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

2021 Tax Consultation Pricing *

CLIENTS & AFFILIATES	NON-CLIENTS
$205 per Form 1040 Schedules included: A - Itemized deductions B - Interest and dividends D - Capital gains and losses.	**$295 per Form 1040** Schedules included: A - Itemized deductions B - Interest and dividends D - Capital gains and losses.
+$40 for Schedule C (business income)	**+ $40 for Schedule C** (business income)
+$40 for a Schedule E (real estate income)	**+$40 for a Schedule E**(real estate income)
+$60 for an additional state	**+$60 for an additional state**
$305 per form 1041, 1065, 1120 or 1120S	**$395 per form 1041, 1065, 1120 or 1120S**

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 2022**.

TurboTax Affiliate Discount

For those who prefer to prepare their own taxes, TD Ameritrade Institutional provides a discounted Turbo-Tax 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 https://www.irs.gov/

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

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