

2020 Individual Tax Return Price Sheet

Service	Fee	Notes
Basic Tax Services		
2020 Federal and State Tax Return	\$350	<i>Any Filing Status Includes general itemized deductions, interest and dividends, Electronic Filing</i>
General Simple Tax Services Questions	Included	<i>Tax research is provided at \$225 per hour</i>
Tax Planning Touchpoint	Included	<i>Up to 15 minutes during 3rd or 4th quarter, based on availability</i>
Amendment of Prior Year Return	\$350	Amendment of Tax Return for new client - \$395
Additional Tax Services		
1040 Schedule D - Capital Gains and Losses	\$50	<i>Includes up to 10 transactions (transactions exceeding may be charged an hourly rate of \$225 depending on the complexities.</i>
Partnership/Corporation K-1's	\$50	
Additional State Tax Return (per state)	\$95	
1040 Schedule E - Rental Real Estate	\$125*	<i>\$35 for each additional rental property</i>
1040 Schedule C -Profit or Loss From Business (Up to \$125,000 Revenue)	\$125*	<i>For each schedule C filed</i>
1040 Schedule C -Profit or Loss From Business (\$125,001 to \$200,000 Revenue)	\$175*	<i>For each schedule C filed</i>
1040 Schedule C -Profit or Loss From Business (Greater than \$200,000 Revenue)	\$250*	<i>For each schedule C filed</i>
Sec 199a - New 2018 Business Deduction	\$95	
Add On Services		
Handling all Individual Tax Notices Related to a Prepared Tax Return. This does not include audit representation services.	\$50	<i>This must be requested and paid at the time of the return preparation. The Standard hourly rate for IRS or State Tax Agency related services is \$225</i>
Audit Assistance	\$250 per hour	
Economic Impact Payment Research	\$225 per hour	<i>Any research required to resolve amount or eligibility issues</i>
W-4 Analysis - Adjusting Withholding	\$75	<i>This must be requested and paid at the time of the return preparation. If requested subsequent to the preparation of the 2019 return the fee is \$125</i>
Dependent Child 2020 Return (W-2 ONLY)	\$150 per child	
Speed Pass (Only available before April 1): Tax Return will be prepared and reviewed within 1-3 days of receipt of all tax information	\$100	<i>Only available before April 1st</i>
Discounts		
Referral Discount - We will provide a \$25 discount off your tax preparation fee for every referral that engages our services.		
Important Notes		
Any complexities or forms not specifically mentioned above will be performed at a rate of \$225/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 \$150/hr will be charged.		
If complete information/documentation is <i>received between April 1, 2021 and April 10, 2021</i> , two options are available: 1) A \$200 Deadline Rush Fee will be added to the invoice and the tax return will be prepared and filed by the IRS deadline 2) Extension will be filed. If a balance due is expected, there will be a \$125 Fee to calculate the estimated payment due and extension. If no balance is expected with the information provided, an extension will be filed for \$75. The Tax Return will be prepared and filed after April 15.		