



## Price List for Businesses, etc.

### *Business Income Tax Returns*

### Cost of Return

#### **Basic Tax Preparation Rate:**

Partnerships, S-Corporations, & C-Corporations

When we are provided a complete and reconciled Income Statement and Balance Sheet

only \$600

#### **Advanced Tax Preparation Rate:**

Includes compilation of records &/or corrections made to the General Ledger

\$1,500

### *Estates & Trusts Income Tax Returns*

#### **Basic Tax Preparation Rate:**

When we are provided a complete and reconciled Income Statement and Balance Sheet

only \$750

#### **Advanced Tax Preparation Rate:**

Includes compilation of records &/or corrections made to the General Ledger

\$1,500

#### **Costs in Addition to Standard Rates:**

The specific costs for different needs are listed on page 2.

Total Additional Costs = \_\_\_\_\_

Total Costs (before available discounts) \_\_\_\_\_

Less: applicable discounts &/or rebates \_\_\_\_\_

Referrals  x \_\_\_ Coupon  Other  (\_\_\_\_)

**Total Cost** \_\_\_\_\_

#### **Complex Tax Preparation & Planning Work**

generally require additional fees related to the level of complexity. The final cost is discussed and agreed upon before the work process continues.



## Price List for Businesses, etc. (continued)

### Costs in Addition to Standard Rates:

A) Each <b>Adjusting Journal Entry</b> needed	_____ x	\$15 =	_____
B) Special <u>Income &amp;/or Expense Allocations</u> needed			
1) First <b>THREE</b> Partners or Shareholders			\$900
2) # of additional Partners or Shareholders	_____ x	\$60 =	_____
C) <b>Assets</b> to be <b>Depreciated</b> &/or <u>Disposed</u> of	_____ /5 x	\$60 =	_____
D) <b>Assets</b> <u>under-Depreciated</u> in Prior Years ( <b>\$481A</b> cxn)	___/9 x	\$360 =	_____
E) <b>Automobile(s)</b> Used for Business	_____ x	\$60 =	_____
F) <b>Automobile</b> used for <b>more than 50%</b> for Business	_____ x	\$75 =	_____
1) <b>Leased</b> & Available for Non-Business Use			\$150
G) <b>Casualty loss</b> incurred (robbery, fire damage, etc.)			\$150
H) <b>Employees</b> hired from a <b>Hurricane Katrina</b> affected area			\$420
I) Estimated Tax Payment Vouchers (Federal)			\$60
J) Estimated Tax Payment Vouchers (one State)			\$60
K) An <b>Extension</b> is required for 1 <sup>st</sup> Filing Deadline			\$60
- additional state			\$30
- additional locality			\$30
If <b>Liability IS due</b> , per government entity that needs a calculation			\$150
L) <b>Foreign Source Income</b>			
1) Interest &/or Dividends	_____ x	\$60 =	_____
2) <b>PFICs</b> (Passive Foreign Investment Company) Form <b>8621</b>	_____ x	\$180 =	_____
3) Controlled Foreign Partnerships (Form <b>8865</b> )	_____ x	\$240 =	_____
4) Reportable Txn Disclosure Stmt (Form 8886)	_____ x	\$300 =	_____
M) <b>Health insurance</b> is paid through the business.			\$120
N) <b>Interest Expense Allocation</b> Calculation			\$540
O) <b>Inventory Calculation</b> relating to <u>Products</u> (not service) <u>Sold</u>			\$150
P) Special <b>M-1 Schedule Adjustments</b> needed	_____ x	\$120 =	_____
Q) <b>Mailing Address</b> has changed since prior tax returns were filed			\$30
R) Analyze a <b>Partnership Agreement</b> .	_____ pages x	\$30 =	_____
S) <b>\$754 Partner Allocation</b> Treatment			\$900

*"Taxes... that's all we do."*



## Price List for Businesses, etc. (continued)

### U) # of **Partners or Shareholders**

- 1) First **THREE** Partners/Shareholders (included)  
2) # of additional Partners/Shareholders \_\_\_\_\_ x \$60 = \_\_\_\_\_  
3) # of **NEW** Partners/Shareholders for this year \_\_\_\_\_ x \$75 = \_\_\_\_\_  
4) # of Partners/Shareholders **Removed** for this year \_\_\_\_\_ x \$75 = \_\_\_\_\_  
5) # of **Non-Resident** Partners/Shareholders \_\_\_\_\_ x \$75 = \_\_\_\_\_  
6) Did % of the ownership change for any Partners/Shareholders  YES  No  
If yes, how many changed? \_\_\_\_\_ x \$60 = \_\_\_\_\_

- V) a) **Pension** Contributions \$120  
b) Was money moved to Pension trust after Dec. 31, **2006** \_\_\_\_\_ x \$180 \_\_\_\_\_

W) **Re-Processing Fee** (if data originally provided by customer was incorrect) \$150

X) **Rental Property** owned by entity \$210

Y) **Special Attachments** required for returns \_\_\_\_\_ x \$210 = \_\_\_\_\_

Z) **State, City or Local Returns** req'd (other than Home state) \_\_\_\_\_ x \$150 = \_\_\_\_\_

AA) **State Apportionment** Formula \_\_\_\_\_ x \$300 = \_\_\_\_\_

BB) **Division** (i.e. LLC owned 100% by a Corporation) \_\_\_\_\_ x \$210 = \_\_\_\_\_

CC) Was there an **Asset Sale** by the Business? \_\_\_\_\_ x \$540 = \_\_\_\_\_

DD) Is this tax return needed for **Dissolution**? \_\_\_\_\_ x \$210 = \_\_\_\_\_

EE) Sales of Investments (stocks, etc.)

1) 1<sup>st</sup> two transactions \$120

2) Add'l sales of investments \_\_\_\_\_ /5 x \$240 = \_\_\_\_\_

FF) Does the business receive K-1's from other Entities \_\_\_\_\_ x \$150 = \_\_\_\_\_

GG) Is there a loan(s) between the company and one or more Shareholders/Partners?  YES  No

If Yes, how many specific loans? \_\_\_\_\_ x \$240 = \_\_\_\_\_

**Total Cost of Additional Items** (carry this to the bottom of page 1) \_\_\_\_\_

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generally require additional fees related to the level of complexity. The final cost is discussed and agreed upon before the work process continues.