

Winery R&D Tax Credit Prospecting Guide

Brewery R&D Credit Pitch

"Hey quick one-has your brewery ever claimed federal R&D tax credits for your brewing process?" Most brewers think R&D is just for biotech and software, but the IRS loves rewarding small breweries that experiment with new recipes, processes, or production systems. If you're innovating anywhere in the brewing process, you could be owed a serious chunk back-up to 3 years retroactively.

We help breweries get those dollars with minimal disruption. You brew, we recover."

Brewery Call Script

Opening:

"Hi [Name], I work with craft breweries to help them recover federal R&D tax credits-often worth tens of thousands per year. If I could ask you just 3 quick questions, I can tell you if this would apply to you."

Qualifying Questions:

1. Do you experiment with new beer styles, yeast strains, or fermentation methods?
2. Have you implemented or modified brewing or packaging equipment?
3. Do you track data to improve consistency, shelf stability, or production yield?

If YES to any:

"Those are exactly the kinds of activities the R&D credit was designed to reward. Most breweries are surprised to find out how much they qualify for. Would you be open to a no-cost estimate of what your potential claim looks like?"

Brewery R&D Qualifier Cheat Sheet

Potential R&D Activity	What to Look/Ask For
New beer formulations	Do you experiment with different styles, hops, or yeast strains?
Process improvements	Tried to improve fermentation time, clarity, or production yield?
New equipment testing	Installed or modified brewing, keggling, or canning equipment?
Sustainability efforts	Used water/energy-saving equipment or processes?

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Quality control methods	Track batch data to improve consistency or avoid spoilage?
Packaging innovation	Updated your bottling, labeling, or packaging systems recently?