

PRE-STUDY SURVEY

WHEN ANSWERING THIS PRE-STUDY SURVEY, PLEASE BE AS ACCURATE AS POSSIBLE.

CONTACT INFO

COMPANY NAME:

CUSTOMER NAME:

CUSTOMER TITLE:

COMPANY INFO

EMPLOYEES OR CONTRACTORS IN/OUT US (YES OR NO):

STATES OF OPERATION:

ENTITY TYPE (C CORP, S CORP, PARTNERSHIP, SOLE PROPRIETORSHIP, PBC):

ACCOUNTING PERIOD:

YEAR FOUNDED:

YEAR OF FIRST GROSS RECEIPTS:

WERE THE TOTAL GROSS RECEIPTS FOR THE MOST RECENT TAX YEAR ABOVE OR BELOW \$5 MILLION?

DO THE SAME FIVE OR FEWER OWNERS TOGETHER OWN ANY OTHER BUSINESS(ES)?

PAY ROLL PROVIDER:

TAX PREPARER FIRM:

BRIEFLY DESCRIBE THE R&D ACTIVITY (PRODUCT, PROCESS, SOFTWARE DEVELOPMENT, ETC.):

WHAT YEAR DID WORK BEGIN ON THE R&D ACTIVITY MENTIONED ABOVE?

LAST YEAR'S SPEND ON THE ACTIVITY (ESTIMATED)
- R&D EMPLOYEE W2 WAGES:

LAST YEAR'S SPEND ON THE ACTIVITY (ESTIMATED)
- U.S. BASED R&D CONTRACTING:

LAST YEAR'S SPEND ON THE ACTIVITY (ESTIMATED)-
R&D DISPOSABLE SUPPLIES:

DOES YOUR COMPANY FUND THE RESEARCH:

DOES YOUR COMPANY RETAIN THE IP RIGHTS TO THE RESULTS:

ARE THE QUALIFIED RESEARCH ACTIVITIES COMPLETED IN THE US?

CLAIMED R&D TAX CREDIT IN THE PAST?

CLAIMED EMPLOYEE
RETENTION TAX CREDIT?

HOW DID YOU LEARN
ABOUT BOWERS R&D?
PLEASE CHECK THE
CORRECT RESPONSE:

SEARCH ENGINE (GOOGLE,
YAHOO, ETC)

LINKEDIN

BOWERS R&D REP
REACHED OUT

REFERRAL

IF REFERRED, PLEASE
NOTE WHO REFERRED YOU
TO BOWERS R&D:

.....

THANK YOU!
WE LOOK FORWARD TO HELPING YOU
SEND LESS TO THE IRS!

