

INDIVIDUAL SERVICES

▪ 1040 Individual Return (includes a state return) <i>Extensions are complimentary for all clients</i>	\$600
▪ Schedule EIC (Earned Income Credit)	\$65 each
▪ General individual and family credits, e.g., Education (8863), Energy Credit (5695), etc.	\$80 each
▪ Schedule C ≤\$5000 in expenses deductions	\$100 each (\$200 >\$5,000 in expenses)
▪ Schedule D (Capital Gains/Losses)	\$50 each
▪ Schedule B (Interest and Ordinary Dividends)	\$250 per 1099-COMP
▪ 4562 Depreciation	\$50 per new asset
▪ Complex elections, e.g., Qualified Opportunity Zones, 1221 Small Business stock etc.	Beginning at \$50 per
▪ Forms not listed	Price negotiable
▪ Accounting, and Forensic reconstruction	\$150/hr
▪ Research (§ Election Statements, Disclosures, etc.)	\$150/hr

BUSINESS SERVICES

▪ 1120-S, and 1065	Beginning \$1250 (additional K-1s \$50)
▪ 1120 (C Corp)	Beginning \$2350
▪ General Business Credits	Priced on complexity of credit
▪ Partnership or Shareholder Basis Calculations	Beginning at \$300
▪ Forms assoc. w/ Employee Benefits, e.g., 5500	Beginning at \$250
▪ Information Return filings, e.g., 1099-NEC	\$15 per return
▪ Estate & Gift Returns	Priced on complexity of return
▪ Resolution of IRS Collections, Audits, Liens & Levies, and other tax controversies	Choice of hourly or flat-fee rate. Retainer Required.
▪ Tax Planning & Strategy	\$150/hr (complimentary for Controversy clients).
▪ Quickbooks subscription & integration	\$750 (one-time setup fee plus \$32/mo QB subscription fee).
▪ Beneficial Ownership Filings (BOI)	\$75 per single entity/\$150 for complex filings
▪ SCorp payroll filings, e.g., 941, W-2(fees paid to ADP payroll)	\$500 one-time setup fee, plus \$50/month per w2 employee (billed annually).

Retainers secure engagement and are applied toward performed services.

10% discount for New Client Referrals & Military & Veterans

