

## **2010 FEE SCHEDULE**

The retainer is 50% of previous year's total tax preparation fee, mandatory at first tax appointment or mail-in. Balance of tax preparation charges is due upon receipt of completed return. Payment on all other services is due upon receipt of invoice.

### **TAX PREPARATION**

\$275 per hour plus computer charges/processing fee  
Increased processing fee for extra time spent

### **RETAINER FOR TAX PREPARATION**

50% of previous year's total tax preparation fee  
*(Balance due upon receipt of completed return)*

### **CONSULTATION DURING TAX PREP APPOINTMENT**

\$275 per hour

### **NEW CLIENT CONSULTATION *(First 30 minutes)***

No Charge

### **MINIMUM TAX PREPARATION FEE**

\$625

### **EARLY- BIRD DISCOUNT *(For the month of January)***

20% discount

### **OFFICE AND PHONE CONSULTATIONS, PROJECTIONS, REVISED QUARTERLIES, RESEARCH, ANALYSIS, PROBLEM RESOLUTION, EXTENSION PROJECTION; GOVERNMENT CORRESPONDENCE *(including e-mails & faxes)***

\$275 per hour

### **APPOINTMENTS CANCELLED WITHIN 48 HOURS**

\$85 *(non-emergency – tax season only)*

### **HANDLING FEE FOR "STILL NEED" LIST**

\$10 per business day

### **MULTI-STATE VALIDATION FEES**

\$35 per state

### **MORTGAGE INTEREST ACQUISITION**

#### **INTEREST CALCULATION**

\$275 per hour

### **PARTNERSHIP, LLC, FIDUCIARY VALIDATION FEES**

\$80 Federal and one state

\$40 each additional state

### **E-FILING FEE**

\$25

### **E-FILE HOLD FEE**

\$30

### **FILING PAPER RETURNS**

\$75

### **HANDLING FEE FOR LATE 8879/BALANCE OF PREP FEE**

\$10 per business day, to be added to next year's retainer

### **AMENDED RETURNS**

Based on circumstances

### **BASIC EXTENSION**

\$35

### **PDF OF RETURN**

\$20 per year

### **ADDITIONAL COPIES OF RETURNS**

\$30 per copy per year

### **CLIENT LETTERS (FINANCING) i.e. Mortgage Comfort Letters**

\$60 Hard copy/Fax

\$275 per hour discussion(s) with Loan Officer

*(Must have signed disclosure)*

## **AUDITS**

### **INITIAL PHONE CONSULTATION**

No charge

### **RETAINER FOR AUDIT PREPARATION**

\$500

*(Balance of prep work due prior to actual audit meeting)*

### **AUDIT ASSISTANCE OR AUDIT REPRESENTATION**

Including prep work, audit meeting, post audit, resolution, phone communications with client and/or research, written correspondence, appeals, tax court petitions, filings, etc.

\$275 per hour

### **RETAINER FOR AUDIT REPRESENTATION**

\$500

*(Any balance due, payable at conclusion of audit, upon invoice receipt)*