



1136 S. Delano Court West, Suite B201-2002
Chicago, IL 60605

www.howardtaxprep.com
855-743-5765

2018 TAX RESOLUTION SERVICES

We typically charge a flat fee for tax debt relief services. The amount of the flat fee varies from case to case depending on the circumstances. Here is a breakdown of the average flat fee we charge for common tax debt relief services:

Consultation: We offer a TIMED FREE 15 MINUTE PHONE/EMAIL CONSULTATION.

After your 15-minute consultation, consultations are available in 30 minute increments. Our consultation fees are **\$75 for ½ hour, and \$125 for an hour**. Should you continue with your tax resolution services we will be more than happy to apply the consultation fee against the cost of any services that you hire us to provide, which in effect makes it free if you decide to work with us.

Tax Resolution Investigation of Liability Includes Initial Research, IRS correspondence, Power of Attorney, Transcripts, receiving of notices. **Fee: \$255**

Collection Information Data Initiate protection from IRS collection actions, pull debt records to see how much is owed at time of representation, when the debt arose, what kinds of penalties have been assessed, calculate **IRS 10 Year Debt Expiration Dates (CSED)**, check your IRS account for changes such as audits, liens, collections, significant balance changes, and determine your options for resolving the tax debt. **Fee: \$275.**

Financial Analysis Federal or State. All tax debt solutions (whether Federal or State) are based upon a client's financial standing. The financial analysis includes your credit report, court record search, a summary of debt owed, calculation of available credit, trade account pay off dates, value of real property, value of retirement accounts, bank statement analysis, and analysis of necessary monthly expenses. **Fee: \$250 Per Analysis; \$375 Combo Federal & State**

State tax representation Includes power of attorney, receiving of documents, request for levy release, completing installment agreement paperwork, requesting a hardship, and negotiating Offer in Compromise if possible. **Fee: \$875 to \$1,500 PER STATE.**

IRS Tax Lien Removal If you are trying to sell or refinance your home and have a federal tax lien filed on your home, you may need one of our IRS Enrolled Agents to remove the lien. The flat fee we charge is for preparing & submitting financials, stopping collections, receiving documents, communicating with the IRS, and negotiating. **Fee: \$950-\$1,550.**

Payroll Tax Debt Form 941/940 taxes Representation and resolution of tax problem whether your business is open, closed or soon to be closed. The flat fee we charge is for preparing & submitting financials, stopping collections, receiving documents, communicating with the IRS, and negotiating. **Fee: \$1,275 to \$6,500.**



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2018 TAX RESOLUTION SERVICES (continued)

Penalty Waiver Request Completion of official document requesting penalty & interest waiver/abatement on personal or business taxes (includes appeals). The flat fee we charge is for preparing & submitting financials, stopping collections, receiving documents, communicating with the IRS, and negotiating. **Fee: \$575 to \$1,800.**

Currently Not Collectible Status: Once we file your tax returns we may find that you qualify for a special hardship with the IRS. We will prepare a personal financial statements that confirms if you were forced to pay your tax debt, and necessary living expenses, you would face a financial hardship. Being classified as currently not collectible does not mean that the debt goes away. It means that the IRS has determined that you cannot afford to pay the debt at this time. Penalties and interest will continue to be added to the debt ****THIS DOES NOT EXTEND THE TIME THE IRS HAS TO COLLECT YOUR TAX DEBT! **** the flat fee we charge is for preparing & submitting financials, stopping collections, receiving documents, communicating with the IRS, and negotiating. **Fee: \$875 to \$1,500.**

Partial Pay Installment Agreement Once we file your tax returns we may find that you qualify to pay a small portion of the debt, and the remaining debt in payments made over time. If this is the case, our office will then need to prepare a personal financial statement showing what you can afford to pay monthly after your personal expenses. Self-employed clients will also need to have business profit and loss statements completed. The flat fee we charge is for preparing & submitting financials, stopping collections, receiving documents, communicating with the IRS, and negotiating. **Fee: \$650-\$1,850**

Offer in Compromise: Debt settlement for substantially less than you owe. For example, a good offer in compromise would be to settle a \$150,000 debt with a mere \$4,000 payment. The flat fee we charge is for preparing & submitting financials, stopping collections, receiving documents, communicating with the IRS, and negotiating, and an offer in compromise with the IRS. Cost depends on the amount of the tax owed, as the more one owes, the more complex the case is. **Fee:**

