YOUR
LOGO

**COMPANY NAME**

R&D TAX-CREDIT ANALYSIS PROPOSAL

Prepared by:

**[Client Name]**

**[Contact information]**

**[Date]**

# Introduction

Thank you for considering [Your Company Name] to support your organization with r&d tax credit analysis proposal. We deliver effective, compliant, and scalable financial operations solutions.

This proposal outlines our approach to delivering r&d tax credit analysis proposal for [Client Name].

# Project Objectives

- Identify and maximize eligible R&D tax credits
- Reduce tax liabilities and reinvest savings
- Ensure full documentation and audit-readiness

# Proposed Services

- Technical interviews and project qualification
- Financial analysis and cost segmentation
- IRS-compliant documentation and report prep
- Filing support and audit defense (if needed)

# Scope of Work

- Discovery and eligibility review
- Interviews with engineering/accounting
- Credit calculation and documentation
- Filing and submission support

# Timeline

Proposed project timeline:

|  |  |  |
| --- | --- | --- |
| Phase | Description | Estimated Date |
| Discovery | Review projects and identify qualifying work | [Start Date] |
| Analysis | Calculate expenses and document findings | [Date] |
| Filing | Prepare forms and submit to tax authority | [Completion Date] |

# Pricing

Estimated cost breakdown:

|  |  |  |
| --- | --- | --- |
| Service | Description | Cost |
| Discovery | Initial review and eligibility mapping | [Amount] |
| Documentation | Prepare technical narratives and costing | [Amount] |
| Filing & Support | Submit and defend credit claims | [Amount] |
| Total Estimated Fee |  | [Total] |

# About Us

[Your Company Name] has secured over $10M in credits for innovation-focused firms.

# Case Studies / Testimonials

Generated $350K in R&D credits for a mid-sized robotics manufacturer.

# Terms and Conditions

Terms: Contingent fee or fixed rate model available. NDA and cooperation required.

# Acceptance

To approve this proposal and initiate services, please sign below.

Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
Name: [Client Name]
Title: [Title]
Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_