

**Tax Preparation Schedule of Fees by Form**  
**Dates Effective January 1, 2024**



**INDIVIDUAL INCOME TAX RETURN (TYPICAL FORMS)**

1040	U.S. Individual Income Tax Return	\$175.00	Per form
1040-SR	U.S. Individual Income Tax Return for Seniors	\$135.00	Per form
1040 Dependent	U.S. Individual Income Tax Return for Dependents of Active Clients	\$75.00	Per form
1040 Schedule A	Itemized Deductions	\$75.00	Per form
1040 Schedule B	Interest & Ordinary Dividends	\$5.00	Per form
1040 Schedule C	Profit & Loss from Business (Sole Proprietorship) - See Business Forms	\$155.00	Per business*
1040 Schedule D	Capital Gains & Losses	\$10.00	Per item (\$25 Minimum)
1040 Schedule E pg 1	Supplemental Income and Loss (Rental Properties)	\$100.00	Per Rental*
1040 Schedule E pg 2	Supplemental Income and Loss (Partnerships/S Corps)	\$25.00	Per form*
1040 Schedule EIC	Earned Income Credit	\$50.00	Per form
1040 Schedule F	Profit or Loss from Farming	\$150.00	Per form*
1040 Schedule H	Household Employment Tax (Nanny Tax)	\$40.00	Per form
1040 Schedule R	Credit for the Elderly or the Disabled	\$25.00	Per form
1040 Schedule SE	Self-Employment Tax	\$25.00	Per form
2441	Child & Dependant Care Expense	\$25.00	Per form
8812	Child Tax Credit	\$25.00	Per form
8829	Business Use of Home	\$45.00	Per form

**BUSINESS INCOME TAX RETURNS (TYPICAL FORMS)**

1065	U.S. Return of Partnership Income	\$850.00	Minimum*
1120	U.S. Corporation Income Tax Return	\$900.00	Minimum*
1120-S	U.S. Income Tax Return for an S-Corp	\$850.00	Minimum*
4562	Depreciation & Amortization	\$10.00	Per Item (\$30 Minimum)
4797	Sale of Business Property	\$50.00	Per form
K-1s- Creation	Inc, Loss, Div or Partners or Shareholders	\$25.00	Per form
1099Misc or NEC- Creation	Report for services performed by a person such as a subcontractor	\$15.00	Per form
1099Int- Creation	Report for interest paid person to whom you have paid at least \$10	\$15.00	Per form
1096- Creation	Annual Summary and Transmittal of U.S. Info Returns	\$50.00	Per form (Required)

**ADDITIONAL FORMS**

1040X NON ABS PREP	Amended U.S. Individuals Income Tax Return	\$450.00	Per form*
1040X ABS PREP	Amended U.S. Individuals Income Tax Return	\$185.00	Per form*
1041	U.S. Income Tax Return for Estates and Trusts	\$550.00	Minimum*
1045	Application for Tentative Refund	\$200.00	Per form
706	Estate (and Generation-Skipping Transfer) Tax Returns	Varies	Per hour
944	Employers Annual Federal Tax Return	\$100.00	Per form
945	Annual Return of Withheld Federal Income Tax	\$100.00	Per form
990	Tax Exempt Organization	\$700.00	Minimum*
1116	Foreign Tax Credit ( Individuals, Estate, or Trust)	\$40.00	Per form
1118	Foreign Tax Credit (Corporation)	\$50.00	Per form
2106	Employee Business Expense	\$40.00	Per form
2106-EZ	Employee Business Expense (Short Form)	\$20.00	Per form
2210	Underpayment of Estimated Tax	\$30.00	Per form
2555	Foreign Earned Income	\$75.00	Per form
3800	General Business Credit	\$40.00	Per form
3903	Moving Expenses	\$30.00	Per form
4136	Credit for Federal Tax paid on Fuels	\$25.00	Per form

**ADDITIONAL FORMS CONTINUED EFFECTIVE 1/1/2024**

4137	Tax on Unreported Tips	\$20.00	Per form
4684	Casualties & Thefts	\$50.00	Per Casualty/Theft
4797	Sale of Business Property	\$50.00	Per form
4835	Farm Rental Income & Expense	\$50.00	Per form
4868	Application for Extension to File U.S. Individual Return	\$50.00	Per form
4952	Investment Interest Expense Deduction	\$30.00	Per form
4972	Tax on Lump-Sum Distributions	\$75.00	Per form
5329	Additional Taxes Attributable to Qualified Retirement Plans	\$30.00	Per form
5405	First Time Homebuyers Credit	\$25.00	Per form
5695	Residential Energy Credits	\$25.00	Per form
6198	At Risk Limitations	\$25.00	Per form
6251	AMT Alternative Minimum Tax	\$35.00	Per form
6252	Installment Sale Income (First year)	\$100.00	Per form
6252	Installment Sale Income (subsequent years)	\$25.00	Per form
6781	Gain or Loss from Selection 1256 Contracts & Straddles	\$10.00	Per Item (\$30 Minimum)
8283	Non Cash Charitable Contributions	\$30.00	Per form
8332	Exemption Release Divorced or Separated Parents	\$20.00	Per form
8379	Injured Spouse Claim & Allocation	\$25.00	Per form
8582	Passive Activity Loss Limitations	\$35.00	Per form
8606	Non Deductible IRA	\$25.00	Per form
8615	Tax for Children under 18 who have investment income	\$25.00	Per form
8801	Credit for Prior Year Minimum Tax	\$35.00	Per form
8814	Parent's Election to Report Child's Interest & Dividends	\$20.00	Per form
8824	Like Kind Exchanges	\$100.00	Per form
8834	Qualified Electric Vehicle Credit	\$25.00	Per form
8839	Qualified Adoption Expenses	\$30.00	Per form
8846	Credit for Employer Soc. Sec. & Medicare taxes on tips	\$25.00	Per form
8853	Archer MSAs and Long-Term Care Insurance Contracts	\$25.00	Per form
8863	Education Credits	\$25.00	Per form
8880	Qualified Retirement Savings Contribution Credit	\$10.00	Per form
8889	Health Savings Account	\$20.00	Per form
8910	Alternative Motor Vehicle Credit	\$25.00	Per form
8917	Tuition & Fees Deduction	\$10.00	Per form
8938	Statement of Foreign Assets	\$35.00	Per form
8949	Sales & Other Dispositions of Assets	\$5.00	Per form
8959	0.9% \$200,000 Employment Tax (Additional Medicare Tax)	\$25.00	Per form
8960	3.8% Net Investment Income Tax	\$25.00	Per form
Sales of Home	Sale of your Home Worksheet	\$30.00	Per form
Net Operating Loss	Calculating of Net Operating Loss	\$200.00	Per form

**ADDITIONAL INFORMATION**

State	State Return (First)	\$50.00	First State
State (Additional)	State Return (Additional returns after first)	\$75.00	Additional State
E-File	E-Filing of return	\$0.00	Required
Paper Copy Mailed	Mailing of paper copy to client	\$20.00	Optional
Client Base Fee	Processing fee for all clients if business return, this is charged per owner.	\$40.00	Required

**DISCOUNTS OR FEES**

Referral Credit	For the referring customer, valid for the current tax. year only	5.00%	Of total (up to \$50 limit)
Early Discount	For INDIVIDUAL returns if all info received by end of February	5.00%	Of total (up to \$50 limit)
Rush Fee	If rush requested by client or required due to deadlines	25.00%	Of total

\*Price Based on Complexity of Return

\*\*Any Additional Bookkeeping Necessary will be charged at \$125 per hour