


1040 Department of the Treasury—Internal Revenue Service (99)
U.S. Individual Income Tax Return
 1—Dec. 31, 2011, or other tax year beginning
 and initial Last name
 Last name and initial Last name

Tax Service Tailored To Your Individual Needs!

Each service is priced as needed and serves as a general guide for what your estimated invoice will be. Our services include your encrypted secure member folder granting you access to your documents 24/7, year-round superior customer service, tax planning at the time of service, and our accuracy guarantee.

Single/ MFS




\$65

Includes 1040, two W2 & E-file forms

Basic


MFJ/ HOH



\$175

Includes 1040, Two W2, CTC, EIC & EFILE


Extra



1099/ Home Office

Sch C, Form 8829, Sch SE Depreciation, 1099 - NEC


\$125



Property Tax, Medical & Charities

Sch A, Form 4684, Form 6251 Form 8283


\$75



Rental Properties

Sch E, 1099-Misc Form 4562, Depreciation


\$75



1095-A/ PTC

8962, ACA Premium Tax Credit


\$35



IRA/Saving

Sch 2, 1099-(R, DIV,INT, SA) Form 5329 & 4972, Sch B


\$35



Student

Form 8863, Form 1098T, Form 8917, 1098E

\$55



Investments

Sch D, 1099-B, Form 8949,

\$75

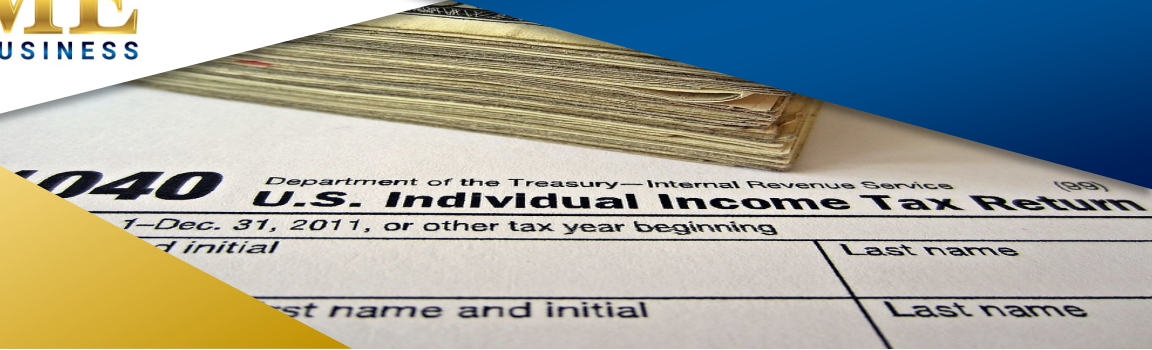


Farm Land

Sch F, Form 4562, form 2210, Sch J & Sch SE,

\$125

Service prices include the anticipated forms to file each service; however, your taxes may be unique and require forms not listed, which may result in additional fees. Fees are due at the time of service. We offer no upfront fee option powered by Santa Barbara bank for an additional \$141.90 (bank fee), to save fees, a convenient in house payment arrangement for \$25, paying with cash or card is free. Fees are subject to if the file is E-filed or submitted to the IRS; if you decided not to file, you would be subjected to a \$75 Tax consultation charge.



Our Accuracy Guarantee

We pride ourselves on our accuracy and are confident in our abilities to maximize your refund while reducing your tax risk and liabilities. What this means if we make a mistake, we will fix it free of charge.

Year Round Customer Service

Our members benefit from our year-round customer service, 24/7 access to their documents and resources through their secure member folder, and member discounts. Our award-winning customer service representatives are available to help you load documents, update your file, basic tax resolution, schedule an appointment, and more.

Tax Resolution

In some cases, a member may forget documents, IRS garnishes the refund because of past debts, chooses to verify the information you submitted, or audits your file and holds up the processing of your tax file. This is not covered under our accuracy guarantee and will require a tax resolution appointment. Fortunately, we made tax resolution affordable by reducing our normal consultation fee to **\$ 75 for the year** if purchased at the time of service, otherwise billed as needed at \$75 per hour. This does not include any forms needs to resolve the IRS issue.

The Best in Audit & Id Theft Protection



Covers denied credits even if the return has not been funded

- EITC
- Child Tax Credit
- Additional Child Tax Credit
- American Opportunity Credit
- First Time Homebuyers Credit
- W-7 rejects

\$99 Yr.



Coverage includes the same as Protection plus and includes:

- 50 Hours off Attorney Representation
- Will Preparation
- Unlimited attorney Advice
- Traffic tickets
- Document review
- Covers the whole family

\$39 Mo.