

CASE STUDY

Oklahoma City advertising agency qualified for tax credits from activities they routinely performed resulting in significant tax savings

Like most taxpayers, Insight Creative Group, Inc. (ICG) relied on their tax preparer to take advantage of all tax credits and deductions available to them. The firm was unaware that tasks they were routinely performing, qualified for tax credits that could save them significantly.



OVERVIEW

ICG was introduced to Chris Fleming, CEO & Founder of Fleming Advisors. After Chris explained his company's distinct differences, the management at ICG decided to have Fleming Advisors perform a review of their income taxes to see what opportunities may exist.

CHALLENGES

Management at ICG was unaware of any challenges. With their own in-house accounting department, CFO and external CPA firm preparing their tax returns, everything appeared to be going well.

RESULTS

After performing a complimentary tax review and gaining a deeper understanding of the work that creative team at ICG did, Fleming Advisors discovered that activities ICG employees were performing routinely, qualified for tax credits which were not being taken advantage of.

Fleming Advisors prepared amended tax returns for tax years 2014, 2015 & 2016 resulting in combined refunds exceeding \$157,000.



SPOTLIGHT ON INSIGHT CREATIVE GROUP, INC.

- Insight Creative Group, Inc. (ICG) is an advertising and marketing agency located in the heart of Oklahoma City.
- The agency has three shareholders and 28 employees
- Their philosophy is Big Work, Big Impact!

You don't know what you don't know! We trusted our CPA who was with a large well-known firm in OKC, to leverage all savings entitled to us. It turned out that bigger isn't always better as we were leaving a LOT of money on the table! Fortunately, we were able to get refunds for a few prior years thanks to Fleming Advisors. We continue to work closely with Fleming Advisors today because we realize now how important it is to partner with those who treat our business as if it were their own.

-Eric Joiner | CEO/Partner, Insight Creative Group, Inc.



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