



# RESEARCH & DEVELOPMENT INITIAL QUALIFICATION

## GENERAL INFORMATION

* Contact Name:		Today's Date:	01/26/2021
Contact Phone:		Contact Email:	
* Company Name:			
Website:			
Address:			
City:		* State:	
Zip Code:		Country:	
* CPA		CPA Firm	
Has your business previously qualified for R&D Tax Credits?		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
<b>ATTN:</b> IF <b>YES</b> , only fill out the section titled <a href="#">What is Research &amp; Development?</a> located directly below with a description of your current activities and return to your contact at Bedford.			

## WHAT IS RESEARCH & DEVELOPMENT?

Research and Development (R&D) refers to the work a business conducts for the innovation, introduction and improvement of its products and procedures. It is a series of investigative activities to improve existing products and procedures or to lead to the development of new products and procedures.

<b>Based on the R&amp;D definition, please describe 1 or 2 activities in your company (Current or Prior 3 years)</b>



## GENERAL BUSINESS ACTIVITY

<b>In a few words, describe your business and/or services:</b>

## R&D BUSINESS ACTIVITY

<b>Does your company create or improve any or all of the following...</b>			
<input type="checkbox"/> Products	<input type="checkbox"/> Software		
<input type="checkbox"/> Processes	<input type="checkbox"/> Any Patents?		
<b>Do you have financial risk &amp; rights regarding the above?</b>		<input type="checkbox"/> Yes	<input type="checkbox"/> No
		<input type="checkbox"/> Not sure?	
<b>If <u>YES</u>, please provide the <u>annual</u> figures for the below</b>			
<b>Annual Revenue?</b>	\$	<b>Annual Payroll?</b>	\$
		<b># of Employees</b>	

## OTHER NOTES & QUESTIONS


## THANK YOU FOR PROVIDING THE INFORMATION ABOVE!

This information will help us better understand your business and activities and help us determine your eligibility for the R&D Tax Credit.

**The Next Step:** Our R&D Team will contact you regarding the scheduling of an initial call with you and your team to discuss your company's eligibility!