

2017 FEE SCHEDULE

A retainer is mandatory at first tax appointment or mail-in. The balance of tax preparation charges is due upon receipt of completed return. Payment on all other services is due upon receipt of invoice, unless otherwise indicated.

TAX PREPARATION

\$325 per hour
plus form charges/processing fee (no increase)

RETAINER FOR TAX PREPARATION

50% of previous year's total tax preparation fee
(*Balance due upon receipt of completed return*)

CONSULTATION DURING TAX PREP APPOINTMENT

\$325 per hour

NEW CLIENT CONSULTATION (*First 30 minutes*)

No Charge

MINIMUM TAX PREPARATION FEE

Current Client – \$650 New Client – \$1,000

EARLY-BIRD DISCOUNT (*For the month of January*)

20% for 1/3/17 - 1/20/17 and 10% for 1/23/17 - 2/3/17

**OFFICE AND PHONE CONSULTATIONS, PROJECTIONS,
REVISED QUARTERLIES, RESEARCH, ANALYSIS,
PROBLEM RESOLUTION, EXTENSION PROJECTION;
GOVERNMENT CORRESPONDENCE (*including e-mails
& faxes*)**

\$325 per hour

APPOINTMENTS CANCELED WITHIN 48 HOURS

\$85 (*non-emergency – tax season only*)

AFFORDABLE CARE ACT (ACA – 1095A)

\$35 minimum fee for forms 8962 & 8965

MULTI-STATE VALIDATION FEES/TAX RETURN

\$95 per state

PARTNERSHIP, LLC, FIDUCIARY VALIDATION FEES

\$85 Federal and one state

\$45 each additional state

LLC FILING

\$150

CHANGE IN ACCOUNT STATUS – FORM 3115

\$75 minimum fee

1099/W-2 PREPARATION

\$30 (hand-written) each

E-FILING FEE

\$30

RE-DO FEE

\$75

FILING PAPER RETURNS

\$80

HANDLING FEE FOR LATE 8879'S & BALANCE OF PREP FEE

\$10 per business day, to be added to next year's retainer

AMENDED RETURNS

Based on circumstances

BASIC EXTENSIONS

\$35

PDF OF TAX RETURNS

No charge for current and prior two years returns.

CLIENT LETTERS (FINANCING) i.e., Mortgage

Confirmation

\$65 Hard copy/Fax

\$325 per hour discussion(s) with Loan Officer

(*Must have signed disclosure*)

AUDITS

INITIAL PHONE CONSULTATION

No charge

RETAINER FOR AUDIT PREPARATION

\$500

AUDIT ASSISTANCE OR AUDIT REPRESENTATION

Including prep work, audit meeting, post audit, resolution, phone communications with client and/or research, written correspondence, appeals, tax court petitions, filings, etc.

\$325 per hour