

"I didn't know anything about R&D tax credits before Acquire. Now it's become a meaningful part of how we manage our tax burden."

Refining Surgical Excellence While Unlocking Hidden Tax Efficiency.

CLIENT EXPERIENCE CASE STUDY

Dr. Michael Schwartz
COSMETIC & RECONSTRUCTIVE PLASTIC SURGERY

The Situation

Board-certified plastic surgeon and founder of Pasadena Plastic Surgery, Dr. Michael Schwartz specializes in advanced cosmetic and reconstructive procedures of the face and body. With a focus on facial aesthetics, including rhinoplasty, facelifts, and eyelid surgery, as well as breast and body contouring, Dr. Schwartz is known for his meticulous, outcomes-driven approach to patient care.

His practice also includes specialized treatment for conditions such as lipedema, requiring highly tailored surgical planning and post-procedural care. Drawing on continuous learning from medical research, peer collaboration, and emerging technologies, Dr. Schwartz consistently refines his techniques to enhance both safety and results, reflecting a commitment to clinical excellence and innovation in modern plastic surgery.

HIGHLIGHTS

INITIAL MINDSET:
"I was skeptical actually at first."

KEY OUTCOMES:
Acquire's knowledge, depth and detail were real differentiators

TIME INVESTMENT:
Minimal = 1-2 hours of my time per year

CPA COORDINATION:
Fully aligned and inclusive creating no disruption

ACQUIRE TAX CREDITS

"I was reassured that indeed it is legitimate, it's legal, it's encouraged."

The Challenge

Dr. Schwartz operates a highly specialized cosmetic surgery practice, where improving outcomes is not optional but embedded in every procedure.. From refining surgical techniques to evaluating new medical devices and treatment approaches, his work consistently involves:

- Adapting techniques based on evolving clinical insights
- Evaluating new technologies for patient safety and outcomes
- Integrating learnings from conferences, publications, and peer collaboration

Despite this ongoing advancement, none of these efforts had ever been viewed through a financial or tax-related lens.

The Turning Point

Dr. Schwartz's introduction to Acquire Tax Credits came through an existing professional relationship. **"I had a good experience with Scott... when he explained this to me, it seemed like a good idea."**

That trust—combined with a clear, structured explanation—provided the confidence to move forward. Acquire worked directly with Dr. Schwartz's CPA to ensure alignment, clarity, and continuity. **"They've coordinated with my CPA... on a yearly basis."**

Over time, this created a seamless workflow between physician, CPA, and Acquire.

A Focus on the work already happening inside the practice



The Solution

Acquire Tax Credits worked alongside Dr. Schwartz and his CPA to help identify, organize, and document practice activities under applicable R&D tax credit guidelines.

The process was not about changing how the practice operated. Instead, it focused on the continual refinement already occurring inside the practice—from surgical technique evolution to evaluating new technologies, improving workflows, and refining patient outcomes.

As the process unfolded, **activities that once felt like routine problem-solving began to carry greater significance when viewed through a structured documentation framework.**

IDENTIFY > ORGANIZE > DOCUMENT

- **Surgical Technique Refinement**
- **Evaluation of New Devices & Technologies**
- **Workflow & Patient Safety Improvements**
- **Clinical & Outcomes-Based Adjustments**
- **Ongoing Procedural Evolution**

"Acquire's knowledge, depth, and detail were real differentiators."

The Difference

The value of the process extended beyond the tax review itself. It also created greater visibility into how ongoing clinical refinement could be more intentionally organized and discussed throughout the year.

Rather than viewing tax planning as a once-a-year event, the process helped introduce a more proactive mindset around documentation, CPA coordination, and operational continuity.

For Dr. Schwartz, one of the most important aspects was the seamless collaboration between physician, CPA, and Acquire.

Shift in Perspective

The review helped Dr. Schwartz recognize that innovation inside a plastic surgery practice often appears through smaller, ongoing improvements rather than dramatic breakthroughs.

A refined surgical approach. A workflow adjustment. Evaluating a new device or integrating insights from research, conferences, and peer collaboration.

That perspective created greater awareness around the value of documenting improvement activities throughout the year instead of only revisiting them during tax season.

Discover what this might look like for YOU ›
Schedule a 30 minute demo call and find out.

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.

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