

CAPABILITY STATEMENT

R&D TAX INCENTIVE

AT A GLANCE

CharterNet Rothsay is an award-winning, Australian, business advisory firm with a reputation in delivering outstanding R&D Tax Incentive claim outcomes.

As a boutique consultancy, we are relationship driven and provide a service that specialises in the complex nature of R&D Tax Incentive. We work with emerging businesses that innovate, are unafraid to experiment and who are seeking specialists to secure the maximum, defensible R&D Tax Incentive benefit on their behalf.

CharterNet Rothsay's R&D Tax Incentive track record:

- 100% Success Rate
- \$320m+ secured for client to date
- Over 350 R&D Tax Incentive claims completed annually
- Full outsource model i.e. typically just 60-90 minutes of client time required
- Industry-specific technical team from STEM backgrounds

BOUTIQUE EXPERIENCE END-TO-END

We manage the entire application process from identifying eligible projects and activities through to liaison with the relevant regulatory authorities (AusIndustry and the ATO) through our full outsource, phased delivery service profile.

We require far less of our client's time than our competitors in this space – 60 to 90 minutes end to end. Our team of subject-matter experts can quickly & fully understand a company's R&D Tax Incentive project(s), distil technical concepts into the R&D Tax Incentive Application and ensure that the maximum, defensible amount is being claimed.

Open communication and transparency throughout the claim process ensures only eligible costs are claimed and can be defended in the event of a review.

TRUSTED TEAM WITH DIVERSE TECHNICAL CAPABILITIES

Our on-staff technical specialists have a diverse range of educational and professional backgrounds to suit the nature of our clients' businesses. In addition to accountants with Big-4 and mid-tier firm expertise, our team of scientists and engineers provide a holistic skill set to ensure the level of understanding on highly technical concepts with our clients is maximised.

STRONG RELATIONSHIPS ARE CRITICAL TO SUCCESS

CharterNet Rothsay sits on the State Reference Group; an invitation-only government roundtable of R&D Tax Incentive service providers (Big 4 and leading boutiques) and has a close working relationship with AusIndustry & the Australian Taxation Office.

Our long-standing relationships with government bodies enables us to be at the forefront of legislative changes and administrative matters to keep our clients apprised on the latest developments in R&D Tax Incentive matters, and how best to navigate the claim process.

CLIENT TESTIMONIALS

NetComm Wireless (ICT)

"It was taking our CTO 1-2 weeks per lodgement and we conduct 8-12 projects a year. Now we trust CharterNet Rothsay with all of our claims." - NetComm Wireless Telecommunications

GeNeuro (Life Sciences)

"As a foreign company, CharterNet Rothsay were invaluable - their advice to restructure our company operations allowed us to apply for the maximum R&D claim available". - GeNeuro, Swiss clinical stage biotech company with an Australian subsidiary

Prismatik (Technology)

"Weary of time cost, it was critical to find the right adviser who could absorb knowledge effectively, work autonomously, and provide us with breathing room to focus on growth. It's been a breath of fresh air. The process is painless. It's exactly what I hoped for." - Prismatik

BREADTH OF INDUSTRY EXPERIENCE

We have served hundreds of Australian and international clients, from fast-growing startups, to exchange-traded companies with global operations.

Industries that we focus on:

- Technology
- Life Sciences (drug development, medical devices)
- Engineering
- Manufacturing
- ICT
- Agriculture/Aquaculture

WHAT OUR VALUES MEAN FOR YOU



Be the Yoda - we're always thinking outside the box with a view to adding value. Advisory focused, we seek to maximise opportunities and facilitate sustainable growth.



Strength Through Diversity - the sum of the parts is greater than the whole. We speak 14 languages, we are tertiary qualified in 8 different fields, we have serviced clients across 17 industries, and believe our differences make us better.



Kaizen - the philosophy of continuous improvement and evolution. While we source knowledge and wisdom from our track record of successful R&D lodgements, we understand the fact that you don't move forward by doing things the same.



???? - every quarter, as a team, we decide on a focus value for the quarter, something we can live and breathe together, and one that speaks to the time. Start thinking about a particular value you think we should live next quarter.

ACCOLADES



Australian Financial Review Fast 100 2016



NAB Professional Services Awards 2018



BRW Fast Starters 2014 and 2015



AFR TOP 100 2018-2022

FOR MORE INFORMATION, PLEASE CONTACT



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