



Specialty Tax Services Checklist For Your Clients

Before sending your client's tax return for signature, make sure you have reviewed the return for eligibility for the credits, incentives, and tax-saving possibilities described below.

DOES YOUR CLIENT:	YES	CLIENT BENEFIT:
Design, develop, or improve a product, process, technique, formula, invention or software?	<input type="checkbox"/>	May qualify for federal and state R&D Credits .
Export goods or services?	<input type="checkbox"/>	May qualify for various federal export incentives .
Pay sales tax?	<input type="checkbox"/>	Most likely has overpaid their sales tax bill , and could be eligible for significant cash refunds, as almost every state has numerous manufacturing sales tax exemptions available which most clients don't know about.
Have operations in multiple states?	<input type="checkbox"/>	Most likely has overpaid their state income tax .
Have manufacturing operations in the U.S.?	<input type="checkbox"/>	May qualify for various federal and state manufacturing incentives .
Have employees in federal or state regions designated for economic development?	<input type="checkbox"/>	We can conduct a preliminary analysis to determine if the client is eligible for one or more of a variety of employment-based credits offered by the federal government and various states.
Face an audit or dispute with any federal or state taxing authority?	<input type="checkbox"/>	alliantgroup can help you and your clients successfully resolve any federal or state tax controversy .



www.alliantgroup.com / 800.564.4540

Houston · New York · Los Angeles · Chicago · Boston · San Francisco

Seattle · Orange County · San Diego · Miami · Washington D.C.

Montreal · Atlanta · Denver · Phoenix

If the answer is "yes" to any of the above questions, your client may be eligible to receive thousands of dollars from the government in the form of credits, deductions, and incentives. alliantgroup is the nation's premiere specialty tax consultancy, bringing added value to CPA firms by helping their clients take advantage of federal, state, and local tax credits and incentives.