



Personal & Business

PROFESSIONAL INCOME TAX SERVICES

\$99*

*Individual Standard Deduction Returns Only
Extra fees will apply for additional services required.
Contact us for details.

TAX PREPARATIONS | TAX AUDITS | TAX REPRESENTATION

INDIVIDUAL RETURNS

Form 1040 - Standard Deduction	\$99
Itemized Deductions Schedule-A, PLUS.....	\$25 each
Additional Forms (2106, 8829, 8863, 1095-OTR, 8962, 8965, 8283, 4684)	\$10 each
Interest & Dividend Income Schedule-B.....	\$10 first 5 entries
Additional Entries	\$2.00 each
Foreign Account or Trust (<i>A separate form will be required</i>).....	\$100
Business Schedule-C or Farm Schedule-F	\$110 first 2 hours
Reduced Price (<i>If you have tracked the depreciation schedule on your own</i>).....	\$55 first 2 hours
Additional Hours.....	\$75 per hour
Capital Gain/Loss Schedule-D - Non-Business.....	\$15 first 2 entries
Additional Entries	\$10 each
Capital Gain/Loss Form 4794 - Business or Rental.....	\$30 each sale
Rental Income Schedule-E - Residential and Commercial Rentals (<i>Includes Depreciation Form 4562, Passive Loss Limitation Form 8582 and related worksheets</i>).....	\$30 per property
Farm Rental Form 4835 (<i>Includes Depreciation Form 4562, Passive Loss Limitation Form 8582 and related worksheets</i>).....	\$60 per property
Gambling Winnings Form W2G (<i>Up to 4 forms per page</i>).....	\$20 per page
Wage Income Form W2.....	\$0 first 4 forms
Additional Forms	\$5 each
Retirement/Pension Income Form 1099-R.....	\$0 first 4 forms
Additional Forms	\$5 each
Miscellaneous Income Form 1099-MISC	\$0 first 4 forms
Additional Forms	\$5 each
Extensions	\$50 pre-paid
2nd or Additional State Returns	\$50 each

CORPORATION (“C” OR “S”), PARTNERSHIP AND LLC RETURNS

Minimum Fee	\$350
Participants K-1 <i>(Fee is applicable for Services Only entities that do not require a Balance Sheet (i.e., Gross Receipts are under \$250,000 and Total Corporate Assets are under \$250,000, or \$600,000 in Assets for Partnership/LLC). Fee includes electronic filing (if available) and one State Return if required.)</i>	\$10 each
Balance Sheet <i>(If the entity sells products, carries inventory, or exceeds the above amounts.)</i>	\$150

NOTE: Extra fees will apply for each additional Schedule or Form needed.

GIFT TAX RETURN (FORM 709)

Minimum Fee	\$80 per return
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ESTATE RETURNS - FEES BASED ON THE TIME AND EXPERTISE REQUIRED TO COMPLETE THE RETURN

Minimum Retainer Fee <i>(Will require the execution of Form 2848 IRS Power of Attorney by the Executor)</i>	\$250
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NOTE: Extra fees will apply for each additional Schedule or Form needed.

TRUST RETURNS – FEES BASED ON THE TIME AND EXPERTISE REQUIRED TO COMPLETE THE RETURN

Minimum Retainer Fee - Simple or Grantor Living Trust.....	\$250
Minimum Retainer Fee - Complex or Decedent’s Estate Trust	\$500

NOTE: Extra fees will apply for each additional Schedule or Form needed.

TAX AUDIT REPRESENTATION – FEES BILLED HOURLY PER INCOME TAX YEAR UNDER AUDIT

Minimum Retainer Fee - If We Completed the Returns.....	\$1000 pre-paid
Minimum Retainer Fee - If the Returns Were Completed Elsewhere.....	\$1500 pre-paid

NOTE: Extra fees will apply for each additional Schedule or Form needed.

TAX AUDIT APPEALS OR COLLECTIONS – FEES BILLED HOURLY PER INCOME TAX YEAR UNDER AUDIT

Minimum Retainer Fee - If We Handled the Underlying Audit.....	\$400 pre-paid
Minimum Retainer Fee - If the Underlying Audit was Handled Elsewhere.....	\$800 pre-paid

TAX REPRESENTATION OUTSIDE OF INCOME TAX AUDIT – FEES BILLED HOURLY

For services such as reviewing and responding to an IRS CP-2000 “Notice of Proposed Assessment” (based on omissions from your tax return), or other tax agency matters (EDD, FTB, BOE, or other) that will require written replies or telephone resolution. This fee can be avoided by reporting ALL your income on your original return.

Minimum Retainer Fee	\$100 pre-paid
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Not all Forms/Schedules that may be needed for your return are listed above. We make our best effort to cover the most common services in our price list but if special circumstances are required, fees may be adjusted based on time and expertise required to complete the return. If you have questions regarding any of the listed pricing or service, please call or email us directly.