

	Basic	Moderate	Complex
Base Price	\$350+	\$475+	\$650+
Base Price + Additional Items = Tax Prep Fee ¹			
¹ If you fit into two or more categories, higher rates will apply			
Filing Status			
Single	✓	✓	✓
Married Filing Jointly	✓	✓	✓
Head of Household	✓	✓	✓
Qualifying Widow(er)	✓	✓	✓
Married Filing Separate		✓	✓
Income Sources			
W-2 Wage Income	✓	✓	✓
Interest and Dividend Income (1099-INT/1099-DIV)	✓	✓	✓
Unemployment Income (1099-G)		✓	✓
Social Security Income (1099-SSA)		✓	✓
Retirement Income (1099-R)		✓	✓
Stocks, Bonds, and Investments (1099-B)		✓	✓
Gambling Winnings (W-2G)		✓	✓
Sole Proprietor Income (Schedule C)*			✓
Rental Property Income (Schedule E)*			✓
Investment Income (Schedule K-1)*			✓
Single Member LLC/Qualified Joint Venture			✓
Foreign Income			✓
*Additional charges may apply for multiple Schedule C, E, or K-1 entries.			
Deductions			
Standard Deduction	✓	✓	✓
Medical and Dental Deductions		✓	✓
State and Property Tax Deductions		✓	✓
Home Mortgage Interest Deductions		✓	✓
Charitable Contribution Deductions		✓	✓
Casualty and Theft Losses Deductions		✓	✓
Credits			
Earned Income Tax Credit	✓	✓	✓
Premium Tax Credit (Affordable Care Act 1095-A)	✓	✓	✓
Child/Dependent Care Tax Credits		✓	✓
Education Tax Credits		✓	✓
Miscellaneous Items			
Federal Return Filing	✓	✓	✓
State Return Filing**	✓	✓	✓
E-file	✓	✓	✓
Year-round Access for Quick Questions	✓	✓	✓
Digital Document Storage	✓	✓	✓
Newsletter Subscription		✓	✓
IRS Notice Assistance		✓	✓
**Additional fees for additional state returns			
Additional Unique Tax Items - Additional Fees Apply			
Sale of Principal Residence	* Additional Fee	* Additional Fee	* Additional Fee
Sale of Business/Rental Property	* Additional Fee	* Additional Fee	* Additional Fee
Sale and Other Disposition of Capital Assets	* Additional Fee	* Additional Fee	* Additional Fee
Change in Accounting Method	* Additional Fee	* Additional Fee	* Additional Fee
Self Employed Pension Calculation	* Additional Fee	* Additional Fee	* Additional Fee
Business Use of Home	* Additional Fee	* Additional Fee	* Additional Fee
Adoption Credit	* Additional Fee	* Additional Fee	* Additional Fee
Residential Energy Credit	* Additional Fee	* Additional Fee	* Additional Fee
Plug-In Electric Drive Motor Vehicle Credit	* Additional Fee	* Additional Fee	* Additional Fee
IRA Contributions Deduction	* Additional Fee	* Additional Fee	* Additional Fee
Roth IRA Conversion	* Additional Fee	* Additional Fee	* Additional Fee
Quarterly Estimates	* Additional Fee	* Additional Fee	* Additional Fee
Foreign Bank Account Reporting (FBAR)	* Additional Fee	* Additional Fee	* Additional Fee
Gains and Losses From Cryptocurrency Transactions	* Additional Fee	* Additional Fee	* Additional Fee
Foreclosure or Debt Cancellation (1099-C)	* Additional Fee	* Additional Fee	* Additional Fee
Filing Extension	* Additional Fee	* Additional Fee	* Additional Fee
Amended Return	* Additional Fee	* Additional Fee	* Additional Fee
Tax Planning	* Additional Fee	* Additional Fee	* Additional Fee
Representation Before Tax Authorities	* Additional Fee	* Additional Fee	* Additional Fee
Handling of Messy or Incomplete Documents	* Additional Fee	* Additional Fee	* Additional Fee