

## Tax Preparation Fee Schedule by Form

Form	Title	Price	Description
990	Tax Exempt Organization	\$ 1,750	minimum */**/****
1040	U.S. Individual Income Tax Return (Includes One State)	\$ 425	per form
1040 Schedule A	Itemized Deductions	\$ 95	per form
1040 Schedule B	Interest and Ordinary Dividends \$20 per item	\$ 20	per item
1040 Schedule C	Profit or Loss from Business – (Small business-zero or minimal expenses)	\$ 125	minimum per form */**
1040 Schedule C	Profit or Loss from Business – (Small business-multiple expenses)	\$ 250	minimum per form */**
1040 Schedule C	Profit or Loss from Business – (Small business-complex business)	\$ 450	minimum per form */**
1040 Schedule D	Capital Gains and Losses	\$ 20	per item (\$20 minimum)
1040 Schedule E (pg 1)	Supplemental Income and Loss (Page 1 Rental Properties)	\$ 175	per rental **
1040 Schedule E (pg 2)	Supplemental Income and Loss (Page 2 Partnerships/S Corps)	\$ -	per form
1040 Schedule EIC	Earned Income Credit \$95 per form	\$ 95	per form
1040 Schedule F	Profit or Loss from Farming \$150	\$ 150	minimum per form */**
1040 Schedule H	Household Employment Taxes (Nanny Tax)	\$ 50	per form
1040 Schedule R	Credit for the Elderly or the Disabled	\$ 50	per form
1040 Schedule SE	Self-Employment Tax	\$ -	per form
1040 Schedules 1-6	2018 Schedules 1-6	\$ -	per form
1040-ES (Worksheet)	Estimated Tax for Individuals (Includes Vouchers)	\$ 75	per form
1040-X	Amended U.S. Individual Income Tax Return	\$ 450	minimum */**
1041	U.S. Income Tax Return for Estates and Trusts	\$ 875	minimum */**/****
1045	Application for Tentative Refund	\$ 125	per form
1065 (w Sch L)	U.S. Return of Partnership Income (Includes 2 k-1's)	\$ 1,250	minimum */**/****
1065 (w Sch L)	U.S. Return of Partnership Income (Businesses over \$1 Million of Gross Revenues)	\$ 1,750	minimum */**/****
1096 & 1099	Annual Summary and Transmittal of U.S. Info Returns & Prepare 1099 Forms	\$ 50	per form
1099-MISC & 1099-NEC	Miscellaneous Income & Nonemployee Compensation	\$ 20	per form
1099-G	Certain Government Payments	\$ 20	per form
1099-R	Retirement/Pension/IRA Distribution	\$ 20	per form
1099-SSA	Social Security Benefits	\$ 20	per form
1116	Foreign Tax Credit (Individual, Estate, or Trust)	\$ 50	per form
1118	Foreign Tax Credit (Corporation)	\$ 50	per form
1120 (w Sch L)	U.S. Corporation Income Tax Return	\$ 1,250	minimum */**/****
1120 (w Sch L)	U.S. Corporation Income Tax Return (Businesses over \$1 Million of Gross Revenues)	\$ 1,750	minimum */**/****
1120-S (w Sch L)	U.S. Income Tax Return for an S Corporation (Includes 1 k-1)	\$ 1,250	minimum */**/****
1120-S (w Sch L)	U.S. Income Tax Return for an S Corporation (Businesses over \$1 Million of Gross Revenues)	\$ 1,750	minimum */**/****
Wksht 2119	Wksht 2119 – Taxable Gain on Sale of Home	\$ 125	per form
2210	Underpayment of Estimated Tax	\$ -	per form
2441	Child and Dependent Care Expense	\$ 25	per form
2555	Foreign Earned Income	\$ 125	per form
3800	General Business Credit	\$ 50	per form
4562	Depreciation and Amortization	\$ 25	per item
4684	Casualties and Thefts	\$ 75	per casualty/theft
4797	Sale of Business Property	\$ 75	per item (minimum)
4835	Farm Rental Income and Expenses	\$ 150	per form (minimum)
4868	Application for Extension to File U.S. Individual Return	\$ 75	per form
5329	Additional Taxes Attributable to Qualified Retirement Plans	\$ 25	per form
5405	First Time Homebuyers Credit	\$ 25	per form
5695	Residential Energy Credits	\$ 50	per form
6252	Installment Sale Income (first year)	\$ 150	per form
6252	Installment Sale Income (subsequent years)	\$ 75	per form
6781	Gain or Loss from Section 1256 Contracts and Straddles	\$ 25	per item (\$25 minimum)
8283	Non-Cash Charitable Contributions	\$ 25	per item
8332	Exemption Release Divorced or Separated Parents	\$ 25	per form
8379	Injured Spouse Claim and Allocation	\$ 125	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	\$ 50	per form

