



R&D Tax Optimization Case Study

Maximizing Credits with Compliance and Confidence

The Challenge

Organizations underclaimed R&D tax credits due to unclear eligibility, poor documentation, and high perceived compliance risk.

Insight Partners' Approach

- Eligibility assessment across qualifying activities
- Technical documentation and nexus analysis
- Credit calculation and audit-ready support
- Alignment with tax and finance leadership

Quantified Impact (Single Tax Year)

Financial

\$3.6M R&D credits identified
100% compliance with regulatory standards

Risk & Compliance

Audit-ready documentation delivered
Reduced exposure and rework

Why Insight Partners

- ✓ Deep technical and regulatory expertise
- ✓ Conservative, defensible credit positions
- ✓ Seamless collaboration with finance teams
- ✓ End-to-end ownership from analysis to filing

Insight Partners LLC
Great moves start with insights