Tax Preparation Services

Important Deadlines

- 4/15/24 – IRS Tax Filing Deadline
- 3/15/24 – Tax files must be received at PWM to guarantee filing by the IRS deadline. Files received after 3/15/2024 will be filed on extension.

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

2024 Tax Consultation Pricing *

CLIENTS & AFFILIATES
$250 per Form 1040 Schedules included: A - Itemized deductions B - Interest and dividends D - Capital gains and losses.
+$50 for Schedule C & E (business income, real estate income)
+$75 for an additional state
$350 per form 1041, 1065, 1120 or 1120-S

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 2024**.

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