L E G A C Y T A X A D V I S O R Y L L C

2020 Fee Schedule

Preparation 1040 - *Includes Schedule A and B*	$185.00
- Includes **1 HOUR** of tax preparer time – additional time:	$125.00 / hr
Preparation 1040EZ	$85.00
Excess 1099's for Schedule B - *more than 15 interest items and/or 15 dividend items)*	$85.00
Schedule D - *5 items or less*	$25.00
Schedule D - *6 or more items*	$50.00 / hr
Schedule C - *per schedule*	$120.00
Schedule E - *3 properties or less*	$60.00 / ea
- Each Additional Property	$25.00
Schedule F	$50.00
Schedule H	$50.00
K1	$85.00
Sale of Residence	$50.00
Schedule SE	$25.00
Forms 1116, 2106, 2441, 3903, 4972, 5329, 5695, 8283, 8606, 4868	(each) $25.00
Forms 4562, 4797, 6252	$35.00
Preparation 1040X or Fiduciary Returns	$185.00
Preparation Federal and State Estate Taxes	$125.00 / hr
Bookkeeping or Estate Administration Assistance	$50.00 / hr
Asset Inventory	$100.00 / hr
Form 8948 – *Paper Tax Return IRS form for not filing under 2013 Electronic Mandate*	$50.00
Travel for Pick-up and/or Delivery of Tax Returns from Residence	additional $50.00
Additional Paper Copy of Return	$10.00
Additional Time w/ Tax Preparer	$125.00 / hr
Delivery by mail	$15.00

THESE FEES ARE BASED ON PROVIDING ALL OF THE DOCUMENTATION NEED AT DROP OFF. MISSING INFORMATION OR CHANGES MAY CAUSE ADDITIONAL CHARGES.

1623 York Road Lutherville MD 21093   (410) 828-8870

Legacy Tax Advisory LLC
1623 York Road
Lutherville Timonium, MD 21093
(410) 828-8870

PRIVACY NOTICE

Federal law mandates that, as our client, we must make you aware of a law protecting the privacy of individuals. Our firm respects and maintains the confidentiality of our client. In compliance with the law, we inform you that we collect nonpublic, personal information about you from the following sources:

Information we receive from you on tax preparation worksheets and other documents we use in preparing your tax return or other forms and information about your transactions with us or others.

We do not disclose any nonpublic personal information about our clients or former clients to anyone, except when instructed to do so by clients, or as necessary for electronically filing your tax return, or as permitted by law.

Access to nonpublic personal information is restricted to those professionals necessary for providing accounting and tax services to our clients. We maintain physical, electronic, and procedural safeguards that comply with federal standards to guard your nonpublic personal information.

Your confidence in us is very important and we want you to know that your personal and tax information is safe. If you have any questions or concerns, please contact

ENGAGEMENT TERMS

This letter is to confirm and specify the terms of our engagement with you and to clarify the nature and extent of the services we will provide. In order to ensure an understanding of our mutual responsibilities, we ask all clients for whom returns are prepared to confirm the following arrangements:

We will prepare your federal and state income tax returns from information that you will provide us. We will not audit or otherwise verify the data you submit, although it may be necessary to ask you for clarification of some of the information. It is your responsibility to provide all the information required for the preparation of complete and accurate returns. You should retain all the documents, canceled checks and other data that form the basis of income and deductions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority. You have the final responsibility for the income tax returns therefore; you should review them carefully before you sign them.

Our work in connection with the preparation of your income tax returns does not include any procedures designed to discover defalcations or other irregularities, should any exist. We will render such accounting and bookkeeping assistance as determined to be necessary for preparation of the income tax returns. We will use professional judgment in resolving questions where the tax law is unclear, or where there may be conflicts between the taxing authorities’ interpretations of the law and other supportable positions. Unless otherwise instructed by you, we will resolve such questions in your favor whenever possible.

Your returns may be selected for review by the taxing authorities. Any proposed adjustments by the examining agent are subject to certain rights of appeal. In the event of such government tax examination, we will be available upon request to represent you and will render additional invoices for the time and expenses incurred.

L E G A C Y T A X A D V I S O R Y L L C

TAX AGREEMENT

I/We acknowledge receipt of a copy of the 2020 Fee Structure. I hereby consent to have Legacy Tax Advisory LLC prepare my/our tax returns and pay the fee in full in accordance with said fee structure.

I/We authorize, Legacy Tax Advisory LLC, to disclose all of my 2020 tax-related information to the required agencies and departments for the purpose of completing my 2020 tax returns.

I/We acknowledge receipt of a copy of the 2020 Engagement Agreement, Privacy notice and Fee Schedule. I hereby consent to have Legacy Tax Advisory LLC prepare my/our tax returns and pay the fee in full.

____________	________________________	________________________
Date	Client Printed Name	Signature
____________	________________________	________________________
Date	Client Printed Name	Signature

Thanks for the trust you have in us, and letting us be your tax service provider.

Sincerely,

Legacy Tax Advisory LLC
1623 York Road
Lutherville MD 21093
410-828-8870

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