



Tips on a Successful Tax Season and Fee Schedule Guide

Schedule an appointment if you feel that you need a true consultation, about *significant situations* or *dramatic changes* from the prior year or *if you are a new client*. We enjoy time with our clients, however our main goal is to complete your return timely. **Please be aware that appointments during tax season are for preparation of returns and not tax planning. Planning appointments can be booked for May or June.**

Delivery of documents. Please fully utilize the secure portal sent to your email. Organizing all your documents and delivering them at one time in a complete and organized package will help us be efficient and save you on preparation fees. LATE ARRIVING investment statements and K-1's can be submitted when you receive them if you anticipate they will arrive after March 15th.

Please provide all additional information requested in our secure portal. Notify us when you have completed your submission of all tax support documents.

Delivery method. If you have an appointment, please bring **ALL** your documents. The Portal is available for you to upload late arriving documents or additional information as requested. Please use as few pdf's as possible – we do not need you to label each individual document – we print them all! Multiple pdf or jpg files are time consuming to print and organize and therefore will be billed by time.

Extension of filing. Not all returns can be filed by April 15th because of late arriving information or backlog in our office. Generally, returns received in the office after April 1st may not be completed by the April 15th deadline. However, any taxes are still due by April 15th deadline which may require (if time permits) some additional work to determine a tax extension payment. Our office is not responsible for any penalties for underpaid taxes. Extensions can be filed for the IRS and the State of MO by our office with a written request for an additional fee of \$25 for personal and \$50 for Business Returns.

Late changes to your return. Once your return has been completed and the pdf has been posted to your portal there will be charges for “forgotten” information that requires a re-work of the return.

Tax Preparation Fee Guide

Basic 1040 Return preparation fee begins at \$395 which includes the following items:

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| *W2's | *Interest & Dividend Income |
| *Social Security Income | *Pension/Retirement Statements |
| *Student Loan Interest | *Educator Deductions (teachers) |
| *Sch A deductions | *Local KCMO return if applicable |
| **Electronic filing of Federal and 1 State return | |

Additional Fees will apply for return that include the following items. The amount of charges will depend on the complexity of the situation to complete return

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| *Investment beyond Interest/Dividends | *K1's |
| *Stock options | *HSA contributions & distributions |
| *Sale/Purchase of Real Estate (primary or rental) | *Self Employment schedule (Sch C) |
| *Rental Properties (Sch E) | * Farm Income & Expenses (Sch F) |
| *Earned Income Credit worksheet | *Depreciation Schedules |
| *Premium Tax Credit from Healthcare | *Multiple State returns |

***** Fees for services vary based on the condition of your records, the complexity of the return, and the amount of correspondence and length of meetings required in order to obtain complete and organized information. Fees might also include other factors deemed relevant, including the difficulty of the issues and the skill required to perform the accounting, tax, or other service properly, time limitations imposed either by you or the circumstances.**