



# Growth Management Group Incentive Analysis Agreement

AGENT	
NEXT APPT	

Company Name \_\_\_\_\_

Company Contact \_\_\_\_\_

Company Phone \_\_\_\_\_ Email \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Thank you for considering GMG Specialized Tax Solutions, LLC (hereinafter "GMG") to perform an Incentive Analysis for your company.

### INCENTIVE ANALYSIS OVERVIEW

GMG will perform the following in order to evaluate, analyze, and procure your eligible specialized tax incentives:

- Determine company qualification for specialized incentive programs
- Complete Introduction Call with company representative and GMG National Project Manager
- Collect documentation in order to determine company utilization of incentives
- Establish total fee to procure benefit(s)
- Finalize project and provide all necessary technical and financial documentation to company and CPA

### SPECIFIC PROGRAMS

GMG has access to a number of Incentive programs including Commercial Property Cost Segregation, Section 41 Research & Development Credits, Real & Personal Property Tax Mitigation, Energy EAct 179D, as well as Hiring-based Incentives such as Work Opportunity Tax Credit (WOTC), Federal HUD Zone Credits, and State Location Based Credits.

### FEE SCHEDULE

GMG agrees to complete their Incentive Analysis at **no cost**. If Analysis demonstrates sufficient benefit to the Client, GMG procurement fees will be charged on a per project or hourly basis in accordance with Circular 230. Procurement fees not to exceed ten (**10**) percent for Cost Segregation, thirty-five (**35**) percent for Research & Development Credits, twenty-five (**25**) percent for Hiring-based Incentives, and fifty (**50**) percent for Property Tax Mitigation.

### AGREED TO & ACCEPTED

Company agrees to and accepts the terms and conditions outlined herein in addition to specific program and/or service terms found online at [www.gmg-savings.com/terms](http://www.gmg-savings.com/terms).

\_\_\_\_\_  
Client Signature

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date