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R&D READINESS CHECKLIST

Are you R&D-Ready?
Let's make sure you can check all the necessary boxes.

- Do you create or improve custom designs, processes, equipment, or technology? ☐ Yes ☐ No
- Does your team test, prototype, or refine solutions? ☐ Yes ☐ No
- Do technical staff spend time on problem-solving or iteration? ☐ Yes ☐ No
- Can you estimate or document how much time is spent on that work? ☐ Yes ☐ No
- Do you track project stages (design, testing, improvements)? ☐ Yes ☐ No
- Have you filed for the R&D credit in the past? ☐ Yes ☐ No
- Are you open to amending returns for past years (if needed)? ☐ Yes ☐ No

SCORE:

☐ 6–7 Yes = You're ready

☐ 3–5 Yes = Worth exploring — let's talk

☐ 0-2 Yes = Let's see what we can uncover

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