



*The largest cost savings
program for the life sciences
industry.*

BIO Savings Week: Discover What's Next Day 2: Scale September 17, 12:30 PM (ET)

Moderator:

- David Mosley, Regional Director, Business Development, BIO

Speakers:

- Alexis Borum, District Channel Manager – R&D Tax Credits (East), ADP Tax Credits
- Chandler Conley, Senior Director of Technical Operations, East Coast, PSC Biotech Corporation
- Liz Davidsohn, Franchise & Strategic Partnerships, ADP
- Tyler Draper, Principal Account Executive, Corporate Traveler
- Steve Joseph, EVP, Strategic Partnerships, BiotechExec
- Jeffrey Kiu, District Channel Manager, R&D Tax Credits (West), ADP Tax Credits
- Sophie Tsai, Account Executive (North America & APAC), PSC Software

ADP HR

Liz Davidsohn

Liz.Davidsohn@adp.com



Welcome to Today's HR & ADP Presentation



Liz Davidsohn
Strategic Partnerships
Account Executive ADP

Helping small businesses simplify:

- HR Administration
- Payroll & Workforce Management
- Compliance & Risk Mitigation
- Employee Experience

(770) 855-2131 |
Liz.Davidsohn@ADP.com

ALWAYS THE RIGHT FIT. NOW, AND IN THE FUTURE.

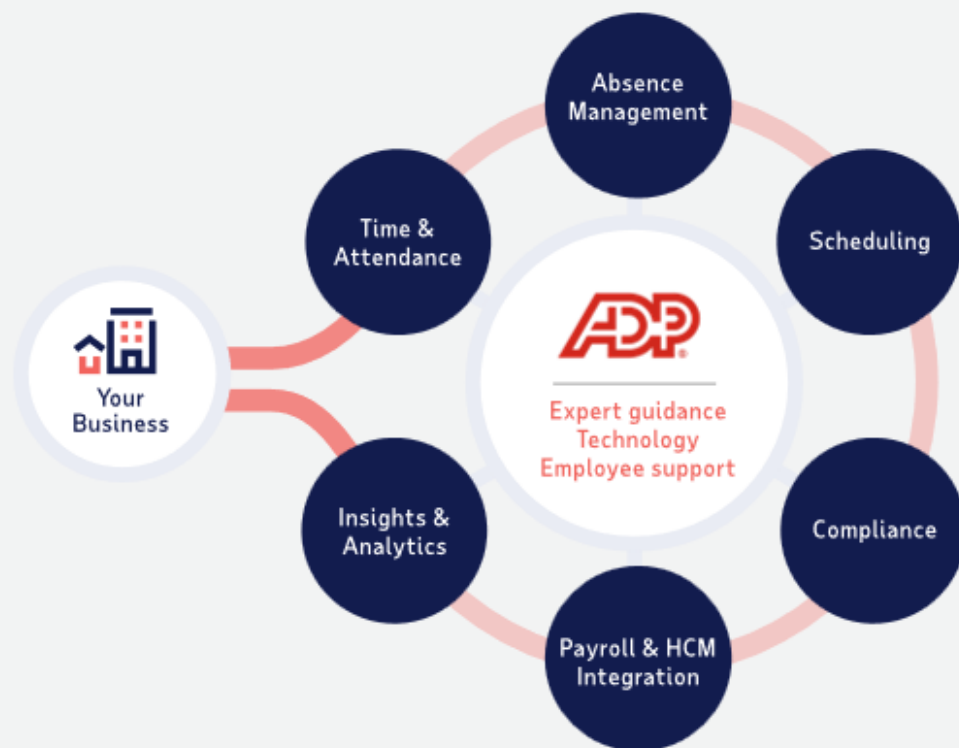
From payroll to employee benefits, ADP's services and solutions help you get what you need, when you need it so you can focus on your business.



HR SUPPORT, ADMINISTRATION AND COMPLIANCE

Tools for every part of the employee life cycle.

