

Thank you for your interest in my tax preparation services. Below is an overview of my pricing structure and process.

Pricing and Services

My base fee starts at \$300 and includes:

- Preparation of your Federal 1040 return (including Schedules A and B, if required).
- E-filing of both Federal and State returns.
- A digital copy of your returns and confirmation of acceptance within five business days.
- A physical copy of your return and all original source documents returned by May 15th (unless requested sooner).

Please note that additional fees apply for returns requiring Schedules C, D, or E, or forms such as 3115. An hourly charge may also apply for high-volume data entry, such as numerous W2-Gs or charitable donations.

Timeline and Process

New clients can expect a minimum of two-week turnaround once I receive all your source documents. To ensure an April 15th filing, all source documents must be received by March 19th. Documents received after this date will incur a \$25 fee to file an extension. This fee can be credited toward returns processed after April 16th, if all source documents are provided by September 15th for the October 15th extension deadline. I will maintain full transparency regarding my capacity to meet the April 15th deadline if requested.

Because every tax situation is unique, I will provide a final price quote after reviewing your prior-year returns and current source documents. All fees and service details will be clearly outlined in an engagement letter for your approval before work begins.

I look forward to the possibility of working with you.