

# WHO MAKES A GREAT QUALIFIED CLIENT AND WHY

## RESEARCH & DEVELOPMENT (RD):

### Minimum Requirements:

- U.S. firm with over \$500k in annual payroll
- Results: Average savings of \$20k-\$40k/year for every \$1M in total payroll(tax money back)

## PROPERTY TAX (PT):

### Minimum Requirements:

- Commercial property with in excess of \$30k / year of real and personal property taxes
- Results: Average reduction of 15%

## COST SEGREGATION (CS):

### Minimum Requirements:

- Purchased or built within the last 20 years with \$500k plus cost
- OR renovations/improvements within the last 20 years of \$250k plus
- AND has paid fed tax w/in last 3 yrs. or plans to in current
- Results: Average savings is \$75k for every \$1m in purchase price or construction cost.

## HIRING INCENTIVE (HI):

### Minimum Requirement:

- Employers with at least one new hire/year

- Results: Employers generally can earn a tax credit equal to 25% or 40% of a new employee's first year wages, up to the maximum for the target group to which the employee belongs

## CREDIT CARD (CC):

### Minimum Requirements:

- Potential clients must annually process in excess of \$500,000 in credit card payment volume
- Results: 100% success rate in identifying savings with average of 21% savings per client

## WASTE & RECYCLING (WR):

### Minimum Requirements:

- Companies with a waste expense in excess of \$500 per month in waste and or recycling fees.

## WORKERS COMPENSATION (WC):

### Minimum Requirements:

- Companies that have an average workers compensation premium of \$40k or above and are fully insured
- Results: 70% of all companies have been or are currently overcharged for Work Comp

## WHAT INCENTIVES WILL THESE BUSINESSES QUALIFY FOR?

AUTO DEALERS – CS/CC/PT

HOTELS – CS/CC/PT

MANUFACTURING – RD/PT/WC/CC/WR

ENGINEERING - RD

RESTAURANTS – CC/HI/PT/WC/WR

ONLINE RETAILERS - CC

ARCHITECTS- RD

CONTRACTORS – RD/WC

STAFFING/PEO - HI

SOFTWARE – RD

CHEMICAL – RD

PHARMACEUTICAL – RD

RETIREMENT HOMES – CS/PT

SHOPPING MALLS – CS/PT/WR

FUNERAL HOMES – CS/PT

GROCERY STORES – CS/PT/CC/WR

GOLF COURSES – CS/PT/CC

MEDICAL FACILITIES – CS/PT/CC/WR

CONSTRUCTION – WC/CC

HOSPITAL – CC/WR



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