



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](#)

