

J D AND COMPANY
1040 TAX PREPARATION FEES SCHEDULE

<u>Personal Returns</u>			<u>Pension Items</u>			<u>Tax Credits</u>		
1040 Page 1 & 2	\$	120	IRA/Roth IRA Worksheet	\$	15	Tax Credit (3800)	\$	35
Schedule A	\$	75	SEP/KEOGH	\$	35	At Risk Computation (6198)	\$	35
"Kiddie Tax" (8615/8814)	\$	40	Lump Sum Distribution (4972)	\$	60	Child Care (2441)	\$	35
<u>Business</u>			Premature Distributions (5329)	\$	25	Foreign Tax (1116)	\$	38
Self-Employment Tax (SE)	\$	25	Defined Benefit Plan	\$	60	ITC/179 Recapture	\$	38
Business/Farm (Sch C or F)	\$	75	Non-Deductible IRA Dist. (8606)	\$	30	EIC	\$	22
<u>Various Sales (Sch D, 4797, 6252)</u>			Social Security Calculation	\$	35	Fuel (4136)	\$	22
Stock Sale (Sch D)	\$	40	Pension Rollover (more than 1)	\$	35	Elderly (R)	\$	22
Bad Debt Loss	\$	40	Minimum Distribution Calculation	\$	50	Child Tax Credit (8812)	\$	30
Like Kind Exchange	\$	165	<u>Adjustments to Income</u>			Hope and Lifetime Credit (8863)	\$	30
Other Sale (4797)	\$	40	Employee Business Expense (2106)	\$	30	<u>Other Items</u>		
Recapture	\$	28	Alimony Paid or Received	\$	10	Administration (all returns)	\$	50
Installment Sale:			Early Withdrawal Penalty	\$	25	Form W-4 Calculation	\$	25
First Year	\$	85	Higher Education Expense			Estimates (Fed, CA)- ea	\$	10
Subsequent Years	\$	30	Teacher Deduction	\$	6	Extensions	\$	75
Foreclosure	\$	200	Student Loan Interest	\$	6	Tax Projection Worksheet	\$	100
Repossession	\$	200	Clean Fuels	\$	25	Dissolution (through attorney)		
<u>Other Income Items</u>			<u>Other Schedules</u>			Incorporation (through attorney)		
Interest & Dividend- ea	\$	5	Casualty Loss (4684)	\$	50	ID numbers	\$	85
Substitute W2 (4852)	\$	35	Depreciation (4562)- ea	\$	6	1099's/W2's- ea	\$	25/50
Extra W2 schedule (more than 3 W2s)- ea	\$	10	Underpayment Penalty	\$	13	Extra Copy of Return	\$	25
Rental Property (Sch E) 1st property	\$	50	Tax on Tips (4137)	\$	29	Rerun- Client Change	\$	75
Additional Properties- ea	\$	35	Net Operating Loss (1139)	\$	75	Express Mail cost		Actual
Partnership, Estate or Trust (K-1)	\$	50	Investment Interest (4952)	\$	40	<u>Other Returns</u>		
Additional K-1s- ea	\$	35	Foreign Income (2555)	\$	75	California	\$	75
Passive Loss (8582) per item	\$	7	Deceased Taxpayer Refund (1310)	\$	30	Out of State Returns	\$	100
<u>Discounts</u>			Alternative Minimum Tax (6251)	\$	30/60	Personal Property Tax	\$	75/150
Dependents		50% off	Home Office Calculation (8829)	\$	28/55	<u>Electronic Filing</u>		
Married Filing Separate	30%	off Joint	Non-Cash Contribution (8283)	\$	35	All eligible returns will be electronically filed		
Tithing Credit		10%	Moving Expense (3903)	\$	38	at no additional charge. This applies only to		
E-Organizer		10%	Discharge of Indebtedness (982)	\$	57	returns originally filed with J D and Company.		
			Tax Shelter Disclosure (8271)	\$	25	<u>Consulting Services</u>		
			<i>The minimum fee for any new return is \$275 except dependents which is \$100.</i>			Other Consulting (hourly rate)	\$	100
						Personal Financial Plan		Ask for referral

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EXAMPLES:

A. Typical W2 income with Itemized Deductions:
\$ 320

B. Same as A above but with Schedule C Income:
\$ 420

C. Same as A above but with Rental or Pass through Income (sched E):
\$ 383