R&D Eligibility Cheat Sheet

Software-as-a-Service Companies

SaaS

Has your company undertaken any of the following activities?
If yes, you may be eligible for R&D tax credits.

Development

☑ Built or tested a beta version or prototype
☑ Integrated applications/databases that don't typically communicate
☑ Received RFQs from your customers
☑ Saved specs, meeting notes, reqs, etc. from development activities

Products & Processes

☑ Designed/developed new software or improved existing software
☑ Customized existing software to meet a customer's specifications
☑ Changed or improved a process to reduce costs, improve capabilities, boost output, or drive efficiency, accuracy or timing

Hiring/Outsourcing

☑ Employed computer engineers, programmers or data scientists
☑ Hired technical staff to market and sell your products
☑ Contracted third-party techs or companies for software development
☑ Paid for outside specialists to assist in testing

Research & Testing

☑ Purchased routers, servers or other equipment needed for development or testing that have not been capitalized or depreciated
☑ Performed research required for government or industry approval
☑ Paid for third-party cloud computing to enable development or testing

MY SAAS ADVISOR

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