

FAMILY DENTIST | 1 LOCATION | TAYLORSVILLE, UTAH

"I Thought It Was Too Good to Be True."

How Dr. Luke Rudelich gained greater clarity around his practice activities, tax planning and documentation.

CLIENT EXPERIENCE CASE STUDY

Dr. Luke Rudelich

My R&D Tax Credit Story...

Dr. Rudelich practices at Southwest Dental, a long-standing family dental office serving patients across the Taylorsville community. The practice provides comprehensive care, including restorative, endodontic, implant, and surgical procedures.

Like many modern dental practices, Southwest Dental continually works to improve patient care through procedural refinements, technology adoption, workflow improvements, and clinical problem-solving. Through his work with Acquire Tax Credits and his CPA, Dr. Rudelich gained greater visibility into how certain practice activities may be evaluated under applicable R&D tax credit guidelines.

HIGHLIGHTS

INITIAL MINDSET:
"This probably doesn't apply to us"

KEY OUTCOMES:
Increased visibility, structured documentation, reduced tax uncertainty

TIME INVESTMENT:
~3 hours initially, then streamlined annually

CPA COORDINATION:
Fully aligned, no disruption

ACQUIRE TAX CREDITS

"R&D probably doesn't apply to us"

The Challenge

For years, Dr. Rudelich's tax process looked familiar. He worked with his CPA, submitted the necessary information, and waited to hear what he owed. What was missing was not effort. It was awareness.

Dr. Rudelich had not previously been introduced to R&D tax credits as potentially applying to a dental practice. His CPA had limited exposure as well. So day-to-day activities inside the practice were not being reviewed through that lens.

Coming out of a period when many tax credit programs were heavily promoted, Dr. Rudelich wanted to be careful. For him, the real question was whether this opportunity could be approached in a credible, properly documented, CPA-aligned way.

The Turning Point

Before moving forward, Dr. Rudelich brought the opportunity to someone he already trusted: his accountant. That step mattered.

Acquire Tax Credits provided support in helping organize the discussion, explain the process, and coordinate with the CPA. The CPA remained responsible for all tax positions and filings.

"When my accountant gave the thumbs up... that's when I was like, okay, let's do this."

That changed the conversation. It was no longer just a new tax credit idea. It became a structured review process involving his practice, his CPA, and a documentation-focused support team.

A Focus on the work already happening inside the practice



IDENTIFY > ORGANIZE > DOCUMENT

The Solution

Acquire Tax Credits worked with Dr. Rudelich and his CPA to support the review and organization of practice activities under applicable R&D tax credit guidelines.

The focus was not on creating artificial activity or changing how the practice operated. Instead, the process centered on the identifying, organizing, and documenting of work that is already happening inside the practice.

As the process unfolded, **Dr. Rudelich began to see his practice differently. Activities that had previously felt like normal problem-solving began to carry more significance** when viewed through a structured documentation framework.

- **Clinical & Procedural Refinements**
- **Adjustments to Treatment Approach**
- **Workflow & Operational Improvements**
- **Implement New Tools & Technologies**
- **Ongoing Improvements to Treatment Planning, Efficiency, and Outcomes**

> **"In a lot of ways, it's been a meaningful shift in how I think about my practice and planning."**

The Difference

The value of the process was not only in the tax review itself. It also changed how Dr. Rudelich thought about planning.

Instead of treating tax season as something that simply happened at the end of the year, the practice began developing a more proactive mindset around documentation, improvements, and activity tracking.

For a practice owner, that clarity matters. It can support better conversations with the CPA, more organized year-round planning, and greater awareness of how practice improvements may be documented and reviewed.

Shift in Perspective

The review helped Dr Rudelich recognize that innovation inside a dental practice often shows up through smaller, practical improvements. A better way to perform a procedure, a refined workflow, a new tool, or a clinical adjustment to improve results.

That perspective gave the practice a clearer reason to pay attention to improvement throughout the year, instead of only looking backward during tax season.

Discover what this might look like for YOUR practice. Call us to set up your free 15-minute feasibility call.
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Disclaimer: Activities described are evaluated under IRS §41 guidelines and are subject to a facts-and-circumstances analysis. Acquire Tax Credits provides documentation and coordination support but does not provide tax, legal, or accounting advice. All determinations, tax positions, and filings are made by the client's CPA or tax advisor. Outcomes vary.

ACQUIRE TAX CREDITS