



## 2025 Fee Schedule

### INDIVIDUAL SERVICES

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| <ul style="list-style-type: none"> <li>▪ 1040 Individual Return (includes a state return)<br/><i>Extensions are complimentary for all clients</i></li> </ul> | \$600                                   |
| <ul style="list-style-type: none"> <li>▪ General individual and family credits, e.g., Education (8863), Energy Credit (5695), etc.</li> </ul>                | \$80 each                               |
| <ul style="list-style-type: none"> <li>▪ Schedule C ≤\$5000 in expenses deductions</li> </ul>  | \$100 each (\$200 >\$5,000 in expenses) |
| <ul style="list-style-type: none"> <li>▪ Schedule D (Capital Gains/Losses)</li> </ul>  | \$50 each                               |
| <ul style="list-style-type: none"> <li>▪ Schedule B (Interest and Ordinary Dividends)</li> </ul>   | \$250 per 1099-COMP                     |
| <ul style="list-style-type: none"> <li>▪ 4562 Depreciation</li> </ul>  | \$50 per new asset                      |
| <ul style="list-style-type: none"> <li>▪ Complex elections including Qualified Opportunity Zones, 1221 Small Business stock etc.</li> </ul>                  | Beginning at \$50 per                   |
| <ul style="list-style-type: none"> <li>▪ Forms not listed</li> </ul>   |   |
| <ul style="list-style-type: none"> <li>▪ Accounting, and Forensic reconstruction</li> </ul>  | \$150/hr                                |
| <ul style="list-style-type: none"> <li>▪ Research (§ Election Statements, Disclosures, etc.)</li> </ul>  | \$150/hr                                |

### BUSINESS SERVICES

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| <ul style="list-style-type: none"> <li>▪ 1120-S, and 1065</li> </ul>            | Beginning \$1250 (additional K-1s \$50) |
| <ul style="list-style-type: none"> <li>▪ 1120</li> </ul>                        | Beginning \$2350                        |
| <ul style="list-style-type: none"> <li>▪ General Business Credits</li> </ul>    | Priced on complexity and # of employees |
| <ul style="list-style-type: none"> <li>▪ 1099 preparation and filing</li> </ul> | \$15 per 1099                           |
| <ul style="list-style-type: none"> <li>▪ 990 Non-Profit</li> </ul>              | Beginning \$2350 (990-N \$50)           |
| <ul style="list-style-type: none"> <li>▪ Estate &amp; Gift Returns</li> </ul>   | Priced on complexity of return          |
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| <ul style="list-style-type: none"> <li>▪ Quickbooks subscription &amp; integration</li> </ul> | \$750 (one-time setup fee plus \$32/mo QB subscription fee).                 |
| <ul style="list-style-type: none"> <li>▪ Beneficial Ownership Filings (BOI)</li> </ul>        | \$75 per single entity/\$150 for complex filings                             |
| <ul style="list-style-type: none"> <li>▪ SCorp payroll &amp; W2 filing annual</li> </ul>      | \$500 one-time setup fee, plus \$45/month per w2 employee (billed annually). |
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| <ul style="list-style-type: none"> <li>▪ Tax Planning &amp; Strategy</li> </ul>  | \$150/hr (complimentary for Representation clients)   |
| <ul style="list-style-type: none"> <li>▪ Resolution of IRS Collections, Audits, Liens &amp; Levies, and other tax controversies</li> </ul> | Choice of hourly or flat-fee rate. Retainer Required. |

*Retainers secure engagement and are applied toward performed services.*

*10% discount for for Military & Veterans*

