

Information as of January 2016

Service Provided: taxes, planning, investments	Indicative Pricing (\$)
Tax Preparation	
Basic federal with Schedules A, B, D. Also one state	\$275
Dependent family member (basic return)	\$50
Independent family member	30% discount
Additional state, per state	\$70
Rental real estate income, Schedule E	\$125 minimum
Foreign Bank Account Report Form 114 or 8938	\$40
Installment Agreement	\$25
Preparation of estimated tax and related vouchers	No charge
Extension for federal and state	\$25
Reviewing and explaining IRS or state notices	Free initial review
Responding to notices and correspondence	Fee depends on time involved
Amendment for current or prior year	Fee depends on reason for amendment
Small Business Tax Preparation	
Sole Proprietor, Schedule C	\$125 minimum
NYC Unincorporated Business Tax return	No charge for business income below \$90k; \$50 for income greater than \$90k
New York MCTMT	No charge
Partnerships Form 1065 with no more than three partners	\$400 minimum
Nonprofits Form 990EZ	\$350 minimum
Corporation tax returns (C or S)	Fee upon request
Financial Planning	
Comprehensive financial plan	Pricing available on request
Consultation, maximum two hours	Pricing available on request
Projects	Pricing available on request
Investment Management	
Includes ongoing financial planning and tax preparation	Pricing and a proposal available on request