



# MASSIE

Since in 2004, Massie has focused on finding innovative solutions to the R&D tax credit that Make it Easier on our client's Subject Matter Experts, Tax Departments and even the IRS. Over the years, they set the bar high when it comes to client engagement and employee happiness. But as the business matured, so too did the competition. It became increasingly clear that a change was in order if Massie was going to keep its position as category leader.

We were tasked with determining the viability of—and ultimately executing on—a brand positioning that could appeal to new customers without alienating the existing core audience, thus growing the customer base and driving long-term growth.

# MARKET ALIGNMENT

Overall, the branding for your market is relatively updated and will probably continue to change with time. Typically companies update their branding/websites about every 5 years. Since it looks like most of your industry has done this in the last 3 years, you are in a unique position to be trend setters for the next round of updates or follow those before you.

From our market analysis, the blue dot would be the ideal location for your new company to grow. By providing a proven way to do R&D Tax Credits, you will be desirable to larger companies while your cost effective approach and innovative side will keep middle size companies interested.

We recommend having a brand that is a little bolder than most to stand out from the crowd - something with a little more personality than BDO and Tax Credit, but keeping their professional and friendly tone.

Our new brand approach, to focus on being innovators and engineers, already puts us a step in the right direction.



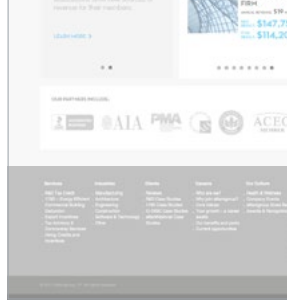
## EVERY BRAND IDENTITY STARTS WITH COMPETITIVE RESEARCH

Competitive research is a vital foundation for any branding project as it provides crucial context for differentiation in the marketplace. By analyzing competitors' visual identities, messaging strategies, and positioning, designers can identify both gaps in the market and oversaturated approaches to avoid. This intelligence allows for the creation of truly distinctive brand identities that stand out while still meeting industry expectations, ultimately ensuring the new brand will effectively capture its intended audience's attention in a crowded marketplace.

> Colors:



Applied Imagination



## COMPETITOR 3: BDO

BDO is a close competitor to MASSIE. Their branding is clean, modern, and consistent. Most of their photography is high-end stock which gives them more of a big corporate and polished feel while maintaining a distinctive look. Their site looks a little cookie-cutter and has good organization, structure, and typography.

Over all I would say BDO is a good middle of the road standard and starting point build your branding from.

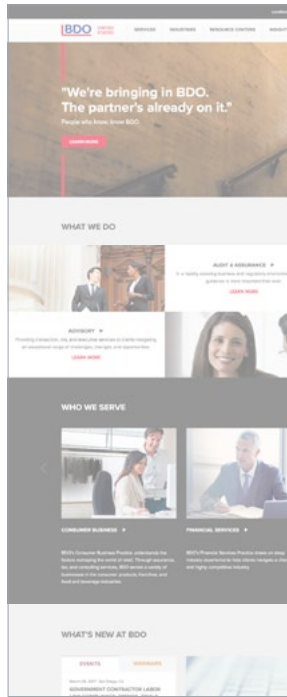
> Logo: Custom Typography



> Colors:



Applied Imagination



## COMPETITOR 5: KPMG

Like PWC, KPMG is a large CPA firm. Their branding is very corporate with a big box feel - kind of a one size fits all approach. While their brand isn't super new and modern, it looks like it has been updated in the last 5 years. Their photography is a little all over the place in style and feels very standard stock heavy. But they use it to give their site color instead of using their brand colors. The typography is a little dated and can be a hard to read at times.



# COMPETITOR 4: PWC

PWC is one of the BIG4 accounting firms. They have a large, corporate brand with lots of inconsistencies. Half of their website was updated in late 2016. With this update, they pushed their brand into a more corporate direction but gave a semi-friendly tone to their messaging. Their primary color is red, their design is fairly modern, but overall lacks creativity and structure. They use a lot of stock photography and have a traditional style for their typography.

