HOW PRICING WORKS	Every new engagement begins with a **$150 Initial Consultation** (45 minutes). The fee is credited toward your engagement if you move forward. After the consultation, we send a service agreement with your scope and fee. Individual returns carry a **$500 minimum**, collected when you engage and applied to your final fee.

Individual Tax Preparation

RETURN TYPE	TYPICAL RANGE	TYPICAL SITUATIONS
Basic W-2 Return	$500 – $650	W-2 income, standard deduction, interest income, limited investment reporting
Standard Individual Return	$500 – $1,500+	Married filing jointly, multiple W-2s, retirement income, mortgage interest, education credits
Self-Employed / Schedule C	$900 – $1,500+	Independent contractor income, business expenses, home office, multiple income streams
Real Estate / Investments	$900 – $1,600+	Rental properties, depreciation schedules, capital gains, brokerage activity
Complex / Multi-State Returns	$1,200 – $2,000+	Multiple state filings, city returns, multiple businesses, significant investment activity

Business & Nonprofit Tax Returns

RETURN TYPE	TYPICAL RANGE	NOTES
1120-S · S Corporation	$900 – $1,800+	Shareholder basis, reasonable compensation review, and books condition drive the fee
1065 · Partnership	$900 – $1,900+	Increases with partner allocations, capital accounts, cleanup, and reconciliation
1120 · C Corporation	$1,000 – $2,200+	Quoted after review of records, filing history, and accounting support needed
1041 · Estate / Trust	$900 – $1,600+	Based on trust activity, beneficiaries, and supporting schedules
990 · Nonprofit	$900 – $2,000+	Quoted after review of organization activity, records, and compliance needs
990-EZ · Small Nonprofit	$900 – $1,300+	Smaller exempt organizations with less complexity

Nonprofit Audit & Assurance

SERVICE	FEE	NOTES
Financial Statement Audit	**Quoted**	GAAS or Government Auditing Standards; based on revenue, funding sources, records and timeline
Single Audit (Uniform Guidance)	**Quoted**	Adds federal award testing and compliance reporting to the financial statement audit
Financial Statement Review	**Quoted**	Limited assurance for boards, funders and lenders that do not require an audit
Agreed-Upon Procedures	**Quoted**	Specific procedures for a grantor, funder or program; scope set in the engagement letter
Compilation / Prepared Statements	**Quoted**	Financial statements prepared from your records, without assurance

Assurance engagements are quoted after an initial review and confirmed in a written engagement letter. Independence rules may limit other services we provide to an audit or review client.

Virtual CFO & Monthly Accounting

PACKAGE	MONTHLY FEE	BEST FOR
Essential Accounting	**$500 / month**	Monthly bookkeeping, reconciliations, monthly close, P&L and balance sheet
Growth CFO	**$900 / month**	Everything in Essential, plus a monthly review meeting, KPI tracking, budget-to-actual and cash flow monitoring
Strategic CFO	**$1,500+ / month**	Everything in Growth, plus forecasting, profitability analysis, tax planning coordination and lender/investor reporting
Custom / Enterprise	**Custom**	Multi-entity or complex businesses needing consolidation, custom reporting and internal controls

Annual business tax returns are quoted separately. Catch-up or cleanup bookkeeping is quoted after review.

Tax Resolution & IRS Representation

SERVICE	TYPICAL RANGE	NOTES
Initial Consultation	**$150**	Review of notices, balances and filing history; credited toward your engagement
Single-Year Return (Resolution Case)	**$500 – $1,200**	Quoted based on filing complexity and urgency
Multiple-Year Filing Engagement	**$900 – $3,500+**	Often required before relief options can be pursued
IRS Notice Review & Response	**$350 – $1,200**	Depends on notice type, response scope and supporting documentation
Installment Agreement Setup	**$500 – $1,500**	Based on case complexity and filings required
Penalty Abatement Request	**$750 – $2,000**	Any contingent fee terms are disclosed in the engagement agreement
Comprehensive Resolution Engagement	**$1,500 – $5,000+**	Larger compliance, notice, balance-due and multi-step matters

Good to know. Ranges reflect typical engagements. Your final fee is confirmed in your service agreement after we review your documents, filing requirements and scope. Work begins once the agreement is signed and the engagement payment is received; returns are filed once the balance is paid.