8801	Credit for Prior Year Minimum Tax	\$ 30	per form
8812	Additional Child Credit	\$ -	per form
8814	Parent's Election to Report Child's Interest and Dividends	\$ 50	per form
8824	Like Kind Exchanges	\$ 75	per form
8829	Business Use of Home (simplified option)	\$ 25	per form
8829	Business Use of Home (expanded option)	\$ 50	per form
8834	Qualified Electric Vehicle Credit	\$ 75	per form
8839	Qualified Adoption Expenses	\$ 75	per form
8863	Education Credits	\$ 50	per form
8867	Paid Preparer's Due Diligence Checklist	\$ 30	per form
8880	Qualified Retirement Savings Contribution Credit	\$ 25	per form
8889	Health Savings Account	\$ 25	per form
8910	Alternative Motor Vehicle Credit	\$ 50	per form
8915	Qualified Disaster Retirement Plan Distributions	\$ 75	per form
8917	Tuition & Fees Deduction	\$ 50	per form
8936	Qualified Plug-In Electric Motor Vehicle Credit	\$ 75	per form
8938	Statement of Foreign Assets	\$ 35	per form
8949	Sales and Other Dispositions of Assets	\$ 25	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
8995	Qualified Business Income Deduction	\$ 25	per form
K-1s	Income, Losses, Dividends, etc. of Partners or Shareholders	\$ 50	(and up) per form
W-2	Wage and employee tax statement	\$ 20	per form
W-2G	Certain Gambling Winnings	\$ 20	per form
Alimony Payments	Collecting Information & Entering Alimony Payments	\$ 25	per entry
State	State Return (first) Included first state	\$ -	
State (additional)	State Return (additional returns after the first state)	\$ 75	additional states
E-file	Federal and state tax returns Included	\$ -	
MFJ vs. MFS Analysis	Perform MFJ vs. MFS Analysis to Optimize Most Advantageous Way to File Tax Return	\$ 100	per analysis
Auto Worksheet (Simple)	Auto Worksheet for Small Business, etc. (simple using mileage)	\$ 25	per form
Auto Worksheet (Complex)	Auto Worksheet for Small Business, etc. (complex using actual vehicle expenses)	\$ 25	per form
New Rental Setup	Calculate Depreciable Basis for Residential Rental (typically done for first year of rental)	\$ 100	per rental
Sale of Primary Home	Reporting the sale of a primary residence in the return	\$ 125	per sale
E-File Rejection	Fee to cover time spent resolving an e-file rejection due to fraud or incorrect information	\$ 75	per rejection
E-File Rejection Fix (If Needed)	Fee to cover time spent communicating an e-file rejection and create a paper tax filing if necessary	\$ 75	per rejection
IRS or State Notice Review	Fee to cover time spent reviewing IRS or State notices and researching issue	\$ 150	per notice
Tax Return Resend After Adjustment	Fee to cover time adjusting return or adding additional documents to tax return and resending once finalized and delivered to client	\$ 75	per resend return
New Client Setup (Simple Setup)	Fee to cover time entering previous year tax return into our system and entering prior year info, carryforwards, etc. (for simple prior year returns)	\$ 75	per setup
New Client Setup (Complex Setup)	Fee to cover time entering previous year tax return into our system and entering prior year info, carryforwards, etc. (for complex prior year returns)	\$ 150	per setup (minimum)
EA Hourly Rate for Any Service Not Listed	Enrolled Agent hourly rate for any tax or business service not listed in our price list	\$ 275	per hour or increments thereof

### Document and Tax Return Delivery

Have Docs Delivered by Mail	Deliver original tax documents back to client using USPS Priority Mail	\$ 35	per mailing
Have Paper Copy of Return Mailed	Create a paper copy of the tax return for delivery using USPS Priority Mail	\$ 50	per copy per mailing

\* Pricing based on time working on return and complexity of return  
\*\* Any additional bookkeeping necessary will be charged at our standard Enrolled Agent rate  
\*\*\*2024 Enrolled Agent hourly tax rate is \$275 per hour

Rates effective January 1, 2024