CTA
Solutions to Fund Your Future

CPA PARTNER FIRM BENEFITS

Specialty tax expertise that strengthens your firm.

Expand your advisory capabilities, uncover more value for clients, and keep the CPA relationship at the center. CTA supplies the technical depth, documentation, and audit support behind the scenes.

FREE CPE
PRACTICAL EDUCATION FOR CPA FIRMS

Offer more. Retain more. Compete with confidence.

Specialty incentives can be difficult to staff and scale internally. CTA helps local and regional firms deliver the capabilities clients expect from national providers without competing for core tax and accounting work.

Your client remains your client. We complement your team, coordinate with your firm, and focus exclusively on specialty tax incentives.

WHAT YOUR FIRM GAINS

01 CLIENT RETENTION
Support growing and complex clients with deeper advisory resources while protecting the relationship and the core work your firm already owns.

02 AUDIT DEFENSE
CTA stands behind its work with technical support through examination and, when needed, the appeals process.

03 ADDITIONAL REVENUE
Create more opportunities for strategic consultation, expanded advisory hours, and optional revenue sharing where appropriate.

04 ONGOING EDUCATION
Keep your professionals current with timely CPE, articles, and practical updates across a fast-changing tax landscape.

WHY CORPORATE TAX ADVISORS

- **Exclusive expertise**
  Federal and state incentives that complement your traditional practice.
- **US-based team**
  CPAs, engineers, tax attorneys, and incentive specialists in house.
- **Relationship growth**
  Quality work and quantifiable benefits that strengthen client trust.
- **Taxpayer and CPA focus**
  Benefit usability is considered before engagement discussions begin.

CPE

COMPLIMENTARY PROFESSIONAL EDUCATION

Bring practical specialty-tax insight to your team.

High-level, real-world sessions designed to sharpen planning conversations and help CPAs identify client opportunities.

In person
For firms or gatherings with 5+ CPAs

Live online
Flexible learning for remote teams

Specialized topics
Relevant strategies for today's clients

NASBA compliant
Formats led by industry experts

PREVIOUS AND UPCOMING TOPICS

- The R&D Tax Credit: taxpayer savings and the "Big Beautiful Bill"
- Tariffs and transfer pricing: compliance and IRS scrutiny
- Real estate tax strategies and Section 179D deductions
- Cost segregation essentials for high-impact tax planning
- Tax credits and incentives: an introduction for CPAs

SIMPLE BY DESIGN

How we partner

01
Screen
Identify likely opportunities and benefit usability.

02
Document
Build the technical analysis and support package.

03
Support
Coordinate with your firm and stand behind the work.

Our expertise includes

Specialty services that complement your core practice

- R&D — **Research and Development Tax Credit**
- 179D — **179D Energy Efficient Commercial Buildings**
- CS — **Cost Segregation**
- TP — **Transfer Pricing**
- IRA — **Green Tax Credits (IRA / ITC / PTC)**
- ST — **State Job and Retraining Credits**

START A PARTNER CONVERSATION

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