



## 2025 Individual Tax Return Price Sheet

Service	Fee	Notes
<b>Tax Services</b>		
<b>Base Fee for Federal and State of Residence Tax Return</b>	<b>Starting at \$575*</b>	Any Filing Status Includes general itemized deductions, interest and dividends, Electronic Filing, safe harbor tax estimates if applicable
IRS or State Notice / Correspondence	<b>INCLUDED!</b>	Does not include an audit and only covers return with information provided in preparation of the return.
Tax Fall Check in	<b>INCLUDED!</b>	Light touch point via phone or email to check in on changes in the current year, top of mind considerations.
Tax Advisory collaborative call with investment advisor	<b>INCLUDED!</b>	Up to 30 minutes (in lieu of Tax check in, not additional)
BeanLab Business Prepared returns Partnership / S Corporation K-1's	<b>INCLUDED!</b>	Complexity Time on K-1 performed at a rate of \$300/ hr if applicable.
Non BeanLab prepared return Partnership / S Corporation K-1's	<b>\$135</b>	Per K-1, shareholder basis / form 7203 complexities performed at a rate of \$300/hr
IRS Transcript Form 8821	<b>INCLUDED for PREPAID clients</b>	Signed form allows BeanLab to pull transcripts to ensure all information reported to the IRS is used in tax preparation.
Schedule D - Capital Gains and Losses	<b>\$110</b>	Includes up to 3 brokerage statements. Additional brokerage statements \$50 each. Capital Stock Basis research is \$300/hr.
Crypto Currency Activity	<b>Customized</b>	Cryptocurrency data collection, cleanup, and reconciliation done at \$300/hr. No additional schedule D charge for cryptocurrency.
Publicly Traded Partnerships K-1's	<b>\$60</b>	Complexity Time on K-1 may be billable at \$300/ hr if applicable.
Additional State Tax Return (per state)	<b>\$225</b>	BeanLab will only file an additional state tax return if required.
Schedule C - Small Business	<b>Range \$85 - \$1,000**</b>	For each schedule C filed, see details below
Schedule E - Rental Real Estate	<b>\$225***</b>	\$135 for each additional rental property
Tax Credits	<b>Customized based on time</b>	Include but not limited to Premium tax credit, foreign tax credit, adoption credit, energy efficient, (child tax credits or college credits are not additional)
Extension Fee	<b>\$125</b>	See engagement letter details for timing requirements
Rush Fee	<b>Starting at \$125</b>	After an extension is filed, a rush fee will apply to the return if any required documentation is received within the month prior to the October deadline, as follows: 30-16 days before the deadline: Greater of \$125 or 10% of the return cost. 15-6 days before the deadline: Greater of \$225 or 20% of the return cost. 5 or fewer days before the deadline: Greater of \$350 or 30% of the return cost.
Miscellaneous Complexities: Home Sale/ Purchase, Installment Plan with Return, Heavy Payment for Balance Due Administration, FinCEN Form 114/ FBAR, Non-Collaboration (mailing/ dropping off documents, paper filings),		
<b>Add On Services</b>		
Dependent Child Return (W-2 ONLY)	<b>\$375 per child</b>	We highly encourage self-preparation for W-2 only returns.
<b>Important Notes</b>		
* Base Fee: Base fee includes the Client Collaboration tax information collecting tool. The base fee increases to \$725 (over \$250K - \$500K), \$1,000 (\$500K - \$1,000,000), Over \$1,000,000 is customized. The income thresholds increase the fee as prep time associated with the return and IRS tax preparer liability increases.		
** Schedule C Small Business : Minimal activity, under \$3K in revenue (\$85), Revenue up to \$25,000 w/ minimal expenses (\$125), Revenue up to \$125,000 (\$275), Revenue up to \$200,000 (\$350), Revenue up to \$1,000,000 (\$575), Revenue over \$1,000,000 (\$1,000+) . 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 system. If accounting is required, a rate of \$250/hr will be charged.		
*** Schedule E Rental Properties: In addition to the form completion, there could be additional complexities such as real estate purchases, or sales, or managing fixed asset additions which involve additional complexities. These complexities are performed at a rate of \$300/hr.		
Any complexities or forms not specifically mentioned above will be performed at a rate of \$300/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.		