

## 2020 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

### **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 – \$2,000

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

20% for 1/02/20 - 1/17/20 and 10% for 1/20/20 - 1/31/20

**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 Form 8962

### **NEW 199A DEDUCTION (QBI)**

\$125 minimum

### **MULTI-STATE VALIDATION FEES/TAX RETURN**

\$95 per state

### **PARTNERSHIP, LLC, FIDUCIARY VALIDATION FEES**

\$125 federal and one state  
\$52 each additional state

### **LLC FILING**

\$150

### **CHANGE IN ACCOUNT STATUS – FORM 3115**

\$250 minimum fee

### **1099/W-2 PREPARATION**

\$30 (hand-written) each

### **E-FILING FEE**

\$35

### **RE-DO FEE**

\$75

### **FILING PAPER RETURNS**

\$85

### **HANDLING FEE FOR LATE 8879S & 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 – Bank or Complete Copy**

**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