



## Price List for Personal Tax Returns

<b>Basic Tax Preparation Rate</b> (includes home state):	<b>Cost of</b>
	<b><u>Return</u></b>
Client does not itemize his/her deductions and data consists of:	
A) ONE Form W-2	only \$120
or	
B) 1. TWO Form W-2s <i>or</i>	\$150
2. One W-2 & one Form 1099 <i>or</i>	
3. Simple Sole Proprietorship Business	
C) Two Form W-2s <i>or simple Sole Proprietorship Business</i>	\$180
Maximum of three Forms 1099-INT &/or Forms 1099-DIV	

<b>Advanced Tax Preparation Rate</b> (includes home state):	
Two Form W-2s <i>or simple Sole Proprietorship Business</i>	\$300
Maximum of 6 Forms 1099-INT &/or Forms 1099-DIV	
Requires basic <u>itemized deductions</u> (generally limited to Form 1098 & cash donations to charity)	

### Costs in Addition to Standard Rates:

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

Total Additional Costs	=	
<b>Total Costs (before available discounts)</b>		
Less: applicable discounts &/or rebates		
Referrals <input type="checkbox"/> x ___ Coupon <input type="checkbox"/> Other <input type="checkbox"/>		( )
<b>Total Cost</b>		

### 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 Personal Tax Returns (continued)

### Costs in Addition to Standard Rates:

- A) Each additional Form W-2 \_\_\_\_\_ x \$30 = \_\_\_\_\_
- B) Each additional Form 1099 \_\_\_\_\_ x \$30 = \_\_\_\_\_
- C) Each additional Sole Proprietorship Business \_\_\_ x \$120 = \_\_\_\_\_
- D) Sales of Investments (stocks, etc.)
  - 1) First TWO transactions \_\_\_\_\_ \$60
  - 2) Additional Sales of Investments \_\_\_\_\_ /5 x \$120 = \_\_\_\_\_
- E) **Assets to be Depreciated** \_\_\_\_\_ /5 x \$60 = \_\_\_\_\_
- F) **Automobile Used** for Business or Rental Property \$60
- G) Automobile Used for **more than 50%** for Business \$75
- H) Dependent &/or Child Care Credit \$30
- I) Estimated Tax Payment Vouchers (Federal) \$60
- J) Estimated Tax Payment Vouchers (one State) \$60
- K) An **Extension** is required to file beyond April 15<sup>th</sup> \$60
- L) Hope/Lifetime Learning Credit \$60
- M) Inventory Calculation relating to Products (not service) Sold \$120
- N) Newly Married (officially wed during tax year in question) \$75
- O) **Payment Plan request** to Fed/State Government Agency \$150
- P) Pension Contributions (to an **IRA** or a **SEP**) \$30
- Q) Re-Processing Fee (if data originally provided by customer was incorrect) \$75
- R) Add'l **State/City/Local** Returns req'd (other than **Home state**) \_\_\_ x \$75 = \$ \_\_\_\_\_
- S) **Rental Property** (must NOT be purchase year)
- T) **Student Loan Interest OR Educators Expense** Adjustment \$30
- U) **Schedule K-1** (only if directly provided by TaxOnly or affiliates) \$75
- V) Mailing Address has Changed since prior tax returns were filed \$30
- W) Reportable Transaction Disclosure Statement (IRS Form 8886) \$300

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

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