


## 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 client portal with access to your documents 24/7, year-round superior customer service, tax planning at the time of service, and our accuracy guarantee.


**Single / MFS**



**\$95**

Includes 1040, two W2 & E-file forms


**MFJ / no children**



**\$175**


Includes 1040, two W2 & E-file forms

**MFJ / HOH**



**\$255**


Includes 1040, Two W2, CTC, EIC & EFILE



**1099/ Home Business**

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


**\$129**



**Property Tax, Medical & Charities**

Sch A, Form 4684, Form 6251 Form 8283

**\$95**



**Rental/Royalties**

Sch E, 1099-Misc Form 4562, Depreciation


**\$125**



**Health Care Deductions/Credit**

Form Sch 3, Form 8885, 8962, 8941, Premium Tax Credit


**\$35**



**Retirement/Saving**

Sch B, Sch 1, 1099-(R, DIV,INT, SA), Form 5329, 8880, 4972


**\$45**



**Student Deduction/Credit**

Form Sch 3, Form 1098T, 1098E 8863, 8885, 8962, 8941, or 8917


**\$29**



**Capital Gain/Loss**

Sch D, Sch 1, 1099-(B/S), 1 Form 8949 and 4797, Form 4952, 3468.

**\$75**



**Farm/Ranch**

Sch F, Sch J, Form 1099-NEC, Form 2210, 4562, 8582, 4835

**\$125**

**Additional Taxes**

ALT tax, PTC repayment, Medicare tax, tax on IRA, First time homebuyer repayment, or SE Tax.

**\$59**

**Other Personal Credits/Deductions**

Moving Expenses, Residential Energy, Adoption, Alternative Motor Vehicle, Elderly/Disabled.

**\$35**

These 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 many payment options: a "No Upfront" fee offered through Santa Barbara bank for an additional \$161.90 (bank fee), or we take Cash, Credit/Debit Card for no additional fee. Payment is due before the tax return 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:

- 5 0 Hours off Attorney Representation
- Will Preparation
- Unlimited attorney Advice
- Traffic tickets
- Document review
- Covers the whole

**\$39 Mo.**