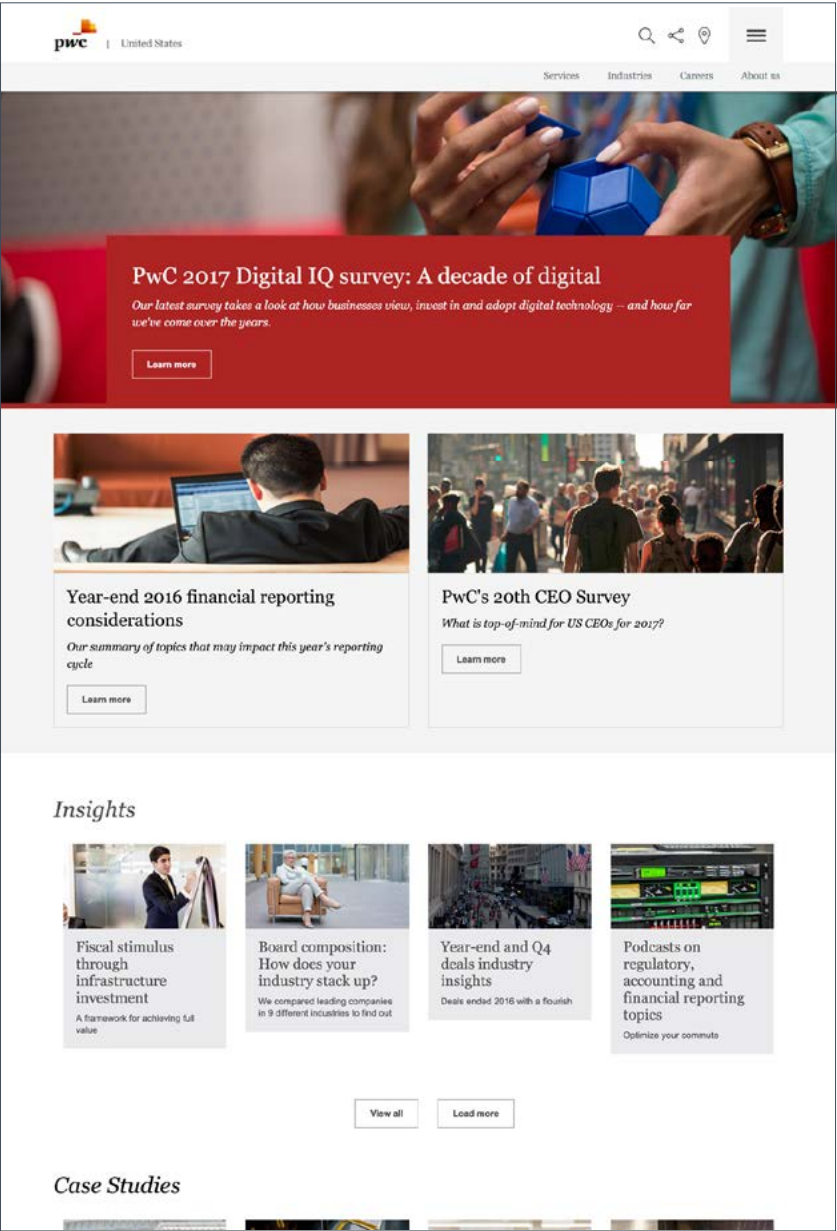
> Logo: Typography and Icon



> Colors:



Applied Imagination



## MISSION STATEMENT

This statement will act as your brand promise to your customer and will show your main drive/goal as a company.

*MASSIE R&D Tax Credits' mission is to redefine how your company handles R&D Tax Credits. Using the proven MASSIE Method – a customized way to educate and train SMEs to provide real time documentation of their R&D activities using web technologies - we innovate, optimize, and simplify the process.*

*We encourage greater participation and buy-in from SMEs to save you time, money, and reduce the workload on your tax department. With better supporting information, you can expect larger tax credits, more accurate estimates, and smoother audits.*

## PRIMARY MESSAGE

Below is a clear statement of what you do. This serves as your opening statement and main marketing pitch. This statement is supported by your secondary messaging.

*We apply the MASSIE method - the proven way to innovate, optimize, and simplify R&D Tax Credits.*



## DEFINING THE BRAND APPROACH

Messaging and tone of voice are the verbal DNA of a brand, establishing its distinct personality and emotional connection with audiences where visual elements alone cannot reach. A strategically crafted voice creates consistency across all touchpoints, ensuring recognition while communicating values that differentiate a brand from competitors and transform functional relationships into meaningful emotional bonds.

companies and added in the latest technology, our ingenuity, and an engineer's approach to simplify and optimize R&D Tax Credits.

- Customized solution, instead of one size fits all
- Encourage greater SME participation with an easier process
- SMEs submit documentation in real time, which provides greater detail
- SME's note everything in their own words, instead of a CPA middle man
- Using latest Web Technologies for training, documentation location, and follow ups

Benefits of the MASSIE Method

- Accurate tax credit estimates
- Yield larger credits

The different types of services you provide

- Full Outsource - You can outsource your R&D Tax Credits to us
- Large CPA Firm to In House Transition - We can help you transition away from outsourcing so you can handle it internally
- MASSIE 64 Point Reverse Audit - We can Credit a tune up by evaluating where you improve and untimely yielding higher credits
- MASSIE Controversy Services - We can help you resolve conflict with the IRS
- State Tax Incentive Group - We can also help you

## TONE OF VOICE: PERSONAL EXPERT

What your target person is looking for. Someone who they can trust, who is educated, an expert in the field, who is transparent about issues, and provides helpful knowledge and educational material.