- Hiring & Screening
- Employee Onboarding
- HR Help Desk (HR Team Support)
- Employee Handbook Wizard Creation
- Job Descriptions
- HR Toolkits, HR Forms and Documents
- Compliance Updates
- State and Federal Resources
- Database of HR Questions and On-Demand Best Practices



Attract and Retain Incredible People

Recruiting and Hiring



Leverage **CareerPlug** and/or **ZipRecruiter** for Seamless Talent Acquisition. Post to all leading U.S. job boards, including Indeed & ZipRecruiter.

- Recruiting/Hiring
- Onboarding
- Screening
- Benchmarking



Candidates who receive a response to their application within 24 hours are:

- **4.1 times more likely to get hired**
- **6.7 times more likely to land an interview**

Candidates from your careers page are 4× more likely to become hires.

Make it easy to apply and engage with your company!

EMPLOYEE HANDBOOK WIZARD

Easy to create

Simply answer questions about your company, operations and benefits, and create a custom handbook (ready for your review). Pre-written text options make it even easier.

Policies at your fingertips

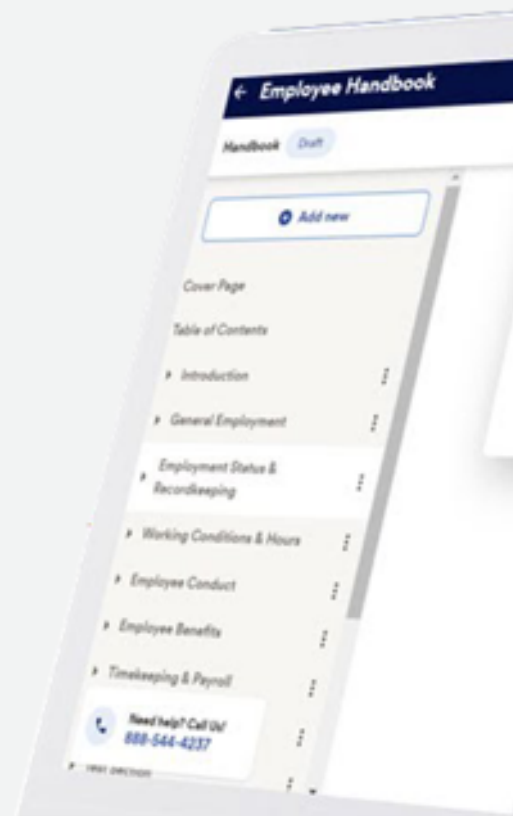
See recommended federal and state policies, select from a library of additional policies, or add your own.

Easy to update

When you make changes to your company profile, the wizard suggests policy updates that you can add with a click.

Acknowledgement tracking

See which employees have/have not acknowledged the handbook, and send reminders.



BEYOND PAYROLL PRODUCTS



PAY-BY-PAY WORKERS COMPENSATION

- **Improve Cash Flow:**
- **Connection To ADP Payroll:**
- **Automated Payments:**
- **Premium Reporting:**
- **Streamlined Audit:**



GROUP HEALTH THROUGH (ADPIA®)

- **Better benefits administration:**
- **Dedicated relationship manager**



RETIREMENT SERVICES

- **Deep experience and knowledge:**
- **Personalized insights and education:**
- **Security everyone can count on:**

*While premium deposits may be eliminated by most carriers, mandatory state assessment fees may be required

** While Pay-by-Pay may reduce the administrative burden of the annual audit, the carrier reserves the right to perform a more in-depth audit, as outlined in your policy documents

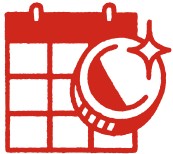
***To take advantage of ADP's Benefits Connector, clients must have a group health policy brokered through ADPIA and must be an ADP payroll client using RUN Powered by ADP®. Excludes Autopay clients. Certain optional features within the Benefits Connector application may require a fee.

