

KBKG ENTERPRISE ZONE CASE STUDIES



DENTAL OFFICE - SAN JOSE

A dentist office with 17 employees previously claimed \$15,000 of Enterprise Zone hiring tax credits. KBKG was engaged to review the dentist's purchases, tax returns, human resource records and payroll for any additional benefits. KBKG's team was able to identify additional hiring credits by focusing on qualifying criteria beyond the employees' residences at hire.

RESULTS:

Total refunds for the project were approximately \$100,000, and KBKG was subsequently engaged to provide a cost segregation study.



MEDICAL BILLING COMPANY - SANTA ANA

This closely-held S-corporation had 45 clerical employees and previously worked with a provider to identify any qualified employees. The provider did not find any tax credits for the company. The company's CPA had worked with KBKG on cost segregation projects and asked KBKG to perform an analysis of the records.

RESULTS:

KBKG coordinated a refund claim for the corporation and its shareholders of approximately \$250,000.



MEDICAL DIAGNOSTICS MANUFACTURER - VALENCIA

This 20-employee C-corporation had previously claimed R&D tax credits and net operating losses, but utilized KBKG's employment tax credit services to accrue Enterprise Zone tax credits that carried forward.

RESULTS:

The client saved \$108,000 on its 2010 return and was able to offset Alternative Minimum Tax.



LAW FIRM - LOS ANGELES

This 12-employee partnership did not believe any employees would qualify since none of its employees lived nearby; however, several of its employees had been unemployed prior to starting with the firm.

RESULTS:

KBKG secured \$75,000 in savings for the partners of the firm.

