



2023 Individual Tax Return Price Sheet

| Service | Fee | Notes |
|---|----------------------------|--|
| Tax Services | | |
| Federal and State Tax Return | Starting at \$550** | <i>Any Filing Status Includes general itemized deductions, interest and dividends, Electronic Filing</i> |
| Amendment of Prior Year Return | Starting at \$550 | <i>Amendment of Tax Return for new client - \$595</i> |
| 1040 Schedule D - Capital Gains and Losses | \$100 | <i>Includes up to 3 brokerage statements. Additional brokerage statements \$50 each. Capital Stock Basis research is \$250/hr.</i> |
| Partnership/S Corporation K-1's | \$125 | <i>Complexity Time on K-1 may be billable at \$250/ hr if applicable.</i> |
| Publicly Traded Partnerships K-1's | \$75 | <i>Complexity Time on K-1 may be billable at \$250/ hr if applicable.</i> |
| Additional State Tax Return (per state) | \$200 | <i>BeanLab will only file an additional state tax return if required.</i> |
| 1040 Schedule E - Rental Real Estate | \$200* | <i>\$125 for each additional rental property</i> |
| 1040 Schedule C -Profit or Loss From Business <i>(Minimal activity)</i> | \$75* | <i>For each schedule C filed</i> |
| 1040 Schedule C -Profit or Loss From Business <i>(Up to \$125,000 Revenue)</i> | \$250* | <i>For each schedule C filed</i> |
| 1040 Schedule C -Profit or Loss From Business <i>(\$125,001 to \$200,000 Revenue)</i> | \$300* | <i>For each schedule C filed</i> |
| 1040 Schedule C -Profit or Loss From Business <i>(Greater than \$200,000 Revenue)</i> | \$500* | <i>For each schedule C filed</i> |
| Extension Fee | \$100 | <i>If document collection is not fully completed and submitted by March 1st, an extension may likely need to be filed. If extension payments or quarterly tax estimates need to be calculated, a rate of \$250/ hr (estimated 1 hr) applies.</i> |
| Miscellaneous Complexities: Home Sale/ Purchase, Installment Plan with Return, Heavy Payment for Balance Due Administration, Non-Collaboration (mailing/ dropping off documents, paper filings) | | |
| Add On Services | | |
| Audit Assistance | \$250 per hour | |
| Dependent Child Return (W-2 ONLY) | \$350 per child | <i>We highly encourage self-preparation for W-2 only returns.</i> |
| Important Notes | | |
| Any complexities or forms not specifically mentioned above will be performed at a rate of \$250/hr. Most situations can be researched, prepared, discussed, and resolved within half to one full hour. We will proactively communicate ahead of time with you if we estimate the time required to exceed one hour. | | |
| * This fee does not include gathering, performing accounting services, or categorizing income, expense or other financial information necessary for the preparation of the tax return schedule. Income, expense and any other required financial information must be provided in the appropriate summary form from your accounting/bookkeeping system. If accounting is required, a rate of \$225/hr will be charged. | | |
| ** Base fee includes the robust Client Collaboration tax information collecting tool. The fee increases based on income thresholds, as prep time associated with the return and IRS tax preparer liability increases. | | |