Member Benefits



FREE SETUP & EARLY HR ACCESS

No setup fees, and full access to HR tools before first payroll



25% DISCOUNT ON PAYROLL SERVICES

Discount available for new clients



3 MONTHS OF FREE SERVICE

ADP R&D Tax Credits

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Jeffrey Kiu

Jeffrey.Kiu@ADP.com



ADP R&D TAX CREDITS



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**BIO & State Life
Science Member
Companies -
20% discount on
ADP R&D Tax
Credit services**

LAYING THE GROUNDWORK

Federal R&D Tax Credit ¹



FEDERAL R&D TAX CREDIT

The **Federal R&D Tax Credit** is a general business credit established in 1981 and made permanent in 2015.

- Designed to encourage U.S. expenditures in **engineering, physical, biological, and computer sciences**
- **May be claimed retroactively**; businesses can generate a refund of taxes previously paid and carry forward unused credits up to 20 years
- Additional options may be available based on the **2023 Inflation Reduction Act**



MAY BE MONETIZED BY OFFSETTING:

1. Regular tax liability for all businesses; or
2. Payroll tax (employer's Social Security portion of FICA) for businesses in their first five years of generating gross receipts AND gross receipts of less than \$5 million/year (\$500K/year credit limit).

**R&D Tax credit is a permanent tax credit
for companies to claim every year**

¹ See 26 U.S. Code Section 41 (2016); Protecting Americans from Tax Hikes Act of 2015, Consolidated Appropriations Act 2016 (P.L. 114-113), Division Q, H.R. 2029, 114th Congress (2015-2016).

ADP VALUE

ADP HELPS BY FOCUSING ON YOUR SAVINGS, SIMPLICITY AND COMPLIANCE,
SO, YOU CAN FOCUS ON YOUR BUSINESS WITH CONFIDENCE.



Maximize Credits

Capture every **eligible dollar** through a proactive, data-driven approach so you can maximize and receive the full credit value you've earned.



Compliance

Compliance is ADP's foundation. Our process and audit defense **minimize risk and gives you peace of mind**, backed by decades of credibility.



Process Efficiency

Our **low lift, streamlined approach** integrates seamlessly with payroll and tax systems, saving time for your finance, HR and business leaders.



Better Value/ Cost Effective

Flexible fee structures, transparent pricing, and built-in audit defense support delivers **maximum ROI with no surprises**.



Depth and Breadth of Tax Credit

With **over 46** years of tax credit experience, **300** dedicated tax experts and **over 3,000 potential tax credits available**; ADP has helped businesses capture over **\$6B** in credits across federal, state and local programs.

Plus: **ADP is 1 of only 2 payroll providers** that enable Qualifies Small Businesses to improve **cash flow** with **Real Time Redemption** of the R&D tax credit against payroll taxes.

R&D CLS Success

Company: Lumino Dx

Employee: 9

Industry: Biotech



Qualifying Activities: CRO developing proprietary innovative platforms.



Total Credit: \$19,720

SoCal R&D Tax Credit

ADP R&D REAL-TIME REDEMPTION

With real-time redemption, ADP can help qualified small businesses clients claim and apply your R&D Tax Credits sooner!

Payroll tax offset is an option for a Qualified Small Businesses (QSB) to claim the R&D Tax Credit. **It allows a business to apply a portion of their R&D credit against the employer-paid portion of the Social Security and Medicare tax liabilities.**

To qualify to redeem the R&D Tax Credit as a payroll offset, a company must meet these two rules:

1. The company has **less than \$5 million in gross receipts/sales** in the tax year for which the credit is claimed
2. The company has **less than 5 years of gross receipts/sales**

Next Steps: How to Claim

Schedule 30-minute complementary call with

Alexis (East) or Jeff (West)

ADP'S END TO END APPROACH:



EVALUATE AND CALCULATE YOUR R&D TAX CREDITS



CAPTURE AND FILE FOR THE CREDITS



HELP YOU CLAIM AND APPLY FOR THE CREDITS TO YOUR PAYROLL TAXES SOONER VS. WAITING FOR IRS REFUND

BiotechExec

Steve Joseph

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When does an emerging life science company need experienced C-suite leadership?

