Incentive Opportunity Assessment

Mergers, acquisitions, and leadership changes often inherit incentive programs that are missed, misunderstood, or misapplied. These incentives, tied to hiring, capital investment, training, and facility decisions, can quietly lapse, trigger recapture, or remain unrealized without focused review.

Specialty Tax Group's Incentive Opportunity Assessment gives finance leaders a clear view of existing, pending, and overlooked incentives. We identify what may be at risk, what value can still be captured, and what actions should be prioritized moving forward.

WHAT OPPORTUNITIES WE REVIEW

Past, current, and planned activities that may trigger incentives:

- Job creation and wage-based tax credits
- Training and retraining incentives
- Capital investment and equipment-based credits
- Sales and use tax abatements or refund programs
- Facility expansions, new locations, and relocations
- Location-based programs tied to designated zones, industries, or communities

WHAT YOU RECEIVE

Delivered in a concise, finance-ready format:

- Identification of existing, pending, and overlooked incentives
- Review of eligibility, documentation, and compliance requirements
- Estimated value ranges and potential timing
- Evaluation of carryforwards, recapture risk, and audit exposure
- A prioritized action plan to protect and optimize incentive value

WHEN THIS ASSESSMENT IS MOST VALUABLE

- Post-acquisition or merger integration
- New CFO or Controller onboarding
- First audit or tax filing under new ownership
- Evaluation of inherited compliance or recapture risk
- Aligning incentives with updated growth or consolidation plans

LEARN MORE

REDUCE RISK. CAPTURE VALUE. CREATE CERTAINTY FOR FUTURE GROWTH.

Incentive agreements often span multiple years and are based on assumptions that may evolve with changes in ownership, leadership, or operating strategy. Capital investment and job commitments can materially affect eligibility, compliance requirements, and credit utilization.

Proactive incentive assessments protect value and position companies to capture additional opportunity as business plans evolve.

GET STARTED

For a complimentary incentive eligibility review and assessment, contact:

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