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Please note that for the 2021 tax filing season, the minimum cost of tax return preparation for Form 1040 starts at $450 and up. For new clients, there will be no charge for a brief 10-15 minute initial virtual or telephone consultation to go over our process and pricing. For new and existing clients, we are now offering virtual or telephone consultations for a pre-determined flat fee where we can answer specific tax or accounting questions or suggest tax planning and tax savings strategies.

Preparation fees for Forms 1065, 1120 & 1120-S start at $800 and up depending on our total time spent, company gross revenues and overall complexity of the return. A Schedule L (Balance Sheet) is now included with every Form 1065, 1120 & 1120-S. Our base business tax return fee also includes shareholder/partner basis calculations when applicable. The "charge by form" method of billing tax return preparation fees is a transparent but imperfect way for us to apply the costs for the total time to get returns completed. We typically take into consideration the time that it takes to prepare each tax form and sometimes the "charge by form" method may overstate or understate the price based on actual time spent, so we will apply a discount or add fees to the final invoice to adjust the total cost when appropriate.

Our goal is to bill our clients in a fair and transparent way, so we can do our best to eliminate surprises once the return is completed and ready to file. The cost to prepare your tax return all comes down to the overall amount of time we spend working on your return. Ideally, we prefer to receive all tax documents before starting work on the tax return to minimize the possibility of omitting a document and to eliminate our time spent getting in and out of the return during preparation. Clients that provide tax information in a disorganized fashion or time we spend communicating to a client asking for missing information will likely be subject to additional fees added to the final invoice. It is important to understand that every tax return is different. The forms necessary to complete your tax return may vary from year to year as your situation changes. For that reason, final pricing is always subject to a client's current situation and the complexity of their return. Below is a breakdown to show some of the more common returns and how our pricing works but as always you may contact us for an estimate tailored to your tax needs:

Simple Individual Tax Return	
Form 1040	$ 425.00
Standard Deduction	Included
State (1st State included)	Included
e-File	Included
1 W-2	$ 25.00
Total	**$ 450.00**

Simple Individual Itemized Return	
Form 1040	$ 425.00
Schedule A	$ 75.00
Other Forms: (childcare, W-2's, etc)	$ 100.00
State (1st State included)	Included
e-File	Included
Total	**$ 600.00**

Simple Individual Small Business Return	
Form 1040	$ 425.00
Schedule C (Minimal Expenses)	$ 200.00
Auto Worksheet	$ 30.00
Form 8829 Business Use of Home	$ 30.00
Other forms: childcare, interest, educa	$ 115.00
e-File	Included
1 W-2	Included
Total	**$ 800.00**

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TAX RETURN PREPARATION SCHEDULE OF FEES BY FORM

Rates Effective January 1, 2022

Form	Title	Price	Description
990	Tax Exempt Organization	$800.00	minimum */**/***/****
1040	U.S. Individual Income Tax Return (Includes 1 State Return)	Included	per form
1040 Schedule A	Itemized Deductions	$75.00	per form
1040 Schedule B	Interest and Ordinary Dividends	$20.00	per item
1040 Schedule C	Profit or Loss from Business - (Small Business-minimal expenses)	$200.00	minimum per form */**
1040 Schedule C	Profit or Loss from Business - (Small Business-multiple expenses)	$300.00	minimum per form */**
1040 Schedule D	Capital Gains and Losses	$20.00	per item ($30 minimum)
1040 Schedule E (pg 1)	Supplemental Income and Loss (Page 1 Rental Properties)	$175.00	per rental **
1040 Schedule E (pg 2)	Supplemental Income and Loss (Pahe 2 Partnerships/S Corps)	$30.00	per form
1040 Schedule EIC	Earned Income Credit	$85.00	per form
1040 Schedule F	Profit and Loss from Farming	$150.00	per form
1040 Schedule H	Household Employment Taxes (Nanny Tax)	$50.00	per form
1040 Schedule R	Credit for the Elderly or the Disabled	$30.00	per form
1040 Schedule SE	Self-Employment Tax	$0.00	per form
1040-ES (worksheet)	Estimated Tax for Individuals (Includes Vouchers)	$50.00	per form
1040-X	Amended U.S. Individual Tax Return	$450.00	minimum per form */**
1041	U.S. Income Tax Return for Estates and Trusts	$750.00	minimum */**/***/****
1045	Application for Tentative Refund	$200.00	per form
1065 (w Sch L)	U.S. Return of Partnership Income (includes 2 K-1's)	$800.00	minimum */**/***/****
1065 (w Sch L)	U.S. Return of Partnership Income (Businesses over $1 Million Gross Revenues)	$1,000.00	minimum */**/***/****
1096 & 1099	Annual Summary and Transmittal of U.S. Info Returns & Prepare 1099 Forms	$30.00	per form
1099	Miscellaneous Income	$20.00	per form
1099-R	Retirement/Pension/IRS Distribution	$20.00	per form
1116	Foreign Tax Credit (Individual, Estate, or Trust)	$30.00	per form
1118	Foreign Tax Credit (Corporation)	$50.00	per form
1120 (w Sch L)	U.S. Corporate Income Tax Return	$800.00	minimum */**/***/****
1120 (w Sch L)	U.S. Corporate Income Tax Return (Businesses over $1 Million Gross Revenue)	$1,000.00	minimum */**/***/****
1120-S (w Sch L)	U.S. Income Tax Return for an S Corporation (Includes 1 k-1)	$800.00	minimum */**/***/****
1120-S (w Sch L)	U.S. Income Tax Return for an S Corporation (Businesses over $1 Million of Gross Revenues)	$1,000.00	minimum */**/***/****