Often before it needs — or can justify — another full-time executive.

Companies Need Specialized Expertise — Without Building Bigger Teams



CEO / Strategic Leadership

Company building • strategy • growth



CMC & Regulatory

Development • manufacturing • FDA



Fundraising & Finance

Capital strategy • investor readiness



Clinical & Medical

Clinical strategy • development



Partnerships & Licensing

Partnerships • licensing • transactions



Commercial & Operations

Go-to-market • execution • scaling

Highly experienced. Increasingly specialized. NOT NECESSARILY FULL-TIME.



Companies Often Wait Too Long to Bring in Experienced Leadership

THE POSITION

Do we need a full-time CFO?
A full-time CBO?
A full-time CMO?

MAYBE NOT YET

THE EXPERTISE

Do we need financing experience?
Partnership & licensing experience?
Clinical development experience?

MAYBE RIGHT NOW

Think about the expertise you need
RATHER THAN THE POSITION YOU NEED TO FILL.

Access the Expertise You Need — in the Way You Need It



ADVISORY

A few hours or a defined project



FRACTIONAL

Ongoing C-suite leadership



FULL-TIME

As company needs evolve

———— **SUPPORTED BY 500+ EXPERIENCED LIFE SCIENCE C-SUITE EXECUTIVES** ————

Curated • Referral-Based • Nationwide

Use the right amount of experienced leadership — at the right time.

The Right Leadership at the Right Time Can Change a Company's Trajectory

THE NEED

University spinout
Promising diagnostics technology
Needed an experienced CEO

FRACTIONAL CEO

Experienced CEO placed
on a fractional basis

FULL-TIME

Converted in
2 months

SUCCESSFUL EXIT

Led company through
successful sale
Remains in a CEO role today

Fractional wasn't the destination — it was the right starting point.



Where Can Experienced Leadership Benefit Your Company?

WHERE'S THE GAP?

Fundraising?
Partnerships?
Clinical strategy?
Operations?
Commercialization?

BIO MEMBER BENEFITS

10% DISCOUNT
on BiotechExec's services

COMPLIMENTARY
initial advisory session
up to 1.5 hours

You may not need another full-time executive.
YOU MAY NEED THE RIGHT EXPERIENCE NOW.

Start with a conversation about where experienced leadership could have **THE GREATEST IMPACT.**



STEVE JOSEPH

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Corporate Traveler

Tyler Draper

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**How does your
team manage
business travel?**



What's changing in life sciences travel?

More travel. More to manage.

