



Professional Tax Preparation Services

Individual Tax Returns Fee Schedule

Service Type	Rate	Description
Total Minimum Base Rate *	\$150.00	Includes federal individual tax form and one state return.
Additional Forms & States **	\$50.00 – \$75.00 / ea	Supplemental schedules or extra state returns required for your file.
Hourly Accounting Rate	\$75.00 / hr	Applied to extensive advisory, cleanup, or complex cases.

Individual Pricing Footnotes & Details:

- *** Minimum Base Rate Breakdown:** This introductory rate reflects a baseline software/processing cost combined with an introductory accounting hour. It covers individual filers with standard deduction profiles and includes one state tax return.
- **** Additional Forms & States:** Supplemental filing elements are evaluated based on structural complexity. The standard add-on fee range applies to each additional state tax return required, as well as forms such as business income (**Schedule C**), capital gains or investment sales (**Schedule D**), and rental property management (**Schedule E**).



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Terms of Service & Filing Policies

- **Final Invoices:** Final billing is calculated based on the total complexity, volume of data entry, and total number of specific forms required to accurately execute your tax return under current tax laws.
- **Document Readiness:** Clients are expected to provide clear, reconciled data. Information requiring manual organization, accounting adjustments, or bookkeeping cleanup will be billed at the standard hourly accounting rate of **\$75.00 per hour**.

Deadlines & Late Document Submission Policies

- **Guaranteed On-Time Filing:** To guarantee that your tax returns are filed by the official IRS deadline without requiring an extension, all final, reconciled documents must be submitted to our office at least **30 days prior** to your specific federal filing date.
- **Extension Requests:** If complete documentation is not received by the 30-day cutoff, we will automatically file a standard extension on your behalf to protect you from late-filing penalties.
 - **Extension Processing Fee:** Filing an extension requires a upfront payment equal to your tier's minimum base rate (**\$150.00 for individuals / \$200.00 for businesses**), which will be fully deducted from your final tax preparation bill at the time of filing.
 - *Please note:* An extension to file is **not an extension to pay** any taxes owed to the IRS or state agencies.
- **Late Submission Surcharges:** Any files or missing critical documents submitted within **14 days** of the federal filing deadline are subject to a **rush processing fee of up to \$75** added to the final invoice.
- **Drop-Dead Cutoff Date:** To maintain quality and accuracy for all clients, intake for the current filing cycle will be closed **7 days** prior to the federal deadline. Documents received after this cutoff will be processed post-deadline.