

## Businesses

# Pricing guide

## Business services

The base package includes all federal and state domestic forms and schedules. The base packages are subject to form limitations, additional fees may apply.

| Package includes  | Business | Individual + Business |
|---|----------|-----------------------|
| <b>Price</b>  | \$650    | \$900                 |
| <b>Individual State return</b>  | 0        | 2                     |
| <b>Business State return</b>  | 1        | 2                     |
| <b>Form 1120 / 1120S / 1065 / 990</b><br>Federal Entity Return  | 1        | 1                     |
| <b>Form 1040</b><br>Federal Individual Return   | 0        | 1                     |
| <b>Schedule 8812</b><br>To claim the Child Tax Credit for dependent(s)  | 0        | 1                     |
| <b>Schedule 8825</b><br>Partnerships/S-Corps: To report income and deductible expenses from rental real estate activities | 2        | 0                     |
| <b>Schedule A</b><br>To report itemized deductions for homeowners or renters  | 0        | 1                     |
| <b>Schedule B</b><br>To report Interest and Ordinary Dividends earned from investments                                    | 0        | 1                     |
| <b>Schedule D (Crypto/Stocks)</b><br>To report capital gains and losses earned from stock or crypto investments           | 0        | 2                     |
| <b>Schedule E (K-1)</b><br>To report income or losses earned from shareholder activity                                    | 0        | 2                     |
| <b>Schedule E (Rentals)</b><br>To report income or losses earned from rental real estate                                  | 0        | 2                     |

| Package includes  | Business | Individual + Business |
|---|----------|-----------------------|
| <b>K-1 Preparation</b><br>Partnerships/S-Corps: To report earnings, losses, and dividends earned from the business to passthrough on their individual taxes | 2        | 2                     |
| <b>Franchise Tax</b><br>For those states that charge an annual franchise tax to maintain business operations in the state                                   | 1        | 0                     |

## Additional forms and schedules

This pricing guide provides the pricing for the following forms and schedules which may be additional to, or not be included, in the base package pricing.

| States  | Business | Individual + Business |
|---|----------|-----------------------|
| <b>Individual State return</b><br>For additional states the individual worked or had business activities in | -        | \$44.99               |
| <b>Business State return</b><br>For additional states the business had activities in                        | \$64.99  | \$64.99               |
| <b>Franchise Tax</b><br>For additional franchise tax states the business needs to report activities in      | \$64.99  | \$64.99               |

| Schedules  | Business | Individual + Business |
|--|----------|-----------------------|
| <b>Schedule 8825</b><br>For additional rental properties the business owned  | \$44.99  | \$44.99               |
| <b>Schedule D (Crypto/Stocks)</b><br>For additional brokerage accounts the individual has to report stocks/crypto transactions bought/sold | -        | \$49.99               |
| <b>Schedule E (K-1)</b><br>For additional K-1s the individual received as a partner/shareholder from other companies they're involved in   | -        | \$14.99               |
| <b>Schedule E (Rentals)</b><br>For additional rentals the individual received 1099s for  | -        | \$14.99               |

| K-1  | Business | Individual + Business |
|--|----------|-----------------------|
| <b>K-1 Preparation</b><br>For additional K-1s that need to be prepared for partners/shareholders of the business | \$44.99  | \$44.99               |

## Foreign forms

The following list of foreign forms is not included in the base package. The price is calculated on a per form basis.

| States   | Business | Individual + Business |
|--|----------|-----------------------|
| <b>Form 1116</b><br>To claim the Foreign Tax Credit if you pay income taxes imposed by a foreign country reducing your tax liability         | -        | \$44.99               |
| <b>FinCEN Form 114 (FBAR)</b><br>To report a foreign bank and/or financial account(s) that exceeds \$10,000 at any time in the calendar year | \$99.99  | \$99.99               |
| <b>Form 5471</b><br>To report the (re)organization of a foreign corporation and the acquisition/disposition of its stock                     | \$399.99 | \$399.99              |
| <b>Form 5472</b><br>For corporations that have 25% foreign ownership at any time of the tax year   | \$229.49 | \$229.49              |