- **Visibility**
- **Compliance**
- **Scale**
- **Support**

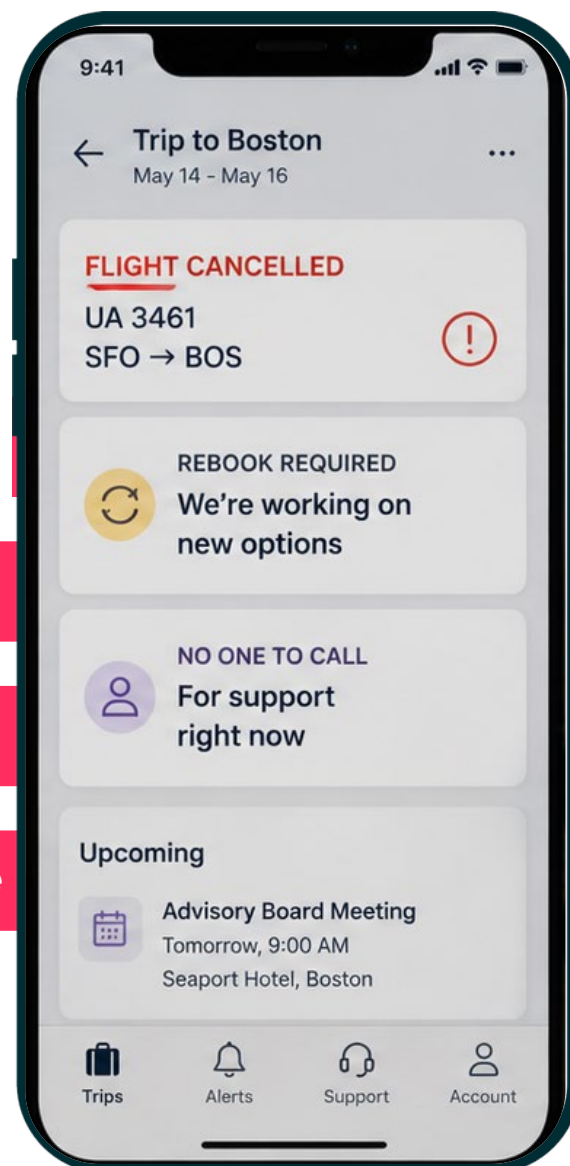


What's getting harder?

