

# Fee Quote Questionnaire

**Please answer the following questions so we can better provide a quote for our services.**

**Name:**

**Date:**

And note that we do NOT prepare the following returns: Non-Profit returns (990); C Corporation returns (1120), Partnership returns (1065) or Married Filing Separate returns. If you need any of these filings, we can refer you to another tax preparer. Our minimum fee for an individual 1040 tax return is \$500. For S Corporations our fees start at \$650. Our minimum fee for TX Franchise filings prior to 2023 is \$100 and \$50 for post 2023. Our tax preparation fees do NOT include compiling business income and expenses from your bank account to arrive at totals for the year, or bookkeeping. We can provide a separate quote for those services or refer you to a Bookkeeper. Current year tax preparation fees are billed after we complete the return and are due before we submit your return to the IRS. If you need us to prepare tax returns for more than one year, we do require a 100% payment up front before we work on each delinquent year. We are a virtual firm and require our clients to use our secure platform for uploading documents.

**Please initial here that you have read this paragraph:** \_\_\_\_\_

**Please include which tax return year(s) we need to file for you here:** \_\_\_\_\_

Are you filing married or single?

How many children are you claiming under 17?

How many children are you claiming 17 and older?

Any of your children in college?

If yes, how many?

Do you normally qualify for the Earned Income Credit (this is for low income families and is different from the child tax credit)?

Outside of retirement accounts, do you have interest/dividend income?

Outside of retirement accounts do you have capital gains income?

Do you have any rental properties?

If yes, are any short-term rentals?

If yes, how many are short-term rentals?

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Do you receive 1099-NEC income?

Do you have a side business/dba?

Do you have an LLC?

If yes, what is the name of the LLC?

If yes, how is it taxed? Check below:

Disregarded Entity (filed on Schedule C of your 1040)

S Corporation-file 1120S S Corporation return

If you have an LLC, is your account in good standing with the state of Texas?

If you have 1099/dba/LLC income, what program or system do you use to compile your financial information (ie. Excel, QuickBooks, other accounting software)?

Do you use a Bookkeeper to do this, or do you do it yourself?

Do you receive K-1's from investments outside of your ownership in the above S Corp or Partnership?

If yes, how many K-1's do you receive each year?

Do you have Farm income/expenses?

Do you need us to prepare any of your dependents tax returns (these are children that you will claim on your tax return)?

State return (outside of TX) need to be filed?

If yes, which states?

Any additional information that you believe would be relevant to your filing this year?

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**Would you be interested in any of the following additional services? (check all that apply)**

Quarterly estimated tax calculations on business income

1099 NEC year-end filing for contractors you pay

Priority Service-unlimited email access with response within 24 business hours for questions related to taxes, business, and accounting. Does not include questions that require research or calculations.

Quarterly zoom check-ins to discuss business strategies/consulting/financials

Tax planning in the Fall

**Please return this form to [Donna@BusinessHarmony.Life](mailto:Donna@BusinessHarmony.Life)**