

# Stay Competitive With Greater Tax Savings For Your Clients

You know your clients. You are their trusted advisor with unique insight into their history, preferences, and goals. To provide the comprehensive service they expect from a CPA, you need tax specialists on your side.

## Partner of Choice for Maximizing Credits

At CTI, we complement your consultancy with elite tax professionals and skilled incentives program management, all with the transparency you require to nurture client relationships.

### Dedicated Resources & Services



**All-Star Expert Team**  
of legal, engineering, science,  
accounting & finance



**Client Retention**  
as control of the relationship  
remains in your hands



**Dashboard Reporting**  
with 24x7 access to clients'  
tax project data in real-time



**Proactive Management**  
with personal engagement to  
secure unequalled returns



**Flexible Methodology**  
founded on a framework  
configurable to your needs



**Workflow Automation**  
to optimize efficiencies with  
secure, in-house software

### PRIMARY AREAS:

- WOTC/Hiring Credits
- R&D Tax Credits
- Cost Segregation
- Investment Credits
- Training Grants

*“ Their competency exceeds any national CPA firm due to their specialization, and they are very professional and trustworthy. ”*

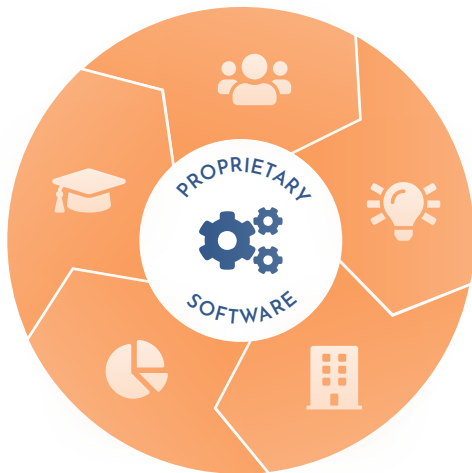
– Partner, SF CPA Firm

You Don't Have to Go It Alone...

Call 866-444-4880 to partner with CTI's experienced tax pros.

## Add Unmatched Value with CTI

We specialize in securing all the tax credits, exemptions, grants, refunds and deductions to which your clients are entitled.



**Employment Incentives:** Benefits for job creation, capital investment, and hiring people with certain barriers to employment



**Research & Development Incentives:** Reduce taxes with qualified business expenses related to research and development activities



**Cost Segregation:** Generate tax and financial savings for clients by identifying previously overlooked benefits from purchased assets



**Discretionary Incentives:** Offered at state and local levels to attract business, usually for full-time job creation and capital investment



**Training Incentives:** Your clients may be able to offset employee training costs, while improving the skill-level of their employees

## Exceed your Clients' Goals

From our vast experience of working with CPAs, we have identified several activities and thresholds that can make your client's business an ideal candidate for benefiting from a CPA-CTI partnership.

- Annual employee hires > 750
- Employee training (> 40 trainees in a single state)
- Operations in a federal, state, or local enterprise zone
- Develop or improve products, processes, or software
- Design or enhance techniques, formulas, or inventions
- Property acquisition/leasehold improvements > \$500K
- Annual military hires > 75 (US hires only)
- New job creation (> 25 jobs in a single state)
- Expand, consolidate, or relocate operations
- Research & development spending
- Active tax audits: income, sales, or property tax
- Major capital expenditures

## Let Us Help You Power Your Clients' Success

*Want to learn more about partnering with CTI's elite tax professionals?  
To broaden your portfolio and rival competing service providers, contact  
a CTI tax consultancy specialist today at 866-444-4880.*

