

Pricing:

1. While I have a base price structure, each return is different.
2. I will provide my pricing after I have a chance to review your prior year and current source Tax forms.
3. My engagement letter will cover most if not all questions you may have about the services I provide.
4. My reduced early season fee starts at \$250 for returns received by March 28, 2026.
My fee starts at \$300 for returns received on or after March 29, 2026.
 - a. This includes preparing your Federal 1040 return.
 - i. Includes both Schedule A and B (if required).
 - b. E-filing your Federal & State Return.
 - c. I will provide you with an emailed copy of your returns along with confirmation letter that your return was accepted within 5 business days.
 - i. I will provide a printed copy of your return along with your source documents no later than May 15th unless requested sooner.
5. Additional fees
 - a. If your Federal Return requires the use of other Schedules such as C, D, or E or other tax forms such as Form 3115 to complete your return.
 - b. Filing an individual extension.
 1. A \$25 extension fee will be **charged** if I do not receive all source documents prior to March 28th for filing by the April 15th deadline.
 - c. After the April 15th deadline
 - i. The \$25 extension fee will be credited to your invoice if I receive your source documents no later than September 15th, which is thirty (30) days prior to the extension deadline October 15th.
 - d. An hourly charge may apply for time that is required to input a large amount of tax data such as W2-G and Charitable Donations.
 - e. Total charges to file your return will be discussed and agreed upon prior to starting your return. Pricing will be included with the Engagement Letter.