

SCHEDULE OF INDIVIDUAL TAX PREPARATION FEES (as of 1/10/2018)

ALL FEES MUST BE PAID OR PAYMENT ARRANGEMENTS MADE BEFORE ANY TAX RETURN IS FILED

1040-EZ ("Short" form)	\$60 - \$100 base fee
1040 ("Long" form)	\$80 - \$250 base fee, plus other forms below
Sch A (Itemized Medical/ Mortgage/Charitable/Employee Expenses)	\$50
Sch B (Interest/Dividends)	\$50
Sch C (Self-employment/1099-MISC)	\$75 - \$600, depending on business books
Sch D (Capital Gain/Loss, Stocks, Bonds, Sale of Home)	\$50 - \$400, depending on number of transactions
Sch E (Rental Real Estate, Royalties, Corp/Partnerships)	\$75-\$150 per property or entity
Sch F (Farm Income)	\$75
8867 (Due Diligence Checklist)	\$80
4562 (Depreciation)	\$10 per line item or asset
8962 (Premium Tax Credit reconciliation)	\$25
1040-X (Amendment--Original return prepared by our firm)	\$50 + form charges (if any new forms needed)
1040-X (Amendment--Original return prepared by other firm)	\$125 + form charges (if any new forms needed)
W-2/1099 (2 per person/3 per family)	\$3 per after first 3
Categorizing/Calculating/Organizing Receipts	\$90/hr (30 minute min, billed every 6 minutes)
Incorporation/Partnerships (Assist with setting up company)	\$500 + filing fees*
IRS/State DOR Visits (Attend IRS meetings with you) **	\$125/hr (2 hour min)
Fast Refund Products (Refund Anticipation Loans)	\$60 (excludes fees charged by issuing bank) ***
Fee Withhold/Refund Transfer (fees withheld from refund)	No Charge (participating bank charges \$34.95)
Mobile Tax Appointment (We come to you)	\$50
Failure To Use Tax Organizer	\$25

DISCOUNTS (maximum 50%)

Repeat Customer	5% per year (maximum of 25%)
Public Service (Military, Police, Firefighter, Nurse, Teacher)	25%
Referral (Discount for a new, paying client)	25%
Use Secure Document Portal	10%

* Filing fees differ by state and type of structure. Third party providers may be used.

** IRS rules strictly regulate who can represent you before the IRS. This section refers to our firm accompanying you to a Revenue office to assist you with paperwork, explain any work we have performed, and other administrative functions. If you require representation before the IRS in a tax court or other actionable hearing, you are **strongly** encouraged to seek the advice of a tax attorney, Enrolled Agent, or Certified Public Accountant. This office has an Enrolled Agent available for consultation in such cases.

*** This firm **highly** encourages taxpayers to use standard electronic filing with Direct Deposit of the refund from the IRS—there is no additional cost for this, and the refund generally arrives within 21 days. Refund Anticipation Loans are very expensive, high interest loans against an expected refund that will allow you to receive part or all of your expected refund in the form a loan. It is a loan and can be denied. These products can take from 6 hours to 17 days to receive (or longer if you owe a participating bank on a previously unpaid RAL). This will be a loan from a third-party bank—it **is not** your actual refund from the IRS. You are personally liable for the loan; if the actual refund from the IRS is insufficient to repay the loan, you must still repay the bank that issued the loan. Taxpayers who have had previous issues with past due taxes, child support, student loans, or have had their EIC disallowed in previous years are **highly discouraged** from choosing a loan product. Bank charges for a RAL vary based on the lender and amount of the loan, but can range to as much as \$325.00. The Annual Percentage Rate of the loan (the amount that the loan actually costs you, based on how long you have had the loan) can range to as much as 300%.