

Personal Fixed Price Agreements (FPAs)

Monthly subscription fees are determined annually (February 1 – January 31) except for clients starting mid-year. For new clients, additional charges apply for a one-time set-up fee and preparation of any previous year extended returns. We have listed examples of clients that fall under each tier below. This is not an exhaustive list, and special situations may be priced differently.

Personal Tax Service Package

- Annual 1040 tax filing
- Mid-year tax projection and another before end of year, along with strategizing
- Year-round assistance and consulting as you need advice
- Assistance with tax audits and correspondence for any year we have prepared
- Amended tax returns for any year we have prepared

Sample Clients (for illustration purposes only, other situations will be priced accordingly)

Client Situation	Tier	Monthly Fee	Prior Year Extended Return Prep Fee	Set-Up Fee
Primarily W-2 income with Sch C for side hustle (no home office)	Tier 1	\$225/month	\$1,650	N/A
W-2 income with one rental property				
W-2 income with one K-1				
Primarily W-2 income with Sch C for side hustle (includes home office)	Tier 2	\$275/month	\$1,800	\$500
W-2 income with two or three rental properties				
W-2 income with two or three K-1s				
W-2 income with more than three K-1s, all in-state income	Tier 3	\$300/month	\$1,950	\$750
1099 income (Sch C) from one state				
Return including Real Estate Professional Status or Short-Term Rentals	Tier 4	\$325/month	\$2,100	Starting at \$1,000
W-2 income with four to seven K-1s, resulting in multiple state returns				
Locums sole proprietorship (Sch C) with multiple state returns				
W-2 income with eight to twelve K-1s, resulting in multiple state returns	Tier 5	\$350/month	\$2,250	Starting at \$1,000
Primary income is private practice sole proprietorship (Sch C) from reconciled bookkeeping records				



Additional charges apply to business services (corporate/partnership taxes, bookkeeping, payroll), any foreign account filings, and household employee filings.

One-time fees apply for the additional services:

- **Catch-up/Correction of Forms 8606 - \$100 per form**
Gift Returns – Starting at \$350

Dependent Tax Service Package - \$300

- Annual 1040 tax filing
- Assistance with tax audits and correspondence for any year we have prepared
- Amended tax returns for any year we have prepared