

Bookkeeping services (Quickbooks)				
Quickbooks clean up	\$35/h			
	Bronze	Silver	Gold	Diamond
Monthly account reconciliation	✓	✓	✓	✓
Monthly transactions limit (all accounts), \$1/extra transaction over the limit.	25	50	100	250
Bank and credit card accounts	1	2	4	7
Monthly Profit & Loss, Balance sheet, Quarterly Year to date statements	✓	✓	✓	✓
Payroll reconciliation with W-3 and payroll provider			✓	✓
Reconciliation with payment processors (Stripe, Square, etc.)			✓	✓
Vendor report, A/R aging summary, Quarterly Year to date statements.				✓
Monthly Plan	\$100	\$170	\$300	\$450

Business Tax Returns	
1120, 1120s, 1065	
\$0 income/expenses business returns	\$300*
Revenue under \$250k	\$750*
Revenue over \$250K	\$900 and up*
Priority/Rush Business Tax Preparation (engagement signed and documents uploaded less than 30 days before tax deadline)	\$200
Business Tax Return Extension (7004) (FREE with signed tax return preparation engagement.)	\$150
* Business tax return filers must provide an Income Statement and Balance Sheet, or request bookkeeping services.	

Sales Tax

One-Time Services:

Sales Tax Registration/Sales Tax Permit Registration	\$130
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Ongoing Services:

Simple sales tax return	\$100 + return**
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Complex sales tax return	contact for details
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\$0 Sales Tax returns	\$25
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** clients must provide information about collected sales tax

BUSINESS FORMATION

LLC PACKAGE

- Name Availability Check
- Official Articles of Organization
- FREE corporate compliance tool (compliance reminders)
- FREE Registered Agent Service for 1 year
- Federal EIN number (for non resident +200\$)
- Custom Operation Agreement
- Shipping & handling
- Standard Processing Speed (filed within 24 hours, processing depends on the state)
- The pricing doesn't include state filing fees or any newspaper publication fees (when required)

\$400 + fee

CORPORATION PACKAGE

- Name Availability Check
- Official Articles of Incorporation
- FREE corporate compliance tool (compliance reminders)
- FREE Registered Agent Service for 1 year
- Federal EIN number (for non resident +200\$)
- Corporate Bylaws and Minutes

\$450 + fee

Payroll	
One-Time Services:	
Register as an employer at the federal level	\$130
Register as an employer at the state level	\$100 (if applicable)
Submit a New Hire Report for officially hired employees	\$50 per person (if applicable)
Payroll calculation (federal + state taxes)	\$30 per person
Ongoing Services:	
Monthly federal tax payments	\$20/month or \$50/quarter
Quarterly preparation of federal reports	\$75/quarter
Quarterly state tax payments	\$50/quarter
Quarterly payroll report preparation	\$75/quarter
Annual filing of W-2 forms	\$100/year
Total per Quarter:	\$250 + \$100 annually (W-2 filing)

Addition information:	
S-corporation election	\$100
Late S-corporation election	\$150
1099 filing	\$30(\$25>5pcs)
S and C corporation reasonable compensation report	\$100/report
*1120, 1120S, 1065 fillers get personal returns at 25% off (if business return isn't discounted)	

Individual Tax Preparation

1040 base

1040 base fee Includes the following:

- Up to 3 W2s (each additional \$5)
- Retirement income 1099-R
- Social Security Income (SSA-1099)
- Taxable Disability Income
- Unemployment income (1099-G)
- Taxable Refund (1099-G)
- IRA Deduction
- Student Loan Interest Deduction
- Educator expenses
- Interest (1099-INT)
- Dividends (1099-DIV)
- One State Return

\$280

W4

W4 form

\$35

Schedule C (Small Business). Sole-Proprietors & SMLLCs (includes 1099-NEC, 1099-K forms)

Schedule C (Small Business). Sole-Proprietors & SMLLCs (includes 1099-NEC, 1099-K forms)

\$100

* If you have multiple Schedule C's, each additional form is 25% off

** Schedule C filers must provide Income Statement or fill out Schedule C Business Income & Expenses organizer or request bookkeeping services.

Additional Items

Additional state

\$80/each

Stocks/covered securities (1099-B)

\$20 per broker

Uncovered stocks, Restricted Stocks (RSU), Options

\$65 -\$300

Cryptocurrency (Must provide 1099-B/Summary.**)

\$25 per
broker/wallet

Misc.Income (Non-business 1099-K, Jury Duty, Prizes, Awards, Taxable Alimony, Settlements)
(up to 3 1099-misc forms are included, additional \$5/each)

\$25

Cancelled Debt exclusion/Cancelled Debt Income (1099-C)

\$50

Individual Tax Preparation

Additional Items	
Gambling (W2-G) (up to 3 included, additional \$5/each)	\$20
Rental Income (Schedule E)	\$150 per property
Depreciation	\$20/asset (max \$500)
Sale of primary residence	\$75-\$150
Sale/disposition of business property (depending on complexity)	\$100-\$250
Additional Medicare tax	\$15
1040 ES -estimated tax vouchers + state vouchers	free
K-1 income depending on the complexity	\$25-\$95
Child Tax Credit (CTC)	free
Earned Income Credit (EIC)	\$15
Day Care credit	\$25 per dependent
Educational Credits	\$35
Electric vehicle credit	\$50
Foreign tax credit (1116)	\$150
Foreign Income Exclusion (2555)	\$150
Premium Tax Credit (1095-A)	free
NOL (federal or state)	\$100
8824 -Like Kind Exchanges	\$200

Individual Tax Preparation

Additional Items	
CA 568 LLC with tax return	\$50
CA 568 LLC standalone	\$100
CA Unreimbursed Employee Expenses	\$75
1040X (+cost of the return with changes)	\$100
Gift Tax Return (709)	\$250
Foreign Gift Tax Return (3520)	\$250
FBAR (up to 3 accounts, \$15 each additional)	\$100
8938 -Statement of Foreign Financial Assets up to 3 accounts (\$15/each additional)	\$120
4868-1040 extension (with tax preparation deposit)	\$50-100
9465 Installment agreement filed with the return	\$120
Priority/Rush Tax Preparation (engagement signed and documents uploaded less than 30 days before tax deadline)	\$200
*If no tax statement is available, clients must connect wallets to ZenLedger or a similar service to generate tax reporting documents.	