

Mark Schwanbeck Tax Preparation

Mark Schwanbeck, EA

Enrolled Agent admitted to practice before the IRS

**Submit Documents by
June 15, 2020 for 25%
Early Bird Discount**

2020

2019 Tax Return

Preparation Price List

Forms/Schedules/Services	Description	Price
1040	Basic Return (2 W-2s, no schedules)	\$100 each
1040	Complex Return (up to 4 W-2s)	\$175 each
State Return	All states except NY and CA	\$100 each
Schedule A	Itemized Deductions	<i>included - no charge</i>
Schedule B	Interest & Ordinary Dividends	\$15 for each 1099INT or 1099 DIV
Schedule C & SE	Sole Proprietor or LLC*	\$100 each
Schedule D	Capital Gains and Losses from Sales	\$15 for each 1099B (security sale)
Schedule D	Property Sales and Non-Public Securities	\$85 each transaction
Schedule D	Restricted Stock Sales	\$85 each property
Schedule E (front)	Rental Property Income/Loss*	\$125 each property
Schedule E (back)	Supplemental Income/Loss	\$80 each K-1
1040 ES / New W-4 Work Sheet	Estimated Tax Withholding/Payments	\$50 each
Form 9465	Installment Payment Agreement	\$80 each
Small Business Accounting	Starting at	\$250 price quote will be provided
1040X - Amended Tax Return	Starting at	\$250 price quote will be provided
Other Services	Tax Planning, Representation & Amended Returns	\$200 per hour – quote will be provided

*** \$25/hour for additional bookkeeping if required to prepare these schedules.**

All information must be submitted by 7/1/2020 for the 7/15/2020 tax return filing deadline. **Tax return information submitted after that deadline may require the filing of a three-month extension.** However, if all the information is provided, most returns will be completed and filed before August 1, 2020.

Extensions must be requested by 7/13/2020 and the \$40 fee must be submitted with request.

Discounts

EARLY BIRD DISCOUNT -- If all your tax documents are submitted by **6/15/2020**, a 25% discount will be applied on your tax return invoice.

ELECTRONIC SUBMISSION -- If you scan your tax documents and submit the PDF files via our file upload site, by 6/15/2020, you will be eligible for a \$50 discount.

DEPENDENT DISCOUNT -- As a client of Mark Schwanbeck Tax Preparation, we will prepare your dependent(s) tax returns for half of the standard fee.

REFERRAL BONUS -- If you refer a friend or colleague to us, existing clients will be eligible for a \$25 referral bonus that will be applied to your invoice or paid with an Amazon gift card. (Ask anyone you refer to mention your name!)

How Much Will My Return Cost?

If you would like an estimate for your tax return preparation cost, send an email to mark@mstaxprep.com or call (703) 906-5056. We will need to see your last year's tax return, or you can tell us the title of each page. If your tax situation has changed this year, that will affect the accuracy of the estimate.

The following tax forms are charged at \$25/form:

Income Forms: W-2s, 1099R, 1099M, 1099G, 1099SSA
 Foreign Tax Credit (1116)
 Child Tax Credit (8812)
 Health Savings Accounts (8889)
 Additional Medicare Tax (8959)
 Net Investment Income Tax (8960)
 Due Diligence Checklist (8867)
 Tuition and Fees Deduction (8917)

Most other tax forms are charged at \$40/form:

Six Month Extension (4668)
 Additional Tax on Qualified Plan (5329)
 Alternative Minimum Tax (6251)
 Child/Dependent Care Expenses (2441)
 Child's Interest & Dividends (8814)
 Credit for Elderly or Disabled (R)
 Earned Income Credit (EIC)
 Educational Credits (8863)
 Explanation for Not Filing Electronically (8948)
 Homebuyer Credit Repayment (5405)
 Non-Cash Charitable Contributions (8283)
 Non-Deductible IRA Contribution (8606)
 Mortgage Loan Limit Worksheet
 Office Expenses (8829)
 Passive Activity Loss (8582)
 Premium Tax Credit (8962)
 Power of Attorney (2848)
 Qualified Business Income Worksheet
 Residential Energy Credit (5695)
 Sale of Business Property (4797)