

**2021
2020 Tax Return
Preparation Price List**

Mark Schwanbeck Tax Preparation

Mark Schwanbeck, EA

Enrolled Agent admitted to practice before the IRS

**Submit Documents by
March 15, 2021 for 20%
Early Bird Discount**

Forms/Schedules/Services	Description	Price
1040	Basic Return (2 income forms, no schedules)	\$100 each
1040	Complex Return (up to 4 income forms)	\$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 corporate stock
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
Printing and Mailing	Preparation charge for paper tax returns	\$50 each
Small Business Accounting	Starting at	\$300 price quote will be provided
1040X - Amended Tax Return	Starting at	\$250 price quote will be provided
Retainer-Based Services	Tax Planning, and IRS/State Representation Services	\$200 per hour-quote will be provided

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

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

Income Forms: W-2, 1099R, 1099M
1099NEC, 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)
Credit for Elderly or Disabled (R)

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

Additional Tax on Qualified Plan (5329)
Alternative Minimum Tax (6251)
Child/Dependent Care Expenses (2441)
Child's Interest & Dividends (8814)
Claim of Refund for Deceased (1310)
Passive Activity Loss (8582)
Earned Income Credit (EIC)
Educational Credits (8863)
Employee Business Expenses (2106)
Homebuyer Credit Repayment (5405)
Not Filing Electronically (8948)
Six Month Extension (4668)
Non-Cash Charitable Contributions (8283)
Non-Deductible IRA Contribution (8606)
Mortgage Loan Limit Worksheet
Office Expenses (8829)
Qualified Business Income Deduction (8995)
Premium Tax Credit (8962)
Power of Attorney (2848)
Qualified Business Income
Residential Energy Credit (5695)
Sale of Business Property (4797)

All information must be submitted by 3/15/2021 for the 4/15/2021 tax return filing deadline. **Tax return information submitted after that deadline may require the filing of a six month extension. However, if all the information is provided, most returns will be completed and filed before June 1, 2021**

Extensions must be requested by 4/13/2021 and the \$40 fee must be submitted with request.

Available Discounts

EARLY BIRD DISCOUNT -- If all your tax documents are submitted by **3/15/2021**, a 20% discount will be applied on your tax return invoice.

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

Included Services

Annual services include income tax return preparation, estimated taxes, payroll withholding analysis, tax planning for life events (e.g., birth of a child, marriage, etc.) and related tax questions.

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.

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75 West School Street, Unit 218, Charlestown, MA 02129
C: (703) 906-5056 | O: (617) 829-5056 | F: (410) 867-4837
mark@mstaxprep.com | www.mstaxprep.com