

Tax Preparation Schedule of Fees by Form*

Rates Effective January 1, 2022

Form	Title	Price	Notes
INDIVIDUAL, ESTATE & TRUST RETURNS			
1040	U.S. Individual Income Tax Return	\$ 175.00	Form only*
1040-X	Amended U.S. Individual Income Tax Return	\$ 250.00	Form only*
1041	U.S. Income Tax Return for Estates and Trusts	\$ 325.00	Form only*
1040-SR	U.S. Individual Income Tax Return for Seniors	\$ 175.00	Form only*
1040 Schedule 1	Additional Income and Adjustments To Income	\$ -	Inc w/1040 & 1040-SR
1040 Schedule 2	Additional Taxes	\$ -	Inc w/1040 & 1040-SR
1040 Schedule 3	Additional Credits and Payments	\$ -	Inc w/1040 & 1040-SR
RRC	Recovery Rebate Credit Worksheet	\$ 35.00	
1040 Schedule A	Itemized Deductions	\$ 90.00	
1040 Schedule B	Interest and Ordinary Dividends	\$ 50.00	
1040 Schedule C	Profit or Loss from Business (Sole Proprietorship)	\$ 200.00	Per entity**
1040 Schedule C	Profit or Loss from Business (Sole Proprietorship)	\$ -	Free for bookkeeping clients
1040 Schedule D	Capital Gains and Losses	\$ 50.00	Does not include Form 8949
1040 Schedule E (pg 1)	Supplemental Income and Loss (Page 1 Rental Properties)	\$ 200.00	Per rental**
1040 Schedule E (pg 1)	Supplemental Income and Loss (Page 1 Royalties Only)	\$ 35.00	
1040 Schedule E (pg 2)	Supplemental Income and Loss (Page 2 Partnerships/S Corps)	\$ 50.00	
1040 Schedule F	Profit or Loss From Farming	\$ 200.00	Form only**
1040 Schedule H	Household Employment Taxes (Nanny Tax)	\$ 75.00	Form only**
1040 Schedule R	Credit for the Elderly or the Disabled	\$ 35.00	
1040 Schedule SE	Self-Employment Tax	\$ 40.00	
1040-ES	Estimated Tax for Individuals	\$ 100.00	Set of four quarterly forms
1045	Application for Tentative Refund & Net Operating Loss (NOL)	\$ 250.00	
1116	Foreign Tax Credit (Individual, Estate, or Trust)	\$ 75.00	
2210	Underpayment of Estimated Tax	\$ 40.00	
2441	Child and Dependent Care Expense	\$ 75.00	
2555	Foreign Earned Income	\$ 110.00	
3800	General Business Credit	\$ 60.00	
3903	Moving Expenses	\$ 40.00	
4136	Credit for Federal Tax Paid on Fuels	\$ 40.00	
4137	Tax on Unreported Tips	\$ 30.00	
4562	Depreciation and Amortization	\$ 40.00	Additional item \$20 each
4684	Casualties and Thefts	\$ 80.00	Per casualty/theft
4797	Sale of Business Property	\$ 75.00	Per item
4835	Farm Rental Income and Expenses	\$ 175.00	Per rental**
4868	Application for Extension to File U.S. Individual Return	\$ -	w/o payment (retainer required)
4868	Application for Extension to File U.S. Individual Return	\$ 60.00	with payment calculation
4952	Investment Interest Expense Deduction	\$ 30.00	
4972	Tax on Lump-Sum Distributions	\$ 80.00	
5329	Additional Taxes Attributable to Qualified Retirement Plans	\$ 40.00	
5405	Repayment of the First Time Homebuyers Credit	\$ 40.00	
5695	Residential Energy Credits	\$ 35.00	
6198	At Risk Limitations	\$ 30.00	
6251	AMT Alternative Minimum Tax	\$ 60.00	
6252	Installment Sale Income (first year)	\$ 140.00	Per sale
6252	Installment Sale Income (subsequent years)	\$ 40.00	Per sale
6781	Gain or Loss from Section 1256 Contracts and Straddles	\$ 40.00	Additional item \$20 each
7203	S Corporation Shareholder Stock and Debt Basis Limitations	\$ 75.00	
8283	Non Cash Charitable Contributions	\$ 30.00	Per form
8332	Exemption Release Divorced or Separated Parents	\$ 30.00	Per form
8379	Injured Spouse Claim and Allocation	\$ 30.00	Per spouse

