



Tax Preparer's Guide

Please follow the steps listed below:

Step 1: Meet with client and go through the Tax Organizer questionnaire, Complete and let them sign the form.

Step 2: Collect all necessary documents to ensure accuracy. Write all documents received from the client at the Tax Organizer questionnaire.

Step 3: Communicate to the client that it will take 3 -5 business days or longer (if the documents are incomplete) in providing an update. If there's any missing information or any questions – expected to respond within 24 – 48 hours (Both client and Tax preparer).

Step 4: Prepared Tax 2018 will be forwarded to the client for review and approval.

Step 5: Completed, Reviewed and received approval from the client that they have agreed with the prepared TAX File 2018 then it will be transmitted to IRS directly. Payment MUST be obtained before E-File.

Check payable to: REACH Insurance Services

Cost per transaction varies, as it depends about the client tax situation.

Thank you so much!

PRICE LIST:

Prices listed are estimated amounts, it can change/varies.

Individual Income Tax Preparation Price List

Form Number and Name	Form Pricing
1040 – U.S. Individual Income Tax Return	\$125.00
Schedule A – Itemized Deductions	\$15.00
Schedule B – Interest and Ordinary Dividends (per ea. 10 Items)	\$15.00
Schedule C – Profit and Loss from Business (per ea. Business)	\$30.00
Schedule C-EZ – Net Profit from Business (per ea. Business)	\$20.00
Schedule D – Capital Gains and Losses (per ea. 10 Items)	\$15.00
Schedule D1 – Continuation Sheet for Schedule D (per ea. 10 items)	\$15.00
Schedule E – Supplemental Income and Loss (per ea. Property)	\$30 – \$60
Schedule EIC – Earned Income Credit	\$20.00
Schedule F – Profit or Loss from Farming (per ea. Farm)	\$30.00
Schedule H – Household Employment Taxes	\$15.00
Schedule J – Farm Income Averaging	\$20.00
Schedule R – Credit for the Elderly or the Disabled	\$20.00
Schedule SE – Self Employment Tax	\$15.00
1040A – U.S. Individual Income Tax Return Short Form	\$100.00
Schedule 1 – Interest and Ordinary Dividends for Form 1040A filers	\$15.00
Schedule 2 – Child and Dependent Care Expenses for Form 1040A filers	\$20.00
Schedule 3 – Credit for the Elderly or the Disabled for Form 1040A filers	\$15.00
1040EZ – Individual Income Tax Return for Single and Joint Filers With No Dependents	\$75.00

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1040ES – Estimated Tax for Individuals	\$15.00
1040X – Amended U.S. Individual Income Tax Return	\$75.00
1116 – Foreign Tax Credit – Individual, Estate, Trust, or Nonresident Alien Individual	\$20.00
2106 – Employee Business Expense	\$25.00
2210 – Underpayment of Estimated Tax by Individuals, Estates and Trusts	\$15.00
2210F – Underpayment of Estimated Tax by Farmers and Fisherman	\$15.00
2441 – Child and Dependent Care Expenses	\$25.00
2555 – Foreign Earned Income	\$20.00
2688 – Application for Additional Extension of Time to File U.S. Individual Income Tax Return	\$15.00
2848 – Power of Attorney and Declaration of Representative	\$10.00
3903 – Moving Expenses	\$25.00
4137 – Social Security and Medicare Tax on Unreported Tip Income	\$15.00
4562 – Depreciation and Amortization	\$15.00
4684 – Casualties and Thefts	\$15.00
4835 – Farm Rental Income/Expense (per farm)	\$30.00
4868 – Application for Automatic Extension of Time to File U.S. Individual Income Tax Return	\$15.00
4952 – Investment Interest Expense Deduction	\$15.00
4972 – Tax on Lump Sum Distributions	\$15.00
5305RB – Roth Individual Retirement Annuity Endorsement	\$15.00
5329 – Taxes Attributable to IRAs, Qualified Retirement Plans, Annuities, Endowment Contracts and MSAs	\$15.00
5405 – First-Time Home Buyer’s Credit	\$20.00
6251 – Alternative Minimum Tax – Individuals	\$15.00
6252 – Installment Sale Income	\$15.00
8283 – Non-cash Charitable Contributions	\$15.00

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8332 – Release of Claim to Exemption for Child if Divorced of Separated Parents	\$15.00
8379 – Injured Spouse Claim and Allocation	\$15.00
8396 – Mortgage Interest Credit	\$20.00
8453 – U.S. Individual Income Tax Declaration FREE for Electronic Filing	Free
8582 – Passive Activity Loss Limitations	\$25.00
8582CR – Passive Activity Credit Limitations	\$25.00
8586 – Low Income Housing Credit	\$15.00
8606 – Nondeductible IRAs	\$15.00
8615 – Tax for Children Under Age 14 Who Have Investment Income of More Than \$1,400	\$15.00
8812 – Additional Child Tax Credit	\$15.00
8814 – Parents’ Election to Report Child’s Interest and Dividends	\$15.00
8815 – Exclusion of Interest from Series EE U.S. Savings Bonds Issued After 1989	\$15.00
8822 – Change of Address	\$5.00
8829 – Expenses for Business Use of Your Home	\$25.00
8839 – Qualified Adoption Expenses	\$20.00
8857 – Request for Innocent Spouse Relief	\$15.00
8863 – Education Credits	\$20.00
8867 – Paid Preparer’s Earned Income Credit Checklist	\$15.00
8910 – Alternative Motor Vehicle Credit	\$20.00
8917 – Tuition and Fees Deduction	\$15.00
8919 – Uncollected Social Security and Medicare Tax on Wages	\$15.00
Electronic Filing	FREE
Worksheets, each	\$10.00
Statements, Reports, each	\$10.00

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W-2s, each	\$15.00
1099s, each	\$15.00
CA 540 – Individual Income Tax Return Long Form	\$100.00
Schedule CA (540) – California Adjustments – Residents	\$15.00
Schedule D (540) – California Capital Gain of Loss Adjustment	\$15.00
3506 – Child and Dependent Care Expenses Credit	\$15.00
3885A – Depreciation and Amortization Adjustments	\$10.00
Schedule IA 126/IA 130 – Nonresident and Part-Year Resident Credit; Credit Computation	\$10.00
540ES – Estimated Tax for Individuals	\$15.00
540X – Amended Individual Income Tax Return	\$45.00
CA – Individual Income Tax Declaration for Electronic Filing	FREE
Worksheets, each	\$10.00
Statements, Reports, each	\$10.00

Business Income Tax Preparation Price List

1065 Partnership Tax Return	\$350
1020 Corporate Tax Return	\$425
1020S Tax Return S Corporation	\$400
Schedule M-3	\$30.00
Other Non-Credit Schedules, each	\$10.00
Worksheets, each	\$10.00
Statements, Reports, each	\$10.00
CA 100 Corporate Tax Return	\$175
CA 100S S Corporate Tax Return	\$175

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CA 565 Partnership Return of Income	\$150
CA 568 LLC Return of Income	\$150
Business Non-Credit Schedules, each	\$10.00
Worksheets, each	\$10.00
Statements, Reports, each	\$10.00

W2: The First 2 will be free but after that it will be additional charge of \$15 per W2

1099: The First 1099 will be free but after that it will be additional charge of \$15 per 1099

Business Tax will be based on the current needs and charges will be TBD.

Promotions:

Choice of 1:

Free E-File!

Or

10%

Or

\$10 Off

If you refer a friend, you will get \$15 off