processes, pouring techniques, temperature control and measurement, monitoring metallurgical process performance, flow control, mold and coating materials, binder materials

POTENTIALLY QUALIFYING R&D JOB TITLES

- Computer Numerically Controlled (CNC) Programmers
- Foundry Process Control Technicians
- Foundry Workers
- Heat Treatment Supervisors
- Manufacturing Engineers, Supervisors
- Melt Deck Supervisors
- Pattern Makers
- Welders

AMT OFFSET

For tax years beginning after December 31, 2015, eligible small businesses (those with $50 million or less of gross receipts) may claim the research credit against AMT liability.

UP TO $250,000 IN PAYROLL TAX

Qualified start-up companies may elect to use up to $250,000 of the research credit against payroll taxes. Treasury Regulations have substantially broadened the range of taxpayers who are eligible for the credit. Start-ups to publicly traded businesses who were previously unable to realize a benefit from this lucrative tax credit should reassess their eligibility.

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CASE STUDY

DEVELOPER OF FOUNDRY PRODUCTS AND PROCESSES

Annual Revenue: $11 Million

RESULTS:

$125,000

In Federal & State R&D Tax Credits
R&D TAX CREDITS: LIFE SCIENCES

GET TAX CREDITS FOR YOUR RESEARCH

Refunds are available for companies performing research within the Life Sciences Industry. The research credit provides dollar-for-dollar cash savings each year for companies performing activities related to the development of new or improved products and processes. These benefits could provide much needed cash to hire additional employees, increase R&D, expand production facilities, etc.

Many companies involved with the life sciences are unaware that their efforts within designing and developing their products can yield a large amount of research credits. Examples of R&D activities related to the industry as well as potentially qualifying job titles are listed below.

EXAMPLES OF QUALIFYING R&D ACTIVITIES

- Automation of internal processes by developing and implementing new hardware and software systems
- Design and manufacturing of prototype medical devices, drug delivery systems, or pharmaceutical packaging apparatuses
- Development and testing of new pharmaceuticals, therapies, biologics, or other medical compounds
- Improving existing products to increase shelf life, reduce side effects, or prolonged duration of therapeutic activity
- Production of clinical trial lots and initial scale-up of manufacturing processes
- Support of direct research activities, such as quality testing, maintaining lab equipment, data collection, and regulatory compliance work

POTENTIALLY QUALIFYING R&D JOB TITLES

- Analytical Chemist
- Analytical Scientist
- Control System Lead
- Drug Product Engineer
- Good Manufacturing Practices (GMP) Analyst
- Lab Manager
- Lab Technician
- Mechanical Engineer
- Process Engineer
- Process Integration Manager
- Quality Assurance/Control (QA/QC) Specialist, Manager, or Director
- Research Associate, Research Scientist
- Validation Engineer

AMT OFFSET

For tax years beginning after December 31, 2015, eligible small businesses (those with $50 million or less of gross receipts) may claim the research credit against AMT liability.

UP TO $250,000 IN PAYROLL TAX

Qualified start-up companies may elect to use up to $250,000 of the research credit against payroll taxes. Treasury Regulations have substantially broadened the range of taxpayers who are eligible for the credit. Start-ups to publicly traded businesses who were previously unable to realize a benefit from this lucrative tax credit should reassess their eligibility.

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CASE STUDY

DEVELOPER OF LIFE SCIENCE PRODUCTS AND PROCESSES

Annual Revenue: $30 Million

RESULTS:

$800,000

In Federal & State R&D Tax Credits
R&D TAX CREDITS: MACHINING

GET TAX CREDITS FOR YOUR RESEARCH

Refunds are available for companies performing research within the Machining Industry. The research credit provides dollar-for-dollar cash savings each year for companies performing activities related to the development of new or improved products and processes. These benefits could provide much needed cash to hire additional employees, increase R&D, expand production facilities, etc.

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EXAMPLES OF QUALIFYING R&D ACTIVITIES

- Coding and programming for machinery communication
- Computer-aided design (CAD) and computer-aided manufacturing (CAM) modeling and simulation
- Computer numerically controlled (CNC) programming
- Designing for tight tolerances
- Developing prototype tooling
- Developing robotics and automated technology
- Eliminating or minimizing warpage in welding and fabrication processes
- Experimenting with different types of materials
- Maintaining speed of milling process without breakage
- Maintaining uniform constraints in the lathing process
- Maximizing feeds and speeds while ensuring quality and integrity of the part
- Modeling, simulation, or systematic trial and error
- Special fixture requirements

POTENTIALLY QUALIFYING R&D JOB TITLES

- Computer Numerically Controlled (CNC) Programmers
- Engineering Managers
- Engineering Supervisors
- Mechanical Engineers
- Machinists
- Manufacturing Engineers

AMT OFFSET

For tax years beginning after December 31, 2015, eligible small businesses (those with $50 million or less of gross receipts) may claim the research credit against AMT liability.

