

INDIVIDUAL AND SMALL BUSINESS INCOME TAX SERVICES			
Forms/Schedules	Description	price	per
1040,1040A, OR 1040EZ	Individual Income Tax Return (before 3/15)	350	each
	Individual Tax Return (between 3/15 & 8/14)	400	each
	Individual Tax Return (8/15 and after)	450	each
State Return	State Income Tax Return	75	each
1041, 1065, 1120, 1120S, 990	Fiduciary, Partnership, Corporate Returns	475-1075	each
4868	6 Month Extension to File	25	each
B	Interest and Ordinary Dividends	3	entry
C-EZ & C	Sole Proprietor or LLC	75-175	each
D	Capital Gains & Losses	12	entry
D	Capital Gains & Losses 1099-B Summary	50	brokerage
E (front)	Rental Property Income/Loss (Front)	55	prop
E (back)	Supplemental Income/Loss (Back)	15	K-1
1040 ES	Estimated Tax Calculations	15	each
Excess Entry Forms	Charge for > 3 W-2's or 1099's	3	each
9465	Installment Agreement	125	each
Tax Planning, 1040X Prep	Tax Planning & Amended Return Prep	125	hour
Organizer Fee	Failure to Use Organizer	25	each
Expedited Preparation	Preparation w/in 30 days of due date	150	each
Reprint Fee	If Add'l Info Provided After Finalizing Return	25	each

SMALL BUSINESS, PAYROLL AND 1099 SERVICES

Initial Consultation, 30 minutes	Introduction & discussion of your business needs (bookkeeping, payroll, licensing, taxes)	Free
Start Up & Consultations	Corporate Formations, Bookkeeping	\$125/hour
Routine Bookkeeping	Hourly Fees or Monthly Fixed Agreement	\$125/hour
1 employee	Monthly Payroll Fee	\$85/month
2 or more employees	Monthly Payroll Fee	\$95/month and up
1099 and 1096 Preparation	All info due by 1/5 (or \$5 Late Fee added per form)	\$17.50/form
Add'l Forms & Filings	i.e. Sales Tax, Use Tax	\$25/form

The following tax forms are charged at \$10/form:
Foreign Tax Credit (1116), Underpayment of Estimated Taxes (2210), Additional Child Tax Credit (8812)

Most other tax items are charged at \$25/form, including, but not limited to:
Eamed Income Credit (EIC), Credit for Elderly or Disabled (R),
Claim of Refund for Deceased (1310), Child/Dependent Care Expenses (2441),
Sale of Business Property (4797), Investment Interest (4952),
Add'l Tax on Qualified Plan (5329), Homebuyer Credit (5405),
Residential Energy Credit (5695), Alternative Minimum Tax (6251),
Non-Cash Charitable Contributions > \$500 (8283), Passive Activity Loss (8582),
Non-Deductible IRA Contribution (8606), Home Office Expenses (8829),
Child's Interest & Dividends (8814), Series EE & I Savings Bonds (8815),
Educational Credits (8863), Health Savings Accounts (8889),
Health Insurance Premium Tax Credit (8962),
Disclosure Statements.

Pricing for Innocent Spouse Relief, Like Kind Exchanges, Asset Sales, Annualized Income Calculations and Installment Sales vary based on complexity.

Tax return prices will increase by \$50 on 3/15 and 8/15 (2/15 and 7/15 for S Corp, C Corp and Partnerships). If you send in your information prior to the initial deadline, your price will be the lowest possible, but for those who delay and have more complicated returns, the price will increase throughout the year to cover our costs of filing extensions and follow up needed.

We require information 30 days in advance to meet any filing deadline. The deadline to submit tax information is 3/15/26. Tax return information submitted after that deadline will be required to have an extension filed and completion by 4/15/26 cannot be guaranteed. Extensions must be requested by 4/05/26. Data for extended returns must be submitted by 9/15/26 for the 10/15/26 extension deadline (or 2/15/26 for the 3/15/26 S Corp, C Corp and Partnership deadline). Filing an extension does not extend your payment deadlines, and you may face interest and penalties for tax payments made after the initial tax deadlines.

Failure to fill out sections of my tax organizers pertinent to your return, or upload all requested documents, will result in a \$25 fee, and may result in additional time charges billed at standard hourly rates, or an incorrectly filed tax return. To ensure your tax return is correct, please read the organizer carefully and fill it out completely.