

**Tax Preparation Schedule of Fees by Form**  
**Dates Effective January 1, 2026**



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

|                      |  |          |                         |
|----------------------|--|----------|-------------------------|
| 1040                 | U.S. Individual Income Tax Return                                      | \$180.00 | Per form                |
| 1040 Dependent       | U.S. Individual Income Tax Return for Dependents of Active Clients     | \$75.00  | Per form                |
| 1040 Schedule 1-A    | Additional Deductions "Big Beautiful Bill"                             | \$25.00  | 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 | \$175.00 | 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  | \$175.00 | 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   | \$50.00  | Per form                |
| 8829                 | Business Use of Home   | \$45.00  | Per form                |

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

|                           |   |          |                         |
|---------------------------|---|----------|-------------------------|
| 1065                      | U.S. Return of Partnership Income                                   | \$950.00 | Minimum*                |
| 1120                      | U.S. Corporation Income Tax Return                                  | \$950.00 | Minimum*                |
| 1120-S                    | U.S. Income Tax Return for an S-Corp                                | \$950.00 | 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                          | \$30.00  | Per form                |
| 1099Misc or NEC- Creation | Report for services performed by a person such as a subcontractor   | \$20.00  | Per form                |
| 1099Int- Creation         | Report for interest paid person to whom you have paid at least \$10 | \$20.00  | Per form                |
| 1096- Creation            | Annual Summary and Transmittal of U.S. Info Returns                 | \$75.00  | Per form (Required)     |
| W2- Creation              | Report for services performed by each employee                      | \$20.00  | Per form                |
| W3- Creation              | Annual Summary and Transmittal of U.S. Info Returns to SSA          | \$75.00  | 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            | \$190.00 | 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 1/1/2026**

|                    |   |          |                         |
|--------------------|---|----------|-------------------------|
| 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               | \$25.00 | Optional         |
| Client Base Fee    | Processing fee for all returns                | \$50.00 | 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) |
| 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