



Client Pricing 2023 TAX SEASON

TAX PREP FORMS + SERVICES *included for a base price of \$595 PER RETURN*

FORM 1040	✓	
RESIDENT STATE INCOME TAX RETURN	✓	One included. Additional states and local returns subject to add-on pricing.
FORM W-2	✓	Two included, additional forms \$50/form
SCHEDULE A	✓	
DEPENDENT CARE CREDIT	✓	
FORM 1099 INT (INTEREST STATEMENTS)	✓	Two included, additional forms \$25/form
SAFE HARBOR	✓	

ADD-ON PRICING BILLED ON A PER-FORM BASIS OR AS-NEEDED

BI-ANNUAL INCOME TAX ESTIMATE CALCULATIONS	\$500
QUARTERLY INCOME TAX ESTIMATE CALCULATIONS	\$1,000
AUDIT ASSISTANCE	\$100
FORM 1099 CONSOLIDATED INVESTMENT STATEMENT**	\$50-\$300
ADDITIONAL CREDIT(S)/DEDUCTION(S)**	\$50-\$300
SCHEDULE C**	\$250-\$1,500
SCHEDULE E P1**	\$250-\$1,500
FORM K-1**	\$50-\$300
SCHEDULE F**	\$250-\$1,500
FORM 8606**	\$50-\$300
SCHEDULE H**	\$100-\$500
NON-RESIDENT STATE TAX RETURN(S)**	\$150-\$300
LOCAL TAX RETURN(S)**	\$150-\$300
EQUITY COMPENSATION CALCULATIONS***	Hourly Rates Apply
PHONE CALLS***	Hourly Rates Apply
TAX RESEARCH***	Hourly Rates Apply
EXTENSION CALCULATIONS***	Hourly Rates Apply
OTHER COMPLEXITY****	Hourly Rates Apply

* Married Filing Separately (MFS) will be billed as a separate return.

** Price determined based on complexity.

*** Rates are based on the specialist/manager who completed the service.

**** Examples of complexity include but are not limited to: Missing or incorrect cost basis; Noncovered shares; Extensive charitable donations; Categorizing and organizing extensive expenses (Sch. C, Sch. E, etc); Missing or incorrect depreciation; ISOs and RSUs; Sale of a home or rental property; Cryptocurrency transactions; FBAR reporting; Change in accounting method; State allocations; Adjustments and elections; Filing status analysis (MFJ vs. MFS); and Dependent tax return(s).