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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
30 MINUTE CONSULTATION: \$75

REVIEW OF FEDERAL RETURN: \$25 Per tax year.
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 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
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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	
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	\$125	Setup/Guided Instruction
Bookkeeping Support	For DIY Software users	\$75	per Hour
Bookkeeping Monthly	Hire us on a monthly basis. Based on revenue & business type	\$49/\$75	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	\$45	\$7 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.

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.