

# Driving Your Firm's Success With R&D Tax Credits

How to Create Value and  
Ensure Compliance with  
Technology-Driven Studies



## Technology for the win

Technology is disrupting conventional systems in every field, and accounting is no exception.

Today, accountants can take advantage of a vast array of tools to make their jobs more efficient, consistent, and profitable. But how can technology help position you as a strategic partner to your clients?

Let's think about why they hire you in the first place. Clients look to you for expertise, responsiveness, and advice. They want help figuring out ways to save money while remaining compliant—not just to file returns during tax time.<sup>[1]</sup>

Because more businesses than ever before qualify for the R&D tax credit<sup>[2]</sup>, you can strategically advise more clients to claim it. Here's where technology makes you the hero. Specialized software simplifies access to this lucrative tax benefit, cementing your role as an indispensable advisor. Plus, it ensures consistent and thorough compliance with all requirements.

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*I REACHED OUT TO SEVERAL COMPANIES, BUT WAS NOT IMPRESSED. THEN I FOUND CLARUS R+D AND IT WAS AN ENTIRELY DIFFERENT STORY. EASY SOFTWARE. HELPFUL PEOPLE. REASONABLE FEES.*

— RICHARD CUMBERLAND  
Controller, Zupt LLC

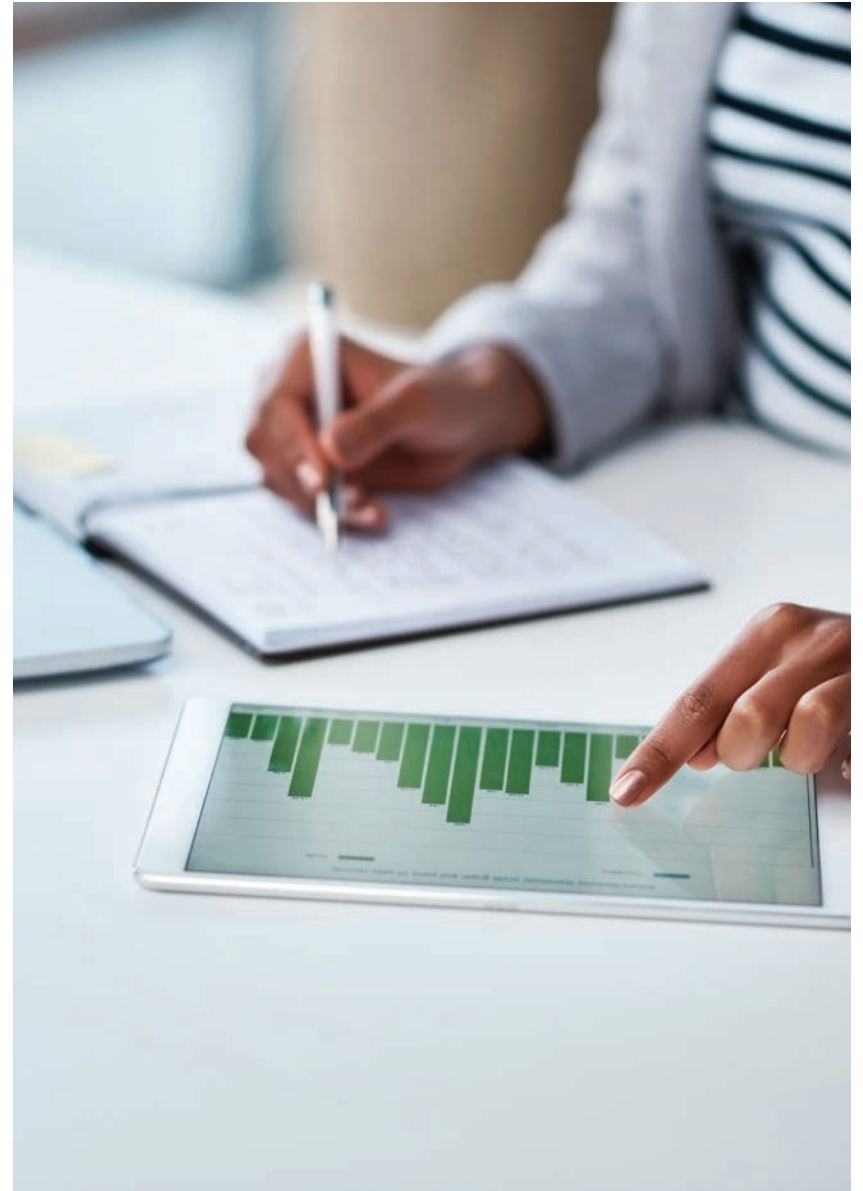


## R&D tax credits are worth it

The R&D tax credit has been around since 1981, yet businesses – especially SMBs and startups – continue to miss out.