What basic human value does your company offer? You love helping your clients change the world, one innovation at a time. While providing them with the best values of all, more of their own time, money, and peace of mind.

How is the way you work different? By educating SMEs on how to compile data on a quarterly basis with the latest online technology, customized solutions, and department incentives, you get a process that is as easy as possible for everyone involved. In doing this, you encourage more participation, get comprehensive supporting documentation, receive larger tax credits, and have smoother audits.

A few words that your values boil down to?

Innovative	Intelligent	Excellence	Passion
Helpful	Caring	Intuitive	Transparent
Analytical	Professional	Efficient	Experts

Your brand personality is a **Personal Expert**, **comprehensive**, and **transparent**, but gives

Why Personal? Because you are people helping people. The core benefits to the MASSIE Method is you provide time saving options for your fellow accountants so they know their time is valuable.

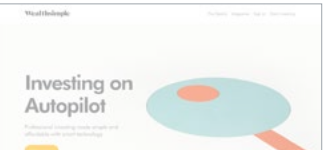
Why Expert? Simply put that is who you are. Your target market is looking for. So go ahead and use the industry lingo but remember to stay friendly and remember to help them, as a person not just the company.

Through various studies we have learned that people in the B2B or B2C, tend to favor naturalistic language. Technical terms are needed because they are necessary, but wherever possible, consider using everyday language. Your personal, helpful, caring, and passionate approach will give your audience a sense of trust while they are an educated expert they need.

## SITES AND BRANDS FOR INSPIRATION

### COMMON ELEMENTS:

- Lots of White Space
- More Color
- Brighter Colors
- Modern
- Thin and Simple
- Large Images



## SECONDARY MESSAGING

Below are a few quick statements of what you do and how you are different from competitors. These act as key benefits of using the proven MASSIE Method.

1. **Better SME participation through training and real time documentation.**
2. **Better supporting documents that holds up to the scrutiny in audits**
3. **Better results with less effort on your tax department**
4. **Better planning with accurate tax credit estimates**
5. **Better R&D Tax Credits**

