

Opportunity Checklist



FIXED ASSET SERVICES

YES

NO

- | | YES | NO |
|----------------------------------------------------------------------------|--------------------------|--------------------------|
| 1. Purchased or constructed a building with a cost in excess of \$750,000? | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Made renovations to your facility in excess of \$200,000? | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Maintaining depreciation records for a large number of fixed assets? | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Are you paying more than \$50,000 in property taxes? | <input type="checkbox"/> | <input type="checkbox"/> |



R&D TAX CREDITS

- | | YES | NO |
|-------------------------------------------------------------------------------------------|--------------------------|--------------------------|
| 1. Do you employ degreed chemists, engineers, programmers or scientists? | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Do you develop and/or improve new products or processes? | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Do you build prototypes, jigs, dies, or models to test or evaluate? | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Do you incur raw material costs during the product development or improvement process? | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. Do you subcontract any engineering or testing functions? | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. Do you develop or customize software in house or with a third party vendor? | <input type="checkbox"/> | <input type="checkbox"/> |



GLOBAL BUSINESS SERVICES

- | | YES | NO |
|-----------------------------------------------------------------------|--------------------------|--------------------------|
| 1. Do you have operations, facilities, or business activities abroad? | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Do you sell product abroad? | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Do you file forms 5471, 5472, 8865, 926, or W-8BEN? | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Are you behind on compliance filing? | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. Do you have existing or future cross-border structures, including: | | |
| a. U.S. companies expanding into overseas locations? | <input type="checkbox"/> | <input type="checkbox"/> |
| b. Non-U.S. companies expanding into the U.S.? | <input type="checkbox"/> | <input type="checkbox"/> |



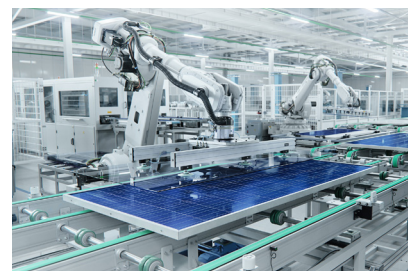
LOCATION ADVISORY SERVICES

- | | YES | NO |
|-----------------------------------------------------------------------------|--------------------------|--------------------------|
| 1. Are you adding 25+ jobs over 5 years? | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Will you buy, lease, expand, or build a new facility over the next year? | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Are you acquiring or merging with another business? | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Will your company purchase \$3M+ in new equipment? | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. Are you relocating operations? | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. Do you plan to train new employees? | <input type="checkbox"/> | <input type="checkbox"/> |

Industries We Serve



With diverse practice areas and a deep technical bench, McGuire Sponsel delivers solutions that add value for a wide range of industries and company sizes. All four practice lines are built to enable leading firms to strengthen client relationships with a conservative and methodical approach to specialty tax.



INDUSTRY	Fixed Asset Services	R&D Tax Credit Services	Global Business Services	Location Advisory Services
Agricultural Properties				
Architectural Engineering				
Assisted Living				
Auto Dealerships				
Automation & Robotics				
Construction				
Data Centers				
Food Processing				
Healthcare				
Hotels & Resorts				
Industrial & Distribution				
Life Sciences & Biotech				
Manufacturing & Machining				
Multi-family				
Restaurants				
Technology & Software				