



Individual Fixed Billing Worksheet

Client Contact information

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| | Price Per Form | Number Of Forms | Estimated Total |
|--|----------------|-----------------|-----------------|
| Form 1040 - Base Rate | \$170 | | \$0 |
| Computer Fees | \$10 | | |
| If paper filing return | \$20 | | |
| Scan source documents manually | \$15 | | |
| Scan/Postage/Express Mail - if original documents are scanned or being returned | \$10 | | |
| Additional Forms Needed - (Does not include projection) | | | |
| Form 4868 - Extension of time to file (does not include a projection if needed) | 15 | | |
| Form 1040 ES - Estimated Tax - per quarter - (does not include projection or safe harbor calc) | 15 | | |
| Form 2441 - Child & Dependant Care Credit | 35 | | |
| Form 6251 - Alternative Minimum Tax - (does not include AMT planning or analysis) | 20 | | |
| Form 8801 - Credit for prior years minimum tax | 40 | | |
| Form 8879 - Efile Authorization | 20 | | |
| Form 3903 - Moving Expenses | 45 | | |
| Schedule A - Itemized Deductions | | | |
| Form 4952 - Investment Interest | 30 | | |
| Form 8283 - Charitable Deductions | 20 | | |
| Form 4684 - Casualty Losses | 35 | | |
| Form 2106 - Employee Expenses | 45 | | |
| 50 | | | |
| Schedule B - Interest & Dividends | | | |
| 1099's in excess of 5 | 10 | | |
| | 2 | | |
| Schedule C - Sole Proprietorship | | | |
| Prep using our organizer | 50 | | |
| Prep using source documents - (does not include bookkeeping) | 80 | | |
| Form 8829 - Business Use of Home | 35 | | |
| Form 6198 - At Risk Limitation | 20 | | |
| 4562 - Depreciation of assets - up to 5 | 25 | | |
| Assets in excess of 5 | 5 | | |
| Form SE - Self Employment Tax | 5 | | |
| Schedule D - Capital Gains & Losses | | | |
| Assumes you provide info. Up to 5 transactions | 15 | | |
| Capital transactions in excess of 5 | 5 | | |
| Short sale or foreclosure | 30 | | |
| Form 6252 - Installment Sale Income | 30 | | |
| Form 4684 - Casualty & Thefts | 45 | | |
| Form 4797 - Sale of Business Property | 30 | | |
| Sale of business assets in excess of 3 | 5 | | |
| Schedule E - Supplemental Income & Loss | | | |
| K-1's | 30 | | |
| Rental Activity | 8 | | |
| Prep using our organizer | 25 | | |
| Prep using source documents - (does not include bookkeeping) | 40 | | |
| 4562 - Depreciation of assets - up to 5 | 25 | | |
| Assets in excess of 5 | 5 | | |
| Form 6198 - At Risk Limitation | 20 | | |
| Form 8582 - Passiv Loss Limitations up to 3 activities | 25 | | |
| Form 8582 for Passive activities in excess of 3 | 5 | | |
| Form SE - Self Employment Tax | 5 | | |
| Schedule 4562 - Other Depreciation of Assets. Up to 5 | | | |
| Assets in excess of 5 | 25 | | |
| Recalculate Depreciation on existing assets | 5 | | |
| 5 | | | |
| Other Forms | | | |
| Schedule EIC - Earned Income Credit | 20 | | |
| Schedule R - Credit for Elderly or Disabled | 20 | | |
| Form 1040 NR - Nonresident | 210 | | |
| Form 2848 - Power of Attorney | 10 | | |
| Form 4972 - Tax on lump sum distributions | 20 | | |
| Form 8822 - Change of Address | 0 | | |
| Form 8615 - Tax for Children under 14 | 25 | | |
| Form 2210 - Annualized Calculations | 25 | | |
| State Returns | | | |
| California | 100 | | |
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Other Items or Calculatons (specifically quoted fees):

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|---------------------------------------|--|--|--|
| Projection for extension | | | |
| Projection for estimated tax payments | | | |
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Total Amount Due with Return

\$0.00