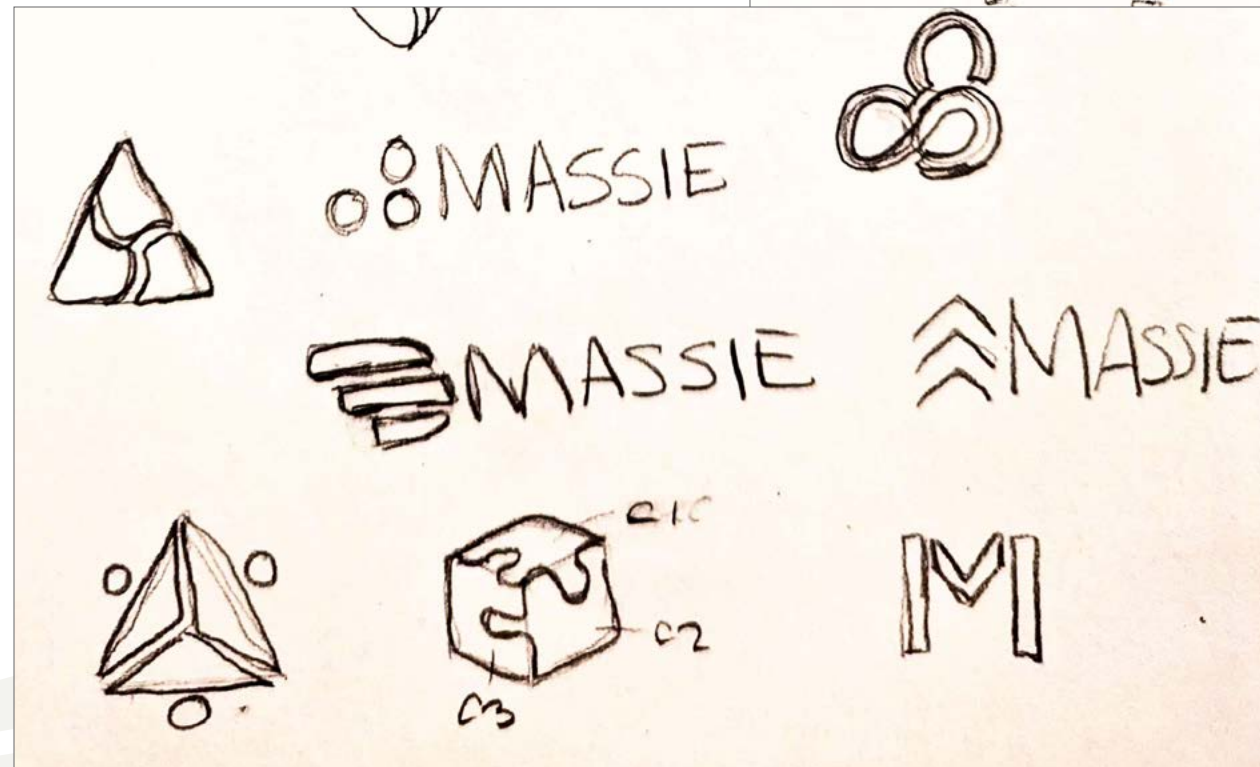
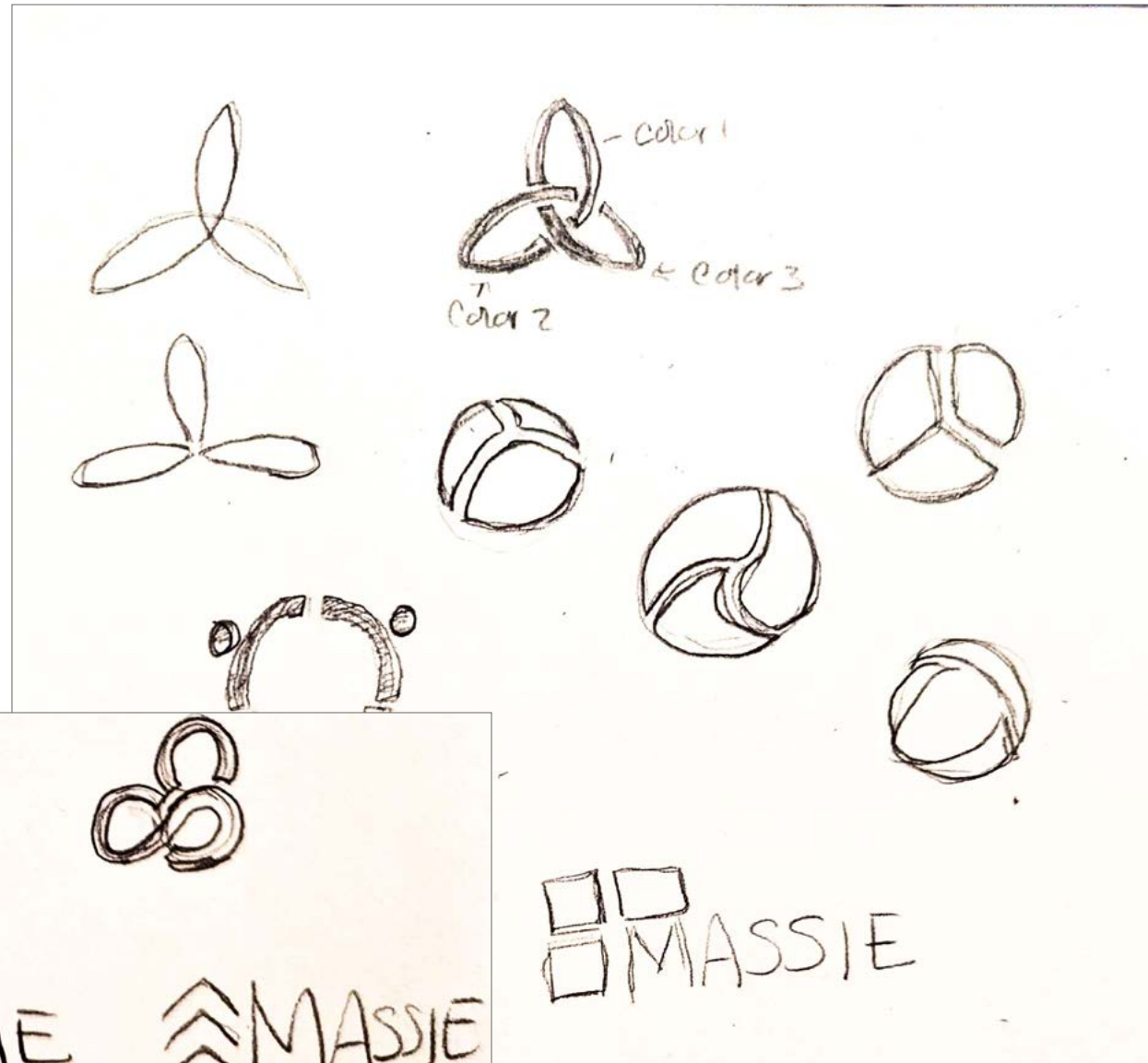
## TAGLINE

Your tagline is your elevator pitch. It serves as a quick, short summary of your key messaging statement and/or mission statement.

