



Davis & Associates CPA Firm

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"Your Financial Solutions Team"

Minimum Fee Schedule for Tax Preparation and Related Services *

Personal Return

1040 (Standard Deduction)	185.00
1040 (with Schedule A)	205.00
Additional State Return	50.00

Children's Short Form	75.00
Kiddie Tax Computation (8615)	20.00
Parent's Election (8814)	38.00
Education Credits or Tuition Deductions	50.00
Installment Payment Request (9465)	30.00
Health Care Forms- 95A	25.00
Premium Tax Credit 8962	33.00
Health Coverage Exemptions	49.00

Business & Farm Income / Expenses

Schedule C - Business Income	78.00
Schedule F - Farm Income	78.00
Depreciation & Amortization (4562)	43.00
Depreciation & Amortization New Assets	12.00 each
Business Use of Home (8829)	40.00
Schedule SE - Self Employment Tax	18.00

Other Income Items

Schedule B - Interest & Dividends (First 5 Items)	37.00
Additional Schedule B Items	5.00 each
Schedule E - Rental Property (First Item)	125.00
Additional Properties	75.00 each
Partnerships, Trusts K-1s	25.00 each
Passive Loss Limitations (8582)	30.00

Schedule D Transactions

Stock Sales (First 3 Items)	58.00
Additional Stock Sales	10.00 each
Sale of Business Assets (4797)	44.00
Sales & Dispositions of Capital Assets (8949)	26.00
Installment Sales (6252) (First Year)	65.00
Subsequent Years	30.00 each
Tax Deferred Exchanges	250.00
Capital Loss Carryover	12.00
Repossessions or Foreclosures	49.00

Pension Items (No charge for investment clients)

Calculation of Taxable Social Security Benefits	
Pension Income Computation	25.00
Non-Taxable Portion Computation	40.00
Non-Deductible IRA (8606)	15.00
Keogh, Simple, SEP Calculation	24.00
Lump Sum Distribution (4972)	40.00
Premature Distribution (5329)	13.00
RMD Calculation	63.00
	50.00

Other Schedules

Non-Cash Contributions (8283)	30.00	10.00 each
Moving Expenses (3903)	44.00	
Employee Business Expenses (2106)	45.00	
Alimony Paid/Received	6.00	
Casualty Loss (4684)	160.00	
Estimated Tax Payments (1040ES)	24.00	
Underpayment of Tax (2210)	27.00	
Net Operating Loss Carryback (1045)	92.00	
Investment Interest Expense (4952)	30.00	
Foreign Earned Income (2555)	250.00	
Vehicle Expense	39.00	
Alternative Minimum Tax (6251)	165.00	
Schedule H - Household Employees	225.00	

Credits

Am. Op./Hope, Lifetime Credit (8863)	50.00
Low Income Housing Credit (8586)	12.00
Child Care Credit (2441)	35.00
Foreign Tax Credit (1116)	45.00
Earned Income Credit	75.00
Fuel Tax Credit (4136)	20.00
Child Tax Credit	30.00
Schedule R - Retirement Credit	12.00
Residential Energy Credit (5695)	24.00
Recovery Rebate Credit	20.00

Other Items

SS-4 - Employer ID Number	25.00
W-4 Calculation	25.00
Rerun - Client Changes	15.00
Extra Copy of Return	10.00
Tax Shelter Reporting (8271)	15.00
Tax Consultation - CPA	395.00 hour
Tax Consultation - Non-CPA	200.00 hour
Research Time - Non-CPA	145.00
Bookkeeping	95.00 hour
Power of Attorney (2848)	45.00
Express Mail	Actual cost + 5.00

Corporate

Starting Fees	1595.00 - 2250.00
Fees depend on documents submitted.	
Accounting services billed separate.	95.00 hour

Franchise

Individual entity	325.00
Combined entities	425.00 - 600.00

Miscellaneous

Dependents	No charge
Married filing Separate	30% off joint forms

Updated 01/29/2021

*This is a minimum fee schedule, which can be increased if extra time is needed. V:\davis tax information\fee schedules\