

Tax Preparation Schedule of Fees by Form

Rates Effective January 1, 2023

<u>Form</u>	<u>Title</u>	<u>Price</u>	<u>Description</u>
1040	U.S. Individual Income Tax Return (Includes One State Return)	\$325	per form
1040 Schedule A	Itemized Deductions	\$75	per form
1040 Schedule B	Interest and Ordinary Dividends	\$7	per item
1040 Schedule C	Profit or Loss from Business – (Small business-minimal expenses)	\$150	minimum per form */**
1040 Schedule C	Profit or Loss from Business – (Small business-multiple expenses)	\$300	minimum per form */**
1040 Schedule D (8949)	Sale & Disp of Capital Assets	\$15	per item
1040 Schedule E (pg 1)	Supplemental Income and Loss (Page 1 Rental Properties)	\$100	per rental **
1040 Schedule E (pg 2)	Supplemental Income and Loss (Page 2 Partnerships/S Corps)	\$40	per K-1
1040 Schedule EIC	Earned Income Credit	\$60	per form
1040 Schedule F	Profit or Loss from Farming	\$130	minimum per form */**
1040 Schedule H	Household Employment Taxes (Nanny Tax)	\$80	per form
1040 Schedule R	Credit for the Elderly or the Disabled	\$35	per form
1040 Schedule SE	Self-Employment Tax	\$30	per form
1040 Schedules 1-6	2021 Schedules 1-6	\$0	per form
1040-ES (Worksheet)	Estimated Tax for Individuals (Includes Vouchers)	\$35	per form
1040-X	Amended U.S. Individual Income Tax Return	\$325	minimum */**
9645	Installment Agreement Request	\$75	per form
FinCEN 114	Report of Foreign Bank Account	\$25	per item
1045	Application for Tentative Refund	\$200	per form
1099	Miscellaneous, Cancellation of Debt and Non-Employee Income	\$15	per form
1099-R	Retirement/Pension/IRA Distribution	\$15	Per form
1116	Foreign Tax Credit (Individual, Estate, or Trust)	\$35	per form
2210	Underpayment of Estimated Tax	\$40	per form
2441	Child and Dependent Care Expense	\$35	per form
2555	Foreign Earned Income	\$150	per form
3115	Change in Accounting Method	\$600	per form
3800	General Business Credit	\$50	per form
3903	Moving Expenses	\$50	per form
4136	Credit for Federal Tax Paid on Fuels	\$35	per form
4137	Tax on Unreported Tips	\$35	per form
4562	Depreciation and Amortization	\$7	per item
4684	Casualties and Thefts	\$75	per casualty/theft
4797	Sale of Business Property	\$15	(and up) per item
4835	Farm Rental Income and Expenses	\$55	per item
4868	Application for Extension to File U.S. Individual Return	\$55	per form
4952	Investment Interest Expense Deduction	\$35	per form
4972	Tax on Lump-Sum Distributions	\$65	per form
5329	Additional Taxes Attributable to Qualified Retirement Plans	\$35	per form

5695	Residential Energy Credits	\$35	per form
6198	At Risk Limitations	\$50	per form
6251	AMT Alternative Minimum Tax	\$70	per form
6252	Installment Sale Income (first year)	\$75	per form
6252	Installment Sale Income (subsequent years)	\$30	per form
6765	Increasing Research Credit	\$75	per form
6781	Gain or Loss from Section 1256 Contracts and Straddles	\$15	per item (\$25 minimum)
7202	Credit for Sick and Family	\$50	per form
8283	Non-Cash Charitable Contributions	\$20	per item
8332	Exemption Release Divorced or Separated Parents	\$30	per form
8379	Injured Spouse Claim and Allocation	\$60	per form
8582	Passive Activity Loss Limitations	\$25	per item
8606	Nondeductible IRA	\$30	per form
8615	Tax for Children under 18 who have Investment Income	\$55	per form
8801	Credit for Prior Year Minimum Tax	\$60	per form
8812	Additional Child Credit	\$25	per form
8814	Parent's Election to Report Child's Interest and Dividends	\$45	per form
8824	Like Kind Exchanges	\$150	per form
8829	Business Use of Home (simplified option)	\$45	per form
8834	Qualified Electric Vehicle Credit	\$45	per form
8839	Qualified Adoption Expenses	\$65	per form
8846	Credit for Employer Soc. Sec. and Medicare taxes on tips	\$35	per form
8853	Medical Savings Account	\$40	per form
8863	Education Credits	\$40	per form
8880	Qualified Retirement Savings Contribution Credit	\$20	per form
8889	Health Savings Account	\$35	per form
8962	Premium Tax Credit	\$50	per form
8995	Qualified Business Income Deduction	\$65	per form
8995-A	Qualified Business Income Deduction	\$100	per form
8910	Alternative Motor Vehicle Credit	\$35	per form
8917	Tuition & Fees Deduction	\$35	per form
8938	Statement of Foreign Assets	\$75	per form
8949	Sales and Other Dispositions of Assets	\$10	per item
8959	0.9% \$200,000 Employment Tax (Additional Medicare Tax)	\$40	per form
8960	3.8% Net Investment Income Tax	\$40	per form
926	Return by U.S. Transferor	\$55	per form
965-A	Indv Report of Net 965 Tax Liab	\$75	per form
Recovery Rebate	Worksheet	\$25	per form
Shareholder Basis	Worksheet	\$50	per worksheet
Partner Basis	Worksheet	\$50	per worksheet
K-1s	Income, Losses, Dividends, etc. of Partners or Shareholders	\$25	per form
W-2	Wage and employee tax statement	\$15	per form
W2-G	Gambling income	\$20	per form
State	State Return	\$150	per state
CPA Tax Consult		\$200	per hour
Owner Tax Consult		\$400	per hour

Document and Tax Return Delivery			
Pick Up Docs at Office	Pick up original tax documents at our office location	\$0	no charge
Return Delivered Electronically	Copy of the tax return delivered through a secure portal or email if necessary	\$0	no charge
Upload your tax documents	Upload your scanned tax documents to the TaxDome portal	\$0	no charge
Have our firm scan your documents	Our office will scan all your documents for paperless storage	\$25	per tax year
Have Docs Delivered by Mail	Deliver original tax documents back to client using USPS Priority Mail	\$25	per mailing
Paper Copy of Return	Create a paper copy of the tax return for pick up at one of our office locations	\$25	per copy
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
Early Discount	For individual returns if all documents received by end of February	10%	discount will be applied to invoice
Late Fee	If requested items not received by 15 days before filing date	20%	fee will be applied to invoice

* Pricing based on time working on return and complexity of return

** Any additional bookkeeping necessary will be charged at our standard CPA rate

*** CPA hourly tax rate is \$200 per hour