



TAX FEE METHODOLOGY

Tax Compliance		
Activity	Description	Fee
Preparing Tax forms only (i.e., for 1040 and other associated forms)	Preparation of the forms themselves and filing of the forms with the taxing authorities. This fee includes the occasional response to questions associated with the current tax year.	Depends on the number and complexity of the forms. Please see the Engagement Letter for the specific forms to be prepared and associated costs of the preparation.
Tax Planning and Consulting		
Responding to IRS notifications and letters of inquiry or other taxing authority correspondence via letters or phone calls	Investigation, research and response to notifications and letters submitted to the tax payer or tax preparer, including client discussion and correspondence.	\$225 per hour
General tax advice, tax planning consultation, or general business accounting advise and planning; includes any financial projections, analysis or modeling; done via emails, phone calls, in-person or zoom meetings	Development of strategies and planning of business operations and execution to maximize tax positioning and minimize end of the year tax liabilities	\$225 per hour
Accounting, bookwork or spreadsheet analysis; includes correspondence via emails or phone calls with other professionals (e.g., book keepers, other accountants, lawyers)	Organization of supporting documentation, receipts and other accounting information; includes consultation and advice associated with accounting, business or tax software	\$75 per hour
Other out of pocket expenses	Administration activities such as postage, faxes and overnight delivery using outside vendors	Costs as charged