## Optional services

The following list highlights the optional services and the associated fees.

| Express turnaround | Percentage |
|--------------------|------------|
| <b>One day</b>     | 50%        |
| <b>Two day</b>     | 25%        |

# Pricing guide

## Individual services

The base package includes all federal and state domestic forms and schedules. The base packages are subject to form limitations, additional fees may apply.

| Package includes   | Individual simple | Individual complex | Self-employed simple | Self-employed complex |
|--|-------------------|--------------------|----------------------|-----------------------|
| <b>Price</b>   | \$175             | \$350              | \$250                | \$500                 |
| <b>State return</b>  | 1                 | 2                  | 1                    | 2                     |
| <b>Form 1040</b><br>Federal Individual Return  | 1                 | 1                  | 1                    | 1                     |
| <b>Schedule 8812</b><br>To claim the Child Tax Credit for dependent(s)                                   | 1                 | 1                  | 1                    | 1                     |
| <b>Schedule A</b><br>To report itemized deductions for homeowners or renters                             | 1                 | 1                  | 1                    | 1                     |
| <b>Schedule B</b><br>To report Interest and Ordinary Dividends earned from investments                   | 0                 | 1                  | 0                    | 1                     |
| <b>Schedule C</b><br>For Self-employed individuals that receive a 1099 for freelancing or contract work  | 0                 | 0                  | 1                    | 2                     |
| <b>Schedule D (Crypto/Stocks)</b><br>To report capital gains and losses from stock or crypto investments | 0                 | 2                  | 0                    | 2                     |
| <b>Schedule E (K-1)</b><br>To report income or losses earned from shareholder activity                   | 0                 | 2                  | 0                    | 2                     |
| <b>Schedule E (Rentals)</b><br>To report income or losses earned from rental real estate                 | 0                 | 2                  | 0                    | 2                     |
| <b>Schedule F</b><br>For individuals who operate a farm  | 0                 | 0                  | 1                    | 2                     |

## Additional forms and schedules

This pricing guide provides the pricing for the following forms and schedules which may be additional to, or not be included, in the base package pricing.

| States   | Individual simple | Individual complex | Self-employed simple | Self-employed complex |
|--|-------------------|--------------------|----------------------|-----------------------|
| <b>State return</b><br>For additional states the individual worked or had business activities in | \$44.99           | \$44.99            | \$44.99              | \$44.99               |

| Schedules   | Individual simple | Individual complex | Self-employed simple | Self-employed complex |
|---|-------------------|--------------------|----------------------|-----------------------|
| <b>Schedule C</b><br>For additional 1099-NECs the individual received as self-employed income   | -                 | -                  | \$99.99              | \$99.99               |
| <b>Schedule D (Crypto/Stocks)</b><br>For additional brokerage accounts the individual has to report stocks/ crypto transactions bought/sold | -                 | \$49.99            | \$49.99              | \$49.99               |
| <b>Schedule E (K-1)</b><br>For additional K-1s the individual received as a partner/shareholder from other companies they're involved in    | -                 | \$14.99            | -                    | \$14.99               |
| <b>Schedule E (Rentals)</b><br>For additional rentals the individual received 1099s for   | -                 | \$14.99            | -                    | \$14.99               |
| <b>Schedule F</b><br>For additional farms the individual operates   | -                 | -                  | \$99.99              | \$99.99               |

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| Schedules  | Individual simple | Individual complex | Self-employed simple | Self-employed complex |
|--|-------------------|--------------------|----------------------|-----------------------|
| <b>Form 1116</b><br>To claim the Foreign Tax Credit if you pay income taxes imposed by a foreign country reducing your tax liability         | -                 | \$44.99            | -                    | \$44.99               |
| <b>FinCEN Form 114 (FBAR)</b><br>To report a foreign bank and/or financial account(s) that exceeds \$10,000 at any time in the calendar year | -                 | \$99.99            | -                    | \$99.99               |

# Optional services

The following list highlights the optional services and the associated fees.

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