

R&D Tax Credit

Traditionally, many firms spend countless hours:



Combing through multiple spreadsheets
collecting qualifying wage and expense data



E-mailing clients back and forth to gather R&D business component details and methodology

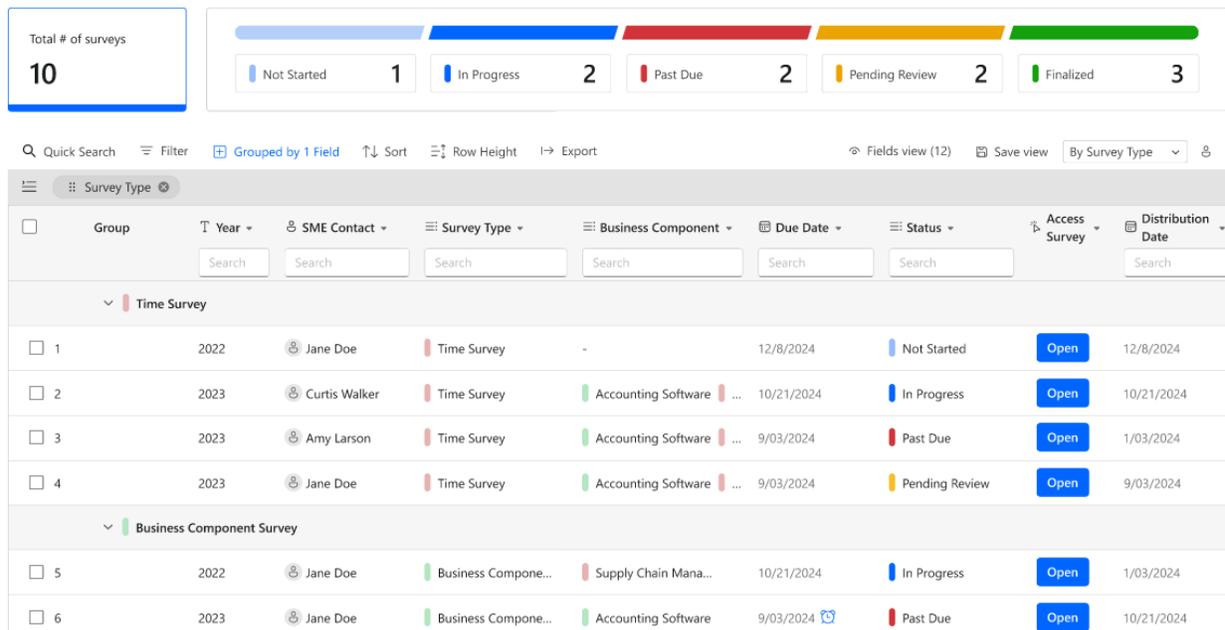


Teleconferencing and calling client subject matter experts to clarify outstanding questions and other details

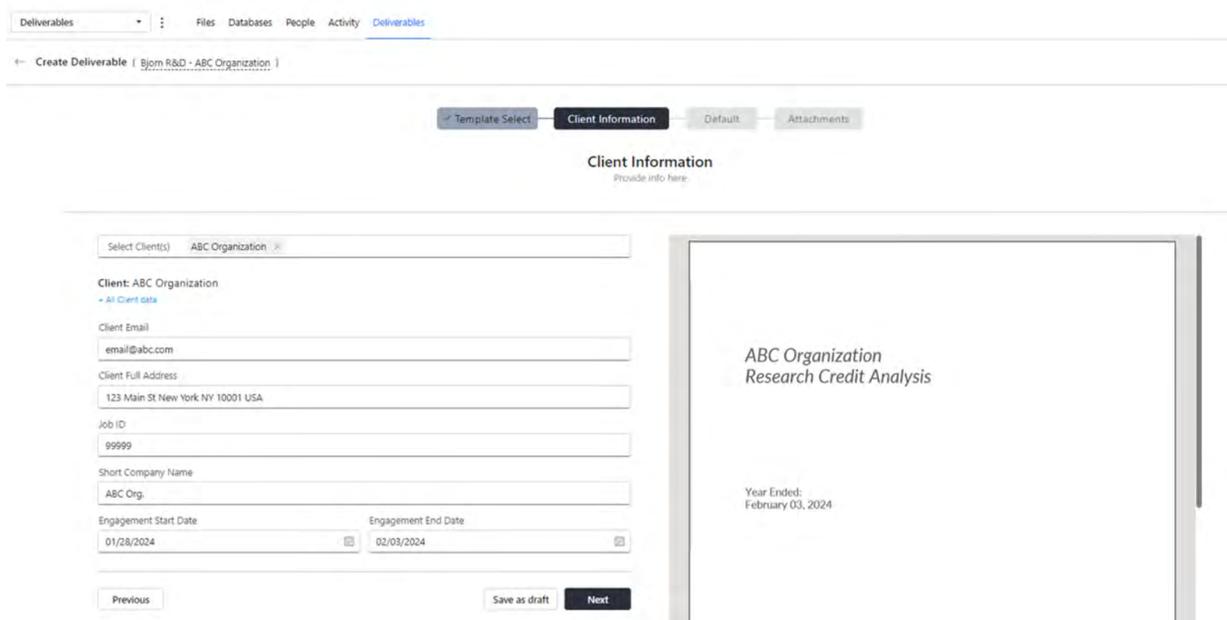
With **HubSync's Research & Development (R&D) Tax Credit module** firms can streamline the complex process of collecting, organizing, and submitting R&D tax credit data supporting taxpayer claims sent to the IRS for processing.

How It Works:

HubSync's Survey dashboard provides firms a holistic view of all surveys, complete with statuses and other data:



- ⚡ **R&D Data Management:** Firms leverage HubSync's Data Management tools to organize and maintain their client, business component, and qualified expense data for multiple clients within a single module.
- ⚡ **Customized Client Surveys:** Powered by HubSync's Survey feature, firms create, distribute, and collect client R&D questionnaires enabling the firm and their clients to share important qualitative and quantitative R&D data.
- ⚡ **HubSync's R&D Tax Credit Deliverable Wizard** introduces a robust document generator, complete with scalable templates and in-app integration, where firms can build comprehensive IRS R&D tax credit claim submissions for each client.



The screenshot shows the 'Create Deliverable' interface for 'Bjorn R&D - ABC Organization'. The 'Client Information' step is active, with a progress bar showing 'Template Select', 'Client Information', 'Default', and 'Attachments'. The form fields are as follows:

- Select Client(s): ABC Organization
- Client: ABC Organization (with a link to 'All Client data')
- Client Email: email@abc.com
- Client Full Address: 123 Main St New York NY 10001 USA
- Job ID: 99999
- Short Company Name: ABC Org.
- Engagement Start Date: 01/28/2024
- Engagement End Date: 02/03/2024

Buttons at the bottom include 'Previous', 'Save as draft', and 'Next'. A preview of the document on the right shows the title 'ABC Organization Research Credit Analysis' and 'Year Ended: February 03, 2024'.

What's Next!

In 2024, HubSync is excited to introduce new features to the R&D Tax Credit module, including:

- ⚡ **R&D Tax Credit Calculations**
- ⚡ **Qualified Data Automation**
- ⚡ **Survey and Deliverable Routing**
- ⚡ **Analytics**