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). If you need any of these filings, we can refer you to another tax preparer. Also, our minimum fee for an individual 1040 tax return is $500. For S Corporations our fees start at $650 for a single-owner entity and for Partnerships, our fee’s start at $700 for a 2-partner entity. Our minimum fee for TX Franchise filings is $100. 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. 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. For current year returns, you are invoiced at completion and payment is due before we submit the return to the IRS. **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? \_\_\_\_\_\_\_\_\_\_
* Do you have interest/dividend/capital gains income outside of retirement accounts? \_\_\_\_\_\_\_\_\_\_\_\_\_
* Do you have any rental properties? \_\_\_\_\_\_\_\_\_\_\_\_ If yes, how many?
* Do you receive 1099-NEC income? \_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Do you have an LLC? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ If yes, what is the name of the LLC? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ If yes, how is it taxed? Circle below:
  + Disregarded Entity (filed on Schedule C of your 1040)
  + S Corporation-file 1120S S Corporation return
  + Partnership-file 1065 Partnership return
* If you have an LLC, is your account in good standing with the state of Texas? \_\_\_\_\_\_\_\_
* If you have an LLC do you have a system to compile your financial information (ie. Excel, QuickBooks, other accounting software)? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Which system do you use? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* 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?

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

* Quarterly estimated tax calculations on your business income (Schedule C/1120S/1065)
* Sales tax filing
* 1099 filing
* Priority (response within 24 business hours), unlimited email access to us for all of your questions related to taxes, business, QuickBooks
* Monthly zoom check-ins to discuss business strategies/consulting/financials
* Quarterly zoom check-ins to discuss business strategies/consulting/financials
* Unlimited Bookkeeping *support* (answer questions, monthly reconciliations, adjusting entries as needed, generate financial statements- does not include posting and categorizing transactions)
* Monthly Bookkeeping Services (post all transactions, monthly reconciliations, adjusting entries, generate financial statements)
* Tax planning in the Fall
* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Please return this form to Donna@BusinessHarmony.Life