- Less than \$25,999.....\$1,250
- \$26,000- \$49,999.....\$2,750
- \$50,000-\$99,999.....\$3,750
- \$100,000-\$299,999.....\$5,750
- \$300,000-\$750,000.....\$8,750
- More than \$750,000... 12,750



2018 TAX RESOLUTION SERVICES (continued)

Basic Installment Agreements The flat fee we charge for setting up an installment agreement (i.e. a payment plan) with the IRS depends on the total amount of tax that is owed. This is because the IRS has different standards for accepting installment agreements that get progressively more stringent the higher the balance due. The flat fee that we charge is for preparing & submitting financials, stopping collections, receiving documents, communicating with the IRS, and negotiating. **Fee:**

- **Less than \$25,000..... \$425**
- **\$25,000 – \$50,000.....\$850**
- **More than \$50,000..... \$1,800+**

Other Miscellaneous Services:

- **Garnishment & Levy Release: \$775 to \$1,500**
- **Injured Spouse Relief: \$575 – \$2,500**
- **Innocent Spouse Relief: \$2,500 – \$4,500**
- **Tax Resolution Billable Hours-\$85 an hour**
- **Attorney litigation \$425 per hour**
- **CPA representation \$300 per hour**
- **CPA review \$250 per return**

Garnishment/Levy Release The flat fee we charge for setting up an installment agreement (i.e. a payment plan) with the IRS depends on the total amount of tax that is owed. This is because the IRS has different standards for accepting installment agreements that get progressively more stringent the higher the balance due. The flat fee that we charge is for preparing & submitting financials, stopping collections, receiving documents, communicating with the IRS, and negotiating. **Fee:**

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BUSINESS FORMATION, PAYROLL, COMPLIANCE, AND MAINTENANCE

DREAMERS PACKAGE--\$100 READY TO BRING YOUR VISION TO LIFE?

This package provides: 15 name searches in the State databases; Preparation & filing of Articles of Incorporation; Federal Tax ID/EIN; Listing of forms corporations need to stay legally compliant. **Does not include consultations, questions, tax planning, or State or Federal filing fees.**

STARTER PACKAGE LLC/ CORPORATION--\$175 LAY YOUR FOUNDATION WITH OUR STARTERS PACKAGE.

This package provides: 30 name searches in the State databases; Preparation & filing of Articles of Incorporation/Operating agreement; Federal Tax ID/EIN; Sample Bylaws/Operating agreement; and toll free number.* **Does not include any consultations, questions, tax planning, State or Federal filing fees.**

OWNERS PACKAGE LLC/ CORPORATION--\$325

JUST ADD YOUR BUSINESS PLAN & YOU'RE READY TO OPEN. We provide you with the following: Unlimited name searches; Preparation & filing of Articles of Incorporation; Federal Tax ID/EIN; Customization of standard bylaws/operating agreement; Sample copy of corporate minutes; toll free number **Does not include tax planning, or State or Federal filing fees.**

EXECUTIVE PACKAGE LLC/ CORPORATION--\$475

SHOW THE WORLD YOU MEAN BUSINESS! Package includes: Unlimited name searches; Preparation & filing of organizing documents; Federal Tax ID; Dunn & Brad Street registration; Customization of bylaws; Corporate minutes forms; Sample business plan; Sample financial statements, and toll free number.* **Does not include Tax Planning, or State/Federal filing fees.**

NON PROFIT SETUP--\$750

WANT TO MAKE A DIFFERENCE, BUT DON'T KNOW WHERE TO START? Then this nonprofit setup package is for you! Package provides: Preliminary nonprofit name clearance; Federal Tax ID; Customization of Bylaws; Completion & filing of organizing documents; Completion of IRS 1023 application for Federal Tax Exemption; and toll free number.* **Does not include State/Federal filing fees.**

1 HOUR CONSULTATION--\$125.00 1/2 HOUR CONSULTATION--\$75.00

Do you know how to prepare your own taxes, but still have a few questions? Do you already know how to setup your own business structure, but aren't sure what forms you need? If so, get the assistance of a nonprofit & for profit corporation owner with IRS credentialed tax knowledge! Gather your things and schedule your 60-minute session today. **All DIY assistance sessions must be purchased in 30 minute increments. NON REFUNDABLE.**

FULL SERVICE PAYROLL--**\$29.99 a month, plus \$4.00 per employee** Payroll company is responsible for all filings and deposits of federal, state, & local taxes. W-2's are also filed for you.

