



Case Study: Driving R&D Credit Value for a SaaS Innovator

R&D Credit Calculations and Supporting Documentation Engagement

The Challenge

The client had previously worked with a provider who took a less attentive approach and even missed an entire year of analysis, leaving valuable credits on the table.

Our Approach

Smith + Howard implemented a comprehensive subject matter expert interview cycle and conducted detailed data analysis to uncover all eligible activities. This process minimized the client's workload while ensuring that no opportunities were overlooked, enabling us to deliver a more complete and accurate result.

Results Delivered

Secured approximately \$840,000 in combined federal and Georgia state tax credits for the most recent tax year.

The Takeaway

The client experienced measurable tax savings and improved confidence in their R&D tax credit strategy.

**Education
Technology**

INDUSTRY

\$38M

ANNUAL
REVENUE

Atlanta, GA

LOCATION



SMITH+HOWARD

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