



## Acena Consulting - Strategic Tax Review

Please answer the following questions related to various incentives and/or compliance issues for federal and state tax purposes. All answers will be kept confidential and used only to help identify potential tax credits, additional deductions or compliance issues.

Company: \_\_\_\_\_ Date \_\_\_\_\_

<u>Question</u>	<u>YES</u>	<u>NO</u>	<u>Comments</u>
Have you developed or improved on your products, processes, formulas, software or inventions?			
Do you have a system that tracks people and hours by development project?			
Is the company profitable?			
Did you buy or construct a building or make a significant improvement to a building in the last year?			
Did you purchase capital assets in the last year?			
Did you spend less than \$800,000 on your capital asset purchases last year?			
Has your building decreased in market value in the last year?			
Do you export products outside the US?			
Do you have international operations?			
Is 50% of the value of your product derived from international sources?			
Is your product incorporated into another product that is exported outside the US?			
Have you implemented ISO9000 or Lean Manufacturing?			



Question	YES	NO	Comments
Do you have an online tracking system for Continuous Improvement efforts?			
Do you have federal compliance standards to track and report on a periodic basis (i.e. FDA, USDA)			
Do you design or build government facilities or schools?			
Have you performed a line-by-line telephone audit in the last 2 years?			
Do you spend in excess of \$1,000,000 for telecommunications and computer services each year?			
Do you know if your business or real property is located within an Enterprise Zone?			
Have you acquired a company during the last year?			
Do you currently complete your FAS109/FIN48 in-house?			
Do you have multi-state offices, sales or employees?			
Have you reviewed your sales tax exemptions and invoices in the last 3 years?			
Do you manufacture, produce or develop your own products and you have taxable income in the current year?			
Do you have net operating loss carryover or credits carryover and have substantial ownership change within the last three years?			
Do you design or manufacture products for the alternative energy market?			

Contact Name: \_\_\_\_\_

Contact Phone: \_\_\_\_\_ Email: \_\_\_\_\_

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*"Integrity Counts, Relationships Matter"*