

TAX PREPARATION SERVICES

IMPORTANT DEADLINES

- **4/15/24**—IRS TAX FILING DEADLINE
- **3/15/24**—TAX FILES MUST BE RECEIVED AT PWM TO GUARANTEE FILING BY IRS DEADLINE. FILES RECEIVED AFTER 3/15/24 WILL BE FILED ON EXTENSION.

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

2024 TAX CONSULTATION PRICING*

CLIENTS & AFFILIATES

\$250 per Form 1040

Schedules included:

- A - Itemized deductions
- B - Interest and dividends
- D - Capital gains and losses.

\$50 for Schedules C & E

(business income, real estate income)

\$75 for an additional state

\$350 per form 1041, 1065, 1120 or 1120-S

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, 2024**.

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

Neither Cadaret Grant & Co. Inc. nor its registered representatives or employees, provide tax or legal services.

Securities and advisory services offered through Cadaret, Grant & Co. Inc. a Registered Investment Advisor, and member FINRA/SIPC. Additional advisory services offered through Prentice Wealth Management, LLC, an SEC Registered Investment Advisor. Prentice Wealth Management, LLC and Cadaret, Grant & Co. Inc. are separate entities.