



Susan Silverman Quigley, CFP®

Certified Financial Planner

8 Yale Street • Garden City, New York 11530

Phone: 516 354 3334 • Fax: 516 320 6879 • Email: Susan@squigleyfinancial.com

To our tax clients – legally we must post a fee schedule but please know that we are not charging for every single form ON TOP of the initial fee. We know that most returns include several different income sources and expenses, and our initial fee builds that in. However, some clients have multiple numbers of forms that are very time consuming. For example, K1s, or 3 or 4 brokerage accounts with trading that must be entered in 3 different parts of the software, or multiple rentals etc. Based on your prior year return or what you submit to us, WE WILL LET YOU KNOW IN ADVANCE if your return is going to cost more than the typical \$350 (\$400 for documents submitted after March 23rd, 2023).

Item & Description	Fee
Base return – Most of our clients are within the \$350-400 range 1040 with 1 state assuming no more than 1 of each for typical forms 1099 int & investment mortgage and property tax statements, childcare etc. See below for additional charges for Sch E and C and excessive D **If items submitted before March 22nd (allowing for 1 or 2 items missing) All Sch C and Sch E info must be in before March 22nd for \$350 & \$400 if items submitted after March 22nd**	\$350
Simple /1040 EZ return No more than 3 forms: standard deduction (not incl. cap gains) **\$250 before March 22nd & \$300 after March 22nd**	\$250 & \$300
Childcare /Child Tax Credit	**Included in base return**
Itemizing Schedule A	**Included in base return**
Crypto Reports For additional reports, refer to pricing up for excessive trading	**1st Included in base return**
Charitable Contributions – For up to \$500 **For donations over \$500, requiring form 8823 - \$25 for up to 3 forms**	**Included in base return**
EXTRA FORMS	
Excessive Trading & Investments – Int. & Dividend forms Excessive trading requiring 8949 or manual entry \$25 – per 1099 consolidated stmt. showing only div. & int. \$50 – per 1099 consolidated stmt. showing div., int. & trading	\$25 & \$50
Estimated Tax Calculation & Payment Coupons/Schedule	\$25

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Item & Description	Fee
<u>Schedule E – For Rental Property</u> **price per property**	\$50
<u>K1 – Adding K1 to Return</u> **price per form** <i>Including the details in statements and other parts of the K1</i>	\$50
<u>Foreign Tax Credit – Forms 116 & Other Foreign Income Forms</u>	\$25-\$50
<u>Education Credits</u> **price per child**	\$25
<u>Additional States</u> **price per state**	\$50
<u>Going on Extension – If missing one doc (i.e., K1)</u> <i>Includes prep of estimated taxes to be submitted with Extension and filing Federal and State Extension</i>	\$50
<u>Going on Extension – If filing for full return</u> <i>Includes rough estimate of taxes to avoid penalties – not responsible for penalties if estimate is wrong based on incomplete information</i>	\$150
<u>Letters from IRS and NYS</u> <i>We are not obligated to help you with audit letters unless the letter is due to a mistake on our part. Depending on the issue, we will give you instructions on how to proceed, at no cost</i>	** Cost varies **
<u>Amendment due to SQuigley Financial Error</u>	**No Charge**
DISCOUNTS	
<u>Investment Client Discount</u> <i>For clients with investments of under \$500k with SQuigley Financial</i>	**20% Discount**
<u>Investment Client Discount</u> <i>For clients with investments of over \$500k with SQuigley Financial</i>	\$100 **Flat fee to cover labor cost**
<u>Investment Client Discount</u> <i>For clients with investments of over \$1mil. with SQuigley Financial</i>	**Free**

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