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Client: _____ Tax Year **2017**Personal Returns

Long Forms - Fed & State	\$ 380
Short Form - Fed & State	210
Other State Return	170
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	150
Rental \$31 each x _____	_____
Partnership, S Corp, Estate or Trust \$35 each x _____	_____
Passive Activity Loss Limitation	65

Schedule D Items

Stock Sale - First	25
Thereafter \$17 each x _____	_____
Bad Debt Loss	30
Tax Deferred Exch. (Section 1031)	150
Residence Sale	50
Other Sale	70
Installment Sale - First Year	85
-Subsequent Years	25
Capital Loss Carryforward	30
Foreclosure/Repossession	100
Capital Gains/Dividend Tax Calculation	30

Pension Items

IRA Deductible Calculation	28
SEP/Keogh Calculation	35
Non-Deductible IRA - Form 8606	25
Premature Distribution (10% penalty)	18

Adjustments to Income

Moving Expense	30
Self-Employed Health Insurance	10
Health Savings Account (HSA)	35
Foreign Income Exclusion	130
Student Loan Interest Deduction	20
Tuition Deduction	20
Domestic Production Activities	60

Deductions (Additional Forms)

Investment Interest	\$ 33
Non-Cash Contribution (over \$500)	45
Casualty Loss	100
Employee Business Expense	80

Other Schedules

Depreciation \$13 each x _____	_____
Estimated Tax - Federal	43
Estimated Tax - State	33
Self-Employment Tax	28
Underpayment Penalty	40
Net Operating Loss	100
Alternative Minimum Tax	75
Home Office	55

Tax Credits

Child Tax Credit	40
Education Credit	40
Child Care Credit	40
Foreign Tax Credit	75
Energy Credit	30
Earned Income Credit	40
Arizona Credits - Forms 301 & _____	40

Other Items

Rework - Client Change	50
Extension	50
Taxable Social Security Calculation	27
Phase Out Exemption/Deductions	30
Medicare Tax on High Earnings	25
Medicare Tax on Investment	20
Health Ins subsidy/penalty calc	65
After MARCH 20th/OCTOBER Surcharge	25

Foreign Asset Reporting 125

Total Fees for Returns \$ _____

Retainer - Audit Representation

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

Mailing/Delivery _____

Total Owed \$ _____