

# FIELDSTONE BUSINESS SAVINGS SOLUTIONS

## 1. COMMERCIAL PROPERTY BENEFIT[COST SEGREGATION]-GMG

TAX PLANNING STRATEGY THAT ACCELERATES DEPRECIATION AND DEFERS TAX PAYMENTS ON COMMERCIAL PROPERTY. OUR TEAM OF TAX PROFESSIONALS, STRUCTURAL DESIGN EXPERTS AND ENGINEERS IDENTIFY AND RE-CLASSIFY COMMERCIAL BUILDING COMPONENT EXPENSES TO MAXIMIZE A CLIENTS TAX BENEFITS. FEE = 10% OF ESTIMATED NET BENEFIT.

## 2. MANUFACTURING INCENTIVES[R&D TAX CREDITS]-GMG

A WAGE BASED CREDIT DESIGNED TO QUALIFY FOR GRANT MONEY FROM THE FEDERAL GOVERNMENT AS AN INCENTIVE TO PROMOTE R&D JOBS. STUDIES PROVIDE CURRENT AND LOOK BACK YEARS. FEE = PER PROJECT BASIS NOT TO EXCEED 35% OF CREDITS FOR EACH YEAR.

## 3. PROPERTY TAX REVIEW-GMG

A REVIEW OF REAL AND PERSONAL PROPERTY TAX ASSESSMENTS OFTEN RESULTING IN THE IDENTIFICATION OF OPPORTUNITIES TO LOWER PROPERTY TAX BILLS. SAVINGS POTENTIAL OF 20%/ FEE =50% OF SAVINGS.

#### 4. ENERGY STUDY-GMG

A REVIEW OF ALL LOCAL, STATE AND FEDERAL PROGRAMS TO ASSIST IN ENERGY REDUCTION EFFORTS. BUILDINGS OF 50,000 SQ FT PLUS SPENDING \$8,000 PER MONTH IN ENERGY EXPENSES. BUILDINGS 10 YEARS AND OLDER = AVERAGE SAVINGS OF 25% TO 40%. PROJECT FEE WILL BE DELIVERED TO CLIENT UPON COMPLETION OF ENERGY REVIEW.

#### 5. HIRE ACT: WOTC (WORK OPPORTUNITY TAX CREDIT)

STUDIES PERFORMED TO DETERMINE THE ELIGIBILITY OF CURRENT AND FUTURE EMPLOYEES IN ORDER TO ASSESS POTENTIAL TAX CREDITS. RELATED TO CERTAIN EMPLOYEES WITH TAX CREDIT QUALIFICATIONS UP TO \$9000 PER EMPLOYEE. FEE = 25% OF NEW BENEFIT.

#### 6. WORKERS COMPENSATION AUDIT: [WORK-COMP PREMIUM RECOVERY GROUP]

EVALUATES ISSUED WORKERS COMP POLICIES AND THE WORK PRODUCT OF THOSE INVOLVED IN ISSUING SUCH POLICIES. BY COMPARING THE POLICY CONTENT TO THE SOURCE DOCUMENTATION USED TO DETERMINE POLICY PREMIUMS, THE POLICY REVIEW PROCESS DETERMINES THE CORRECT AMOUNT OF PREMIUM THAT EACH POLICY HOLDER IS OR SHOULD HAVE BEEN REQUIRED TO PAY. WE REVIEW LAST 5-7 YEARS FOR COMPANIES PAYING OVER \$40,000 IN ANNUAL PREMIUMS WITH A 70% SUCCESS IN FINDING MONEY. FEE = 50% OF TOTAL SAVINGS.

7. **PARCEL AND FREIGHT AUDIT: [VERISHIP]**

A REVIEW AND AUDIT OF A COMPANIES FREIGHT COSTS; FEDEX, UPS, DHL. MINIMUM CLIENT ANNUAL SHIPPING COST TO PARTICIPATE IS \$200,000. THROUGH THE AUDIT, CLIENT SAVINGS ARE BASED ON OVER CHARGES FROM SHIPPING CARRIERS. IN ADDITION, CLIENT REPORTS ARE PROVIDED DETAILING ERRORS. A 90% SUCCESS RATE & 98% CLIENT RETENTION. FEE = 50% OF TOTAL SAVINGS.

8. **UTILITY AUDIT: [FOREFRONT SUPPORT SERVICES]**

A COMPLETE AUDIT OF SPENDING ON ELECTRIC AND GAS EXPENSES. 3 YEAR SERVICE AGREEMENT. A SUCCESS RATE OF 80%. FEE = 50% OF TOTAL SAVINGS.

