

CASE STUDY

Federal Tax Credit Services

Type of business:

Sporting Goods Retailer

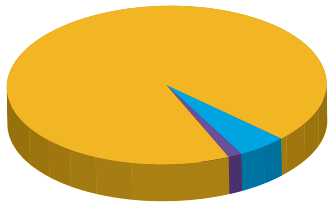
ISSUE

A national sporting goods retailer contracted with Walton Management Services (WMS) to perform WMS's free financial incentive portfolio analysis of client's geographic locations and business activity.

The client was anxious to get started in securing tax credits and incentives and immediately forwarded a complete list of its geographic locations and employee data to its dedicated WMS account representative.

SERVICES PROVIDED

Examination of federal and state tax opportunities, both hiring and non-hiring types, resulted in various Federal Wage Credits, based on employee data and physical locations.



Incentive Package Win For Client	\$1,600,000
Federal WOTC Tax Credits	1,500,000
Federal Indian Employment Tax Credit	80,000
Federal EZ/RC Tax Credits - Per Annum for one location	20,000

RESULTS

The tax credit and incentive opportunities resulted in federal tax credits to offset the client's tax liability. WMS continues to monitor client's locations on an ongoing basis for additional federal and state tax opportunities.

QUOTE:

“ We have utilized the services of Walton Management for the past six years in processing the WOTC and Empowerment Zone employment credits, and we would not have been able to achieve the results we have on these programs without their expertise. ”

- Senior Vice President – National Retailer

FOR MORE INFO CONTACT:

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