2024 Full-Service Individual Tax Return Preparation

**The following is included with full-service individual tax return preparation:**

* IRS Form 1040 (with Schedule A Itemized Deductions or Standard Deduction) and 1st state return.
* Full (but optional) review and signature appointment. Up to 45 minutes of “face time” (plus 15 minutes for adding file notes). Basic tax planning for the upcoming year can be done at this appointment.
* E-filing of all returns and associated schedules. E-file confirmations are available for record keeping as well. (upon request)
* Mid-year withholding checkup (estimated calculations only).
* Up to 1.5 hours of off-season response time by phone or e-mail. This can be used for any tax-related transactions or questions that come up throughout the year.
* Discounts on research time and tax planning consultations.
* Client newsletter with tax tips and curated updates on tax law changes
* Quarterly reminders for estimated tax payments and retirement contributions are included for Schedule C filers.
* Audit protection subscription services including identity theft recovery.
* Private, secure, online portal to house all of your sensitive documents for 3-years.

**The following add-on services are available for an additional fee:**

* Married Filing Separate benefit analysis
* Tax Scenario / Planning Analysis (selling a rental, retirement, etc.)
* Additional tax return copies (upon request)
* In-season blocks of consultation time. We don’t typically do consults for non-clients during tax season. We are happy to consult with existing clients during tax season, but for matters other than return preparation a block of consultation time must be purchased.