TaxOps Minimization

Tax Saving Strategies for Dynamic Companies

Who we are

- An award-winning tax specialty firm helping dynamic businesses claim tax credits, deductions and deferrals
- Industry-leading experience, audit-ready techniques, and senior-level attention
- Higher value deliverable at a more cost-effective price than the Big Four
- Generating countless millions of dollars in income and tax savings

Leverage our knowledge

- Over two decades of success maximizing tax savings in ways that often go undetected by other firms
- Specializing in biotech, energy, engineering, manufacturing, pharmaceutical, software, and technology
- Referred by other CPA firms to perform specialty work in areas outside the referring firm's core expertise

Specialties & advisory services

- Research & Development Credit
- IRS & State Controversy Assistance
- Net Operating Loss and Tax Credit Planning (§ 382/383 Limitations)
- Uniform Capitalization

What our clients say

"One Big Four firm stopped pursuing us as an R&D credit client when they learned we had switched from another Big Four firm to TaxOps. The great work done by Mark Dunning, Jamie Overberg, and the TaxOps' team is well-known in the industry."

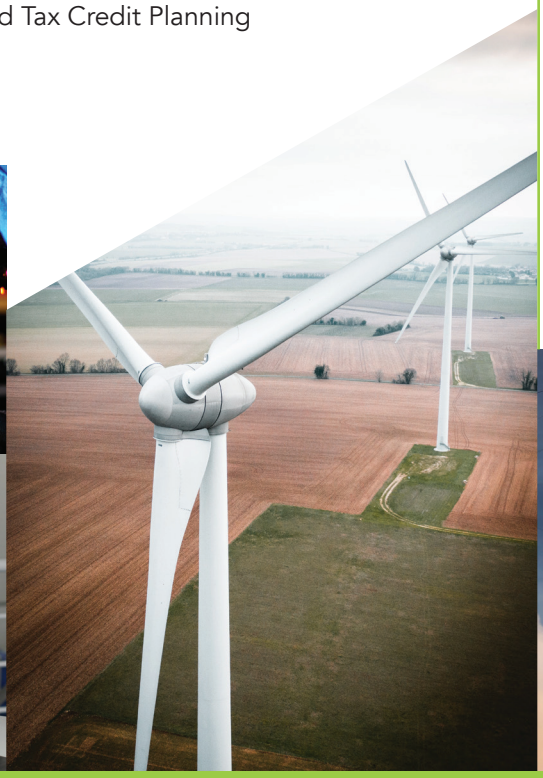
~Kawasaki Motors Corp., U.S.A.

"…We initially chose TaxOps over other Big Four firms due to their R&D experience, responsiveness and attention to detail...TaxOps interviewers get in and get out quickly, minimizing disruptions at Ancestry. Additionally, our TaxOps team has had very little turnover, providing comfort and a friendly face to our engineers and IT professionals. TaxOps has also provided IRS controversy assistance with successful results. We are both fortunate and happy to have TaxOps working with us."

~Ed Gwynn, Vice President of Tax, Ancestry

"I have had the pleasure of working with the TaxOps team for a few years in connection with several companies. They have done a terrific job identifying the opportunity for R&D tax credits and working with our technical team to get the information necessary while minimizing the impact to our team. They are very responsive and professional. Thanks for the value you provide."

~Bill Guerry, Chief Financial Officer, ThinkIQ



Custom-fit Solutions

Research & Development

Unlock the financing potential of R&D credits. These dollar-for-dollar federal and state credits return billions of dollars in benefits to businesses engaged in qualified research and experimentation, up to 5 to 8 cents for every dollar spent in qualified expenses. Available to U.S. taxpayers in an unlimited amount, these lucrative credits go unclaimed by companies with eligible expenses each year. We qualify and quantify activities by associate per component and project, allowing us to uncover additional expensing categories and increase net R&D credit returns.

R&D payroll tax offset

Small and start-up companies claiming the R&D credit can use the R&D credit to offset the employer's portion of payroll taxes instead of waiting until they have taxable income. The company is only eligible for a total of 5 years, cannot have been generating revenue for more than 5 years, and cannot have $5 million or more in revenue to take this offset.

R&D process

Repeatable processes and automation efficiencies allow us to get in, get done, and get out fast, saving youtime, money, and hassle. We perform the R&D study on your timeline and deliver all reports, schedules and memos before the tax return deadline. You'll receive an audit-ready study indexed for easy record retrieval in an integrated framework that satisfies nexus recordkeeping requirements. Our efforts extend to modifying your income tax provision estimate, making us a one-stop shop for public companies.

IRS Controversy Assistance

We work with national and local tax authorities to manage audits and develop workout plans for settling outstanding tax issues and manage pre-filing agreements. Our positive rapport with field agents and tax authorities across the country helps smooth negotiations, resulting in better outcomes for our clients.

Net Operating Loss and Tax Credit Planning

Businesses with accumulated net operating losses (NOLs) and tax credits could find access to these tax benefits limited by IRC § 382/383 without proper planning. § 382/383 studies measure when a limitation arises, and the allowable amounts, related to business events that include ownership changes and funding activities. § 382/383 studies support the amount of deferred tax assets from NOLs or credits in financial statements, tax returns, and transaction due diligence.

Uniform Capitalization

Optimize your calculation methods for capitalizing overhead costs associated with inventory and lower your tax obligations.

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We thrive on client referrals and respect the client relationships of referring firms. TaxOps Min is a division of TaxOps, giving you access to additional tax specialists on-demand. Capture significant savings with all your tax specialists under one roof, collaborating on your behalf.