



We value our client's trust and believe in the principle of truth in advertising. While most firms do not post their tax preparation prices online, we want our clients to understand the model behind our pricing and to have a clear method to estimate the cost of their return preparation.

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 individual situation and the complexity of their return.

<b>Simple Individual Tax Return</b>	
Form 1040-EZ	\$95
Standard Deduction	free
State	\$80
E-file	free
<b>Total</b>	<b>\$175</b>

<b>Typical Individual Tax Return</b>	
Form 1040	\$175
Schedule A	\$90
Other minor forms (child care, cap gains, etc)	\$50
State	\$80
E-file	free
<b>Total</b>	<b>\$395</b>

<b>Typical Sole Proprietor Return</b>	
Form 1040	\$175
Schedule A	\$90
Schedule C	\$150
Form 4562 Depreciation	\$50
Form 8829 Business Use of Home	\$50
Other minor forms (child care, cap gains, estimated tax, self-employment, etc)	\$50
State	\$80
E-file	free
<b>Total</b>	<b>\$645</b>



## Tax Preparation Schedule of Fees by Form

Rates Effective January 1, 2017

<u>Form</u>	<u>Title</u>	<u>Price</u>	<u>Description</u>
<b>706</b>	Estate (and Generation-Skipping Transfer) Tax Return	Varies	per hour
<b>940</b>	Employers Annual Federal Unemployment Tax Return	\$75	per form
<b>941</b>	Employers Quarterly Federal Tax Return	\$75	per form
<b>944</b>	Employers Annual Federal Tax Return	\$75	per form
<b>945</b>	Annual Return of Withheld Federal Income Tax	\$75	per form
<b>990</b>	Tax Exempt Organization	\$700	minimum *
<b>1040</b>	U.S. Individual Income Tax Return	\$175	per form
<b>1040 Schedule A</b>	Itemized Deductions	\$90	per form
<b>1040 Schedule B</b>	Interest and Ordinary Dividends	\$5	per item
<b>1040 Schedule C</b>	Profit or Loss from Business (Sole Proprietorship)	\$150	per business
<b>1040 Schedule D</b>	Capital Gains and Losses	\$10	per item (\$25 minimum)
<b>1040 Schedule E (pg 1)</b>	Supplemental Income and Loss (Page 1 Rental Properties)	\$120	per rental **
<b>1040 Schedule E (pg 2)</b>	Supplemental Income and Loss (Page 2 Partnerships/S Corps)	\$35	per form
<b>1040 Schedule EIC</b>	Earned Income Credit	\$75	per form
<b>1040 Schedule F</b>	Profit or Loss From Farming	\$175	per form **
<b>1040 Schedule H</b>	Household Employment Taxes (Nanny Tax)	\$75	per form
<b>1040 Schedule R</b>	Credit for the Elderly or the Disabled	\$35	per form
<b>1040 Schedule SE</b>	Self-Employment Tax	\$35	per form
<b>1040-A</b>	U.S. Individual Income Tax Return	\$175	per form
<b>1040-ES</b>	Estimated Tax for Individuals	\$45	per form
<b>1040-EZ</b>	Return for Single and Joint Filers With No Dependents	\$95	per form
<b>1040-X</b>	Amended U.S. Individual Income Tax Return	\$200	per form
<b>1041</b>	U.S. Income Tax Return for Estates and Trusts	\$550	minimum *
<b>1045</b>	Application for Tentative Refund	\$200	per form
<b>1065</b>	U.S. Return of Partnership Income	\$650	minimum *
<b>1096</b>	Annual Summary and Transmittal of U.S. Info Returns	\$70	per form
<b>1099</b>	Miscellaneous Income	\$7	per contractor
<b>1116</b>	Foreign Tax Credit (Individual, Estate, or Trust)	\$75	per form
<b>1118</b>	Foreign Tax Credit (Corporation)	\$75	per form
<b>1120</b>	U.S. Corporation Income Tax Return	\$850	minimum *
<b>1120-S</b>	U.S. Income Tax Return for an S Corporation	\$750	minimum *
<b>2106</b>	Employee Business Expense	\$50	per form
<b>2106-EZ</b>	Employee Business Expense (Short Form)	\$25	per form
<b>2210</b>	Underpayment of Estimated Tax	\$50	per form
<b>2441</b>	Child and Dependent Care Expense	\$35	per form
<b>2555</b>	Foreign Earned Income	\$95	per form
<b>3800</b>	General Business Credit	\$75	per form

