

# OWIC CPA - FEES / PRICING

## BUSINESS

BUSINESS	
<b>Forms</b>	
1120S 1 State - 1 Local - up to 4 K-1s	895.00
add Revenue Over \$250K and/or assets over \$1M	325.00
1065 1 State - 1 Local - up to 4 K-1s	895.00
add Revenue Over \$250K and/or assets over \$1M	325.00
Extensions - "Zero" extension \$35 - Extension with Estimates @ hourly rate	See Chart
Additional State/Local	355.00
Additional 8825 pages	195.00
Additional K-1s	10.00
Fixed Asset Schedule - Updating Financials @ Hourly Rate	See Chart
All Other Compilation, Preparation, Research and Review @ Hourly Rate	See Chart

## INDIVIDUAL

INDIVIDUAL	
<b>Forms</b>	
1040 (Includes 1 State)	325.00
Schedule E (rental property)	155.00
Add'l Pages	125.00
Schedule C	195.00
EIC	75.00
Add'l Credits	35.00
Add'l State	99.00
Local - City	150.00
Extension - "Zero"	35.00
Ext. w/ Estimate-hourly rate	See Chart
Schedule D	59.00
8949	39.00

## HOURLY RATES

HOURLY RATES	
Shareholder (CPA, MAcc)	225.00
Accounting/Consulting/Research/Review	
Bookkeeping Manager	75.00
Accounting/Consulting/Research/Review	
Senior Associate (MBA)	75.00
Accounting / Consulting/Research/Review	
Senior Bookkeeper	65.00
Accounting/Consulting/Clean-up for Tax Prep	
Tax Preparer (CA/CPA Candidate)	65.00
Fixed Assets/Consulting/Tax Prep	
ADMIN	40.00

Plans Available - See Next Page

Please note that for the 2023 tax filing season, the minimum cost of tax return preparation for Form 1040 starts at \$325 and will adjust according to complexity and required schedules.

Preparation fees for Forms 1065, 1120 & 1120-S start at \$895 and will adjust based on company gross revenues and overall complexity.

The "charge by form" method of billing tax return preparation fees is transparent but imperfect. Every client's business or situation is different. We take into consideration the time that it takes to prepare each tax form. Occasionally, the "charge by form" method may overstate the price based on actual time or complexity. In these cases we will adjust the final invoice when appropriate. Our goal is to bill our clients in a fair and transparent way.

# OWIC CPA – PLANS / SERVICE LEVELS

## TAX WORK – LEVELS

TAX PREPARATION	COMPLETE COMPLIANCE	STRATEGIST
<ul style="list-style-type: none"> <li>Preparation and filing of tax returns based on documents provided by client.</li> <li>Guidance and advice based on review of documents.</li> </ul>	<p>All items in Tax Preparation plus:</p> <ul style="list-style-type: none"> <li>Quarterly estimate calculations for federal and states, Payment vouchers and instructions</li> <li>Quarterly call to discuss potential changes in income, life situation or family dynamic impacting tax projections</li> </ul>	<p>All items in Complete Compliance plus:</p> <ul style="list-style-type: none"> <li>Monthly or Quarterly Financial Statement and Processes review to strategize optimal tax treatments and prevent lost deductions/credits.</li> </ul>

- “White glove” service can be added to any service level for \$175. This includes, one on one Organizer Interview, personal one on one tax return review, expedited document collection, expedited preparation and concierge payments to taxing agencies (under \$300 – OWIC will pay and add to invoice)
- “White Glove” fee will be added to all files with documents submitted after the published deadlines but requesting timely filing.

## FINANCIAL STATEMENTS – COMPILATION, ANALYSIS & PLANNING

BASIC BOOKKEEPING \$500/Month	CONTROLLER CONFIDENCE Starting @ \$1,000/Month	CFO Starting @ \$2,500/Month
<ul style="list-style-type: none"> <li>Up to 400 Transactions per month</li> <li>Income Statement and Balance Sheet</li> <li>Statements issued by the 15th of the month</li> </ul>	<p>Includes all Basic Bookkeeping items plus:</p> <ul style="list-style-type: none"> <li>Monthly, Quarterly, Annual – Financial Statement review, forecasting, and monthly call.</li> </ul>	<p>All other levels plus:</p> <ul style="list-style-type: none"> <li>Weekly protected one on one service.</li> <li>Planning, implementation, training, process development and execution</li> <li>Catered to specific business needs.</li> <li>Limited availability</li> </ul>

Clean-up, coaching and “one-off” work sessions available at hourly rates. See Chart.

## CONSULTING – BUSINESS DEVELOPMENT, STRATEGY AND COACHING

CONSULTANT	TEAMMATE	PARTNER
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Our number one priority is to make a meaningful impact on your business. We can help with situational one-time consulting projects or ongoing engagements. New ventures, process improvement, pricing or business development, we can help.



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