INDIVIDUAL, ESTATE & TRUST RETURNS (continued)

8582	Passive Activity Loss Limitations	\$ 40.00	Per activity
8606	Nondeductible IRA	\$ 30.00	Per ira
8615	Tax for Children under 18 who have Investment Income (kiddie tax)	\$ 40.00	Per form
8801	Credit for Prior Year Minimum Tax	\$ 40.00	Per for
8812	Credit for Qualifying Children and Other Dependents	\$ 75.00	Per dependent
8814	Parent's Election to Report Child's Interest and Dividends	\$ 25.00	
8824	Like Kind Exchanges	\$ 140.00	Per exchange
8829	Business Use of Home	\$ 40.00	
8834	Qualified Electric Vehicle Credit	\$ 30.00	
8839	Qualified Adoption Expenses	\$ 35.00	
8846	Credit for Employer Soc. Sec. and Medicare taxes on tips	\$ 30.00	
8853	Archer MSAs and Long-Term Care Insurance Contracts	\$ 30.00	
8863	Education Credits	\$ 50.00	Per student, per institution
8867	Paid Preparer's Due Diligence Checklist	\$ 50.00	Per credit
8880	Qualified Retirement Savings Contribution Credit	\$ 20.00	
8889	Health Savings Account	\$ 30.00	
8910	Alternative Motor Vehicle Credit	\$ 30.00	
8917	Tuition & Fees Deduction	\$ 40.00	Per student
8938	Statement of Foreign Assets	\$ 40.00	
8949	Sales and Other Dispositions of Assets	\$ 10.00	Per reportable transaction
8959	Additional Medicare Tax	\$ 30.00	on wage income over \$200,000
8960	3.8% Net Investment Income Tax	\$ 30.00	
8962	Premium Tax Credit (PTC)	\$ 40.00	
8965	Health Coverage Exemptions	\$ 40.00	
8995	Qualified Business Income Deduction Simplified Computation	\$ 35.00	
9465 or 433-D	Application for Installment Agreement	\$ 140.00	
Auto Expense	Auto Expense & Mileage Worksheet	\$ 30.00	Per vehicle
Sale of Home	Sale of your Home Worksheet	\$ 35.00	
Financial Aid	Free Application for Federal Student Aid (FAFSA) Worksheet	\$ 30.00	Per student/parent
Penalty	Penalty and Interest Calculations for late filing/payments	\$ 60.00	