**Innovation in R&D Tax Credits**

Your chosen tagline not only says what you do (R&D Tax Credits), but how you do it through innovation. This simplifies your primary message into one quick statement that is positive, remember able, and easy to understand. While it hints to your method with the word innovation it also gives your company a personal connection with your target market.

To speak further to your target market, innovation also provides a sense of strength and proven method. Which helps ease their decision of switching to a smaller company. Lastly, innovation also provides a hint of who you are. You're a group of innovative experts who approach R&D Tax Credits from an Engineer perspective instead of a CPA's.



## EACH LOGO STARTS WITH MANY SKETCHES & IDEAS

I believe sketching is the foundational step in logo design where raw creativity flows without technical constraints. Quick hand-drawn explorations allow designers to rapidly test multiple concepts, capturing the essence of ideas while they're fresh and discovering unexpected visual solutions that might not emerge when working directly on computer. This organic process builds stronger conceptual foundations for distinctive logos.

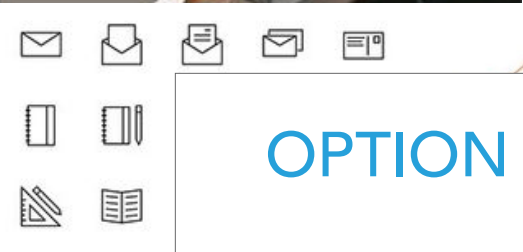
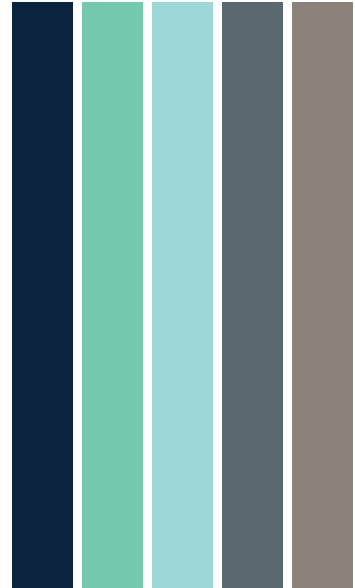
Once I feel I have found 5-10 solid ideas I move to digital exploration.



## DEFINING THE BRAND APPROACH

GMessaging and tone of voice are the verbal DNA of a brand, establishing its distinct personality and emotional connection with audiences where visual elements alone cannot reach. A strategically crafted voice creates consistency across all touchpoints, ensuring recognition while communicating values that differentiate a brand from competitors and transform functional relationships into meaningful emotional bonds.





# OPTION 1: WE ARE PEOPLE

Most of your industry have brands that are very corporate, which tends to be a little cold and lack that human to human communication. Our idea behind this direction is “what makes our method different from the rest is we care about you, your time, and your success”.

We propose having people-focused, middle to high-end photography with warm tones. This will give your brand that personal touch everyone wants in a partner. Using the tangible side of your branding to soften your look will allow you more freedom to nerd out on all the messaging.

Compared to your competitors, this option is the most different with a warmer color pallet that has a pop, tech focused colors, and soft spoken typography. To break out of the mold, we suggest using the shapes in your logo icon to overlap and interact with photography. Large photography and bands of color will off-set loads of whitespace. The end result will really make you stand out.



## MOOD BOARDS

Mood boards serve as visual anchors in the branding process, translating abstract brand attributes into tangible reference points that align client expectations with design direction. They create a shared visual language between stakeholders and designers, preventing misunderstandings while establishing an emotional foundation that guides all subsequent design decisions toward a cohesive brand identity.



## WE OFFER DIFFERENT SERVICES

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ALTERNATE ENERGY

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CHEMICAL RESEARCH

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LOOKING AN ADEQUATE SOLUTION

## OPTION 2: WE ARE ENGINEERS

This option really pushes your brand into the technology world while maintaining a big corporate feel.

The recommended color pallet has it's heart in the technology world, while pairing it with high-end, clean photography, gives you the large company feel that you are looking for. To add in a little more of a personal touch we suggest using a slab serif font and large, monochromatic icons. Because your look isn't that friendly, we recommend using more everyday language with your messaging.

With this direction, your target market of accountants for engineers and technologists, will feel right at home.



### ABOUT US

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- Our Company Growth
- 1000 employees

- Our Company Growth
- Customer Relationship

ABOUT US

### FREQUENTLY ASK QUESTIONS

WE offer luxury service to our customer. Namque porta ipsumque elit, qui doloem ipsum quia dolor sit amet, consectetur, adipiscing elit, sed quis non ipsumque elit. Read more

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## WE ARE PASSIONATE

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## OPTION 3: WE ARE INNOVATION

For our final option, we wanted to live up to your new tagline "Innovation in R&D Tax Credits". This option pushes the visual boundaries of your industry while maintaining an expert level of knowledge in your messaging.

