



## LIST OF SERVICES – 2024

| <b>Tax Planning and Preparation</b>                               | <b>PRICE</b>  |
|---|---|
| Tax Planning, Tax Projection Worksheets                           | \$250/hour  |
| 1040 – U.S. Individual Income Tax Return                          | Starting at \$365   |
| Schedule C – Profit and Loss from Business (Each)                 | \$245.00  |
| Schedule D – Capital Gains and Losses (Each)                      | \$65.00   |
| Schedule E – Supplemental Income and Loss (each source of income) | \$245.00  |
| Each K-1  | \$95.00   |
| One State income tax filing                                       | Included  |
| Each additional state income tax filing                           | \$245.00  |
| U.S. Partnership, LLC & Corporation return                        | Based on Gross Revenue (GR)<br><br>GR <= \$500k - \$745<br>GR >\$500k to <\$1mil - \$945<br>GR >\$1mil to <10mil - \$1,745<br>GR >\$10mil to <20mil - \$1,995<br>GR >\$20mil to <30mil - \$2,245<br>GR >\$30mil - \$2,495 |
| One State income tax filing (business)                            | Included  |
| Each additional state income tax filing (business)                | \$365.00  |
| Late S Election   | \$195.00  |
| Expat / Foreign Income Calcs (Form 2555, FBAR, Form 8938)         | \$395 each form   |
| Situational Tax Law Research                                      | \$150/hour  |
| Tax resolution  | \$100/hour or by quote  |
| Audit defense   | by quote  |

| <b>Bookkeeping services</b> |           |
|-----------------------------|-----------|
| Bank Reconciliations        | \$65/hour |
| Month end journal entries   |           |
| Generate Income statement   |           |
| Generate Balance sheet      |           |
| Consultations               |           |



# ACCOUNTANCY

Certified Public Accountants

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| <b>Payroll</b>  |                     |
|---|---------------------|
| Contractor & Employee Payroll Processing (Weekly, bi-weekly, semi monthly, monthly, annually) (Payroll provider fees paid separate) | \$65/hour *         |
| Annual Payroll Processing (W-2s, other filings)   | Included            |
| Payroll initial setup fees (Up to 5 employees & 1 State Employer ID)  | \$250.00            |
| Applying for various State tax ids  | \$295.00            |
| 1099 processing   | \$20/contractor     |
| 1099 amendments & W-2 amendments  | \$20 each amendment |

| <b>Business formation services</b>  |  |
|---|--|
| Articles of Organization or Incorporation (filing fees not included)                        | \$500.00   |
| Federal Tax Identification Number   | Included   |
| S-Corporation Election  | \$195.00   |
| DBA filing  | \$95.00  |
| Preparation and Electronic Filing of Form 1023-EZ Federal application for tax exempt status | \$400 Does Not Include Federal Fee   |
| Preparation of form 1023 Federal Application for Tax Exempt Status                          | Small Tax-Exempt entities average \$600 – \$1,500 – Does Not Include Federal Fee |

| <b>Other Services (filing fees not included)</b>                               | <b>Each filing</b>   |
|--|--|
| Form 2290  | 1-10 units -\$295.00<br>>10 - \$495.00                       |
| SOS renewal (Statement of Information)   | \$95.00  |
| SOS revivor (Company revivor from suspension)                                  | \$325 Standard filing<br>\$495 Expedited filing              |
| Foreign Entity registration  | \$395.00   |
| Business Licenses  | \$295.00   |
| Applying for various State tax ids   | \$295.00   |
| Seller/ Reseller permits filing (each location)                                | \$295.00   |
| MC-150   | \$125.00   |
| Sales tax filing   | \$295.00   |
| Zero Sales tax return  | \$150.00   |
| IFTA filing  | 1-5 units -\$295.00<br>>5 - \$495.00                         |
| Zero IFTA tax return filing  | \$150.00   |
| Annual UCR filing & IFTA renewals  | 1-5 units -\$245.00<br>6-10 units-\$495.00<br>>11 - \$595.00 |
| UCR renewal only   | \$95.00  |
| Rental/lease agreement   | \$195.00   |
| Board resolutions, minutes of meetings, share certificates, other company docs | \$95.00  |



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|                        |                      |
|------------------------|----------------------|
| Dissolution of company | \$195.00             |
| EFTPS Registration     | \$145.00             |
| Bank letter            | \$125.00 each letter |
| Permits & Decals       | \$30.00 each         |

