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Client: _____ Tax Year **2022****Personal Returns**

Long Forms - Fed & State	\$ 475
Short Form - Fed & State	290
Short Fed and Long Arizona	360
Other State Return	250
Early Season Discount (prior to February 20th)	(25)
Incomplete Tax Organizer surcharge	25

Income Items

Interest & Dividends - First	18
Thereafter \$4 each x _____	_____
Business/Farm	175
Rental \$35 each x _____	_____
Partnership, S Corp, Estate or Trust \$39 each x _____	_____
Passive Activity Loss Limitation	75

Schedule D Items

Stock Sale - First	27
Thereafter \$18 each x _____	_____
Bad Debt Loss	40
Tax Deferred Exch. (Section 1031)	200
Residence Sale	90
Other Sale	120
Installment Sale - First Year	120
-Subsequent Years	38
Capital Loss Carryforward	38
Foreclosure/Repossession	150
Capital Gains/Dividend Tax Calculation	34

Pension Items

IRA Deductible Calculation	55
SEP/Keogh Calculation	55
Non-Deductible IRA - Form 8606	28
Premature Distribution (10% penalty)	28

Adjustments to Income

Self-Employed Health Insurance	13
Health Savings Account (HSA)	40
Foreign Income Exclusion	140
Student Loan Interest Deduction	22
Qualified Business Inc Deduction	120

Deductions (Additional Forms)

Investment Interest	\$ 44
Non-Cash Contribution (over \$500)	60
Casualty Loss	100

Other Schedules

Depreciation \$15 each x _____	_____
Estimated Tax - Federal	50
Estimated Tax - State	40
Self-Employment Tax	31
Underpayment Penalty	44
Net Operating Loss Calculation	110
Alternative Minimum Tax	115
Home Office	60

Tax Credits

Dependent Tax Credit	65
Education Credit	50
Child Care Credit	50
Foreign Tax Credit	80
Energy Credit	35
Earned Income Credit	60
Arizona Credits - Forms 301 & _____	60

Other Items

Rework - Client Change	55
Extension	55
Taxable Social Security Calculation	30
Medicare Tax on High Earnings	28
Medicare Tax on Investment	28
Health Ins subsidy/penalty calc	75
After MARCH 20th Surcharge	25
October Surcharge 50%	_____
Foreign Asset Reporting	140

Total Fees for Returns \$ _____

Protection Plus Audit Representation

(nonrefundable) 8% of total fees _____

Mailing/Delivery _____

Total Owed \$ _____

For payment we only accept checks (no credit cards)