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## Our Personal Fixed Price Agreements (FPAs)

All clients are billed monthly for an annual agreement (February 1 – January 31). The FPAs for clients starting mid-year will include the additional part-year months. To help you get an idea of what your costs might be, we have included examples of clients that fall under each tier below. This is not an exhaustive list, and special situations may be priced differently.

All personal tax services include year-round planning advice, assistance with tax audits and correspondence for any year we have prepared and amended returns for any year we have prepared.

### Tier 1

- Primarily W-2 income with Sch C for side hustle (no home office)
- W-2 income with one rental property
- W-2 income with one K-1

**\$200/month**

### Tier 2

- Primarily W-2 income with Sch C for side hustle (includes home office)
- W-2 income with two or three rental properties
- W-2 income with two or three K-1s

**\$225/month**

### Tier 3

- 1099 income (Sch C) from one state
- W-2 income with more than three K-1s, all in-state income

**\$250/month**

### Tier 4

- Locums sole proprietorship (Sch C) with multiple state returns
- Return including Real Estate Professional Status
- W-2 income with four to seven K-1s, resulting in multiple state returns

**\$275/month**

### Tier 5

- Primary income is private practice sole proprietorship (Sch C) from reconciled bookkeeping records
- W-2 income with eight to twelve K-1s, resulting in multiple state returns

**\$300/month**

Additional charges apply to business services (corporate/partnership taxes, bookkeeping, payroll), any foreign account filings, household employee filings, and applicable one-time set-up fees (ex: long depreciation schedules, multiple K1s, other complexities).

