

2011 Tax Year Prices per Form for Tax Preparation, in US Dollars

Note: Higher prices may apply to complex returns or schedules, forms requiring calculations or where data provided by taxpayer is unclear or incomplete, excessive correspondence back and forth, more copying of faxed forms, phone calls and bank charges in receiving money online. IVA (Mexican sales tax 16%) must be charged for local clients but not for online clients using PayPal.

Individual Tax Returns

Form 1040, Individual Income Tax Return	\$130 to \$150
State Tax Returns	\$25 to \$50
State Part-Year or Non-Resident income allocations	\$25
Electronic Filing (Federal)	\$20
Electronic Filing (State, if available)	\$10
Form 1040X, Amended Tax Return	\$75 to \$150
Form 1040ES, Estimated Tax Payments (electronic)	\$10
Form 1040 NR, Non-Resident Income Tax Return	\$100 to \$150
State specific forms, such as local or excise taxes, per form	\$25 to \$50
State return amendments, ea year	\$25 to 50
FBAR, reporting of Foreign Bank Accounts (June 30 info return)	\$25 to \$50
Schedule A, Itemized Deductions	\$20
Schedule B, Interest and Dividends (depending on entries)	\$ 5 to \$20
Seller-Financed Mortgages, Amortizations, ea	\$10 to \$15
Schedule C, Profit or Loss from Business	\$75 to \$100
Schedule D, Capital Gains and Losses	\$25 to \$50
Stock Sales Over 10 - per sale	\$2 ea
Calculation of Basis for Stock Sales - each	\$5 to \$25
Calculation of prior year loss carryforwards, if needed	\$25
Schedule E, Page 1 - Income From Rental - per Property	\$40
Schedule E, Page 2 - Income from Partnership - per K1	\$15
Schedule SE, Self-Employment Tax	\$10
Form 982, Debt Exclusion	\$30
Form 1099-A, Foreclosure	\$50
Form 1099-C, Cancellation of Debt, Insolvency	\$30 - \$75, TBD
Form 1116, Foreign Tax Credit, dividends, mutual funds, etc.	\$10 to \$20
Form 1116, Calculations for credit over FEIC limits (re Form 2555)	\$75
Form 2210, Underpayment of Estimated Tax, simple	\$5
Form 2210, Annualized Income Installment Method	\$25
Form 2555, Foreign Earned Income Exclusion - setup per person/location	\$100
Form 2555, Subsequent years after initial setup	\$75
Form 2555, FEIC, housing allocations and/or qualifying days calculations	\$50

Form 4562, New Items, Initial Set-up & Basis Determination - each item	\$10 to \$15
Form 4562, Depreciation form, continuation of previous items	\$30
Form 4797, Sale of Rental or Business Property	\$225
Form 4868, Extension for Time to File a Tax Return (client request)	\$15
Form 5329, Taxes on Qualified Plans or Exception to Penalty	\$10
Form 5405, First-Time Homebuyers Credit	\$15
Form 6251, Alternative Minimum Tax	\$60
Form 6252, Installment Sale Income - previously established	\$15
Form 6252, Installment Sale - Initial set-up	\$60
Form 6781, Gains or Losses from Sec. 1256 Contracts/Straddles	\$150
Form 8283, Noncash Charitable Contributions Over \$500	\$15
Form 8582, Passive Activity Loss Limitations	\$40
Form 8812, Additional Child Tax Credit	\$15
Form 8824, Like-Kind Exchanges - TBD - Estimated ranges	\$250 to \$350
Form 8829, Business Use of Home (Schedule C)	\$15
Form 8853, Health Savings Account	\$10
Form 8863, Education Credits	\$15
Form 8938, Statement of Foreign Financial Assets (new 2011)	\$50 or TBA
Form 9465, Installment Agreement Request	\$20

Surcharge for Prior Year Returns	\$25
Late Filing, Late Payment, and Interest Calculations, prior years	\$35
Redo of return if client has provided incomplete/erroneous information	\$50
W-7, Request for ITIN Number	\$150
Telephone or Personal consultations	\$50 to \$75/hour
IRS letters or phone calls - TBD depending on complexity and time	\$75
Offer in Compromise for delinquent taxes	\$200
Calculations of next year's liability (free to current client) or:	\$25

Trust, Corporate, LLC/Partnership Returns

(Forms 1041, 1065, 1120S) - Ask for Quotes. Est. \$400 and up	
Plus required state returns - per quote - depends on state	TBD
Research of tax issues - TBD	
Form 3520/3520A Foreign Trust	\$50
Form 5471 - Report of a Foreign Corporation	\$750 or TBA

Mailing costs, overnight delivery, long-distance phone, excess copying	As Incurred
IVA (Mexican sales tax) required for local clients	16%
PayPal charges	4%

Payment Methods

All returns are priced in dollars. For Lakeside area or Bancomer deposits, this can be converted to pesos at the going rate at xe.com , and payment received in cash pesos.

Payment for returns initiated over the internet will be charged in US dollars, and paid through PayPal. Dollars or pesos can also be transferred to a Bancomer account within Mexico. \$100 deposit for new clients required to begin work, and will be credit to your final invoice. USD or peso checks also accepted for known clients.

All returns must be completely paid for before electronic filing is initiated, or before the paper copies and personal items are returned.

Paper copies of all returns will be provided to clients, whether electronically filed or not. Those not able to file electronically will also receive sufficient copies ready for mailing to US authorities, with instructions where to file. A PDF file will be sent to all internet-initiated returns.

As of January, 2011, paid preparers are required to file all returns possible by electronic filing.

Not all states accept electronic filing from paid providers without separate registration by the provider for that state. Therefore, it may not be possible to efile in all states. In these cases, a paper state return will be provided. Federal electronic returns are only accepted by the IRS with ALL correct information, including addresses and identification numbers for institutions, and names which match records in Social Security files. If a return is rejected electronically, it can still be filed by mailing a paper return. Foreign employers without a US EIN number will require a paper return to be mailed.