| <b>Business Advisory Services</b>                            |                     |
|--|---------------------|
| <b>Consulting</b>  |                     |
| Business Consultation, Periodic Business Reviews (PBR)       | \$150/hour          |
| Complimentary Quick Chats (CQC)                              | Included            |
| Interfacing with Lenders, Attorneys, Financial Planners      | \$150/hour          |
| <b>Financial Analysis</b>                                    |                     |
| QuickBooks, PCS Consulting                                   | \$150/hour          |
| Financial Statements Analysis, Comparisons                   | \$150/hour          |
| Cash Flow Management and Analysis                            | \$150/hour          |
| First Research Industry Reports, Industry-Focused Consulting | \$150/hour          |
| Financial statement preparation                              | \$150/hour          |
| Benchmarking, Trend Analysis                                 | \$150/hour          |
| Budgeting, Forecasting, Goal Setting                         | \$200/hour          |
| <b>Strategy and Maintenance</b>                              |                     |
| Client meeting   | \$150/hour          |
| Succession Planning, Ownership Changes Consultation          | \$150/hour          |
| Annual Business Valuation                                    | By Quote            |
| Annual Corporate Governance, Resolutions, Meetings           | \$150/hour          |
| Internal control review and recommendation                   | \$200/hour          |
| <b>Attest services</b>                                       |                     |
| Compilation  | \$990 - \$2,200     |
| Reviews  | \$2,950 - \$10,000  |
| Audits   | \$15,000 - \$35,000 |

| <b>Rate per position</b>                                |            |
|---|------------|
| Firm Partner  | \$150/hour |
| (meetings, consulting, tasks performed by firm partner) |            |
|   |            |



| <b>Tax Resolution</b>   |  |
|---|--|
| Installment Agreement for FTB without financials  | \$295.00                               |
| Installment Agreement for FTB with Basic Financials with no assets/cars/LIC                           | \$395.00                               |
| Installment Agreement for FTB with million dollar in assets   | \$495.00                               |
| Installment Agreement for FTB with million dollar in assets and business / cars/business/LIC/Residual | \$625.00                               |
| Penalty Abatement- Reasonable Cause - FTB   | 295+15% of Penalty                     |
| Installment Agreement for IRS without financials  | \$295.00                               |
| Installment Agreement for IRS with Basic Financials with no assets/cars/LIC                           | \$495.00                               |
| Installment Agreement for IRS with million dollar in assets   | \$749.00                               |
| Installment Agreement for IRS with million dollar in assets and business / cars/business/LIC/Residual | \$950.00                               |
| Penalty Abatement- FTA (Below \$1,000) - IRS  | 20% of Penalty upto a minimum of \$100 |
| Penalty Abatement- FTA (Above \$1,000) - IRS  | 295+10% of Penalty                     |
| Penalty Abatement- Reasonable Cause - IRS   | 295+20% of Penalty                     |

| <b>Estate and Trust Tax Return (Form 1041) Fee Structure</b> |  |   |
|--|--|---|
| Complexity Level   | Fee Range                              | Description   |
| Simple Estate / Trust Return                                 | \$750-\$1,250                          | - Minimum activity (e.g. reporting interest or dividends)<br>- Small estates or trusts with a few beneficiaries                                     |
| Moderate Complexity  | \$1,250 - \$2,500                      | - Estate / trusts with multiple income sources (e.g. rental properties, K-1s).<br>- Allocations between trust and beneficiaries                     |
| High Complexity  | \$2,500 - \$5,000+                     | - Complex estates / trusts involving multiple beneficiaries, capital gains, or international considerations.<br>- IRS elections (e.g., Section 645) |
| Additional Services  | \$150 / hour for research / consulting | - Valuation reviews or significant advisory support<br>- Audit defense or significant tax resolution  |

| <b>Gift Tax Return (Form 709) Fee Structure</b> |                    |  |
|---|--------------------|--|
| Complexity Level                                | Fee Range          | Description  |
| Simple Gift Tax Return                          | \$750-\$1,000      | - Reporting up to 1-2 assets (e.g., cash, publicly traded stocks).<br>- No gift splitting required               |
| Moderate Complexity                             | \$1,000 - \$1,500  | - Gift of real property or closely held assets.<br>- Gift splitting for one asset                                |
| High Complexity                                 | \$1,500 - \$2,500+ | - High - value gifts requiring qualified appraisals or valuation adjustments<br>- Multiple donees or split gifts |



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\* Minimum hours charged for Payroll processing based on payroll schedule and number of employees

| Frequency    | Number of employees Less than or equal too | minimum # of hours spent/mth |
|--------------|--|------------------------------|
| Weekly       | 1-5  | 4                            |
| Weekly       | 6-15                                       | 5                            |
| Weekly       | 16-30                                      | 6                            |
| Weekly       | 31-50                                      | 7                            |
| Weekly       | Over 50                                    | 8                            |
| Bi-Weekly    | 1-5  | 2                            |
| Bi-Weekly    | 6-15                                       | 3                            |
| Bi-Weekly    | 16-30                                      | 4                            |
| Bi-Weekly    | 31-50                                      | 5                            |
| Bi-Weekly    | Over 50                                    | 6                            |
| Semi-Monthly | 1-5  | 2                            |
| Semi-Monthly | 6-15                                       | 3                            |
| Semi-Monthly | 16-30                                      | 4                            |
| Semi-Monthly | 31-50                                      | 5                            |
| Semi-Monthly | Over 50                                    | 6                            |
| Monthly      | 1-5  | 1                            |
| Monthly      | 6-15                                       | 2                            |
| Monthly      | 16-30                                      | 3                            |
| Monthly      | 31-50                                      | 4                            |
| Monthly      | Over 50                                    | 5                            |
| Annually     | 1-10                                       | 2                            |