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Form	Title	Price	Description
2106	Employee Business Expense	$30.00	per form
2106-EZ	Employee Business Expense (Short Form)	$30.00	per form
2210	Underpayment of Estimated Tax	$0.00	per form
2441	Child and Dependent Care Expense	$30.00	per form
2555	Foreign Earned Income	$80.00	per form
2555 pg 3	Foreign Earned Income (Page 3)	$30.00	per form
3800	General Business Credit	$50.00	per form
3903	Moving Expenses	$30.00	per form
4136	Credit for Federal Tax Paid on Fuels	$30.00	per form
4137	Tax on Unreported Tips	$30.00	per form
4562	Depreciation and Amortization	$15.00	per item ($25 minimum)
46684	Casualties and Thefts	$60.00	per casualty/theft
4797	Sale of Business Property	$75.00	(and up) per item
4835	Farm Rental Income and Expenses	$60.00	per item
4868	Application for Extension to File U.S. Individual Return	$60.00	per form
4952	Investment Interest Expense Deduction	$30.00	per form
4972	Tax on Lump-Sum Distributions	$80.00	per form
5329	Additional Taxes Attributable to Qualified Retirement Plans	$30.00	per form
5405	First Time Homebuyers Credit	$30.00	per form
5695	Residential Energy Credits	$35.00	per form
6198	At Risk Limitations	$30.00	per form
6251	AMT Alternative Minimum Tax	$0.00	per form
6252	Installment Sale Income (first year)	$100.00	per form
6252	Installment Sale Income (subsequent years)	$30.00	per form
6781	Gain or Loss from Section 1256 Contracts and Straddles	$20.00	per item ($25 minimum)
8283	Non-Cash Charitable Contributions	$20.00	per item
8332	Exemption Release Divorced or Separated Parents	$30.00	per form
8379	Injured Spouse Claim and Allocation	$85.00	per form
8582	Passive Activity Loss Limitations	$0.00	per form
8606	Nondeductible IRA	$30.00	per form
8615	Tax for Children under 18 who have Investment Income	$30.00	per form
8801	Credit for Prior Year Minimum Tax	$30.00	per form
8812	Additional Child Credit	$0.00	per form
8814	Parent's Election to Report Child's Interest and Dividends	$30.00	per form

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TAX RETURN PREPARATION SCHEDULE OF FEES BY FORM
Rates Effective January 1, 2022