3903	Moving Expenses	\$50	per form
4136	Credit for Federal Tax Paid on Fuels	\$55	per form
4137	Tax on Unreported Tips	\$50	per form
4562	Depreciation and Amortization	\$20	per item (\$30 minimum)
4684	Casualties and Thefts	\$50	per casualty/theft
4797	Sale of Business Property	\$50	per item
4835	Farm Rental Income and Expenses	\$50	per item
4868	Application for Extension to File U.S. Individual Return	\$50	per form
4952	Investment Interest Expense Deduction	\$50	per form
4972	Tax on Lump-Sum Distributions	\$75	per form
5329	Additional Taxes Attributable to Qualified Retirement Plans	\$50	per form
5405	First Time Homebuyers Credit	\$25	per form
5695	Residential Energy Credits	\$25	per form
6198	At Risk Limitations	\$25	per form
6251	AMT Alternative Minimum Tax	\$50	per form
6252	Installment Sale Income (first year)	\$100	per form
6252	Installment Sale Income (subsequent years)	\$25	per form
6781	Gain or Loss from Section 1256 Contracts and Straddles	\$20	per item (\$30 minimum)
8283	Non Cash Charitable Contributions	\$50	per form
8332	Exemption Release Divorced or Separated Parents	\$50	per form
8379	Injured Spouse Claim and Allocation	\$95	per form
8582	Passive Activity Loss Limitations	\$50	per form
8606	Nondeductible IRA	\$50	per form
8615	Tax for Children under 18 who have Investment Income	\$25	per form
8801	Credit for Prior Year Minimum Tax	\$35	per form
8812	Additional Child Credit	\$25	per form
8814	Parent's Election to Report Child's Interest and Dividends	\$20	per form
8824	Like Kind Exchanges	\$100	per form
8829	Business Use of Home (simplified option)	\$30	per form
8834	Qualified Electric Vehicle Credit	\$50	per form
8839	Qualified Adoption Expenses	\$50	per form
8846	Credit for Employer Soc. Sec. and Medicare taxes on tips	\$50	per form
8853	Archer MSAs and Long-Term Care Insurance Contracts	\$50	per form
8863	Education Credits	\$25	per form
8880	Qualified Retirement Savings Contribution Credit	\$30	per form
8889	Health Savings Account	\$20	per form
8910	Alternative Motor Vehicle Credit	\$25	per form
8917	Tuition & Fees Deduction	\$10	per form
8938	Statement of Foreign Assets	\$35	per form
8949	Sales and Other Dispositions of Assets	\$5	per item
8959	0.9% \$200,000 Employment Tax (additional Medicare Tax)	\$25	per form
8960	3.8% Net Investment Income Tax	\$25	per form
K-1s	Inc, Loss, Div of Partners or Shareholders	\$25	per form
W-2	Wage and employee tax statement	\$7	per employee
W-3	Transmittal of wage and tax statements	\$50	per form
<b>* Pricing based on complexity of return</b>			

<b>** Any additional bookkeeping necessary will be charged at \$85 per hour.</b>			
<b>State</b>	State Return (first)	\$80	first state
<b>State (additional)</b>	State Return (additional returns after the first)	\$50	additional states
<b>E-file</b>		free	
<b>Referral credit</b>	For the referring customer, valid for the current tax year only	10%	of total (up to \$50 limit)
<b>Early Discount</b>	For <u>individual</u> returns if all info received by end of February	10%	of total (up to \$50 limit)
<b>Late Fee</b>	If requested items not received 15 days before filing date	20%	of total
<b>Sale of Home</b>	Sale of your Home Worksheet	\$30	per form
<b>Paper copy</b>	Paper copy of return / postage	\$15	per copy
<b>Net Operating Loss</b>	Calculation of Net Operating Loss	\$200	

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