

Do you have a tax prep checklist?

Yes, our tax organizer TY2023 is designed to help you remember what tax-related documents you'll need to gather and information you need to provide.

I'm a new client. Is there anything special I need to do?

When uploading your files, if we do not have, please scan and upload a copy of your 2022 tax return, both federal and state, if applicable, along with your driver's license(s) and social security card(s).

Will you require a deposit with my Organizer/Questionnaire?

Yes, for NEW clients a \$275 deposit is required to reserve your spot before we start your return. This non-refundable deposit is not your return's total cost. However, it will be applied to your bill. EXISTING clients who pay the deposit will be worked before those that do not but it is not required for existing clients except for priority treatment.

How much does a tax return cost?

Generally, I don't do quotes. By the time I look over your info and calculate my time, I have already done the return. Plus, a huge part of the fee is determined by how well you provide the data which I have no way of knowing.

I will never be the least expensive, but I will always bring value to your tax situation and will be in line with what most other EAs or CPAs would charge. The best general guide I can give you is this link to an article Dave Ramsey did about tax fees: <https://www.daveramsey.com/blog/how-much-does-a-tax-pro-cost>. Since Dave did that article, everything has gone up so we may be 15% to 20% higher.

I charge by the time spent and value brought to the tax situation. I charge my time out at \$200 to \$500 per hour and staff time at \$75 to \$200 per hour depending on the difficulty of the situation. Personal returns tend to run on the lower end of that scale and very complicated business, estate and even some very complicated personal returns run to the higher end of that scale.

If you are looking for the cheapest – I am not for you / If you are looking for value – I am for you.

How long does it generally take to process my return?

There are a few items that determine how long it will take us to complete your return. The first is the speed that you get us your documents, next has to do with how quickly you respond to any questions we have, and last is the difficulty of your return. Once we have everything from you, we can generally complete your return in a few days. However, as it gets closer to the April 15th deadline, we get a lot of returns in and that slows down our process due to a backlog. The sooner you can get your deposit paid, Organizer/Questionnaire completed, your documents uploaded to us, and respond to our questions, the sooner you'll get your return.

HOWEVER, we are big believers in extensions, especially for business and complicated personal returns. The LAST THING you want is someone hurrying through your complicated return. In fact, while we cannot prove it, we believe an extended return has less chance of a random audit.