

2023
2022 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, 2023 for 20%
Early Bird Discount

Forms/Schedules/Services	Description	Price
1040	Basic Return (2 income forms, no schedules)	\$130 each
1040	Complex Return (<i>up to 4 income forms</i>)	\$225 each
State Return	All states except NY and CA	\$120 each
Schedule A	Itemized Deductions	<i>included - no charge</i>
Schedule B	Interest & Ordinary Dividends	\$20 for each 1099INT or 1099 DIV
Schedule C & SE	Sole Proprietor or LLC*	\$120 each
Schedule D	Capital Gains and Losses from Sales	\$20 for each 1099B (security sale)
Schedule D	Property Sales and Non-Public Securities	\$125 each transaction
Schedule D	Restricted Stock Sales	\$125 each corporate stock
Schedule E (front)	Rental Property Income/Loss*	\$150 each property
Schedule E (back)	Supplemental Income/Loss	\$95 each K-1
1040 ES / New W-4 Work Sheet	Estimated Tax Withholding/Payments	\$60 each
Form 9465	Installment Payment Agreement	\$100 each
Printing and Mailing	Preparation charge for paper tax returns	\$60 each
<u>Amended Returns, Small Business Accounting and Representation</u>		
Business Tax Returns	Forms 1065, 1120-S, 1120, & 990 Starting at	\$850 Estimates and
Small Business Accounting	Starting at	\$360 price quotes will
1040X - Amended Tax Return	Starting at	\$300 be provided for
Retainer-Based Services	Tax Planning, and IRS/State Representation Services	\$200 these services.
* \$50/hour for additional bookkeeping if required to prepare these schedules.		

The following tax forms are charged at \$30/form:

Income Forms: W-2, 1099R, 1099M	Additional Tax on Qualified Plan (5329)
1099NEC, 1099G, 1099SSA	Alternative Minimum Tax (6251)
Foreign Tax Credit (1116)	Child/Dependent Care Expenses (2441)
Child Tax Credit (8812)	Child's Interest & Dividends (8814)
Health Savings Accounts (8889)	Claim of Refund for Deceased (1310)
Additional Medicare Tax (8959)	Passive Activity Loss (8582)
Net Investment Income Tax (8960)	Earned Income Credit (EIC)
Due Diligence Checklist (8867)	Educational Credits (8863)
Tuition and Fees Deduction (8917)	Employee Business Expenses (2106)
Credit for Elderly or Disabled (R)	Homebuyer Credit Repayment (5405)
	Not Filing Electronically (8948)

Most other tax forms are charged at \$50/form:

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 3/20/2023 for the 4/17/2023 tax return filing deadline.

Tax return information submitted after the deadline may require the filing of a six-month extension. After the April tax deadline, once you provide your tax return information, most returns are completed within three weeks.

You will receive a \$50 invoice when your extension is filed. This payment will be credited to your invoice when the returns are completed.

Available Discounts

EARLY BIRD -- If all your tax documents are submitted by 3/15/2023, a 20% discount will be applied to your tax return invoice.

DEPENDENT -- Your children's tax returns will be prepared for half to 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. We will need to see your last year's tax return. If your tax situation has changed this year, that will affect the estimate's accuracy.