

**KJ Tax & Accounting, LLC**  
**Rate Schedule for 2016**

**Published Fees Effective January 1, 2016**  
**Fees may vary by case to case basis**

**Individual Tax Preparation Fees** -anticipated average 10% increase. EXAMPLE: If your last year's charges \$300 now would be \$350 Similar situation needs to apply to qualify. Prices are subject to change due to circumstances changing. Per forms method of billing will be used to determine circumstantial change. In addition, protection "Insurance" package for \$49 per total Invoice will be added to protect you from audit. Our popular portal "SecureDrawer" will be included in your fee at \$12 per year.

**Platinum Monthly Subscription Service-** Our clients best option. The corporate, partnership and or individual return, CPA consultations, CPA tax planning, bookkeeping, QuickBooks Hosting, Insurance, SecureDrawer and pricing for 2016 all for one low monthly inclusive fee. Call 262-514-3800 x223 or e-mail [kjtax@kjtacacct.com](mailto:kjtax@kjtacacct.com) ask for Jim Waterford-or-Call 262-363-2930 x223 or e-mail [kjtax@kjtacacct.com](mailto:kjtax@kjtacacct.com) ask for Jim in Mukwonago. Proposed Monthly Subscription Proposal will be sent. Additional fees may apply if out of the scope of the services.

**Other Pricing Plans-**

**CPA Services** (Corporate, Individual, Estate and Trust Consulting) **\$300.00 per Hour**

**Certified Accountant Services** (CPA Bookkeeping Consultation) **\$180.00 per Hour**

**Certified Bookkeeping Services** **\$120.00per Hour**  
Include data entry of checks, deposits, credit card charges and bank reconciliation for startup or catch up purposes only. Rate will be given before services start. A retainer may be requested before work begins.

**Information Technology Services** **\$180.00 per Hour**  
Calls & questions exceeding 10 minutes will be charged accordingly. Trip time will be billed at \$60 per hour plus \$0.55 per mile. Quotes, contracts and warranties that are signed will be honored in lieu of above.

**SecureDrawer (Not Included in Preparation Fee)** **\$12 per Year**  
A fast, easy and secure electronic means to securely access your tax returns & supporting documentation. Visit [www.kjtaxcpa.com](http://www.kjtaxcpa.com) for more information.

**Required Insurance Protection-** **\$48 Per Return**  
Take the worry out of pesky notices from the IRS. We will represent you in front of the IRS and State Taxing Authorities for up to 4 hours of CPA services to properly resolve your issue. Relax and let us take care of it for you.

**QuickBooks Hosting, Assisted Payroll & Merchant Services** **Call for Pricing**  
KJ Tax is a national leader when it comes to adding efficiency and value to you, your family and your business. We will be identifying opportunities for you along the way to suggest our efficient solutions for you. Packages start as low as \$59.95 per month. Special Promotions will be made available throughout the year. Visit [www.kjtaxcpa.com](http://www.kjtaxcpa.com) for more details.

**KJ Tax & Accounting Interactive Website** **Free**  
Enjoy the benefit of our up to date, interactive and educational website. From our live e-newsletter alerts to interactive Financial Planning tools, feel free to visit often and explore the power of the site.

**Telephone & E-mail Consultation Rates**  
Telephone and E-mail rates same as Consultation rates above. Team member will make every attempt to inform the client that the telephone or e-mail consultation will be a chargeable event or not.

Terms: Individual, Partnership and Corporate tax returns need to be **paid in full by VISA, MasterCard, Discover, AMEX, check or cash** BEFORE the return is electronically filed. Corporate clients, all invoices due on receipt. Administrative fee of \$5 per month and 1.5% interest will be charged on ALL overdue invoices. All invoices over 90 days old will be automatically sent to collections, no exceptions.

