

2011 FEE SCHEDULE

Please note that these fees are approximate. Actual fees depend on many factors – forms required, actual preparation time, organization and availability of data, length of interview, special requests, etc.

BASIC FORM 1040 AND ONE STATE (Includes MN M1PR)

NO ITEMIZED DEDUCTIONS (“SHORT FORM” plus Federal Schedules L& M)

Less than 5 items of income	200
5-10 items of income	260
More than 10 items of income	300
Less than 5 items of income – dependent – we do parents	60
Minnesota Contribution Subtraction	10

ITEMIZED DEDUCTIONS (“LONG FORM”)

Less than 5 items of income	300
5-10 items of income	325
More than 10 items of income	360

PRIMARY STATE OTHER THAN MINNESOTA

25

ADDITIONAL SCHEDULES AND CALCULATIONS

Schedule C-EZ (simple business return)	50
Schedule C or F or 4835 (business or farm) MINIMUM FEE	125
Schedule D – Capital Gains and Losses – if basis is provided	15
Basic calculation	100 /hr
Schedule E – Rental Property	100 /ea property
Schedule E – K-1’s prepared by outside firm (no charge if we prepared the K-1)	35 /ea K-1
Schedule EIC – Earned Income Credit	30
Form 2106 – Employee Business Expenses	40
Form 2210 – Penalty calculation – annualization may require add’l fee	25
Form 2441 – Child Care Credit	25
Form 5405 – Homebuyer credits	30
Form 5695 – Energy credits	30
Form 6251 – Alternative Minimum Tax	35
Form 8283 – Non Cash Contributions greater than \$500	25
Form 8582 – Passive Activity Losses	25
Form 8606 – IRA & Roth IRA basis information	15
Form 8829 – Business use of your home	30
Form 8863 and/or 8917– Education credits (including optimization calculation)	25
Form 8889 – Health Savings Account	20
Estimated Tax Calculation	30
Tax Projection for Next Year	100 minimum
Summarize Information (e.g. non cash contributions, medical expenses, etc)	50 /hr
MN Education expenses – Credit or Subtraction	25
Additional State – NON RESIDENT OR PART-YEAR RESIDENT	85
Amended Returns (ORIGINALLY PREPARED BY US)	100
Paper Filing (if eligible for electronic filing - \$5 remitted to State of MN)	35
Extension (if information is received after March 19)	35
Analyze Dependent/Non-dependent choices	35
Analyze married filing separate/tax liabilities	35
Roth Conversion options	35 minimum
Respond to tax authority correspondence	100 /hr

Minnesota Property Tax Return

If we prepare your tax return, the Minnesota property tax return is included in your preparation fee even if we prepare it later. If, however, you are not required to file an income tax return and you would like us to calculate your property tax refund, we must charge according to the above schedule since we must prepare a tax return as the starting point.