

Opportunity Checklist

Real Estate transactions happen quickly. Froehling Anderson and McGuire Sponsel work together to help clients identify opportunities related to economic incentives and specialty tax planning.



LOCATION ADVISORY SERVICES

YES

NO

- | | YES | NO |
|---|--------------------------|--------------------------|
| 1. Are you adding 25+ jobs over 5 years? | ☐ | ☐ |
| 2. Will you buy, lease, expand, or build a new facility over the next year? | ☐ | ☐ |
| 3. Are you acquiring or merging with another business? | ☐ | ☐ |
| 4. Will your company purchase \$3M+ in new equipment? | ☐ | ☐ |
| 5. Are you relocating operations? | ☐ | ☐ |
| 6. Do you plan to train new employees? | ☐ | ☐ |



FIXED ASSET SERVICES

- | | YES | NO |
|--|--------------------------|--------------------------|
| 1. Purchased or constructed a building with a cost in excess of \$750,000? | ☐ | ☐ |
| 2. Made renovations to your facility in excess of \$200,000? | ☐ | ☐ |
| 3. Are you paying more than \$50,000 in property taxes? | ☐ | ☐ |



R&D TAX CREDITS

- | | YES | NO |
|--|--------------------------|--------------------------|
| 1. Do you develop and/or improve new products or processes? | ☐ | ☐ |
| 2. Do you develop or customize software in house or with a third party vendor? | ☐ | ☐ |



GLOBAL BUSINESS SERVICES

- | | YES | NO |
|---|--------------------------|--------------------------|
| 1. Do you have operations, facilities, or business activities abroad? | ☐ | ☐ |
| 2. Do you sell product abroad? | ☐ | ☐ |

Industries We Serve



Through the partnership between Froehling Anderson and McGuire Sponsel, clients gain access to a broad range of specialty tax and advisory solutions designed to strengthen long-term business value. Together, our teams support a wide range of industries with a conservative and methodical approach to specialty tax.



INDUSTRY	Fixed Asset Services	R&D Tax Credit Services	Global Business Services	Location Advisory Services
Agricultural Properties				
Architectural Engineering				
Assisted Living				
Auto Dealerships				
Automation & Robotics				
Construction				
Data Centers				
Food Processing				
Healthcare				
Hotels & Resorts				
Industrial & Distribution				
Life Sciences & Biotech				
Manufacturing & Machining				
Multi-family				
Restaurants				
Technology & Software				