Form	Title	Price	Description
8814	Parent's Election to Report Child's Interest and Dividends	$30.00	per form
8824	Like Kind Exchanges	$125.00	per form
8829	Business Use of Home (simplified option)	$35.00	per form
8834	Qualified Electric Vehicle Credit	$30.00	per form
8839	Qualified Adoption Expenses	$75.00	per form
8846	Credit for Employer Soc. Sec. and Medicare taxes on tips	$30.00	per form
8863	Education Credits	$35.00	per form
8880	Qualified Retirement Savings Contribution Credit	$20.00	per form
8889	Health Savings Account	$35.00	per form
8910	Alternative Motor Vehicle Credit	$30.00	per form
8917	Tuition & Fees Deduction	$35.00	per form
8938	Statement of Foreign Assets	$35.00	per form
8949	Sales and Other Dispositions of Assets	$20.00	per form
8959	0.9% $200,000 Employment Tax (Additional Medicare Tax)	$30.00	per form
8960	3.8% Net Investment Income Tax	$30.00	per form
K-1s	Income, Losses, Dividends, etc. of Partners or Shareholders	$35.00	(and up) per form
W-2	Wage and employee tax statement	$20.00	per form
Auto Worksheet	Auto Worksheet for Small Business, etc.	$30.00	per form
Alimony Payments	Collecting Information & Entering Alimony Payments	$30.00	per form

** Pricing schedule is based on the firm’s average time working on a return and the complexity of the return*
*** Any additional bookkeeping necessary will be charged at our standard rate*
**** Standard rate for tax bookkeeping cleanup is $150/hour*
***** CPA Consultations and high-level tax work / planning will be billed at $350/hour*

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ADDITIONAL FEES

Title	Description	Price	Price Description
State	State Return (first)	Included	per form
State (additional)	State Return (additional returns after the first one)	$50-$75	per form
E-file	Federal and state tax returns	Included	per form
MFJ vs MFS Analysis	Perform MFJ vs. MFS Analysis to Optimize Most Advantageous Way to File Tax Return	$75.00	per form
New Rental Setup	Calculate Depreciable Basis for Residential Rental	$75.00	per form
Sale of Primary Home	Reporting the sale of a primary resident in the return	$75.00	per form
E-File Rejection	Fee to cover time spent resolving an e-file rejection and create a paper tax filing if necessary	$50.00	per form
E-File Rejection Fix (if Needed)	Consultation via email, virtual meeting or phone to answer clients' tax questions (meeting up to 30 min, fee collected up front in most cases)	$50.00	per form
Tax Consultations (Individuals)	Consultation via email, virtual meeting or phone to answer clients' tax questions (meeting up to 30 min, fee collected up front in most cases)	$75.00	1-30 min increment
Tax Consultations (Business Clients)	Consultation via email, virtual meeting or phone to answer clients' tax questions (meeting up to 30 min, fee collected up front in most cases)	$150.00	1-30 min increment
Hourly Bookkeeping for Tax Cleanup & Prep	Hourly rate for bookkeeping/accounting cleanup and preparation	$150.00	per hour
CPA Hourly Rate	CPA hourly rate for any tax or business service not listed above	$350.00	per hour

DOCUMENT AND TAX RETURN DELIVERY

Title	Description	Price	Price Description
Pick up Docs at Office	Pick up original tax documents at our most convenience office location	$0.00	no charge
Return Delivery Electronically	Copy of the tax return delivered through a secure portal or email if necessary	$0.00	no charge
Have Doc Delivered by Mail	Deliver original tax documents back to client using USPS Priority Mail	$25.00	per mailing
Paper Copy of Return	Create a paper copy of the tax return for pick up at one of our office locations	$25.00	per copy
Have Paper Copy of Return Mailed	Create a paper copy of the tax return for delivery using USPS Priority Mail	$50.00	per copy per mailing

PROCESS

1. Create shared drive for client to upload documents to
2. Client to upload relevant documents, see list below for details of documents needed
3. Email us to let us know once you have uploaded all your documents
4. We will review everything and put together an estimate for your tax return and send to you for your approval, we will also send you an estimated date for completion of the return at this time
5. Once you approve the estimate and timeline, we require a 20% down payment to start the return
6. If we have any questions during the preparation of your return we will reach out to you
7. Once return is complete you will receive an emailed copy with your final invoice and also an email from DocuSign to sign form 8879 to give us authorization to eFile on your behalf
8. Once your final payment is made and form 8879 is signed we will eFile your return
9. If eFile is rejected for any reason we will research it and fix the issue and eFile again, if it is an error on our behalf there is no additional charge, if there is an error due to the information we received from the client, an additional fee may be incurred.