DO IT YOURSELF PAYROLL --**\$11.00 a month** you alone are responsible for all of your federal, state, and county tax payments.

REGISTRATION OF BUSINESS TAX PAYMENT ACCOUNT (STATE & COUNTY) for tax paying number--**\$35.00.**

REGISTRATION OF BUSINESS TAX PAYMENT ACCOUNT (FEDERAL) Registration of Business with IRS for tax paying number--**\$35.00.**

STATE NEW HIRE REPORTING --**\$35.00 Per employee.**

STATE UNEMPLOYMENT REGISTRATION--**\$35.00 Per employee.**

TAX REGISTRATION, NEW HIRE REPORTING, & UNEMPLOYMENT REPORTING--Bundle package rate **\$99.00.**

EMPLOYMENT PACKET FOR ADULTS (ages 21-99) --**\$39.95** Includes Federal & State new hire forms and job description.

EMPLOYMENT PACKET FOR CHILDREN (ages 7-21) --**\$49.95** Includes Federal & State new hire forms; job description; **IRS Audit Proof Substantiation of employment documents**; Reporting Documents.

QUICKBOOKS ONLINE ACCOUNTING SOFTWARE--**\$20.00 a month** (If you don't want to pay this amount you can get your own QBO account and give us access).

NO COST BOOKKEEPING & ACCOUNTING SOFTWARE -- **\$125.00 Setup fee, \$0 monthly fee.** Additional support billed at \$75.00 an hour.

COLLECTION AGENCY FOR A/R Third party vendor handles collections on your behalf. -- **\$35.00 Setup fee, \$0 monthly fee.**

TOLL FREE NUMBER WITH EMAIL FAX-- Memo on Call, Multiple Extensions, Internet Fax Auto Attendant, Conference calling, Call recording--**\$10.00 Per month.**

EXPENSE ACCOUNT—Needed by C/S corporations to track expenses and reimbursements of employee business expenses. Without this account, employee expenses can be denied by the IRS. --**\$35.00 Setup, \$25 monthly fee.**

T-SHEETS –Easily track time on any device to streamline payroll, send accurate invoices. Flat fee of \$20.00 per month, plus \$5.00 per employee/administrator.

***Toll free number is free for the 1st 30 days**

BUSINESS AGREEMENTS AND COMPLIANCE RESOLUTIONS

INDEPENDENT CONTRACTOR AGREEMENT: 1099 Contractor agreement— COST \$39.95 per agreement. Additional agreements for same contractor type used in the same month \$25 per additional agreement.	
1099 ONBOARDING SERVICE —Pricing starts at \$50.00 per employee.	
RESOLUTION FOR SALARY: Corporate Resolution to adopt salary—COST \$39.95.	
RESOLUTION DOCUMENTS: Corporate Resolutions—COST \$39.95.	
OPERATING AGREEMENT: Strongly suggested for LLC & Partnerships— COST \$99.99	
CORPORATE BYLAWS: Details how business and day to day operations will be handled. Cost varies starts at \$199.99-\$499.99.	
EMPLOYMENT PACKET FOR ADULTS: For S-Corp members that need to hire themselves or a spouse. Includes new hire forms; job description —COST \$39.95.	
EMPLOYMENT PACKET FOR CHILDREN: Includes new hire forms; job description; IRS Audit Proof Substantiation of employment documents ; Reporting Documents —COST \$49.95.	
<p>Solo 401k/IRA Creation--\$375.00-\$1,500</p> <p>Account setup includes:</p> <ul style="list-style-type: none"> • CompanyRegistration. • Classification of Fund. • Designation of Account Privileges. • Qualified Retirement Fund Agreement • Options trading agreement. • Uninvested funds options. • Beneficiary designations. • Notarized Spousal Consent. • TrusteeDesignations. • FINRA Regulation compliance. • Electronicdocumentsdelivery. • Loan withdrawal option designation 	<p>Accountable Plan Creation--\$225.00</p> <p>Account Setup Includes:</p> <ul style="list-style-type: none"> • IRS regulated requirements. • Employer & Employee plan agreement. • Classification of plan. • IRS Compliant Spreadsheet for tracking accountable plan transactions. • Electronic software for employee expense capture & reimbursement payments. * Administration of accountable plan



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Before we accept new clients we do provide **a free 15-minute consultation**. For those that do not wish to use our tax/business services, but still need advice/have questions our consulting fees are as follows:

1 HOUR CONSULTATION: \$125

REVIEW OF FEDERAL RETURN: \$25 Per tax year.