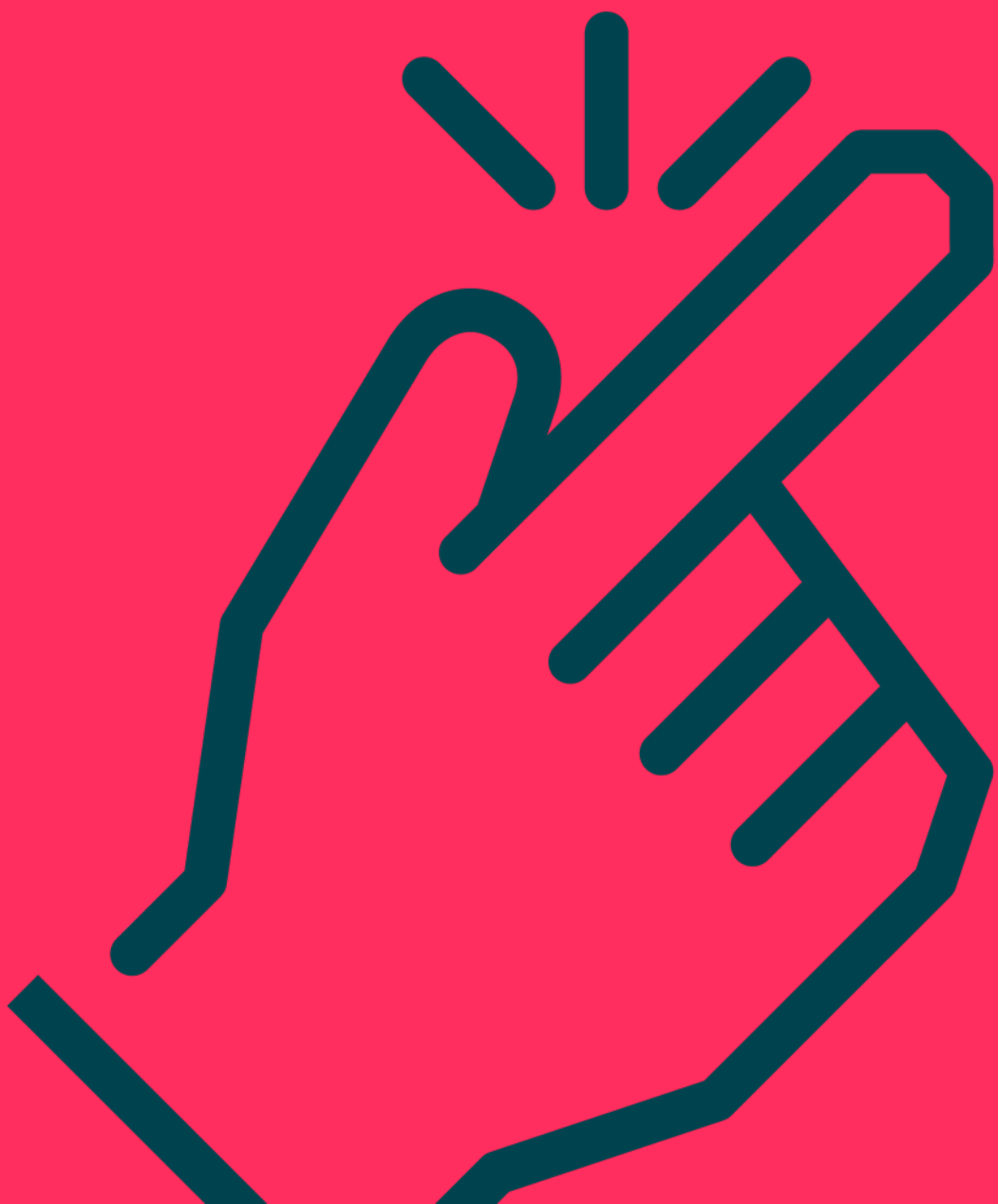
Disruptions

Missed value

Spend & Compliance



The most common
mistake? Waiting
until something
breaks.



What's different with Corporate Traveler

**A travel platform built for how life
science teams actually travel.**

- Clinical trial
- Advisory board
- Symposium
- FDA hearing
- Candidate travel

One program, three parts working together.



Technology

Booking + reporting
Single source of truth



Services

Dedicated support
24/7 when you need it



Process

Built to scale
Policy + best practices



- **\$2.14 saved for every \$1**
- **Guaranteed minimum 1:1 ROI**
- **\$4.1M+ saved by BIO and state life science association members since 2023**



Support when you need it

- 24/7
- Phone + chat
- Any time zone

“

Our client
GeneDx
signed on with
us in November
2025 and have
already
saved \$19k

”





**What should life
science companies
think about over the
next 12 months?**

Thank you!

Contact us at
bio@corporatetraveler.us



CORPORATE
TRAVELER™

PSC Biotech

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Enabling Innovation While Maintaining Compliance

Validation Strategies for AI and Emerging Technologies in Life Sciences

BIO Savings Week
Prepared by Chandler Conley

What's Changing?

AI and New Technologies Are Entering Regulated Environments



What are life science companies asking for?

- How can AI be adopted while remaining compliant?
- How should GxP systems with AI components be validated?
- How can companies accelerate digital transformation without increasing risk?



Trends We're Seeing

- Increased AI-enabled quality systems
- Automated data analysis and review tools
- Digital manufacturing and smart facilities
- Greater reliance on computerized systems

What's the Challenge?

Innovation Is Moving Faster Than Compliance Programs

What is becoming more difficult?

- Determining validation requirements for AI-based solutions
- Assessing risks associated with evolving technologies
- Maintaining documentation and traceability
- Integrating new technologies into existing quality systems

Common Mistakes

- Implementing technology before defining validation strategies
- Underestimating regulatory expectations
- Treating AI validation like traditional software validation
- Lack of cross-functional project governance

What's Different?

How PSC Supports Emerging Technology Implementations and GxP Compliance

New Capabilities

- AI validation strategy development
- Risk-based validation approaches
- Digital transformation support

Technology Expertise

- Technology Implementation strategy
- Data Integrity
- Automated Systems Validation
- GxP Compliance

Services

- Commissioning, Qualification, and Validation (CQV)
- Computerized System Validation (CSV)
- Project Management
- Quality Assurance

End Result

- Lifecycle-based validation
- Risk management frameworks
- Inspection-ready documentation

How **Member Companies** Benefit



Member Savings

- 10% discount on PSC Biotech consulting services



Dedicated Support

- Subject matter experts in validation and compliance
- Flexible project teams



Value-Added Services

- Technology Assessments
- AI validation strategy consultation
- Regulatory and Operational readiness support

"Start defining validation strategies for AI-enabled technologies before implementation, not after deployment."

