

INDIVIDUAL SERVICES

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| ▪ 1040 Individual Return (includes a state return) <i>Extensions are complimentary for all clients</i> | \$600 |
| ▪ Schedule EIC (Earned Income Credit) | \$65 each |
| ▪ General individual and family credits, e.g., Education (8863), Energy Credit (5695), etc. | \$80 each |
| ▪ Schedule C ≤\$5000 in expenses deductions | \$100 each (\$200 >\$5,000 in expenses) |
| ▪ Schedule D (Capital Gains/Losses) | \$50 each |
| ▪ Schedule B (Interest and Ordinary Dividends) | \$250 per 1099-COMP |
| ▪ 4562 Depreciation | \$50 per new asset |
| ▪ Complex elections, e.g., Qualified Opportunity Zones, 1221 Small Business stock etc. | Beginning at \$50 per |
| ▪ Forms not listed | Price negotiable |
| ▪ Accounting, and Forensic reconstruction | \$150/hr |
| ▪ Research (§ Election Statements, Disclosures, etc.) | \$150/hr |

BUSINESS SERVICES

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| ▪ 1120-S, and 1065 | Beginning \$1250 (additional K-1s \$50) |
| ▪ 1120 (C Corp) | Beginning \$2350 |
| ▪ General Business Credits | Priced on complexity of credit |
| ▪ Partnership or Shareholder Basis Calculations | Beginning at \$300 |
| ▪ Forms assoc. w/ Employee Benefits, e.g., 5500 | Beginning at \$250 |
| ▪ Information Return filings, e.g., 1099-NEC | \$15 per return |
| ▪ Estate & Gift Returns | Priced on complexity of return |
| ▪ Resolution of IRS Collections, Audits, Liens & Levies, and other tax controversies | Choice of hourly or flat-fee rate. Retainer Required. |
| ▪ Tax Planning & Strategy | \$150/hr (complimentary for Controversy clients). |
| ▪ Quickbooks subscription & integration | \$750 (one-time setup fee plus \$32/mo QB subscription fee). |
| ▪ Beneficial Ownership Filings (BOI) | \$75 per single entity/\$150 for complex filings |
| ▪ SCorp payroll filings, e.g., 941, W-2(fees paid to ADP payroll) | \$500 one-time setup fee, plus \$50/month per w2 employee (billed annually). |

Retainers secure engagement and are applied toward performed services.

10% discount for New Client Referrals & Military & Veterans

