

TAX PREPARATION SERVICES

CRITICAL ITEMS FOR TAX CONSULTATIONS

- Valid state issued photo ID
- A complete copy of the previous year's returns
- All forms W-2, 1099 & 1098
- Property tax receipts
- Detailed income and expense information for small business and rental real estate
- List of charitable contributions (date, amount & name of charitable organization.)
- Any additional information pertaining to the current tax year

2021 TAX CONSULTATION PRICING*

CLIENTS & AFFILIATES	NON CLIENTS
\$205 per Form 1040 Schedules included: A - Itemized deductions B - Interest and dividends D - Capital gains and losses.	\$295 per Form 1040 Schedules included: A - Itemized deductions B - Interest and dividends D - Capital gains and losses.
+\$40 for Schedule C (business income)	+ \$40 for Schedule C (business income)
+\$40 for a Schedule E (real estate income)	+\$40 for a Schedule E (real estate income)
+\$60 for an additional state	+\$60 for an additional state
\$305 per form 1041, 1065, 1120 or 11205	\$395 per form 1041, 1065, 1120 or 11205

TAX FORM MAILING DATES

Investment related tax documents such as **consolidated 1099's will generally not be mailed until late February**. If you hold securities (usually mutual funds) that report undistributed capital gains, these gains will be reported on a form 2439 which will not be mailed to clients until **mid March, 2022**.

TURBOTAX AFFILIATE DISCOUNT

For those who prefer to prepare their own taxes, TD Ameritrade Institutional provides a discounted TurboTax download for affiliate firms at: <https://turbotax.intuit.com> If you have additional questions, feel free to visit our tax resource page at: <http://www.prenticewealth.com/tax-preparation-resources/> or the IRS website at <https://www.irs.gov/>.

* Additional fees may apply for engagement outside the scope of the pricing schedule.

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