30 MINUTE CONSULTATION: \$75

REVIEW OF STATE RETURN: \$15 Per tax year.

We value our client's trust, and we believe in the principle of truth in advertising. We want our clients to understand the model behind our pricing and to have a clear method to estimate the cost of their return preparation. Howard Tax Prep individual tax preparation pricing is based on the National Society of Accountants annual survey of over 8,000 preparers nationwide. The average price for tax return in 2015 (for the fiscal year 2014) was \$273.

Discounted Cash/Chase Quick Pay/Cash App packages.

Senior Citizen (ages 55+) 20% discount (not applicable to discounted packages).

Veterans/Teachers/First Responders 20% discount (not applicable to discounted packages).

New Customers Receive \$25 off of package prices (not applicable to discounted packages).

Typical SINGLE PERSON/COLLEGE STUDENT	
Form 1040	\$185.00
State	\$35.00
E-file	\$20.00
Technology Fee	\$20.00
Total	\$260.00

Typical Individual with Child/Children Tax Return	
Form 1040	\$225.00
EIC form	\$35.00
Other minor forms (child care, cap gains, etc)	FREE
State	\$35.00
E-file	\$20.00
Technology Fee	\$20.00
Total	\$335.00

Typical HOME OWNER/ITEMIZER	
Form 1040	\$275.00
Schedule A	\$75.00
Other minor forms (child care, cap gains, etc)	
State	\$35.00
E-file	\$20.00
Technology Fee	\$20.00
Total	\$425.00

Typical Self Employed 1099's UBER/LYFT	
Form 1040	\$275.00
Schedule C	\$225.00
Other minor forms (child care, cap gains, etc)	FREE
State	\$75.00
E-file	\$20.00
Technology Fee	\$20.00
Total	\$615.00

Credit/Debit/PayPal card payments are subject to an additional 3% convenience fee.

Howard Tax Preparation LLC Schedule of Fees by Form

Rates Effective October 12th, 2018

<u>Form</u>	<u>Title</u>	<u>Price</u>	<u>Description</u>
706	Estate (and Generation-Skipping Transfer) Tax Return	Varies	per hour
940	Employers Annual Federal Unemployment Tax Return	\$50	per form
941	Employers Quarterly Federal Tax Return	\$50	per form
944	Employers Annual Federal Tax Return	\$50	per form
945	Annual Return of Withheld Federal Income Tax	\$50	per form
990	Tax Exempt Organization	Varies	\$175 Starts at
1040	U.S. Individual Income Tax Return	\$275	per form
1040 Schedule A	Itemized Deductions	\$75	per form
1040 Schedule B	Interest and Ordinary Dividends	\$75	per form
1040 Schedule C	Profit or Loss from Business (Sole Proprietorship)	\$225	per business
1040 Schedule D	Capital Gains and Losses	\$10	per item (\$25 minimum)
1040 Schedule E (pg 1)	Supplemental Income and Loss (Page 1 Rental Properties)	\$100	per rental **
1040 Schedule E (pg 2)	Supplemental Income and Loss (Page 2 Partnerships/S Corps)	\$25	per form
1040 Schedule EIC	Earned Income Credit	\$35	per form
1040 Schedule F	Profit or Loss From Farming	\$125	per form
		**	
1040 Schedule H	Household Employment Taxes (Nanny Tax)	\$40	per form
1040 Schedule R	Credit for the Elderly or the Disabled	\$25	per form
1040 Schedule SE	Self-Employment Tax	\$25	per form
1040-A	U.S. Individual Income Tax Return	\$225	per form
1040-ES	Estimated Tax for Individuals	\$35	per form
1040-EZ	Return for Single and Joint Filers With No Dependents	\$150	per form
1040-X	Amended U.S. Individual Income Tax Return	\$250	per form
1041	U.S. Income Tax Return for Estates and Trusts	\$550	minimum *
1045	Application for Tentative Refund	\$200	per form
1065	U.S. Return of Partnership Income	\$675	minimum *
1096	Annual Summary and Transmittal of U.S. Info Returns	\$50	per form
1099	Miscellaneous Income	\$7	per form
1116	Foreign Tax Credit (Individual, Estate, or Trust)	\$40	per form
1118	Foreign Tax Credit (Corporation)	\$50	per form
1120	U.S. Corporation Income Tax Return	\$900	minimum *
1120-S	U.S. Income Tax Return for an S Corporation	\$850	minimum *
2106	Employee Business Expense	\$40	per form
2106-EZ	Employee Business Expense (Short Form)	\$20	per form
2210	Underpayment of Estimated Tax	\$30	per form