UP TO $250,000 IN PAYROLL TAX

Qualified start-up companies may elect to use up to $250,000 of the research credit against payroll taxes. Treasury Regulations have substantially broadened the range of taxpayers who are eligible for the credit. Start-ups to publicly traded businesses who were previously unable to realize a benefit from this lucrative tax credit should reassess their eligibility.

CASE STUDY

DEVELOPER OF MACHINING PRODUCTS AND PROCESSES

Annual Revenue: $12.5 Million

RESULTS:

$100,000

In Federal & State R&D Tax Credits
Many manufacturing companies are unaware that their efforts associated with the awarding and completion of their projects can yield a large amount of research credits. Examples of R&D activities within the industry as well as potentially qualifying job titles are listed below.

**EXAMPLES OF QUALIFYING R&D ACTIVITIES**

- Determining tooling requirements and optimal placement of equipment
- Developing new or improved quality assurance testing processes
- Developing processes that meet stringent regulatory requirements
- Developing prototypes using computer-aided design (CAD) and computer-aided manufacturing processes
- Developing robotics and automated technology
- Experimenting with new or improved filling and packaging techniques
- Improving strength, durability, and service life
- Maximizing feeds/speeds while ensuring quality and integrity of the part
- Improving processes including filling and sealing of products, packaging, die design/techniques, minimizing environmental impact (waste control and recycling), and flexibility and agility due to increased product volume and diversity

**POTENTIALLY QUALIFYING R&D JOB TITLES**

- Computer Numerically Controlled (CNC) Operator
- Computer-Aided Design (CAD) Technician
- Design Engineer
- Director of Operations
- Machinists
- Manufacturing Engineer
- Packaging Engineer
- Plant Operator
- Process Engineer
- Production Manager
- Quality Assurance (QA) Manager
- Reliability Engineer
- Test Engineer

**AMT OFFSET**

For tax years beginning after December 31, 2015, eligible small businesses (those with $50 million or less of gross receipts) may claim the research credit against AMT liability.

**UP TO $250,000 IN PAYROLL TAX**

Qualified start-up companies may elect to use up to $250,000 of the research credit against payroll taxes. Treasury Regulations have substantially broadened the range of taxpayers who are eligible for the credit. Start-ups to publicly traded businesses who were previously unable to realize a benefit from this lucrative tax credit should reassess their eligibility.

**CASE STUDY**

**DEVELOPER OF MANUFACTURING PRODUCTS AND PROCESSES**

Annual Revenue: $15 Million

**RESULTS:**

$1,000,000

In Federal & State R&D Tax Credits
R&D TAX CREDITS: SOFTWARE DEVELOPMENT

GET TAX CREDITS FOR YOUR RESEARCH

Refunds are available for companies performing research within the Software Development Industry. The research credit provides dollar-for-dollar cash savings each year for companies performing activities related to the development of new or improved products and processes. These benefits could provide much needed cash to hire additional employees, increase R&D, expand production facilities, etc.

Many companies involved with software development are unaware that their efforts within designing and developing their products can yield a large amount of research credits. Examples of R&D activities related to the industry as well as potentially qualifying job titles are listed below.

EXAMPLES OF QUALIFYING R&D ACTIVITIES

- Alpha / Beta testing
- Application and platform design and testing
- Coding, programming, testing (e.g., functional, integration, user interface)
- Developmental cloud computing activities
- New architectures, new algorithms, or new database management techniques
- Software and hardware product development related to communication and interaction
- Specialized technology design (e.g., image processing, artificial intelligence, or speech recognition)
- System software development (e.g., operating systems, compilers)

POTENTIALLY QUALIFYING R&D JOB TITLES

- Director of Software Engineering
- Programmer
- Senior Technical Leads
- Software Analyst
- Software Developers
- Software Integration Engineers

AMT OFFSET UP TO $250,000 IN PAYROLL TAX

For tax years beginning after December 31, 2015, eligible small businesses (those with $50 million or less of gross receipts) may claim the research credit against AMT liability.

UP TO $250,000 IN PAYROLL TAX

Qualified start-up companies may elect to use up to $250,000 of the research credit against payroll taxes. The U.S. Treasury Department released new regulations regarding internal use software (IUS) and its eligibility for the R&D tax credit. The clarification around IUS, which is defined as software used in general and administrative functions, makes it possible for additional software developers who were involved in internal use software development to be included in the R&D tax credit incentives.

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CASE STUDY

DEVELOPER OF SOFTWARE PRODUCTS AND PROCESSES

Annual Revenue: $6.5 Million

RESULTS:

$450,000

In Federal & State R&D Tax Credits
R&D TAX CREDITS: TOOL & DIE CASTING

GET TAX CREDITS FOR YOUR RESEARCH

Refunds are available for companies performing research within the Tool & Die Casting Industry. The research credit provides dollar-for-dollar cash savings each year for companies performing activities related to the development of new or improved products and processes. These benefits could provide much needed cash to hire additional employees, increase R&D, expand production facilities, etc.

