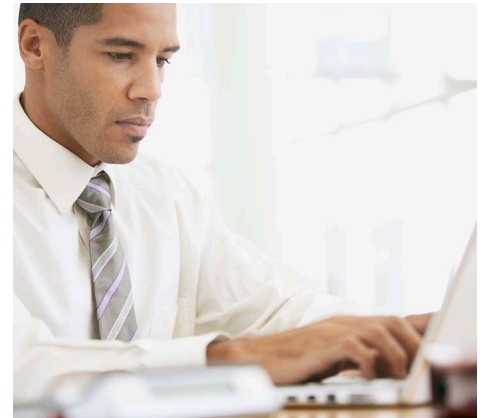


# Incentive Management System<sup>sm</sup> Online Features

Duff & Phelps' Incentive Management System<sup>sm</sup> is a leading edge web-based, tax credit and negotiated incentive analysis, tracking and compliance tool. It enables our client's tax professionals to monitor and manage their federal, state and local incentives over the internet from their PC's to help ensure the incentives secured are actually realized. It also helps them accurately document tax and financial activity for financial reporting purposes.



DUFF & PHELPS' INCENTIVE MANAGEMENT SYSTEM<sup>sm</sup> SIMPLIFIES MANAGING MULTI-STATE STATUTORY AND NEGOTIATED INCENTIVES

## Statutory Credit Module:

- Business unit and location data capture and storage with ability to archive and retrieve multiple tax years as well as filed forms
- Opportunity filter enables onscreen analysis of credit eligibility
  - Pre-loaded state credit database content
  - State and federal zone status
  - Archive and track headcount, property additions, training expenditures, tax liability
- Assign roles and responsibilities and track specific steps required to capture the credit
- Enhanced reporting capabilities
  - Fully flexible filters to customize by tax year, state or location
    - » Credit name
    - » Prior year carryover amount

- » Current year generated and utilized amounts
- » Carryforward amount and expiration date
- » Steps completed vs. steps required to secure the annual credit
  - Detailed, credit-specific notes work-paper archive
- Automated e-mail alert feature to warn of impending filing deadlines
  - Import function allows multiple locations, state and company data to be downloaded easily

## Negotiated Incentives Module:

- Customizable for each incentive
  - Description and program highlights
  - Statute references and links
  - Instant retrieval of executed agreements/contracts and applications
  - Assign roles and responsibilities and track specific steps to secure the incentive

- Calendar feature for potential clawback provisions and reporting requirements
  - Listing of required reports and performance thresholds
  - Auto-alarm function alerts operator of performance requirement shortfalls
  - Links to prior year, previously filed reports
  - Automated e-mail alert feature to warn company personnel of impending filing deadlines
- Enhanced reporting capabilities
  - Ability to sort and report by business unit, year, state and location
  - Track and report on incentive description, amounts, internal and government contact names, filing requirements and deadlines, penalty and clawback milestones and performance requirements

**DUFF & PHELPS**
**Incentive Management System**

- Home
- Administration (4)
- BNA Library
- Reports
- Help
- Corporations
- Duff & Phelps - Production (2)

HOME > BNA LIBRARY > INDIANA [Sign Out](#)

[Tree](#) | [Grid](#) | [Export to Excel](#)

- Investment Tax Credit
  - Qualified Property
  - Qualified Business
  - Priority of Credits
    - Research and Education Credits
    - Research Expense Credit
    - Personal Computer Tax Credit
    - Teacher Summer Employment Credit
    - College and University Contribution Credit
    - Twenty-First Century Scholars Program Support Fund Credit
    - Enterprise Zone Credits and Incentives
      - Enterprise Zone Employment Expense Credit
      - Enterprise Zone Loan Interest Credit
      - Enterprise Zone Gross Income Tax Exemption

**City Property Tax Abatement**

The Negotiated Incentive will start in 2006 and end in 2009

**Active**

**State: Georgia**

Collapse All

**Reports and Supporting Documentation**

	Tax Year	Incentive Amount	Required Head Count	Current Head Count	Required Investment	Current Investment	Comments	Payment Received	Filed Reports & Documentation
<a href="#">Edit</a>	2006	125,000	150	151	1,000,000	1,358,485		1/15/2007	
<a href="#">Edit</a>	2007	125,000	160	165	2,000,000	2,548,214		1/15/2008	
<a href="#">Edit</a>	2008	125,000	170	172	3,000,000	3,154,875			
<a href="#">Edit</a>	2009	125,000	180	0	4,000,000	0			

[Document Management](#)

**Clawback, Requirements & Statutory References**

Type	Details	
<a href="#">Edit</a> Clawback	Continued presence in the jurisdiction for 5 years after end of property tax abatement	✘
<a href="#">Edit</a> Statutory Reference	GA Ann. Stat. XX. XXX	✘
<a href="#">Edit</a> Requirement	180 full-time jobs by the end of tax year 2009	✘
<a href="#">Edit</a> Requirement	4,000,000 capital expenditure by the end of 2009	✘

[Add](#)

**Negotiated Incentive Contacts**

Allan Jones	Salutation	First	Middle	Last	<input type="button" value="Save"/>
	Mr.	Allan	J	Jones	
	Street Address: 3215 Main Street, Suite 200				
	City, State, Zip				

For more information please visit our website:  
[www.duffandphelps.com](http://www.duffandphelps.com)

**About Duff & Phelps**

As a leading global independent provider of financial advisory and investment banking services, Duff & Phelps delivers trusted advice to our clients principally in the areas of valuation, transactions, financial restructuring, dispute and taxation. Our world class capabilities and resources, combined with an agile and responsive delivery, distinguish our clients' experience in working with us. With offices in North America, Europe and Asia, Duff & Phelps is committed to fulfilling its mission to protect, recover and maximize value for its clients.

Investment banking services in North America are provided by Duff & Phelps Securities, LLC. Investment banking services in Europe are provided by Duff & Phelps Securities Ltd. Duff & Phelps Securities Ltd. is authorized and regulated by the Financial Services Authority. Investment Banking services in France are provided by Duff & Phelps SAS. (NYSE: DUF)