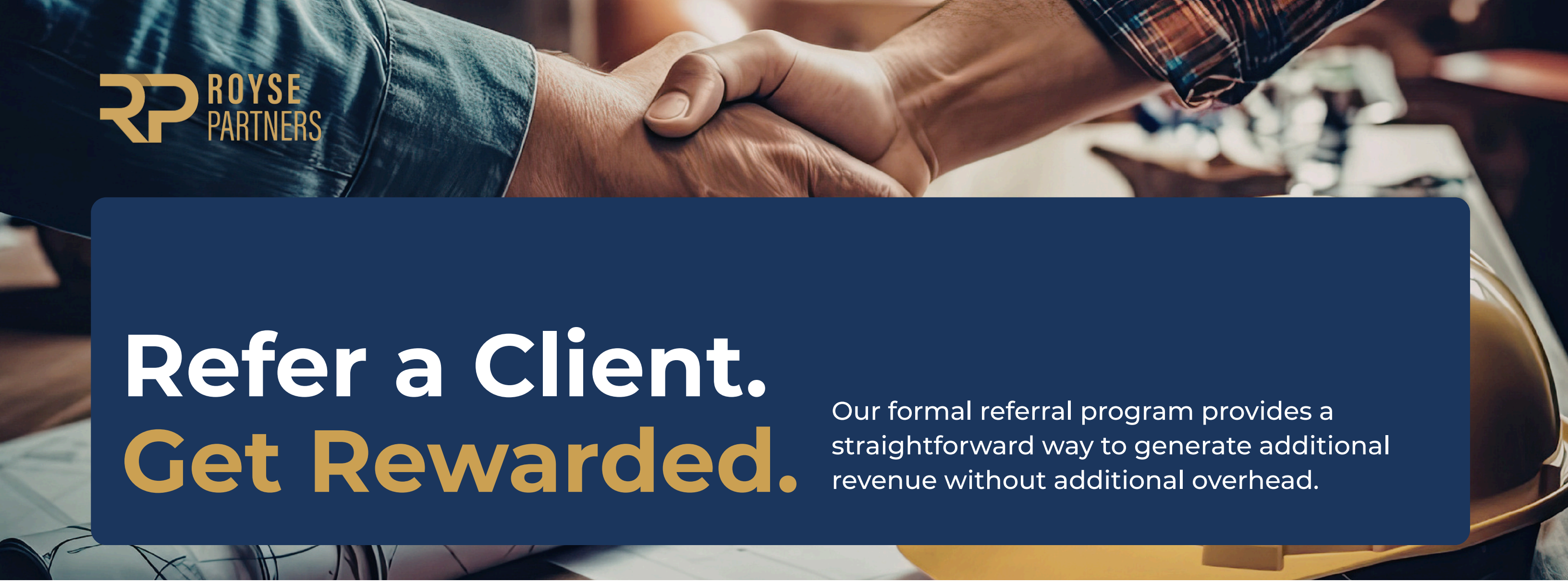

ROYSE PARTNERS

Refer a Client. Get Rewarded.

Our formal referral program provides a straightforward way to generate additional revenue without additional overhead.

HOW IT WORKS

1

Make the Introduction

Submit your referral via email or our intake form. We log it immediately and confirm within two business days.

2

We Handle Everything

We manage the entire client engagement from scoping through delivery and IRS support. You stay in the loop at key milestones.

3

You Get Paid

Once we receive client payment, your referral fee is issued within 30 days. No chasing, no ambiguity.

What You Earn

A formal referral fee is paid on every successful engagement, calculated as a percentage of the value delivered to the referred client. The larger the credit, the more you earn. Reach out to learn what you can expect.

Your Relationship Comes First

We operate in a specialized tax consulting capacity working alongside your existing accounting, tax, and advisory relationships rather than replacing them. We don't pursue the people you refer for unrelated services, and every engagement is coordinated with you as the referring partner.

ROYSE PARTNERS

713.347.3000
INFO@ROYSEPARTNERS.COM
ROYSEPARTNERS.COM

Who Should You
Refer to Royse Partners?

IDEAL CANDIDATE PROFILE

Strong Fit

- U.S.-based business with W-2 employees
- Actively developing, improving, or testing products, processes, software, or formulas
- Has federal or state tax liability, or payroll tax liability if a startup
- Engineers, scientists, or technical staff on payroll
- Proprietary software, tooling, or automation built in-house

Likely Not a Fit

- Purely service-based business with no technical development activity
- No U.S.-based employees performing qualifying activities
- Work is fully funded by contracts or grants where the company does not retain IP rights
- Changes are aesthetic, cosmetic, or seasonal in nature
- Sole proprietor or single-member LLC with no W-2 employees on payroll

INDUSTRIES WITH HIGH R&D CREDIT POTENTIAL

Architecture & Engineering
Custom design, structural innovation, simulation modeling

Manufacturing
Process improvement, new materials, tooling, automation

Software & Technology
Proprietary software, algorithms, platform development

Construction
Design-build firms, general contractors with proprietary methods

Biotech & Medical Devices
Device development, diagnostics, instrumentation, biotech R&D

Agriculture & Food Production
Crop science, yield optimization, process innovation, formulation

Aerospace & Defense
Structural engineering, propulsion, materials testing, avionics

Consumer Products
Product formulation, packaging engineering, prototype testing

60-second Screening Guide

Run through these with your client or contact in 60 seconds. Two or more yes answers means it's worth a conversation.

- [ ] *"Do you have employees who spend time developing or improving a product, process, or piece of software?"*
- [ ] *"Have you ever had to experiment, prototype, or test something before it worked the way you needed it to?"*
- [ ] *"Are you paying federal or state income taxes? Or payroll taxes if you're an early-stage company?"*
- [ ] *"Have you ever claimed an R&D tax credit? Or are you unsure if your work even qualifies?"*
- [ ] *"Do you have technical staff on payroll, such as engineers, developers, scientists, or skilled tradespeople?"*
- [ ] *"Would you be open to a free, no-obligation review to see if there's money on the table you've been leaving behind?"*