



(2026) PRICING SUMMARY

Effective: 1/1/2026 – 12/31/2026

I. INDIVIDUAL TAX RETURNS: INCLUDES FEDERAL FORM 1040 + (1) STATE

Individual tax return preparation (base-rate) : **\$400**

Additional Charges (if applicable):

- | | |
|---|-------|
| 1. Additional state filing requirements (each state): | \$100 |
| 2. Schedule C (<i>Profit or Loss from Business</i>) (each): | \$150 |
| 3. Schedule E (<i>Income or Loss from Rental Real Estate</i>) (each): | \$150 |
| 4. Schedule F (<i>Profit or Loss from Farming</i>) (each): | \$150 |
| 5. Form 8824 (<i>1031 / Like-Kind Exchanges</i>) (each): | \$250 |
| 6. Form 114 (<i>Report of Foreign Bank and Financial Accounts</i>): | \$150 |
| 7. CA Form 568 (<i>Single-Member LLC</i>): | \$275 |

Dependent tax returns (each): \$150

Amended form 1040 + (1) amended state tax return: \$250

* Uncommon tax forms or overly time-consuming tax calculations/reconciliations may incur additional charges and will **always** be discussed with the client prior to billing.

II. BUSINESS TAX RETURNS: FEDERAL FORMS 1065/1120/1120S + (1) STATE

Business tax return preparation (base-rate) : **\$825**

Additional Charges (if applicable):

- | | |
|--|-------|
| 1. Additional state filing requirements (each state): | \$150 |
| 2. Form 8825 (<i>Rental Real Estate Income and Expenses</i>) (each): | \$150 |
| 3. Form 8824 (<i>1031 / Like-Kind Exchanges</i>) (each): | \$250 |
| 4. Form 114 (<i>Report of Foreign Bank and Financial Accounts</i>): | \$150 |

Amended forms 1065/1120/1120S + (1) amended state tax return: \$300

* Uncommon tax forms or overly time-consuming tax calculations/reconciliations may incur additional charges, but will **always** be discussed with the client prior to billing.



(2026) PRICING SUMMARY, CONTINUED...

III. TRUST/ESTATE TAX RETURNS: FEDERAL FORM 1041 + (1) STATE RETURN

Trust/Estate tax return preparation (base-rate) : **\$825**

Additional Charges (if applicable):

- | | |
|---|-------|
| 1. Additional state filing requirements (each state): | \$150 |
| 2. Schedule C (<i>Profit or Loss from Business</i>) (each): | \$150 |
| 3. Schedule E (<i>Income or Loss from Rental Real Estate</i>) (each): | \$150 |
| 4. Form 8824 (<i>Like-Kind Exchanges</i>) (each): | \$250 |
| 5. Form 114 (<i>Report of Foreign Bank and Financial Accounts</i>): | \$150 |

Amended form 1041 + (1) amended state tax return: **\$300**

* Uncommon tax forms or overly time-consuming tax calculations/reconciliations may incur additional charges, but will **always** be discussed with the client prior to billing.

IV. BUSINESS BOOKKEEPING

*** (Ongoing) Monthly bookkeeping has been in high-demand and may not be available at the moment due to the time commitment. Please contact us regarding availability.

**** Alternatively, we do offer “catch up” accounting (i.e. we can put together your financial statements for a specified fiscal period) – examples : ‘Calendar Year 2025’ for tax return preparation or ‘Year-To-Date Financial Statements’ for bank lending requirements.**

Bookkeeping billable rates are based on business activity (number of bank/credit card/loan accounts, monthly transactions, etc.). (\$250-\$350 per month, on average)

V. MISCELLANEOUS CHARGES AND FEES

Consulting/Miscellaneous hourly bill rate (hour) **\$250**

Federal & State tax notice response: **\$250**

Bank or Lender Letters **\$300**

Property Tax Returns (*Form 571-L*) **\$300**



(2026) PRICING SUMMARY, CONTINUED...

S-Corporation Election (<i>Form 2553</i>)	\$250
Year-End Tax Planning (Business + Personal)	\$750
Annual 1099 filings:	
Form 1096 (<i>Annual Summary and Transmittal of U.S. Information Returns</i>):	\$75
Forms 1099 (per recipient):	\$50