



## SR&ED shifts into a new Paradigm!

ScienceTree is a SR&ED Services provider that assists companies accessing development tax credits available from the Federal and Provincial governments. ScienceTree has in-depth expertise in growing SR&ED programs through end-to-end optimization of the SR&ED Process, Systems and Claims Operations:

### Process:

- migrating clients to Process Review
- re-engineering SR&ED processes

### Systems:

- automating SR&ED processes
- maintaining, supporting and operating SR&ED systems

### Claims Operations:

- analyzing claim eligibility, preparing science cases
- supporting costing and CRA audits
- training and support

ScienceTree helps its clients migrate from a traditional, costly SR&ED environment of manual processes, unconsolidated and un-validated data, last minute filings, drawn out “Project Review” audits, and poor yields, to a sustainable “Process Review\*” environment of automated processes, consolidated and validated data, real time and reduced cost audits, reduced preparation cost per project, increased claims and booking certainty.

As a result of our services, one client’s reported R&D grew by a factor of 60 since inception of the reengineered SR&ED program, moving the client to among the very top of Canada's R&D spenders.

ScienceTree also offers its clients immediate opportunities to improve their current claims by employing some of the same strategies developed for clients migrating to Process Review.

ScienceTree’s staff has extensive experience in basic, applied and experimental research and development in a number of industry sectors including: university R&D, oil and gas, defense, aerospace, telecommunications, health, finance, software, information technology and security.

*\* Process Review” is a CRA audit of the claimant’s SR&ED claims preparation process as realized through their SR&ED system.*

## Company Quick Facts

- 110 employees
- ScienceTree applies advanced technology to maximize claims for our clients.
- Over 5000 SR&ED projects prepared and claimed

## Strategic Partnerships

ScienceTree consists of a group of SR&ED and Tax experts who deliver full SR&ED services in Canada. Through our partnership with Thoughtcorp and Microsoft we are able to leverage our collective experience to provide customers with SR&ED process re-engineering, SR&ED system development, claims preparation services, system operations and maintenance, support, tax and related services.



# ScienceTree

SR&ED Process, Systems and Operations

For clients seeking SR&ED claims operations services we offer three types of services:

- Claim Improvement Services
- Basic Claims Services
- Automated Claims Services

### Claims Improvement Services:

- Scope your investment portfolio for additional claim opportunities
- Science: Review of your Technical Project Descriptions
- Science: Preparation of Technical Project Descriptions
- Science: Improve the Structuring of your claim
- Finance: Review claimed expenditures & identify opportunities
- Intellectual Property: Review your right to claim
- Filing Preparation and Support
- Audit Support: Defense of Claims under Project Review
- Forecasting & Tracking Tax Credits
- Accounting Support & Reporting

### Basic Claims Services:

- Scoping Candidate Projects
- Science: Preparation of Technical Project Descriptions
- Science: Claim Structuring
- Finance: Determining allowable claims
- Intellectual Property: Establishing Right to Claim
- Filing Preparation and Support
- Audit Support: Defense of Claims under Project Review
- Forecasting & Tracking Tax Credits
- Accounting Support
- Reporting

### Automated Claims Services:

- Semi-automated Scoping of Candidate Projects
- Science: Survey based semi-automated project qualification
- Science: Software assisted Claim Structuring
- Finance: Semi-automated allowable claims determination
- Intellectual Property: Semi-automated IPR assessment
- Semi-automated Filing Preparation and Support
- Audit Support: Defense of Claims under Process Review
- Forecasting & Tracking Tax Credits
- Accounting Support
- Reporting

For a SR&ED consultation, please call 416-591-8425, or email [info@sciencetree.ca](mailto:info@sciencetree.ca)

[sciencetree.ca](http://sciencetree.ca) | 416.591.8425

4950 Yonge Street, Suite 1700, Toronto, ON M2N 6K1



## About SR&ED

The SR&ED program is a federal tax incentive program, administered by the Canada Revenue Agency (CRA) that encourages Canadian businesses of all sizes, and in all sectors to conduct research and development (R&D) in Canada. It is the largest single source of federal government support for industrial R&D.

The SR&ED program provides claimants cash refunds and/or tax credits for their expenditures on eligible R&D work done in Canada. Claimants can apply for SR&ED investment tax credits for expenditures such as wages, materials, machinery, equipment, some overhead, and SR&ED contracts. SR&ED is a systematic investigation, performed in Canada that seeks a technological advance in order to create or improve existing products, services or processes.

Eligible SR&ED investments qualify for a Federal Investment Tax Credit of 20% to 35%. Provinces add from 4.5% to 37.5%.

Visit our website for more information on the SR&ED Program.  
[www.sciencetree.ca](http://www.sciencetree.ca)