2441	Child and Dependent Care Expense	FREE	per form
2553	Election be taxed as a S-Corp filing	\$175	per business
2555	Foreign Earned Income	\$75	per form
3800	General Business Credit	\$40	per form
3903	Moving Expenses	\$30	per form
4136	Credit for Federal Tax Paid on Fuels	\$25	per form
4137	Tax on Unreported Tips	\$20	per form
4562	Depreciation and Amortization EACH ASSEST	\$30	per item (\$30 minimum)
4684	Casualties and Thefts	\$50	per casualty/theft
4797	Sale of Business Property	\$50	per item
4835	Farm Rental Income and Expenses	\$50	per item
4868	Application for Extension to File U.S. Individual Return	\$50	per form
4952	Investment Interest Expense Deduction	\$30	per form
4972	Tax on Lump-Sum Distributions	\$75	per form
5329	Additional Taxes Attributable to Qualified Retirement Plans	\$30	per form
5405	First Time Homebuyers Credit	\$25	per form
5695	Residential Energy Credits	\$25	per form
6198	At Risk Limitations	\$25	per form
6251	AMT Alternative Minimum Tax	\$35	per form
6252	Installment Sale Income (first year)	\$100	per form
6252	Installment Sale Income (subsequent years)	\$25	per form
6781	Gain or Loss from Section 1256 Contracts and Straddles	\$10	per item (\$30 minimum)
8283	Non Cash Charitable Contributions	\$30	per form
8332	Exemption Release Divorced or Separated Parents	\$20	per form
8379	Injured Spouse Claim and Allocation	\$25	per form
8582	Passive Activity Loss Limitations	\$35	per form
8606	Nondeductible IRA	\$25	per form
8615	Tax for Children under 18 who have Investment Income	\$25	per form
8801	Credit for Prior Year Minimum Tax	\$35	per form
8812	Additional Child Credit	\$25	per form
8814	Parent's Election to Report Child's Interest and Dividends	\$20	per form
8824	Like Kind Exchanges	\$100	per form
8829	Business Use of Home (simplified option)	\$30	per form
8834	Qualified Electric Vehicle Credit	\$25	per form
8839	Qualified Adoption Expenses	\$30	per form
8846	Credit for Employer Soc. Sec. and Medicare taxes on tips	\$25	per form
8853	Archer MSAs and Long-Term Care Insurance Contracts	\$25	per form
8863	Education Credits	FREE	per form

8862	Information To Claim Certain Refundable Credits After	\$15 per form
8965	Healthcare Exemptions	\$50 Per person
8880	Qualified Retirement Savings Contribution Credit	\$10 per form
8889	Health Savings Account	\$20 per form
8910	Alternative Motor Vehicle Credit	\$25 per form
8917	Tuition & Fees Deduction	\$10 per form
8938	Statement of Foreign Assets	\$35 per form
8949	Sales and Other Dispositions of Assets	\$5 per item
8959	0.9% \$200,000 Employment Tax (additional Medicare Tax)	\$25 per form
8960	3.8% Net Investment Income Tax	\$25 per form
K-1s	Inc, Loss, Div of Partners or Shareholders	\$35 per form
W-2	Wage and employee tax statement	\$7 per employee
W-3	Transmittal of wage and tax statements	\$50 per form