The foundation of this direction comes from two places. First, we bring out the white board to think through new ideas. So let's have lots and lots of white space. Second, let's take the Web2.0 look to the next level with a fresh approach at how we use photography, color, icons, and textures.

All your photographs should be vibrant and have an almost teal high (similar to the one in the color pallet). This will insure that even your photography is on brand. The most important part is the images should be of people working in the industries you are targeting. Why? You do what you love so they can do what they love. Color elements should always interact with each other and photography with an overlay effect. To add a touch of engineering, we are using real objects as textural patterns. Finally your typography should have a clean and clear since of hierarchy.

This direction truly shows your innovative side. Anyone looking at your brand will know you use the latest technology, provide customized solutions, and simplify a complex process.



# OUR BRAND GUIDELINES

THE MASSIE BRAND IS OUR COMPANY'S  
MOST VALUABLE ASSET

APRIL 2017



## BRAND GUIDELINES

Brand guidelines are created to establish consistent identity standards that protect visual and verbal cohesion across all brand touchpoints. They transform subjective design decisions into clear governance tools that empower teams to create on-brand materials independently. This documented system preserves brand equity while ensuring audiences experience the same recognizable identity regardless of where they encounter the brand.

# CORE BRAND ELEMENTS

A brand is not just the mark — it’s a collection of words, images, and ideas that create a distinct and meaningful identity. It is our best tool for connecting with people in a way they understand.

## BRANDMARK

The brandmark is one very important element we use to visually reinforce our brand. Using the brandmark correctly and consistently within various market channels protects and strengthens the brand’s equity and value.

Our brandmark is made up of two elements: the three color celtic knot and the typography.

The typography is derived from a custom font to reinforce MASSIE’s customized solutions. Using all caps for our mark gives the impression of strength to our customers. Overall the brandmark is modern, dynamic, professional, and strongly positions us in the innovation industry.



BRANDMARK COLORS: ■ PMS 1655 C ■ PMS 3245 C ■ PMS 7704 C ■ PMS 432 C

## BRAND COLORS

Our color palette plays a huge role in the look of the MASSIE brand. We designed our color palette to distinguish us from our competition and to reinforce our appearance as a innovative, passionate, and professional company.

Use MASSIE Blue for featured headlines and key messaging. Use MASSIE RED to draw attention to callouts and dividers. Use MASSIE TEAL for subheadings and callouts. Use MASSIE Gray to complement the entire look and when you need a neutral “resting spot” for the brandmark or body copy. Use the secondary support palette to enhance the primary colors when necessary.

Use the color palette to support a consistent experience of the brand. Colors may vary depending on paper stock and screen calibration.



## BRAND FONTS

Our primary typeface is Lato - a Google Font. It provides a wide range of font weights, giving it the flexibility to be used throughout brand communications to maintain an underlying consistency. When in doubt, use Lato.

Use Domus Regular for main headlines — never for body copy. Write primary headlines in capitals, as shown throughout this document. Restrict use of italics unless they’re absolutely necessary.

For general copy, we prefer Lato Light; however, for legal copy or other smaller text where type may be hard to read, you can also use Lato Regular as an alternative.

**Typeface For Electronic Media:** For on-screen use only, such as in Web-based communications where brand fonts are not available, use Arial as a substitute.

DOMUS REGULAR:

ABCDEFGHIJKLMNOPQRSTUVWXYZ  
OPQRSTUVWXYZ

LATO LIGHT:

ABCDEFGHIJKLMNOPQRSTUVWXYZ  
OPQRSTUVWXYZ

LATO BOLD:

ABCDEFGHIJKLMNOPQRSTUVWXYZ  
OPQRSTUVWXYZ

EXAMPLE:

SUBSECTION  
HEADERS UP  
TO 3 LINES

SUBHEADERS WITH UP  
TO TWO LINES OF COPY

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## BRAND COLLATERAL

After establishing the brand strategy and visual identity, clients select brand collateral to implement the rebranding. This step is crucial for launching and communicating the new brand to internal teams and external audiences.

