

2019/2020 Price List

Basic 1040 (includes Schedule A, Schedule B, and Schedule D [up to 10 trades]* and one state return)	\$174.00
Basic 1040 price applies if file is complete and in good order. One additional document upload after work started allowed at no cost. Each subsequent file upload is subject to an additional processing fee	+ \$20.00
Each paid tax return includes one “FREE” Tax What-If (May–December)	
Each additional What-If (beyond the free one, done at same time)	+ \$30.00
Independent What-If (no previously paid tax return)	+ \$30.00
1040X (added on to price of Basic 1040 if not prepared by the CPA)	+ \$44.00
Each additional State Return	+ \$20.00
Each RITA or Local Return	+ \$10.00
Form 8962 (ACA Premium Tax Credit) OR Intake Pg. 8 (not insured 12 months)	+ \$20.00
Schedule C (provided year-end profit & loss statement is included; if not, hourly rate of \$145.00/hr)	+ \$45.00
Schedule C-EZ	+ \$20.00
Manual Input Calculations (if Qualified Business Income is over income limits)	+ \$45.00
Form 8829 (Home Office Deduction)	+ \$30.00
Schedule D 11-50 Trades (with cost basis in good order)*	+ \$20.00
51-100 Trades (with cost basis in good order)*	+ \$45.00
Over 100 Trades (with cost basis in good order)*	\$145.00/hr
Schedule E pg. 1 (per property) **	+ \$30.00
Schedule E pg. 2 (per K-1 for S-Corps, Partnerships, Estates, and Trusts)	+ \$20.00
Schedule F	+ \$30.00

Corporate/Partnership - Basic Returns (under 2 hours) 1120,
1120s, or 1065 **\$280.00**

Returns that take more than 2 hours are billed hourly at \$145.00 for the additional hours.

Trust/Estate Returns (billed in the same manner as corporate returns) **\$280.00**

Answering IRS Letter/Notice (no charge if CPA/EA error) **\$45.00**

**All other situations will be determined by an hourly
billing rate of \$145.00/hr.**

* Groups of **covered** short term trades within **each** 1099-B count as one trade. Same for long-term **covered** trades. All other trades count as one trade each.

** Cost Segregation, 1031 Exchange, other non-typical real estate, **call preparer for pricing.**

Additional Notes:

- Returns that take more than 2 hours are billed hourly at \$145 for the additional hours.
- Returns involving Bitcoin transactions are billed at **\$145/hr** for that portion of return. We recommend getting a cost estimate from the preparer before starting the return.
- For situations not described above, or if you're not sure whether something is included in the basic price, contact the preparer to whom you intend to send the return. They can help you confirm the wholesale pricing before you quote a retail price.