

IRS Forms & Schedules to be Prepared	
Form 1040 - U.S. Individual Income Tax Return	\$150
Form 1040-ES - Estimated Tax Payments (Includes CA)	\$20
Schedule A – Itemized Deductions (Form 1040)	\$125
Schedule B - Interest & Ordinary Dividends	\$45
Schedule C - Profit or Loss From Business	\$200
Schedule C-EZ - Net Profit from Business	\$125
Schedule D - Capital Gains and Losses	\$125
Schedule E (Pg. 1) – Supplemental Income & Loss (per Rental Property)	\$175
Schedule E (Pg. 2) - Income or Loss from Partnerships & S-Corps	\$35
Schedule EIC - Earned Income Credit	\$45
Form 1045 - Schedule A - NOL (Page 3)	\$25
Form 1119 - Foreign Tax Credit	\$50
Form 2106 - Employee Business Expenses	\$50
Form 2441 - Child & Dependent Care Expenses	\$35
Form 3903 - Moving Expenses	\$35
Form 4562 - Depreciation & Amortization (5 assets or less)	\$45
Form 4797 - Sales of Business Property	\$125
Form 4868 - Application for Automatic Extension to File	\$125
Form 5695 - Residential Energy Credits	\$45
Form 6251 - Alternative Minimum Tax-Individuals	\$25
Form 8283 - Noncash Charitable Contributions	\$45
Form 8582 - Passive Activity Loss Limitations	\$75
Form 8863 - Education Credits	\$35
Form 8949 - Sales and Other Dispositions of Capital Assets	\$65
Schedule 8812 - Child Tax Credit	\$45
Form 8867 - EIC/CTC/AOTC Due Diligence Checklist	\$35

Form 8889 - Health Savings Accounts (HSAs)	\$35
Form 8829 - Expenses for Business Use of Home	\$45
Form 8880 - Credit for Qualified Retirement Savings Contributions	\$35
Form 8958 - Allocation of Tax Amounts - Community Property States	\$35
Form 8959 - Additional Medicare Tax	\$45
Form 8960 - Net Investment Income Tax - Individuals	\$35
Form 8962 - Premium Tax Credit (Health Insurance)	\$45
Form 8965 - Health Coverage Exemptions	\$45
Documents to be Analyzed	
Form W-2 - Additional Wage and Tax Statement	\$25
Form W-2G - Certain Gambling Winnings	\$25
Form 1099-MISC - Miscellaneous Income	\$25
Form 1099-B - Proceeds From Broker Exchange	\$25
Form 1099-DIV - Dividends and Distributions	\$15
Form 1098-E - Student Loan Interest Deduction	\$10
Form 1099-G – Certain Government Payments	\$25
Form 1099-G - Report of State Income Tax Refund (new clients only)	\$25
Form 1099-INT - Interest Income	\$10
Schedule K-1 (1120S) - Shareholder's Share	\$25
Schedule K-1 (1065) - Partner's Share	\$25
Form 1099-R - Distributions from Pensions	\$25
Form 1098 - Mortgage Interest Statement (with Schedule A)	Included
Form 1098 - Additional Mortgage Interest Statement (<1)	\$35
Form SSA-1099 - Social Security Benefit Statement	\$25

California	
CA Form 540 – California Resident Income Tax Return (with IRS Form 1040)	Included
CA 5532 - Head House Filing Status	\$20
CA Form 568 - Limited Liability Return of Income	\$200

Updated: December 7, 2017