These materials can be both physical and digital, including:

**Physical items:** business cards, packaging design, flyers, brochures, stationery, signage

**Digital items:** social media templates, email signatures, website design, infographics, digital marketing materials

### OUR EXPERTISE COMES IN MANY LEVELS

- FULL OUTSOURCE**  
MASSIE will handle everything from start to finish with an innovative approach, making the process easier on everyone, giving you greater results.
- CO-SOURCING**  
MASSIE can partner with your tax department providing expertise, the latest technology, and manpower to gain larger credits.
- BIG 4 TO IN-HOUSE**  
We help you break from expensive accounting firms by giving you the tools, training, and support to manage your tax credit claims internally.
- REVERSE AUDIT**  
Our 64-Point Reverse Audit program will provide your company with a valuable SVQOT analysis for you to correct errors and strengthen your claim.
- STATE TAX INCENTIVES**  
We are specialists with the Georgia Retaining Tax Credit, along with other Hiring, Training, and Investment tax credits in all 50 states.
- TAX CONTROVERSY**  
We can defend and represent you in every type of R&D tax credit issue with taxing authorities, including audits, appeals, and litigation.

"MASSIE was able to come in, interview people in various departments, obtain the cost information, create the necessary documents, and put together an amazing presentation to support the deduction that was easy to follow and understand. When we were audited I was able to just hand the documents over to the IRS with very little commentary. The entire credit amount was accepted."

**ROBERT HOWREN**  
Director of Tax at BlueLine Corporation in Atlanta, GA

**GET THE CREDIT YOU DESERVE**  
For more detailed information on how MASSIE can help maximize your R&D tax credits we invite you to visit [massietaxcredits.com](http://massietaxcredits.com). Or better yet, give us a call and talk to one of our tax experts in person.

**HOW TO REACH US**  
678.807.7228  
155 Brightmore Way, Ste 100  
Alpharetta, GA 30005  
[info@massietaxcredits.com](mailto:info@massietaxcredits.com)

**INNOVATE, OPTIMIZE, AND SIMPLIFY YOUR R&D TAX CREDIT**

**MASSIE** Innovation in R&D Tax Credits

### WHAT WE DO

We deliver an innovative tax credit experience giving our clients the most value possible, with the least amount of time and effort on their part.

### HOW WE DO IT

We continuously focus on innovative ways to make our tax credit services easier on everyone involved. We focus, we customize solutions. We seek new technologies. We engage with the best in our industry to gain and share knowledge.

### WHY WE DO IT

We enjoy leveraging our knowledge and experience to create value-driven solutions for our clients. Our clients are changing the world - one innovation at a time, and we're proud to be a part of it.

Our nation was built on innovation. The R&D tax credit was enacted to ensure continued technological advancement for the growth and prosperity of industry, and this great country.

Our mission is to ensure you get all the credit you deserve in part out of these advancements.

### WHO WE ARE

Jason Massie and Peter Green, with their team of tax specialists, have over 100 years of combined experience with complex tax processes, audits, and litigation. This gives you the peace of mind that your tax credits will be handled comprehensively, efficiently, and accurately with the end goal of realizing the maximum amount of qualified tax credits for your business.

**Jason Massie**  
Founder & President

**Peter Green**  
CEO

### THE MASSIE METHOD ADVANTAGE

Take advantage of the MASSIE Method to generate larger tax credits and smoother audits by leveraging more SME participation, a streamlined process, and real-time documentation.

#### MORE MONEY

Our MASSIE Method encourages more participation from SMEs resulting in better documentation on more projects, which leads to larger credits. We investigate your company's R&D activities, going beyond the biggest and most obvious projects, uncovering more pockets of R&D qualified activities and qualified expenses.

#### LESS TIME

We know the right people to interview, the right questions to ask, and the right areas to pursue. We learn and work within your processes, your systems, and your culture while minimizing interruptions, but still maximizing data gathering.

#### DONE RIGHT

With over 100 years of experience with experts in tax coding, audits, and case law. Our electronic, searchable, and ready-to-use report facilitates any audit. Making it easy to respond to the IRS quickly and comprehensively with minimal effort for your tax department.

### THE THREE PHASES OF THE MASSIE METHOD

#### PHASE 1: SITUATION ANALYSIS AND ASSESSMENT

First, we spend time learning your industry, your corporate culture, what products and services you share, type of work, and company processes. After research and interviews, we design a plan that involves SME reporting and data gathering with minimum disruption.

#### PHASE 2: SME TRAINING AND DATA COLLECTION

With our user-friendly reporting tool, SMEs record activities regularly with greater detail and in their own words. They note supporting documentation, where data is stored, and where time is being spent. This transparency gives your tax department more insight and visibility with less involvement.

#### PHASE 3: COMPREHENSIVE FINAL REPORT

Lastly, we review all documentation to ensure it reflects an accurate picture of all projects. All supporting documentation is delivered in an electronic, searchable, and ready-to-use report. Allowing you to answer the IRS quickly and comprehensively, making audit easier, less expensive, and less time consuming for everyone involved.