Poll Question

Which GxP area is your organization most likely to apply AI to in the next 12 months?

- A. Quality Management Systems
- B. Manufacturing and Process Monitoring
- C. Validation and Documentation
- D. Laboratory Systems / Laboratory Information Management Systems
- E. Regulatory Affairs
- F. We don't have an AI roadmap for the next 12 months

Let's Discuss Your Program

PSC Biotech helps life sciences organizations implement AI and emerging technologies through risk-based validation, quality oversight, and disciplined project execution.

Let's discuss your next CQV, CSV, QA, or technology implementation program.

Chandler Conley

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www.biotech.com



PSC Software

Sophie Tsai

stsai@biotech.com





ACE eQMS & Inspection Management

eQMS and Inspection management for BIO members |
Presented by Sophie Tsai – Account Executive, PSC Software

PSC Software · BIO Savings Week

What's Changing in the Industry

Section 01 — three shifts are reshaping quality operations in 2026.

Regulation, all at once

QMSR took effect February 2026, aligning FDA with ISO 13485 — alongside CSA, ICH Q9(R1), and new FDA/EMA AI guidance.

AI became an expectation

AI has shifted from nice-to-have to industry focus. Regulators now expect documentation, risk evaluation, and identifiable outputs.

The market is modernizing

Life sciences quality software adoption is growing. Everyone is upgrading at once. Paper and sharepoint based system to a seamless eQMS.

What's Getting Hard

Readiness isn't keeping up.



01

Orphaned data

Records stranded on standalone systems outside the quality system.



02

Weak audit trails

Audit trails insufficient, disabled, or never reviewed.



03

Shared logins

Shared accounts break attributability of every signature.



04

Backdated records

Entries made after the fact, with no contemporaneous evidence.



05

Unvalidated spreadsheets

Quality decisions driven by spreadsheets no one validated.

ACE Starter

Smarter compliance for small teams

What's included

Document Control, Training Management, and Management Review in one validated eQMS with built-in analytics for faster, cleaner reporting.



STARTER

Smarter compliance for small teams. Focused on Document and Training Management with the addition of advanced analytics for streamlined reporting.

ACE Essentials

Everything in ACE Starter, plus quality workflows

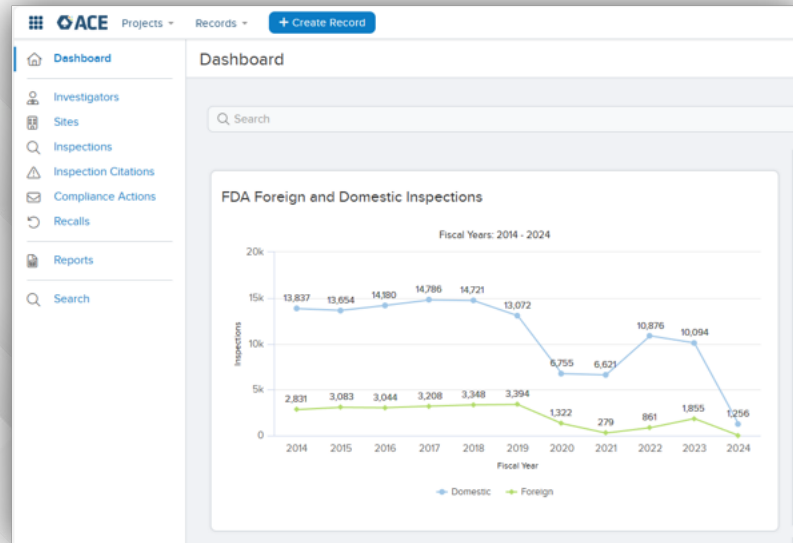
What's added

Everything in ACE Starter AND....
Adds Quality Management and
Asset Management
workflows. CAPA, deviations,
audits, and equipment records on
the same validated platform.



