



Introducing the SR&ED Program's Account Executive Service

More Ways to Serve You!

Pour vous servir encore mieux!



Canada Customs
and Revenue Agency

Agence des douanes
et du revenu du Canada

The Scientific Research and Experimental Development (SR&ED) Program provides tax incentives to Canadian businesses that do SR&ED in Canada. This financial support is designed to encourage businesses, including small and start-up companies, to do work that advances technology in order to develop new or improved products or processes.

Some claimants would like to get personalized service from a designated representative of the SR&ED Program. This service helps to ensure SR&ED Program continuity for your claim and provides:

- ways to simplify the SR&ED claim process for your company;
- guidance in understanding the SR&ED Program requirements;
- clarification about what you should keep to support your claim; and
- information about the status of your claim after it is filed.

If you want to have this free personalized service, then the Account Executive Service, one of the Canada Customs and Revenue Agency's (CCRA) services under the SR&ED Program, is for you.

Through the Account Executive Service, a SR&ED Program expert will help you access the program and its various advisory services. The Account Executive Service was developed as part of the CCRA's ongoing efforts to make the SR&ED Program more responsive to your needs.

What is the Account Executive Service?

The Account Executive Service gives your company a designated contact person, an account executive, from the SR&ED Program.

The account executive will provide one-stop access to information, and help make sure you get maximum benefits from the tax incentives available. The account executive will help you understand the SR&ED Program, the requirements for eligibility of your work, the rules for determining qualified expenditures, ways to support your claim, and the review process. Having an account executive will also help to provide continuity and consistency of service from year to year.

What are the benefits to your company?

The Account Executive Service offers many benefits, including:

- access to advice early in a company's SR&ED process, and before a claim is prepared;
- better understanding by claimants of the SR&ED Program and of the types of research and development that qualifies for tax incentives;
- more certainty about the eligibility of research and development for SR&ED tax incentives;
- consistency and continuity in service through regular communications between a company and an account executive; and
- reduced administrative burden and cost of compliance under the SR&ED Program.

What services does an account executive provide?

An account executive will:

- help you to self-assess the eligibility of your work and reduce delays in processing your SR&ED claim;
- consult with your staff throughout the SR&ED process, from planning phases through to the eventual claim;
- explain the type of information that is required to support your claim and help identify ways to minimize paperwork;
- monitor the processing of your claim after it is filed, and keep you informed about its status;
- help you to take advantage of other services such as the Preclaim Project Review Service; and
- give you general advice on preparing a SR&ED claim. However, CCRA staff members cannot participate in preparing your claim.

Is the Account Executive Service a requirement for participating in the SR&ED Program?

The Account Executive Service is client-driven. An account executive will be assigned only to businesses that feel they would benefit from the services an account executive can provide.

How do you take advantage of this service?

The Account Executive Service is available through CCRA tax services offices across the country. For more details and to ask for the Account Executive Service, contact any of the following tax services officers:

| | |
|------------------|-----------------------------|
| Halifax | (902) 426-2386 |
|1 | (866) 433-5986 |
| Québec..... | (418) 648-7151 |
|1 | (866) 204-0101 ext 648-7151 |
| Montréal | (514) 496-1317 |
| Laval..... | (514) 338-4198 |
|1 | (888) 784-8709 |
| Ottawa | (613) 598-2295 |
| Toronto | (416) 973-3725 |
| Mississauga..... | (905) 566-6148 |
| Hamilton | (905) 572-2650 |
| Calgary..... | (403) 691-5890 |
| Vancouver | (604) 666-8589 |

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www.ccra.gc.ca/sred

Call our toll-free number

1-800-959-5525

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