* Pricing based on complexity of return

** Any additional bookkeeping necessary will be charged at \$65 per hour.

QUICKBOOKS CLEANUP	HOURLY RATE	\$180 per hour
Bookkeeping Tax Rtn	Calculating logs, receipts, etc. Per hour service min ½ hour	\$35 per hour
Data Entry	Additional W2/1099 over free 2 (2 total combination)	\$7 per document
Extension	Personal Returns	\$50
Extension	Corporate Returns	\$99
State PERSONAL	State Return (first)	\$35 initial state
State (additional)	State Return (additional returns after the first)	\$30 additional states
State BUSINESS	State Return (first)	\$75 initial state
State (additional)	State Return (additional returns after the first)	\$70 additional states
Technology fee	Use of technology	\$20
E-file fee	Electronic filing of tax documents	\$20
Referral credit	For the referring customer, valid for the current tax year only	\$25
Early Filer Discount	For individual returns if all info received by JANUARY 15TH	\$25
Late Fee	If requested items not received <u>14 days before filing date</u>	20% of total
Sale of Home	Sale of your Home Worksheet	\$30 per form
Paper copy MAILED IRS	Per return year includes printing/postage/Mailing	\$35 per copy under 20 pages
Paper copy Client Records	Client request paper copy of return instead of downloading from portal.	\$20
Net Operating Loss	Calculation of Net Operating Loss	\$200

BUSINESS FILINGS AND FORMS

Information Returns	Entity Structured, but no business transacted.	\$199 minimum*
1065	Partnership (LLC) return of income	\$675 minimum *
1120	U.S. Corporation Income Tax Return	\$900 minimum *
1120-S	U.S. Income Tax Return for an S Corporation	\$850 minimum *
2553	Apply for Subchapter S-CORP FILING	\$175
Dissolution	LLC	\$75
Dissolution	CORPORATION	\$125

1099 Preparation	First 1099 for vendor/contractor	\$25	Per person
1099 Additional Group	After 1 ST 1099 if done in the same setting on the same day.	\$10	Per person
BUSINESS COMPLIANCE DOCUMENTS			
T-sheets time tracking	Easily track time on any device to streamline payroll, send	\$20	\$5 per employee/admin
1099 Onboarding	W9, Agreements, Verifications, and more.	varies	\$50-\$75 per contractor
Bookkeeping Software	NO MONTHLY FEE Software for accounting and bookkeeping	\$250	Setup/Guided Instruction
Bookkeeping Support	For DIY Software users	\$85	per Hour
Bookkeeping Monthly	Hire us on a monthly basis. Based on revenue & business type	\$59/\$85	starts at
Quick books Online	Purchase Software through us	\$20	monthly rate
ACCOUNTABLE PLAN	Required for C/S Corp reimbursement of employee expenses	\$199	
401K/IRA setup	Retirement Plan Creation. Does not include deductions	\$199	
Pavroll	FULL SERVICE MONTHLY FEE WITH 1 EMPLOYEE	\$30	\$4 per employee(s)
Payroll	FULL SERVICE MONTHLY FEE WITH 1 EMPLOYEE	\$11	
Tax Account Register	With State and County	\$35	
Tax Account Register	With IRS	\$35	Per person
New Hire Reporting	State Requirement	\$35	Per person
Unemployment Report	Federal Requirement	\$35	Per person
Register/Report Bundle	Federal & State Requirements	\$99	Per person
Employment Pack	Ages 21-99 Includes new hire forms; job description	\$39.95	Per person
Employment Pack	Ages 7-21 includes audit proof substantiation forms	\$49.95	Per person
1099 Contractor Agree	Customized Generic Agreement	\$39.95	Per person
Resolutions	Used by LLC/Corporations to record business decisions	\$39.95	Per agreement
Operating agreements	Used by LLC to delegate powers and specify business matters	\$49.95	Per agreement
Bylaws	Set of rules governing how a company is run	Varies	\$199-\$499
OTHER/MISC FEES			
Tax Planning	Personalized Tax Reduction Plan	\$675	minimum
Paper Filing	(Amended returns, Previous Year returns, Taxpayer issues, etc.)	\$35	Plus form fee
Paper Copy of Return	U.S. Federal & State tax return includes certified mailing	\$35	minimum *
Paper Copy of Return	Additional pages after initial 20 pages and initial \$35 fee	\$1	Per page after \$35 charge
ITIN W7 filing	Completion and submission of form without tax return	\$60	
ITIN Certified Acceptance	Completion of W7 & certification of documents for IRS	\$135	
Rerun Charge	Client forgot to give us a form or received a form after filing	\$50	plus form fee
Transcript Request	You have w2,1099,1098 etc./You have no documentation	\$20/50	Per tax year
Certified or Express Mail	U.S postal service rates	Varies	\$10 minimum
Return Check Fee	Includes ACH drafts	\$34	
Fax	Flat fee of \$2.50 1 ST page and \$1.00 each additional page	\$2.50	\$1.00 EACH ADDITIONAL
Notarization	Per page & per stamp fee	\$1.00	per stamp per page

