

Services	Description	Fee
Electronic Filing	IRS can mail a check or Direct Deposit your refund within 2 weeks from the date of e-file	FREE
Personal Protection Plan	Individual Returns: annual fee covers response to any letter audits from the IRS or State for a period of 3 years	\$29
(PPP)	Individual Returns including Schedules C, E, F & Businesses under \$500k	\$39 each (additional \$10 for each Schedule)
	Businesses with Revenue over \$500k	\$49
	Businesses with Revenue over \$3M	\$90

The Personal PPP is a valuable insurance you won't want to do without. Daily, we see a drastic increase in the amount of notices the IRS & State agencies send out. Many of these notices can be addressed with a responding correspondence, thereby preventing the payment of unnecessary taxes. Not having professional tax assistance when dealing with these notices can be a costly mistake. The \$29 Plan covers one tax return for a period of three years which is the time the IRS or State agencies have to question your taxes. The Plan covers one tax year for three years. This means it is necessary to purchase a plan annually to cover each year you file taxes. For example, your 2015 tax return will be covered until April 15, 2019 for only \$29. That's less than \$10 per year. Of course, there are returns which would not warrant coverage such as tax returns which do not itemize deductions. However, if you itemize or file other schedules with your taxes, we highly recommend this coverage for you. More complicated returns containing Schedules C, E, F and businesses need advanced coverage. We will charge an additional \$10 per Schedule. The coverage includes any letter responses and a 3-way phone call with an IRS agent if deemed necessary. Without the coverage, we charge an hourly rate of \$150/hr to provide these services. Providing the Plan to all of our customers helps to keep your costs down. Please note that letter audits are different than live audits in which an IRS agent must come in to examine records. There is much more time involved in live audits. In these cases, we charge an hourly rate of \$180 for representation by Phil Mazziotta who is an IRS Enrolled Agent and possesses the knowledge and skills necessary to negotiate with the IRS or State agencies.

FORMS

FORM 1040	Federal Individual Return with no Schedule A	\$225 and up
	With Schedule A	\$275 and up
Form 1040-SR	Federal Senior Individual Return	\$225 and up
State Returns	Full year residents	\$75 for each additional state
	Part year residents	\$125 each state
EIC	Earned Income Credit	\$75
Schedule B	Interest and Dividends (5 line items)	\$25
	additional line items	\$10/each
Schedule C	Self-Employment Income & Expenses (includes Sch. SE and Form 8829) based on details	\$20K or less revenue-\$125
		>\$20K revenue-\$250 and up
Schedule D	Capital Gains & Losses	\$15/Line Item

Services	Description	Fee
Schedule E	Rental Property	\$200 and up
		\$175 and up for each additional location
Schedule F	Farm Income	\$250 and up
Form 1095A	Marketplace Insurance Statement	\$75 and up
Form 1116	Foreign Taxes Paid – per form	\$20 each
Form 2106	Employee Business Expenses	\$75
Form 2441	Child/Dependent Care Credit	\$100-1 child \$125-2 or more children
Form 3903	Moving Expenses	\$200
Form 4684	Casualties and Thefts Losses and Ponzi Scheme	\$200 and up
Form 4797	Sale of Business Property	\$300 & up
Form 6252	Installment Sale	\$150 & up
Form 8606	Non-Deductible IRAs	\$50
Form 8812	Child Tax Credit	\$50
Form 8863	Education Credits/deductions-AOC/LLC	\$140
Form 8835	Renewable Electricity Production	\$125
Form 8938/114	Specified Foreign Financial Assets	\$125 & up
Form 8834/6	Qualified Electric Vehicle	\$150
Form 8965	Exemptions for Marketplace Insurance	\$20 each
Form 9465	Installment Agreement	\$150
Home	Sale of Primary Residence	\$250
RRC	Recovery Rebate Credit	\$35
MFS	Married Filing Separately Optimization Worksheet	\$200
FORM 1040X	Amended Federal (current clients-we prepared original return)	\$150 and up
	Amended Federal (new clients-we did NOT prepare original return)	\$275 and up
Federal 1041	Fiduciary Return	\$300 and up
Form K-1	Forms 1065, 1041 & 1120S	\$80/ea
1120/1120S/1065	Corporation, S-Corp, Partnerships	\$400 and up

Services	Description	Fee
Business Services	Complete LLC Formation Including EIN (Includes 1 state)	\$275
	Additional State	\$100/ea
	S-Corp Conversion	\$200
	Form 1096 & 1099 Misc (up to 2)	\$150 and up
	Additional 1099's	\$15/ea
	Corporate Annual Report Filing	\$150
	Dissolution of Corp or S-Corp	\$300
	Profit & Loss Statement	\$200
	Balance Sheet	\$200
	Self-Employment Letter	\$150
	Letter for Non-Audit Reasons	\$150 and up
	BOI (Beneficial Owner Interest) Filing	\$200
Additional Services	Financial Consultation	\$175(up to an hr)
	Letter Audit Response	\$175 and up
	Property Tax Reimbursement or ANCHOR application	\$35
	Additional hard copy of tax return	\$15
	Digital copy (CD or email) current year	\$5
	Digital copy (CD or email) prior year	\$10
	Certified Mail	\$15
	FAFSA Application Assistance	\$100
	Offer In Compromise	\$350 and up
	Offer In Compromise Follow up	\$100 and up
	FBAR	\$100 and up
	Sales Tax Filing	\$80/qtr
	Military Discount (active duty)	20% off
	Service with a smile	always free