9. **MERCHANT/CREDIT CARD AUDIT: [VERIPROCESS]**

A REVIEW AND AUDIT OF A COMPANIES MERCHANT ACCOUNTS. WE CORRECT THE ACCOUNT PLAN AND THEN IMPLEMENT A MONTHLY 'PROCESSING OPTIMIZATION' ON FUTURE TRANSACTIONS. A SUCCESS RATE OF 98% WITH AN AVERAGE SAVINGS OF 22%. FEE = 50% OF TOTAL SAVINGS.

10. **WASTE AND RECYCLING AUDIT: [EMMY WASTE MANAGEMENT]**

LOWERS MONTHLY EXPENSES FOR SOLID WASTE, MEDICAL WASTE AND RECYCLING OPPORTUNITIES BY EVALUATING THE CLIENT'S INVOICES, SERVICE AGREEMENTS, EQUIPMENT, CURRENT SERVICE LEVELS, AND PRICING STRUCTURE. CLIENT'S PAYING OVER \$500 PER MONTH IN FEE'S WITH OVER 80%

SAVING MONEY. FEE = 50% OF SAVINGS OVER THE 36 MONTH PERIOD.

11. [CELL PHONE AUDIT: \[JAS CELLULAR\]](#)

REDUCES THE CLIENT'S WIRELESS BILLS FOR 24 MONTHS VIA A THIRD PARTY REVIEW. THE REVIEW WILL LOOK AT ERRORS, OVERAGES, AND OTHER FEES TO OPTIMIZE THE CLIENT'S ACCOUNT. THE FOCUS IS TO SAVE MONEY WITHIN THE SAME CARRIER AND NOT CHANGE CARRIER'S. MINIMUM OF \$1000 IN WIRELESS EXPENSES PER MONTH. A SUCCESS RATE OF 90%. FEE = 50% OF TOTAL SAVINGS OVER THE 24 MONTH PERIOD.

12. [VENDOR SCREENING: \[PRO-COMPLIANCE\]](#)

RELIEVES COMPANIES FROM THE BURDEN OF MANAGEMENT, MAINTENANCE AND SCREENING OF NEW AND EXISTING VENDORS. SUPPORTS DUE DILIGENCE AND REQUIRES VENDORS TO PROVIDE CURRENT DOCUMENTATION TO PROVE THEY ARE LEGITIMATE. IN ADDITION, TRACKS GENERAL LIABILITY AND WORKERS COMP CERTIFICATES OF VENDOR'S. MINIMUM OF 200 VENDOR'S. FEE = \$150 TO \$200 PER VENDOR PAID ANNUALLY.

13. [ENERGY DEREGULATION: \[ENERGY AEX\]](#)

SIMILAR TO EBAY, EXCEPT INSTEAD OF BIDDING THE PRICE UP, THE GOAL IS TO BID THE PRICE DOWN. AN ENERGY DEAL IS PRESENTED FOR AUCTION BASED ON THE CUSTOMER'S SPECIFIC TERMS. SUPPLIERS THEN BID DIRECTLY AGAINST EACH OTHER ELECTRONICALLY DURING PRE-SPECIFIC BIDDING PERIOD FOR THE RIGHT TO SERVICE THAT DEAL. THE LOWEST BIDDER WINS, THUS ENSURING THAT THE CUSTOMER GETS THE BEST POSSIBLE

DEAL FOR SAVINGS ON THEIR ENERGY COST WHILE EXPENDING THE LEAST AMOUNT OF TIME AND EFFORT ON THEIR PART. HAVE AT LEAST 100,000 AGGREGATE ANNUAL KWH USAGE IN A DEREGULATED STATE WITH THEIR LATEST CLEAN ENERGY BILL. FEE= TBD BASED ON PROJECT.

FIELDSTONE'S MULTI-COST RECOVERY AND SAVINGS PLATFORM CAN ENHANCE YOUR BUSINESS IN FINDING YOU UNKNOWN CORPORATE DOLLARS TO ENHANCE YOUR BUSINESS AND CASH FLOW. LET OUR TEAM OF ATTORNEY'S, ENGINEERS, IT AND TAX SPECIALISTS WORK FOR YOU.

NOTE: FIELDSTONE'S SERVICES ARE ALL CONTINGENCY BASED EXCEPT COST SEGREGATION. ACCORDINGLY, OUR SERVICES ARE FREE IF WE DO NOT FIND SAVINGS OR RECOVER YOUR UNKNOWN BUSINESS COSTS.