The above fees are minimum fees based on neat and complete information. Additional fees will be charged for other forms, audit representation or to summarize information. Computer consulting, financial planning, financial statements, are charged using different rates. Quotes are available upon request.



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Business Owner Accounting Package

Our all-inclusive pricing makes tracking your financial life Less Taxing.

Our basic package contains everything a business owner needs to allow you to focus on the work you love while leaving the finances to us. The add-ons we offer provide additional services when, and if, they are needed.

We've found that almost every business has the same needs at various stages of growth. With our use of technology, we're able to work efficiently to provide data quickly, consistently, and accurately no matter the volume of transactions or number of accounts. Due to our focus on efficiency, we're able to offer pricing that is designed to grow with you based on gross revenue.

These charts show how our pricing works depending on your business entity type.

SOLE PROPRIETOR OR SINGLE MEMBER LLC

Gross Revenue/Loss	Price
\$0 – 45k	\$59/mo.
\$46 – 110k	\$99/mo.
\$111 – \$175k	\$129/mo.
\$176 – 250k	\$169/mo.
\$251k +	Custom Quote

PARTNERSHIP, S-CORP OR C-CORP

Gross Revenue/Loss	Price
\$0 – 45k	\$85/mo.
\$46 – 110k	\$125/mo.
\$111 – 175k	\$175/mo.
\$176 – 250k	\$225/mo.
\$251k +	Custom Quote

Initial: _____



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	ADD ON ITEMS	Price
<p style="text-align: center;">✓</p> <p>_____</p>	<p>Monthly Bookkeeping Package – All packages include:</p> <ul style="list-style-type: none"> - Awesome bookkeeping using bank feeds in Quickbooks Online* - Monthly reconciliations - Quarterly financial reports sent to your inbox - Business Tax Return (Federal and 1 state if required) - Digital receipt storage app for your smart phone - Secure digital storage of tax return in our client portal accessible 24/7 - Estimated Tax Vouchers - One monthly email to ask financial questions or address concerns 	<p style="text-align: center;">Per chart on page 1</p> <p style="text-align: center;">\$ _____</p>
Add Ons		
	<p>Quickbooks Online - Take advantage of our wholesale pricing from Intuit. With this add on, we'll pay the bill for QBO, so you'll always pay less than the current retail price.</p>	\$20/mo.
	<p>Weekly Bookkeeping – Need your books done more often? This add on means we'll set aside a day every week to do your bookkeeping, so you've got the data you need, when you need it.</p>	\$20/mo.
	<p>Unlimited Bank Feeds – Our core packages include 60 bank feed transactions, and up to 5 accounts (bank, credit cards, etc.). For businesses that have with heavy usage</p>	\$130/mo
	<p>Unlimited Support – Our bookkeeping package is designed to let you make money while we take care of everything else, but if you do need more time with us each month, this add-on provides unlimited emails, phone calls, and meetings.</p>	\$65/mo.
	<p>Receipt Review – Our bookkeeping package provides an app that allows you to store all your receipts in the cloud right from your smart phone. If you'd like us to review the documents to split between categories, check each line item for deductibility and attach that receipt image to your Quickbooks Online transaction, this add on does it all.</p>	\$50/mo.
	<p>Tax Planning – Tax planning is a huge part of our business. With this add on, we'll not only prepare your books and tax returns, but we'll also look for ways to limit your tax liability and assist in implementing these plans.</p>	\$35/mo.
	<p>Payroll - Need help with running payroll and filing your returns? We'll help you get setup and ensure quarterly and annual filings are done timely and accurately.</p>	\$30/mo. + \$4 per employee