Whether due to confusion over what qualifies or the cost of compliance, companies that miss the R&D tax credit are losing the opportunity to recover roughly 10% of their development expenses. This is a dollar-for-dollar credit against taxes owed – income, payroll, or AMT – and can be carried forward for 20 years.<sup>[3]</sup>

Imagine being able to link yourself to this compelling value for clients. Consider the positive impact to your firm's revenue potential. In the end, R&D tax credits are a win for everyone!

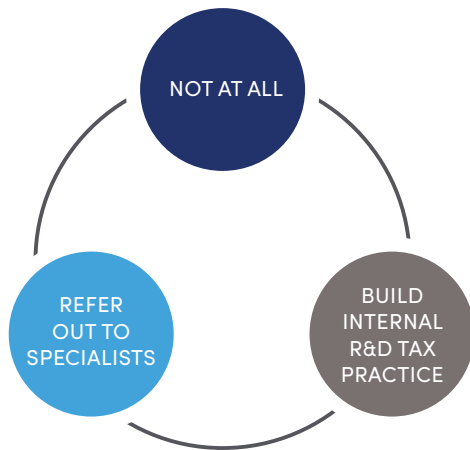




## The old way is not always the best way

Until now, accounting firms had limited options for handling R&D tax credits.

When it comes to R&D tax credits, firms typically handle them in one of three ways.



**Not at all:** When firms ignore the R&D tax credit, they not only miss the opportunity to create value, but they also fall short of expectations. Trust is eroded and clients are lost to competitors.

**Refer out to specialists:** Accounting firms that refer R&D studies to an outside specialist address the need, but jeopardize control of the client relationship. They also risk disassociation from the value created by the credit.

**Build internal R&D tax practice:** Then, there are the firms that decide to take on the full cost and risk of building their own teams, processes, and tools to handle R&D studies. While this creates real value for clients, it's often a large resource drain. Not to mention the audit exposure when requirements aren't met. Or the added responsibility of working with payroll providers to ensure clients receive their full benefit. Because what's worse than missing the credit entirely? Doing the work to claim it, but never monetizing it.

So, how can partnering with Clarus R+D solve these problems? Read on!



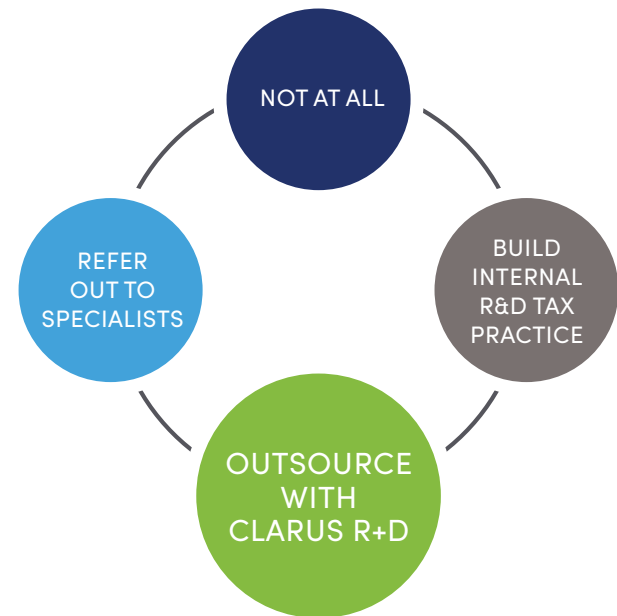
## Welcome to your streamlined R&D tax practice

**Your solution:** Outsource with Clarus R+D to power studies using our specialized software (and your clients will think it's all you).

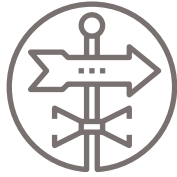
Clarus R+D provides you with all of the upside of a robust R&D tax practice and none of the hassles. Why reinvent the wheel?

