

# Software R&D Tax Credit Expense Template

Company Name: \_\_\_\_\_

Tax Year: \_\_\_\_\_

Prepared By: \_\_\_\_\_

Date: \_\_\_\_\_

## 1. Qualified Employee Wages (W-2)

Employee Name	Role / Title	R&D Qualifying Activities Description	W-2 Box 1 Wages (\$)	R&D Time %	Qualified Wages (\$)

## 2. Qualified Contractor Expenses (U.S. Based)

Contractor / Entity Name	Service Description (Software R&D)	Total Invoice Amount (\$)	Qualified % (Max 65%)	Qualified Contractor Expense (\$)

## 3. Cloud & Server Infrastructure Expenses (Development / Testing)

Vendor (e.g., AWS, Azure)	Purpose (Dev/Test Environment)	Total Cost (\$)	Qualified Allocation %	Qualified Expense (\$)

Total Qualified Employee Wages: \_\_\_\_\_

Total Qualified Contractor Expenses (65% limitation applied): \_\_\_\_\_

Total Qualified Cloud / Infrastructure Expenses: \_\_\_\_\_

**TOTAL QUALIFIED RESEARCH EXPENSES (QRE):**

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