**Thank you for your continued business. We value your relationship with us!**

# KJ Tax & Accounting, LLC

## Estimated Fee Schedule

### 2016 Tax Returns 2017 Filing Season

There may be an additional charge for any item not listed.  
 The minimum fee for any new return is \$300 (except dependents \$125).  
 This is a minimum fee schedule which can be increased if extra time is required.  
 (f.f. stands for filing fee;# /# is a typical low/high range)  
 Affordable Care Act 2014 Tax Law Change + 25%

<u>Personal Returns</u>		<u>Pension Items (cont.)</u>		<u>Tax Credits</u>	
1040, Page 1 and 2	\$200	Lump Sum Distribution (4972)	\$67	Tax Credit (3800)	\$39
Schedule A Std Ded	\$50	Premature Distributions (5329)	\$34	At-Risk Computation (6198)	\$39
"Kiddie Tax" (8615/8814)	\$53	Defined Benefit Plan	\$67	Child Care (2441)	\$39
<u>Business</u>		Non-Deductible IRA Dist. (8606)	\$45	Foreign Tax (1116)	\$45
Self-Employ Tax (SE)	\$29	Social Security Calculation	\$29	/TC/179 Recapture	\$47
Statutory Employee Alloc	\$38	Pension Rollover (over 1)	\$20	EIC	\$39
Business/Farm (C F)	\$52/\$123	Minimum Distribution Calculation	\$47	Fuel (4136)	\$28
<u>Various Sales (Sch D, 4797)</u>		<u>Adjustments to Income</u>		Elderly (R)	\$28
Stock Sale (D) {Min \$31}	\$10ea	Employee Business Expense	\$37/\$68	Child Tax Credit (8812)	\$39
Bad Debt Loss	\$44	Alimony Paid or Received	\$20	Hope and Lifetime Credit	\$39
Like-Kind Exchange	\$255	Early Withdraw Penalty	\$20	Retirement Credit	\$28
Other Sale (4797)	\$43	Higher Education Expense	\$39	<u>Other Items</u>	
Recapture	\$37	Teacher Deduction	\$20	Form W-4 Calculation	\$40
Installment Sale (6252):		Student Loan Interest	\$20	Estimates (Fed, St,Local)	\$21ea
First Year	\$100	Clean Fuels	\$28	Extensions	\$35
Subsequent Years	\$38	Manufacturing Deduction	\$250/1500	Tax Projection Worksheet	\$105
Foreclosure	\$190	<u>Other Schedules</u>		Dissolution	\$350
Repossession	\$190	Casualty Loss (4684)	\$70	Incorporation	\$900
<u>Other Income Items</u>		Depreciation (40 min)	\$7 ea	ID Numbers	\$170
Interest/Dividend (Min26)	\$7ea	Underpayment Penalty (2210)	\$31/\$86	1099s and W-2s	\$40+12ea
Substitute W-2 (4852)	\$36	Tax on Tips (4137)	\$34	Extra Copy of Return	\$16
Extra W-2 Sch(over 3)	\$12 ea	Net Operating Loss (1139)	\$139	Copy Tax Return Later	\$26
Rental Property (E) (1st)	\$62	Investment Interest (4952)	\$46	Power of Attorney	\$45
Additional Properties	\$39	Foreign Income (2555)	\$90	Express Mail Actual Cost +	\$5
Partnership, Estate Trust	\$45	Deceased Taxpayer Refund	\$38	529 Plan Setup	\$60 per ace
Additional K-1s	\$30	Alternative Minimum Tax (6251)	\$70	Administration (all returns)	\$50
Passive Loss (8582)	\$57	Home Office Calculation (8829)	\$67	<u>Other Returns</u>	
<u>Consulting Services</u>		Non-Cash Contribution (8283)	\$48	In-State Returns	Inc
Consulting {hourly}	\$40/200	Moving Expense (3903)	\$40	Out of State Returns	\$97
Personal Fin Plan	\$350/1500	Discharge of Indebtedness (982)	\$70	School District Returns	\$36
<u>Pension Items</u>		Tax Shelter Disclosure (8271)	\$28	Local Returns	\$43
IRA/Roth IRA Worksheet	\$20	<u>Discounts</u>		Personal Property Tax	\$41/\$122
SEP/Keogh	\$44	Dependents 50%		<u>Electronic Filing</u>	
		Married Filing Separate 30% off joint		Included at no charge	
				<b>Paper Copy \$15</b>	