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## Tax Preparation Services

### Critical Items for Tax Consultations

- Valid state issued photo ID
- A complete copy of the previous year's returns
- All forms W-2, 1099 & 1098
- Property tax receipts
- Detailed income and expense information for small business and rental real estate
- List of charitable contributions (date, amount & name of charitable organization.)
- Any additional information pertaining to the current tax year

### 2020 Tax Consultation Pricing \*

CLIENTS & AFFILIATES	NON CLIENTS
<b>\$195 per standard return</b> Schedules included: A - Itemized deductions B - Interest and dividends D - Capital gains and losses.	<b>\$275 per standard return</b> Schedules included: A - Itemized deductions B - Interest and dividends D - Capital gains and losses.
<b>+\$30 for Schedule C</b> (business income)	<b>+ \$30 for Schedule C</b> (business income)
<b>+\$30 for a Schedule E</b> (real estate income)	<b>+\$30 for a Schedule E</b> (real estate income)
<b>+\$50 for an additional state</b>	<b>+\$50 for an additional state</b>

### Tax Form Mailing Dates

Investment related tax documents such as **consolidated 1099's will generally not be mailed until late February**. If you hold securities (usually mutual funds) that report undistributed capital gains, these gains will be reported on a form 2439 which will not be mailed to clients until **mid March, 2021**.

### Turbo Tax Affiliate Discount

For those who prefer to prepare their own taxes, TD Ameritrade Institutional provides a discounted TurboTax download for affiliate firms at: <https://turbotax.intuit.com> If you have additional questions, feel free to visit our tax resource page at: <https://www.werthwealth.com/tax-preparation-resources/> or the IRS website at <https://www.irs.gov/>.

\* Additional fees may apply for unusual circumstances or engagement other than Schedules A, B & D.

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