

As a business grows or matures, they may find themselves undergoing a tax audit; needing assistance with compliance, due date tracking and tax return preparation; or questioning their tax due diligence in the event they are being sold. During various transactions, tax accountants help to alleviate the burden businesses may encounter from federal, state and international tax jurisdictions.

Overview of Our Tax Services



Income Tax Compliance We file income tax returns for businesses ranging in size from startup to multinational entities. Our client businesses include corporations, partnerships, S-corporations and LLCs. We also help owners of controlled foreign subsidiaries prepare and file the appropriate U.S. reports to ensure they are in full compliance with the law. If a business enters a new state and they are unsure if they need to register and file for income tax, we can perform a nexus review to determine if filings are required. If so, then we can file the necessary returns.



Income Tax Planning We provide consulting for a range of tax issues including business planning, M&A due diligence, accounting methods, R&D tax credits, nexus reviews and voluntary disclosure agreements.



Income Tax Accounting (aka ASC 740) We provide quarterly and annual support for income tax provision calculations, including assistance with the preparation or review of the income tax provision, uncertain tax position determinations, valuation allowance assessments, tax basis balance sheet support and purchase accounting resulting from a business combination.

Our Service Approach

To ensure your tax compliance process is operating in a timely, accurate and efficient manner, a partner or senior manager is involved on each engagement. To alleviate the burden on our clients, we also maintain a paperless process from start to finish. Additionally, all of our workpapers are prepared and documented using CCH software tools, which is the standard among Big Four accounting firms. This robust software enables us to keep up-to-date with new tax laws, as well as to improve efficiency and increase productivity across the tax preparation process.

What Businesses Should Look for in a Tax Team

You should seek a tax provider who is proactive and organized, assessable and responsive, and who values relationships. Since the majority of our business is acquired through referrals, we highly regard our clients. We make every effort to exceed your expectations.

About Our Tax Team

Our accountants have extensive experience with tax-related issues for corporations and pass through entities. Team members leverage their experience from Big Four accounting firms and private companies to better understand our clients' needs, which enables us to tailor our services accordingly.

Who We Serve

Our client mix is a direct reflection of the Austin marketplace, which means we serve both public and private companies in the following industries:

- Biotech
- Retail
- Venture Capital
- Manufacturing
- Software & Technology

Software and technology companies are among our most diverse group of clients because they provide support for other industries, including energy, healthcare, education, gaming and cyber security.



We have served **more than 60 tax clients** over the last three years.

CASE STUDY

A rapidly growing technology company was unsure whether or not they qualified for the federal and Texas Research and Development Tax Credit (aka R&D tax credit).

Our tax team analyzed the company's R&D spend over a three-year period and was able to calculate a sizable R&D tax credit for each of the years. We prepared the amended tax returns to claim the credits that had not been taken on the originally

filed returns. We then delivered an R&D tax credit study to document the calculation of the credit and support the position taken in each tax return.

The result? Our client received an unexpected and sizable refund on the taxes paid in each year. The process we put into place will calculate and support prospective R&D tax credits in the coming years.