

LEGACY TAX ADVISORY LLC

2023/24 Fee Schedule

Preparation 1040 - <i>Includes e-file, direct deposit, year-round service</i>	\$225.00
- Includes 1 HOUR of preparer time – additional time:	\$225.00/hr.
Requested scheduled “face to face” pick up of taxes (per ½ hr. add on)	\$40.00
Addition State Returns	\$50.00
Excess 1099's for Schedule B – <i>per interest item and/or dividend items over 5</i>	\$10.00
Schedule D - <i>up to 5 items with cost basis</i>	\$25.00
Schedule D – <i>5 or more items or cost basis research</i>	\$50.00/hr.
Schedule C – <i>starting at- per schedule</i>	\$225.00
Schedule E – Forms 4797 <i>Per property starting at</i>	\$60.00/ea.
- Schedule E research and/or depreciation Form 4562	\$125.00/hr.
K1's – <i>starting at per schedule</i>	\$85.00
Sale of Residence	\$50.00
Schedule SE	\$45.00
Preparation 1040X, 1120 or 1041 Fiduciary Returns starting at additional	\$125.00
Investment and retirement Forms: 1116, 4972, 5329, 8606, 5498	(each)\$25.00
Tax Credit Forms: 2441, 5695, 8863	(each)\$25.00
Itemized Deduction Forms: Sched A, 8283, 1098	(each)\$25.00
Maryland Property Tax Credit Form-HTC-1	\$45.00
Extensions-Form 4868	\$15.00
Creation of Estimated Taxes Vouchers state federal EST/PV	\$30.00
Underpayment Penalty Forms 2210 and 502 UP	\$25.00
Bookkeeping or Estate Administration Assistance	\$225.00/hr.
Asset Inventory	\$100.00/hr.
Form 8948 – <i>Paper Tax Return IRS form for not filing Electronic Mandate</i>	\$50.00
Add on for Travel for Pick-up and/or Delivery of Tax Returns from Residence	\$75.00
Additional Paper Copy of Return and supporting Documents	\$25.00
Additional Time w/ Tax Preparer-OR Additional not listed Forms	\$225.00/hr.
Delivery by Fed Ex	\$20.00
Additional Tax Analysis or non-related questions	\$225/hr.
Missing Documentation- per follow up/week	\$15.00
Preparation of 1040- EZ	\$185.00

THESE FEES ARE BASED ON PROVIDING ALL OF THE DOCUMENTATION NEEDED AT DROP OFF.

MISSING INFORMATION OR CHANGES MAY CAUSE ADDITIONAL CHARGES.

***Forms of payment accepted: Cash, Check, and Credit Card (5% fee), and Venmo (@LegacyTax)**

Privacy Notice on Other Side

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