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Client: _____ Tax Year **2020**Personal Returns

| | |
|---|--------|
| Long Forms - Fed & State | \$ 425 |
| Short Form - Fed & State | 245 |
| Short Fed and Long Arizona | 320 |
| Other State Return | 190 |
| Early Season Discount (prior to February 20th) | (25) |
| Incomplete Tax Organizer surcharge | 25 |

Income Items

| | |
|---|-------|
| Interest & Dividends – First | 17 |
| Thereafter \$3.5 each x _____ | _____ |
| Business/Farm | 175 |
| Rental \$31 each x _____ | _____ |
| Partnership, S Corp, Estate or Trust \$37 each x _____ | _____ |
| Passive Activity Loss Limitation | 75 |

Schedule D Items

| | |
|--|-------|
| Stock Sale – First | 25 |
| Thereafter \$17 each x _____ | _____ |
| Bad Debt Loss | 40 |
| Tax Deferred Exch. (Section 1031) | 200 |
| Residence Sale | 80 |
| Other Sale | 100 |
| Installment Sale - First Year | 100 |
| -Subsequent Years | 35 |
| Capital Loss Carryforward | 35 |
| Foreclosure/Repossession | 150 |
| Capital Gains/Dividend Tax Calculation | 30 |

Pension Items

| | |
|--------------------------------------|----|
| IRA Deductible Calculation | 50 |
| SEP/Keogh Calculation | 50 |
| Non-Deductible IRA - Form 8606 | 25 |
| Premature Distribution (10% penalty) | 25 |

Adjustments to Income

| | |
|----------------------------------|-----|
| Self-Employed Health Insurance | 10 |
| Health Savings Account (HSA) | 35 |
| Foreign Income Exclusion | 130 |
| Student Loan Interest Deduction | 20 |
| Tuition Deduction | 20 |
| Qualified Business Inc Deduction | 100 |

Deductions (Additional Forms)\

| | |
|------------------------------------|-------|
| Investment Interest | \$ 40 |
| Non-Cash Contribution (over \$500) | 50 |
| Casualty Loss | 100 |

Other Schedules

| | |
|--------------------------------|-------|
| Depreciation \$14 each x _____ | _____ |
| Estimated Tax - Federal | 45 |
| Estimated Tax - State | 35 |
| Self-Employment Tax | 28 |
| Underpayment Penalty | 40 |
| Net Operating Loss Calculation | 100 |
| Alternative Minimum Tax | 105 |
| Home Office | 55 |

Tax Credits

| | |
|--|-----|
| Dependent Tax Credit | 40 |
| Education Credit | 45 |
| Child Care Credit | 45 |
| Foreign Tax Credit | 75 |
| Energy Credit | 30 |
| Earned Income Credit | 50 |
| Sick and Family Leave Credit | 100 |
| Retention Credit | 100 |
| Arizona Credits - Forms 301 & _____ | 50 |

Other Items

| | |
|-------------------------------------|-------|
| Rework - Client Change | 50 |
| Extension | 50 |
| Taxable Social Security Calculation | 30 |
| Medicare Tax on High Earnings | 25 |
| Medicare Tax on Investment | 25 |
| Health Ins subsidy/penalty calc | 65 |
| After MARCH 20th Surcharge | 25 |
| October Surcharge 50% | _____ |
| Foreign Asset Reporting | 125 |

Total Fees for Returns \$ _____

Retainer - Audit Representation

(nonrefundable)(Arizona residents only) 8% of total fees _____

Mailing/Delivery _____

Total Owed \$ _____

For payment we only accept checks (no credit cards)