

## SOFTWARE

# Tech Company Trumpets CTI's Expertise & Excellence for Maximum R&D Credits

140 DEDICATED  
EMPLOYEES

38,000 LOYAL  
CUSTOMERS

\$451,997 IN FEDERAL & STATE  
CREDITS

## Vagaro's Challenge

### → Tracking Down Documentation

After nearly ten years in business, Vagaro's new CPA realized the company possessed potential for significant tax savings through R&D credits. But capturing those credits would not be an easy task: the previous CPA was no longer around, and the supportive documentation was in disarray or not readily accessible.

### → Meeting the Statute of Limitations Deadline

They had a lot of loose ends, missing documents, a new CPA without the company's previous files – and time was critical. They needed to determine how close the company was to their statute of limitations' (SOL) deadline to file for the credits – current year +3 years back Fed, current year +4 years back CA state.



**COMPANY NAME:**  
Vagaro, Inc.

**INDUSTRY:**  
Information Technology

**TYPE:**  
Beauty & Fitness  
Business Software

**LOCATION:**  
CA

**IN BUSINESS SINCE:**  
2009

**Reach out to a CTI Tax Specialist Today!**

*To learn how your technology firm can qualify, call CTI at 866-444-4880.*





## The Solution

### → Called in a Tax Specialist

The new CPA felt this situation called for CTI's expertise and brought in its principal member Taz Singh to take charge and decrease Vagaro's tax liability. After witnessing Taz's step-by-step approach, the company's Director of Compliance knew CTI would get the job done.

### → Captured Maximum Credits

CTI realized they could capture credits back to 2014 for state credits and 2015 for federal credits. With a great sense of immediacy, CTI began to piece together the puzzle. They reached out to the previous CPA and scoured years of documentation. With an extensive effort put forth, CTI secured valuable CA state credits, capturing more than Vagaro thought possible.

## The Result

Between 2014 and 2018, CTI captured **\$451,977 in total R&D credits** for the business. As Vagaro's Director of Compliance stated, the company needs to "take every penny" they can get. And CTI delivered. He said, "I could not be happier with the results."

CTI performed expert due diligence, "went the extra mile," and delivered more R&D tax credits than what Vagaro anticipated. The DoC said that CTI's professionalism, audit protection, and ability to discover so many tax credits brought him confidence.

He was also impressed with CTI's consistent availability, Taz's prior experience, and the dedicated project manager's personalized service. He appreciated that any questions, at any time, were answered without delay.

The Director of Compliance believes that "business is business, but business relationships need some type of personal touch," and CTI provided that from the start. He feels "CTI is good at what they do...can maximize the amount of credits you can get...and they're always there for you."



**"I really liked the audit protection, operating with the knowledge that CTI stands behind its work. Audit protection, personal relationships, and the ease of the step-by-step process...I could not be happier with the results."**

— Adam Zachs, Director of Compliance, Vagaro, Inc.

## Powering the Success of Your Business

*Want to learn more about partnering with CTI's elite tax professionals?  
To see how tax incentives can drive opportunity and reduce costs for your business, contact a CTI tax consultancy specialist today at 866-444-4880.*

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