BUSINESS & FIDUCIARY RETURNS

706	Estate (and Generation-Skipping Transfer) Tax Return	\$ 175.00	Billed hourly**
709	Gift (and Generation-Skipping Transfer) Tax Return	\$ 175.00	Billed hourly**
990	Tax Exempt Organization	\$ 600.00	Form only*,**
1065	U.S. Return of Partnership Income (two partners)	\$ 600.00	Form only*,**
1065	U.S. Return of Partnership Income (three or more partners)	\$ 750.00	\$150 per add'l partner**
1118	Foreign Tax Credit (Corporation)	\$ 75.00	
1120	U.S. Corporation Income Tax Return	\$ 750.00	Form only*
1120-S	U.S. Income Tax Return for an S Corporation (single shareholder)	\$ 600.00	\$150 per add'l shareholder**
3800	General Business Credit	\$ 60.00	
4136	Credit for Federal Tax Paid on Fuels	\$ 40.00	
4562	Depreciation and Amortization	\$ 40.00	Additional item \$20 each
4684	Casualties and Thefts	\$ 80.00	Per casualty/theft
4797	Sale of Business Property	\$ 75.00	Per item
4952	Investment Interest Expense Deduction	\$ 30.00	
4972	Tax on Lump-Sum Distributions	\$ 90.00	
6198	At Risk Limitations	\$ 30.00	
6252	Installment Sale Income (first year)	\$ 140.00	Per sale
6252	Installment Sale Income (subsequent years)	\$ 40.00	Per sale
6781	Gain or Loss from Section 1256 Contracts and Straddles	\$ 40.00	Additional item \$20 each
7004	Application for Automatic Extension of time to File	\$ -	w/o payment (retainer required)
7004	Application for Automatic Extension of time to File	\$ 90.00	with payment calculation
8283	Non Cash Charitable Contributions	\$ 30.00	Per form
8582	Passive Activity Loss Limitations	\$ 40.00	
8801	Credit for Prior Year Minimum Tax	\$ 40.00	
8824	Like Kind Exchanges	\$ 140.00	Per exchange
8829	Business Use of Home	\$ 40.00	
8846	Credit for Employer Soc. Sec. and Medicare taxes on tips	\$ 30.00	
8910	Alternative Motor Vehicle Credit	\$ 30.00	
8938	Statement of Foreign Assets	\$ 40.00	
8949	Sales and Other Dispositions of Assets	\$ 10.00	Per reportable transaction
K-1s	Inc, Loss, Div of Partners or Shareholders	\$ 25.00	Per partner

FEDERAL EMPLOYMENT RETURNS

940	Employers Annual Federal Unemployment Tax Return	\$ 75.00	
941	Employers Quarterly Federal Tax Return	\$ 65.00	Per quarter
944	Employers Annual Federal Tax Return	\$ 90.00	
945	Annual Return of Withheld Federal Income Tax	\$ 40.00	

FEDERAL INFORMATIONAL RETURNS

1096	Annual Summary and Transmittal of U.S. Info Returns	\$ 50.00	
1099	Miscellaneous Income	\$ 15.00	Per form
W-2	Wage and employee tax statement	\$ 12.50	Per employee
W-3	Transmittal of wage and tax statements	\$ 60.00	Per form
8809	Application for Extension of Time To File Information Returns	\$ 30.00	
8027	Employer's Annual Information Return of Tip Income	\$ 35.00	
FBAR (FinCEN 114)	Report of Foreign Bank and Financial Accounts	\$ 125.00	Additional item \$20 each
5472	Information Return of a 25% Foreign-Owned U.S. Corporation	\$ 110.00	
5471	Information Return of U.S. Persons With Respect to Certain Foreign Corporations	\$ 250.00	Form only*

STATE RETURNS

State (Home)	Residential State Return (not NY or CA)	\$ 100.00	
State (Home)	Residential State Return (NY or CA only)	\$ 135.00	
State (additional)	Non-resident State Return (not NY or CA)	\$ 75.00	
State (additional)	Non-resident State Return (NY or CA only)	\$ 100.00	
New York City	New York City or Yonkers Resident Return	\$ 75.00	
Other Local Return	Certain localities require separate returns	\$ 35.00	
Sales or Use Taxes	Quarterly or Monthly Sales & Use Tax Returns	\$ 50.00	Per form, period and/or state

MISCELLANEOUS ITEMS

E-file	Electronic filing of returns with IRS email confirmation	\$ -	Valid email required
Referral credit	For the referring customer, valid for the current tax year only	10%	of total (up to \$75 limit)
Early Discount	For individual returns if all info received by end of February	10%	of total (up to \$75 limit)
Late Fee/Rush Fee	If requested items not received 10 days before filing date	20%	of total, less referral discounts
Electronic (pdf) Copy	Included with return and stored in your document portal	\$ -	
Paper copy	Paper copy of return + postage & handling	\$ 50.00	Per copy

*additional schedules charged separately

#worksheets included in form price, unless otherwise stated.

**any required bookkeeping or other expense analysis will be charged at \$175 per hour, unless otherwise discussed

Additional forms not listed above will be quoted before preparation is complete.