



Form	Most Common Filings	Cost	Additional Comments
RET1040	Individual Income Tax Return	\$ 200.00	each
FRMW2	Wages & Tax Statement	\$ 50.00	each
FRM1098	Tuition, Mortgage	\$ 50.00	each
FRM1098	Other	\$ 50.00	each
FRM1099NEC	Nonemployee Compensation	\$ -	Sch C/business return required
FRM1099	Various other income	\$ 50.00	each
SCHA	Itemized Deductions	\$ 100.00	
SCHB	Interest and Ordinary Dividends	\$ -	
SCHC	Profit and Loss From Business	\$ 200.00	each
SCHSE	Self Employment Tax	\$ 50.00	each
SCHD	Capital Gains and Losses	\$ 100.00	each
SCHE	Supplemental Income & Loss	\$ 150.00	per schedule
FRM4562	Depreciable Asset	\$ 35.00	per asset
SCHEIC	Earned Income Credit	\$ 100.00	
FRM3115	Change in Accounting Method	\$ 1,100.00	Starting and up
FRM8812	Credit for Qualified Children and Other Dependents	\$ 50.00	
FRM8936	Electric Vehicle Credits	\$ 85.00	
FRM8834	Qualified Plug In Vehicle Credit	\$ 85.00	
FRM8863	College Education Credits	\$ 85.00	
FRM8839	Adoption Credits	\$ 85.00	
FRM990	Return of Organizatio Exempt	\$ 1,200.00	starting
FRMMISC	Form	\$ 50.00	other not listed
FRMGA500	State	\$ 50.00	GADOR
FRMSTATE	State	\$ 50.00	per state (\$250 NJ,NY, & CA)
EFILE	Filing Fees	\$ 45.00	Filing Fees

Business Filings

RET1120S	1120 S S-Corporation	\$ 800.00	starting and up to \$1,500
RET1120	1120 C-Corporation	\$ 2,000.00	starting and up to \$5,000
RET1065	Partnership	\$ 800.00	starting and up to \$1,500
SCHK1	K-1s	\$ 25.00	each

Other Service Charges

DISC65	Seniors 65+	\$ 125.00	*Only investments and 1099R
DISCMIL	1099 R - Military Retirement	\$ (250.00)	*1040 fee waived also
DISCNEW	New Client Discount	\$ (50.00)	1 per household
DISC150	\$150 Simple W2 Promotion	\$ (150.00)	1 per household
DISC100	\$100 Early Filer Promotion	\$ (100.00)	1 per household
DISCMVA	\$100 Active Military & Veterans	\$ (100.00)	1 per household
REFFERAL	Referral Discount	\$ (50.00)	each
DISCEXT	Extensions -Individual/Personal	\$ 100.00	each
BUSEXT	Extensions - Business	\$ 165.00	each
FROM1040ES	Estimated Quarterly Tax Payments	\$ 150.00	(Free for Payroll Clients)
QBOSETUP	QuickBooks Online Setup/Onboarding	\$ 1,000.00	new QBO users
QBOONBOARD	QuickBooks Onboarding	\$ 500.00	existing QBO users
QBOCORE	Monthly Bookkeeping Core Lite Services	\$ 175.00	per month starting and up
QBOBOOK	Monthly Bookkeeping Basic Services	\$ 400.00	per month starting and up
QBOASMLLC	Monthly Bookkeeping Annual SMLLC Services	\$ 8,500.00	annually
QBOCLEANUP	QuickBooks Online Clean-up	\$ 4,000.00	Starting and up per year
SHOEBOX	Unconventional recordkeeping clean-up	\$ 350.00	per 50 transactions; 1 Account
ADDON50	Addon Account or 50 Transactions	\$ 50.00	per additional account and 50 transactions
COSTSEG	Cost Segregation Partnership	\$ 2,500.00	Starting and up (subject to quote)
FRM2553	1120 Subchapter S filing	\$ 250.00	Scorp Filing
FRM2555	Foreign Income Exclusion 2555	\$ 500.00	each
FBAR	Foreign Assets Reporting FBAR	\$ 200.00	each
STREAM	Streamlined IRS Amnesty Processing	\$ 1,550.00	per family
TAXACADEMY	Tax Academy Enrollment Online	\$ 499.00	includes 30-min meeting/week for first 12 weeks.
ACCTXTUTOR	AccountingTaxTutor Skool Subscription	\$ 35.00	monthly subscription
MEETING	45-minute meeting	\$ 350.00	via Calendly
MEETINGCL	45-minute meeting Core Lite Clients	\$ 250.00	via Calendly
TAXPLAN	Tax Plan Promotion - Individuals	\$ 250.00	with Tax eFiling
TAXADVIIND	Tax Advisory - Individuals	\$ 550.00	per quarter starting
TAXADVBUS	Tax Advisory - Business	\$ 1,050.00	per quarter starting
TAXADVINDA	Tax Advisory - Individuals Annual	\$ 2,050.00	annual discounted
TAXADVBUSA	Tax Advisory - Business Annual	\$ 4,050.00	annual discounted

*Discounts expire March 31st of each tax filing year