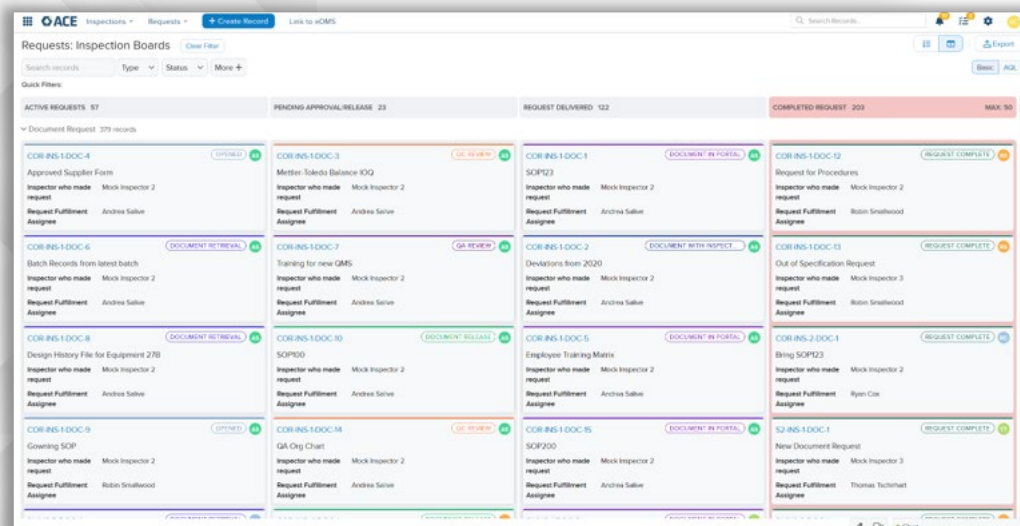
ACE Inspection

End-to-end inspection readiness and management



Includes

On-site inspection support (dependent on implementation package) and FDA inspector insights
Configuration services and virtual training
ACE Certification Program access, 24/7 support



ACE Supports

Box integration and ACE Portal for remote file sharing
Full software integration (REST API)
Configurable workflows, dashboards, permissions
Site separation and global data management

What's New in ACE

Section 03 — new capability mapped to the problems teams brought us.

Challenge 1: Data integrity

What's new

- EBR: structured, table-based entry with review and Quarantine states, replacing risky spreadsheets.
- Re-signing required after any edit to a signed step.
- ACE Sign enforces 21 CFR Part 11 across every envelope.

Challenge 2: Stretched teams

What's new

- ACE Business Intelligence: ask in plain English, get charts and forecasts instantly.
- ACE Help: AI assistant built in for faster onboarding.
- ACE Regulatory Profiles and Document Viewing Portal for inspections.

Challenge 3: System rollouts

What's new

- Pre-validated IQ/OQ/PQ workflows — go live in as fast as 2 weeks!
- Assigned Project Implementation and Account Managers.
- Global Support: new languages added. 24/7 phone line

Member Success Story



Clinical-stage midwest pharma company passes FDA inspection seamlessly with
ACE Inspection

Previous system

Archaic and standalone

- Excel, multiple Teams chats, and OneDrive/SharePoint.
- Long request turnaround and chaotic, stressful inspection days.
- No inspection metrics. How long is the average request turnaround time? How many documents rejected?

With ACE Inspection

One end-to-end solution

- Inspection readiness with FDA inspector profiles and Pre-Inspection State allowing for document staging and inspection team prep.
- Requests, scribe notes, daily summaries, and near misses tracked in one place.
- ACE document portal with tracking history

FDA Inspector Comments

Better than FDA's Box System

"Not only was our inspector open to using the ACE document portal, but today she indicated that she thinks it's **better than Box portal wise!**" —
Director, Quality Assurance

Your Member Benefits



15% off Licensing on ACE Solution Packages:

- **ACE Starter**
- **ACE Essentials**
- **ACE Enterprise**
- **ACE Inspection**



Let's find your right platform fit! Contact stsai@biotech.com for an introductory demo.



Today's presenters: Contact Information



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