INFORMATION NEEDED TO PREPARE & FILE PERSONAL TAX RETURN

1. Prior Year Information
   a. Prior Year Tax Return
2. Personal Information
   a. Copy of front of Driver's License (copy of Spouse's Driver's License if filing jointly)
   b. Spouse's email address if filing jointly (both have to DocuSign form 8879 to authorize our company to eFile your return)
   c. Bank info (name, account type, account number, and routing number)
3. Dependent(s) Information
   a. List of all dependents, relationship, social security number, and date of birth
   b. Childcare records (including the provider's tax ID number) if applicable
   c. Income of dependents if applicable
   d. Form 8332 showing the child's custodial parent is releasing their right to claim a child to you, the noncustodial parent (if applicable) or divorce degree or details if applicable
4. Sources of Income
   a. Employed
      i. W-2(s)
   b. Unemployed
      i. 1099-G
   c. Self Employed
      i. Forms 1099, Schedule K-1, income records to verify amounts not reported on 1099-MISC or 1099_NEC
      ii. Records of expenses (check register, credit card statements, receipts, or financial statements)
      iii. Business Asset information (cost, date places in service, asset type) for depreciation
      iv. Home office information (SF of House, SF of home office, monthly or annual utility expenses, monthly or annual rent, any expenses exclusively for home office use)
      v. Vehicle information (description, date placed in service, cost, mileage, repair costs)
      vi. Record of estimated tax payments made (Form 1040-ES)

d. Rental Income
    i. Records of income and expenses
    ii. Rental asset information (cost, date placed in service) for depreciation
    iii. Major improvements information (cost, date placed in service) for depreciation
    iv. Record of estimated tax payments made (Form 1040-ES)
e. Retirement Income
    i. Pension/IRA/annuity income (1099-R)
    ii. Traditional IRA basis (i.e., amounts you contributed to the IRA that were already taxed)
    iii. Social Security/RRB income (SSA-1099, RRB-1099
f. Savings & Investments or Dividends
    i. Interest, dividends income (1099-INT, 1099-OID, 1099-DIV)
    ii. Income from sales of stock or other property (1099-B, 1099-S)
    iii. Dates of acquisitions and records of your costs or other basis in the property you sold if the basis is not reported on 1099-B)
    iv. Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)
    v. Expenses related to your investments
    vi. Record of estimated tax payments made (Form 1040-ES)
    vii. Transactions involving cryptocurreny (Virtual currency)
g. Other Income & Losses
    i. Gambling income (W-2G or records showing income and expenses)
    ii. Jury duty records
    iii. Hobby income and expenses
    iv. Prizes and awards
    v. Trust income
    vi. Royalty income 1099-MISC
    vii. Any other 1099s received
    viii. Record of alimony paid/received with ex-spouse's name and SSN
    ix. State tax refund
h. Deductions
    i. Home ownership (Form 1098 or other mortgage interest statements)
    ii. Real estate and personal property tax records
    iii. Receipts for energy saving home improvements (solar panels, solar water heater, etc)
    iv. All other 1098 series forms
    v. Charitable donations (cash donations, non-cash donation, amount of miles driven for charitable or medical purposes)
    vi. Medical expenses (must exceed 7.5% of Adjusted Gross Income, includes insurance, doctors visits, dentists, hospitals, prescriptions)
    vii. Childcare Expenses (fees paid to a licensed day care, amounts paid for baby-sitter for child under age of 13 while you work, expenses paid through a dependent care flexible spending account at work)
    viii. Educational Expenses (forms 1098-T from educational institutions, receipts for qualified education expenses, records of any scholarships or fellowships received, Form 1098-E if you paid student loan interest)

ix. K-12 Educator Expenses (receipts for classroom expenses for teachers)
x. Retirement & Other Savings (Form 5498-SA showing HAS contributions, Form 5498 showing IRA contributions, all other 5498 series forms (5498-QA, 5498-ESA)
xi. Federally Declared Disaster (City/county you worked/lived/have property in, records to support property loss, records for rebuild/repairs, insurance reimbursement/claims to be paid, FEMA assistance information.

INFORMATION NEEDED TO PREPARE & FILE COMPANY TAX RETURN

1. Prior Year Information
   a. Prior Year Tax Return with all schedules attached
2. Partnership/Operating Agreements
3. Financials/or access to accounting system
4. List of fixed assets (cost, description, date placed in service)