Many companies involved with tool & die casting are unaware that their efforts within designing and developing their products can yield a large amount of research credits. Examples of R&D activities related to the industry as well as potentially qualifying job titles are listed below.

EXAMPLES OF QUALIFYING R&D ACTIVITIES

- Automating machining processes to optimize die casting times as well as reduce labor costs
- Designing, developing, and testing prototypes
- Developing operational efficiencies with the molding process
- Developing safety measures within the tool & die casting process
- Drafting new parts on computer-aided design (CAD) programs to model product specifications and functionalities
- Improving machining processes to ensure consistency among products
- Testing alternative or new raw materials to work with to improve product performance and useful life

POTENTIALLY QUALIFYING R&D JOB TITLES

- Design Engineer
- Die Cast Engineer
- Computer Numerically Controlled (CNC) Programmers
- Mechanical Engineer
- Manufacturing Engineer
- Process Engineer
- Quality Engineer

AMT OFFSET

For tax years beginning after December 31, 2015, eligible small businesses (those with $50 million or less of gross receipts) may claim the research credit against AMT liability.

UP TO $250,000 IN PAYROLL TAX

Qualified start-up companies may elect to use up to $250,000 of the research credit against payroll taxes. Treasury Regulations have substantially broadened the range of taxpayers who are eligible for the credit. Start-ups to publicly traded businesses who were previously unable to realize a benefit from this lucrative tax credit should reassess their eligibility.

CASE STUDY

DEVELOPER OF TOOL & DIE CASTING PRODUCTS AND PROCESSES

Annual Revenue: $5 Million

RESULTS:

$125,000

In Federal & State R&D Tax Credits
R&D TAX CREDITS:
WINERIES & VINEYARDS

GET TAX CREDITS FOR YOUR RESEARCH

Refunds are available for companies performing research within the Winery & Vineyard Industry. The research credit provides dollar-for-dollar cash savings each year for companies performing activities related to the development of new or improved products and processes. These benefits could provide much needed cash to hire additional employees, increase R&D, expand production facilities, etc.

Many companies involved with wineries & vineyards are unaware that their efforts within designing and developing their products can yield a large amount of research credits. Examples of R&D activities related to the industry as well as potentially qualifying job titles are listed below.

EXAMPLES OF QUALIFYING R&D ACTIVITIES
RELATED TO THE DEVELOPMENT OF NEW OR IMPROVED:

- Bottling, corking, and packaging processes
- Filtration and fermentation techniques
- Grape strains to achieve desired flavor or aroma profiles
- Irrigation systems
- Mixing techniques
- Organic ingredients, supplements, and nutrients
- Packaging designs to ensure shelf life longevity
- Preservatives to extend shelf life
- Product prototype batches to ensure manufacturability
- Quality assurance testing processes
- Recycling and waste management techniques
- Soil and rootstock processes
- Sustainable energy efforts
- Wine formulations

POTENTIALLY QUALIFYING R&D JOB TITLES

- Assistant Winemaker
- Bottling Line Supervisor
- Bottling Line Worker
- Cellar Master
- Cellar Worker
- Director of Winemaking & Production
- Enologist
- Lab Assistant
- Lab Manager
- Production Operations Manager
- Project Engineering Manager
- Winemaker

AMT OFFSET

For tax years beginning after December 31, 2015, eligible small businesses (those with $50 million or less of gross receipts) may claim the research credit against AMT liability.

UP TO $250,000 IN PAYROLL TAX

Qualified start-up companies may elect to use up to $250,000 of the research credit against payroll taxes. Treasury Regulations have substantially broadened the range of taxpayers who are eligible for the credit. Start-ups to publicly traded businesses who were previously unable to realize a benefit from this lucrative tax credit should reassess their eligibility.

ABOUT KBKG

KBKG is a national firm specializing in R&D Tax Credits, Cost Segregation, 45L Tax Credits, 179D Tax Deductions, Transfer Pricing, and other specialty tax incentives. Our engineers and tax experts have performed thousands of tax projects for clients, saving them hundreds of millions of dollars since 1999. As leading educators in our field, we have been invited to speak to thousands of CPAs and tax professionals by the most prominent associations in the industry.

GET MORE INFORMATION

KBKG can quickly review your situation to determine if there is an opportunity. To see if you qualify, call us today or visit our website at KBKG.com/qualify for more information.

CASE STUDY

DEVELOPER OF WINERY & VINEYARD PRODUCTS AND PROCESSES

Annual Revenue: $30 Million

RESULTS:

$250,000

In Federal & State R&D Tax Credits