Initial: _____



1136 S. Delano Court West, Suite B201-2002
Chicago, IL 60605

www.howardtaxprep.com
877-846-8594

	1099 Onboarding – Collecting demographics, licenses, W-9, onboarding	\$200/mo.
	EXPENSE ACCOUNT —Needed by C/S corporations to track expenses and reimbursements of employee business expenses. Without this account, employee expenses can be denied by the IRS. -- \$35.00 Setup, \$25 monthly	\$25/mo. \$35 setup.
	Accounts Receivable – If the invoicing process becomes too much for you, we can create invoices, send them out, receive the payments, and group the payments into bank deposits for you.	\$285/mo.
	Accounts Payable – Paying bills on time can be tough when you’re constantly on the go. This add on takes that off your plate. We enter your bills and use an app to arrange payment, but you still get the final say on when funds are released.	\$285/mo.
	Additional State Returns – We’ll do one state return for your business and/or personal taxes. Should you need additional states, this is the add on for you.	\$8/mo.
	Local, Sales and Tangible Taxes – Some areas of the country require a local tax in addition to their state tax return. These local returns can have many pitfalls and can’t always be electronically filed. Also, if you’re a business that is required to collect and remit sales tax or file a tangible tax return, you know those due dates can be a pain to keep track of. This add on eliminates all those burdens.	\$13/mo.
	Additional Items: -T-Sheets -Retirement Plan 1 time charge -Toll Free Number -Business Insurance - -	\$20/mo. \$5pp \$325-\$1,500 \$10 per month \$Varies \$10 per month \$
	Total	\$ _____

*We use the bank feeds in QuickBooks Online to keep us efficient. Hand written checks slow our process down to a crawl. If you must still hand write checks, any past 5 will incur a \$3 per check fee for us to enter the information into QuickBooks Online.

Package Start Date:

Monthly Amount at Package Start: \$_____

NONPROFIT COMPLIANCE PACKAGE \$249 (Includes 1 state).

- Ensure Organization is Registered & Properly Listed with The IRS.
- Ensure Current Federal Tax Exempt Status Is Up-to-date.
- Ensure Organizations State Nonprofit Requirements & Registrations Are Up- to-date.
- Complete Required Registration Documents for Charitable Solicitation. *
- File Required Registration Documents for Charitable Solicitation. **
- Completion of State Financial Reports. ***
- Filing of State Financial Reports.
- Secure State-Level Tax Exemption within your State.
- Complete Paperwork as Needed for Charitable Games License.
- Contact, verify, and update contact information for officers, directors, and Trustees according as required by State & Federal agencies.

NONPROFIT FEDERAL TAX PACKAGES

Filing of Federal Information Return. (Pricing includes 1 hour of bookkeeping to tally figures. Additional bookkeeping billed at \$65 an hour).

Revenues Under	\$50,000	Cost of tax preparation	\$ 175
Revenues	\$50,000- \$100,000	Cost of tax preparation	\$450
Revenues	\$100,000-\$200,000	Cost of tax preparation	\$725
Revenues	\$200,000-\$300,000+	Cost of tax preparation	\$1000

NONPROFIT STATE TAX PACKAGES

Filing of State Information Return. (Pricing includes 1 hour of bookkeeping to tally figures. Additional bookkeeping billed at \$65 an hour).

Revenues Under	\$25,000	Cost of tax preparation	\$ 75
Revenues	\$26,000- \$150,000	Cost of tax preparation	\$175
Revenues	\$150,000-\$300,000	Cost of tax preparation	\$275

Listed below are the additional documents are required if you don't have the balance sheet, income statement, and statement of cash flows available. Please note these documents are required to complete your tax return. Bookkeeping services are billable at \$65 an hour.

- Form SS4
- Expenses
- Bank Statements
- Cancelled Checks
- Previous Tax Filings
- Articles of Incorporation.
- Grants Written & Received
- Contributors Information
- Accrued Expenses & Revenue
- IRS Letter of Determination

*1 state included, additional states billed at \$75 each.

**1 state included, additional states billed at \$99 each

***Does not include bookkeeping or completion of financial statements.

Revenues, expenses, etc. should already be tallied up.