

INDIVIDUAL AND SMALL BUSINESS INCOME TAX SERVICES

| Forms/Schedules | Description | price | per |
|------------------------------|---|----------|-----------|
| 1040,1040A, OR 1040EZ | Individual Income Tax Return (before 3/15) | 300 | each |
| | Individual Tax Return (between 3/15 & 8/14) | 350 | each |
| | Individual Tax Return (8/15 and after) | 400 | 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 | 75 | 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 | 75 | each |
| Reprint Fee | If Add'l Info Provided After Printing/Sending | 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:
Earned Income Credit (EIC), Credit for Elderly or Disabled (R), Claim of Refund for Deceased (1310), Employee Business Expenses (2106), Child/Dependent Care Expenses (2441), Moving Expenses (3903), 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), Health Insurance Exemptions (8965), Disclosure Statements.

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

NEW STARTING 2023 TAX FILING SEASON: Individual tax return price 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 3/15/24. Tax return information submitted after that deadline will be required to have an extension filed and completion by 4/15/24 cannot be guaranteed. Extensions must be requested by 4/05/24. Data for extended returns must be submitted by 9/15/24 for the 10/15/24 extension deadline (or 2/15/24 for the 3/15/24 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 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.

If you would like a non-binding estimation, please fax a copy of your previous year's tax return to Michele Knight at 303-374-5665, or scan/email to cpa@cpamichele.com.