### SIX BENEFITS OF THE MASSIE METHOD

1. Maximized R&D Tax Credits
2. Less Effort for Your Tax Department
3. Comprehensive Documentation
4. Cost Effective
5. Accurate Tax Credit Estimates
6. Smoother Audits

# STATE TAX INCENTIVES

"I have found MASSIE to be very knowledgeable in regard to the credits and helpful in assisting us to maximize benefits. This, of course, has been welcomed by our staff. However, the attribute that sets MASSIE apart is that they work exceptionally well with our operations personnel and minimize demand on their time in quantifying and appropriately supporting our credits."

**JON DICKINSON**  
P.E., Chief Financial Officer at Geosyntec Consultants in Boca Raton, FL

At MASSIE, our experts have over 100 years of tax credit experience, spanning a variety of complex tax credit services. In addition to our R&D Tax Credit services, MASSIE also offers training, hiring, and investing tax credit services to our clients in all 50 states.

Our nationwide tax credit database allows us to look at all training, hiring, and investment activities and identify the many opportunities available to you, not only on a state by state basis, but on a county by county basis, including Opportunity Zones, Military Zones, Enterprise Zones, etc.

### STATUTORY INCENTIVES:

We provide a custom analysis of top credit opportunities based on your business footprint and activity. This gives you the confidence you are not missing incentives you should be claiming.

### NEGOTIATED INCENTIVES - COMPLIANCE:

Our negotiated incentives compliance services investigates all past negotiated incentive packages. We dig deeper into the compliance details to ensure that your reporting will be handled correctly to get you the maximum credit from past negotiated incentive packages.

We specialize in the most complex credits such as Georgia Quality Jobs Credits and Retraining tax credits, as well as full 50 state tax credit opportunity analysis reviews.

Our State Tax Credit Incentive Group (STInG) has the knowledge and experience to prepare even the most complex tax credit opportunities.

**SOME LUCRATIVE CREDITS WORTH NOTING:**

- Arizona Quality Jobs Tax Credit Program Credit
- Georgia Quality Jobs Credit
- Georgia Retraining Tax Credit
- Georgia Investment Tax Credit
- Georgia Jobs Tax Credit
- Kansas Promoting Employment Across Kansas (PEAK) Withholding Credit
- Louisiana Enterprise Zone Credits
- Mississippi Jobs Tax Credit
- Missouri Works Withholding and Income Tax Incentives
- Pennsylvania EDS Job Creation Tax Credit
- South Carolina New Jobs Credit
- Tennessee Industrial Machinery Credit
- Tennessee Standard Jobs Credit
- Tennessee Enhanced Jobs Credit
- Tennessee Super Credit
- Virginia Major Business Facility Job Credit

### WHO WE ARE

Jason Massie and Peter Green, with their team of tax specialists, have over 100 years of combined experience with complex tax processes, audits, and litigation. This gives you the peace of mind that your tax credits will be handled comprehensively, efficiently, and accurately with the end goal of realizing the maximum amount of qualified tax credits for your business.

**Jason Massie**  
Founder & President

**Peter Green**  
CEO

**GET THE CREDIT YOU DESERVE**  
For more detailed information on how MASSIE can help maximize your R&D tax credits we invite you to visit [massietaxcredits.com](http://massietaxcredits.com). Or better yet, give us a call and talk to one of our tax experts in person.

**HOW TO REACH US**  
678.807.7228  
155 Brightmore Way, Ste 100  
Alpharetta, GA 30005  
[info@massietaxcredits.com](mailto:info@massietaxcredits.com)

**MASSIE** Innovation in R&D Tax Credits



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MASSIE

PRESENTATION TITLE & CONTENT

MASSIE



# PRESENTATION TITLE SHORT

SUB HEADER COPY BE A LITTLE  
LONGER BUT 2 LINES MAX

July 3, 2017

MASSIE

## SLIDE TITLE FOR CONTENT LEFT AND GRAPHIC RIGHT

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## TODAY'S AGENDA

Presenters: Jason Massie and Peter Green

AGENDA

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...edonec vel blandit...

AGENDA ITEM 2

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ITEM NUMBER 3

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AGENDA ITEM 2

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# THANK YOU





## OUR SERVICES

Let our experts help you get  
your R&D Tax Credits  
on the right path to success

FULL OUTSOURCE  
CO-SOURCING  
BIG 4 TO IN-HOUSE  
REVERSE AUDIT  
TAX CONTROVERSY  
STATE TAX INCENTIVES



*Innovation in R&D Tax Credits*



## SIX BENEFITS OF THE MASSIE METHOD

- 1 MAXIMIZED  
R&D TAX CREDITS
- 2 LESS EFFORT FOR  
YOUR TAX DEPARTMENT
- 3 COMPREHENSIVE  
DOCUMENTATION
- 4 COST EFFECTIVE
- 5 ACCURATE TAX  
CREDIT ESTIMATES
- 6 SMOOTHER AUDITS

