

"Working with Acquire was more of a partnership..."

How KMA, Khalsa McBrearty Accountancy Approaches R&D Tax Credit Evaluation for Clinical Clients

PARTNER EXPERIENCE CASE STUDY

Ram Das
CPA, SENIOR TAX MANAGER AND PARTNER
KMA KHALSA MCBREARTY ACCOUNTANCY

HIGHLIGHTS

INITIAL MINDSET:
"Is this going to work for medical clients?"

KEY OUTCOMES:
Acquires knowledge, depth and detail were real differentiators

TIME INVESTMENT:
~10 hours initially, then streamlined annually

CPA COORDINATION:
Fully aligned and inclusive creating no disruption

The Situation

As a CPA firm serving physicians and other high-income professionals, KMA Khalsa McBrearty Accountancy is frequently evaluating complex tax planning opportunities across highly specialized industries. **While the firm had previous exposure to R&D tax credits within technology and startup environments, applying those concepts inside medical practices presented a very different challenge.**

Modern physician practices are increasingly implementing advanced technologies, refining workflows, integrating new devices, and evolving procedural systems in ways that can be difficult for a traditional tax preparer to independently evaluate. At the same time, **the growing number of simplified or commoditized R&D providers in the marketplace created additional concern around documentation quality, substantiation standards, and overall professional risk.**

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"How are we going to evaluate this?"

The Challenge

The larger challenge was determining:

- Whether these activities warranted further evaluation under existing tax frameworks
- Whether the underlying work was being documented appropriately
- Whether the substantiation process could withstand heightened scrutiny
- Whether a CPA firm could confidently coordinate these opportunities without internally operating as R&D specialists themselves

Like many established preparers, Ram Das viewed the growing number of simplified or "online" R&D providers cautiously, particularly when documentation depth and methodological rigor appeared limited.

The Turning Point

Acquire Tax Credits worked alongside Ram Das and her firm by providing a structured, documentation-focused process intended to support the evaluation and substantiation of potential R&D tax credit opportunities for qualified clinical clients.

Rather than operating as a transactional vendor relationship, the engagement evolved into a coordinated professional collaboration between the CPA firm, the client, and Acquire's specialized support team.

For Ram, Acquire offered a key differentiator. **"Your level of depth and questions and the file that you're building on these credits, to me, felt very comfortable."**

"They're doing so much of this that we don't even know about."



The Solution

A Collaborative Workflow Designed to Support the Tax Preparer

An important component of the engagement was maintaining clear coordination between the CPA firm, the client, and Acquire's specialized support team.

Throughout the process, Acquire provided organized documentation packages, supporting forms, filing instructions, and workpapers intended to assist the preparer's review and filing process.

We can make an introduction... and trust that Acquire will run it through and make sure it is [appropriate] and work through the study."

IDENTIFY > ORGANIZE > DOCUMENT

- **Detailed client interviews / technical questions**
- **Activity mapping and workflow analysis**
- **Organized substantiation documentation**
- **Supporting workpapers / filing coordination**
- **Structured communication with both the client and preparer**
- **Coordination throughout evaluation process**

"I got everything I needed... all the forms and all the instructions."

The Difference

For KMA, the ability to rely on a structured process and detailed support materials reduced administrative burden while helping the firm remain focused on its core advisory role.

Ram Das emphasized that the engagement was not viewed as simply outsourcing paperwork, but rather as working alongside a specialized team capable of handling a highly technical process with consistency and depth.

One of the more notable insights from the engagement involved how much innovation may occur within modern medical environments that tax professionals do not always see directly.

Shift in Perspective

While still early in the overall lifecycle of the engagement, KMA's experience with Acquire Tax Credits reinforced the value of working with a specialized partner capable of supporting complex documentation and coordination efforts in an increasingly technical environment.

For Ram Das, trust ultimately came down to expertise, responsiveness, and long-term support. **"Acquire has shown that you have the knowledge necessary for us to trust your work and feel like you're there for the client long term."**

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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.

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