



Tax Preparation Services – 2014 fee schedule

Note: all services are pre-paid in full

Annual “Everything” package (save up to 80% !)

Includes: individual tax returns + *unlimited* consultations + IRS audit insurance **\$3,000**

Tax preparation (*with good records!*) – for individuals, including single-member LLCs

No businesses, **no** self-employment income, **no** investment real estate **\$500**

With business, self-employed or job-related business expenses, **other than RE investor**

One business (consultant, realtor, distributor, etc.) **\$800**

Two businesses (for example, one for each spouse) **\$1,000**

Real estate investor (Realtors and wholesalers – see above)

0 to 3 properties (rented, flipped or owner-financed) **\$800**

4 to 6 properties (rented, flipped or owner-financed) **\$1,000**

7 to 10 properties (rented, flipped or owner-financed) **\$1,200**

more than 10 properties or **1031 exchange** *ask for a quote*

State tax returns or foreign income **\$200** per state
(if you worked / lived / owned property *outside Texas*)

Tax preparation (*with good records!*) – for partnerships and corporations

Partnership or S-corporation **other than RE investor** **\$800**

Partnership or S-corporation for Real estate investor

0 to 3 properties (rented, flipped or owner-financed) **\$800**

4 to 6 properties (rented, flipped or owner-financed) **\$1,000**

7 to 10 properties (rented, flipped or owner-financed) **\$1,200**

more than 10 properties or **1031 exchange** *ask for a quote*

Texas Franchise tax reports, under \$1 million gross receipts *add \$200*
(single-member or husband-wife LLCs are also required to file!)

Tax return preparation – EXTRA fees

IRS audit insurance (free professional representation if audited by the IRS)

Individual tax return (form 1040), including business schedules **\$400**

S-Corporation (form 1120S) or partnership (form 1065) return **\$600**

Bad or incomplete documentation, requiring clarifications and/or research **\$40 / hr**

Tax planning (“what-if” optimization; balancing risk vs. savings, etc.) **\$200 / hr**

Urgency premium – upon your request for urgent services (after cut-off deadline) **+50%**

Tax return preparation – DISCOUNTS (yes, they can be combined)

Current (paying) members of the RICH club or the Wealth Club **–10%**

Loyalty discount for **returning clients** (with **perfect data**; no face-to-face meetings) **–20%**

Perfect books discount – Bookkeeping done by Thuy Vo bookkeeping service **–10%**