As an outsource partner with Clarus R+D, you don't have the cost of creating or maintaining your own R&D tax practice. This means you don't have to hire extra personnel, figure out the complexities of the tax credit laws, or worry about compliance. Clarus R+D takes care of it all!

Moreover, Clarus R+D allows you to maintain control over the whole client experience. It's your brand and your relationship. You provide strategic value to your clients and in the process, grow your bottom line.



*YOU ARE THE  
FACE, AND WE  
ARE THE ENGINE.*



## How to make Clarus R+D work for you.

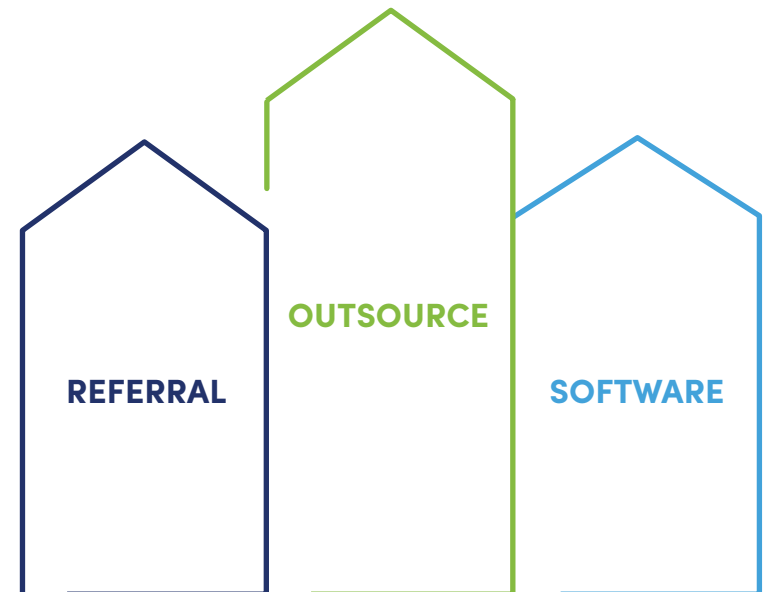
This all sounds good, right? Of course, but you may wonder where to start. Fortunately, you have choices.

**Partners work with Clarus R+D in three ways.**

**Referral:** A good way to start. Clarus is a trusted partner that performs R&D tax studies for your clients.

**Outsource:** Power your own R&D practice. Clarus provides technology and all the backend heavy lifting, but you present R&D as one of your service offerings.

**Software:** High tech autonomy. Use only our software to help you ensure compliance, drive efficiency, and increase profitability.





## Real-life scenarios prove it.

Talk is cheap, so let's illustrate the possibilities with a few authentic scenarios.

### SCENARIO 1:

You're a Top 100 CPA and advisory firm currently referring R&D studies out to several different specialists. Not all have gone well, which reflects poorly on you. You're considering building an internal R&D tax practice, but you're worried about hiring talent and taking on the risk. You decide to become an **outsource partner** with Clarus R+D for greater efficiency and revenue potential, while retaining ownership of client relationships.

### SCENARIO 2:

You're a small accounting firm with SMB clients in the technology and manufacturing space. You know they're eligible for the R&D tax credit, but you struggle with capturing this value for them. To keep their business, you search for a proven, efficient R&D tax solution. Now, as an **outsource partner** with Clarus R+D, you confidently deliver R&D studies for clients. And your staff is winning new business with education, collateral, and sales support from Clarus R+D.

### SCENARIO 3:

You're a contract CFO firm for startups, and you've just launched a small tax practice. Many of your clients qualify for the R&D credit, but your limited tax practice cannot handle the studies. To ensure clients capture the credit, you look for a specialist with a trusted, cost-effective solution. After becoming a **referral partner** with Clarus R+D, your clients consistently maximize their R&D benefit and your firm receives a revenue share.

Our technology-driven R&D tax solution creates meaningful value for your clients and a low hassle revenue stream for your firm.



To schedule a demo, contact [partners@clarusrd.com](mailto:partners@clarusrd.com)  
or visit [www.clarusrd.com/partners](http://www.clarusrd.com/partners).

**Sources:** [1] Journal of Accountancy, "What Clients Want from CPAs"; [2] Accounting Today, "A Practical Guide to the Enhanced R&D Tax Credit Program for Small Businesses and Startups"; [3] CPA Academy, "R&D Tax Credits: Making the Juice Worth the Squeeze for SMBs"

