



**IWASAN**  
CONSULTING



## SR & ED Update – Iwasan's Newsletter

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# SR&ED Update – *Fall 2001*

## Past Updates

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## SR&ED Eligibility Questions to Ask

Recently one of our clients asked us to review a list of questions that they had created as a tool for employees to determine whether their software projects met the three criteria of eligibility under the SR&ED program. Given that this is the most difficult determination to make in this program, we thought we should include our input and pass this knowledge on to you. Most of these questions apply to SR&ED projects in any field of technology.

### TECHNOLOGICAL ADVANCEMENT

- What technical knowledge do you have now that you didn't have before this project started?
- Is this a new application of existing knowledge or has this project expanded/increased the knowledge base in this field of technology?
- What's the technological reason why this architecture or technique was not used by competitors, previous developers, others trying to do the same thing? In other words, why hasn't it been done before?
- How does it compare to earlier solutions?
- What does the competitor do?
- What earlier technical constraint had to be overcome?

### TECHNOLOGICAL UNCERTAINTY

- Why did you use the approach or software architecture that you did?
- Why did you choose to design your product/code this way?
- What algorithm did you choose and why?
- Why did you choose this particular technique or construct?
- Were there constraints in the hardware or software? How did you write your code in light of these defined constraints?
- If this is a case of bringing together existing technology and making it work together, what did you do to make it work together?

### TECHNOLOGICAL CONTENT

- How did you overcome the technological uncertainties?
- How did resolving these uncertainties lead to making the technological advancement?

- Why couldn't the advancement be achieved due to the project constraints?
- What was the chronology of events carried out in order to resolve the technological uncertainties in attempting to make the advancement?
- What progress was made?
- What work is yet to be done?

## Success Stories

Our software client, an SR&ED claimant for 8 years, almost abandoned the SR&ED program after spending considerable time and effort making an application and receiving only 20% of the amount claimed. Iwasan worked with this client the following year in preparing the application and through the audit process. They received a cash refund of \$131,000-100% of the amount claimed. The process was streamlined and the application was handled efficiently and quickly as a result of Iwasan's participation.

In another case, Iwasan recovered \$250K in less than 90 days for a company whose claim had been completely denied. With Iwasan's assistance, the decision was reversed and a cheque for \$250K was issued. Fact is, more than 95% of Iwasan assisted claims recover 80% or more of the amount claimed.

## Iwasan's Services and Fees

### SERVICES:

Iwasan Consulting works exclusively with SR&ED claims, ranging in size from \$10K to several million. We have assisted 1000's of companies in determining whether they have an SR&ED claim; preparing the SR&ED financial and technical documentation for the application and managing the claim through the audit process to completion. The key to our success is our Project Evaluation service, which gives the applicant a clear picture of whether the project will qualify and an estimate of the claim value.

### FEES:

Iwasan's fees are quoted on a case by case basis and can be:

- Hourly
- Fixed
- Contingency

Iwasan can handle all or any part of the claim preparation and audit process depending on your needs.

**Call us today for a complimentary initial review of your project's potential. If favorable, a preliminary technical evaluation will be recommended.**