

The Spale Agency

Tax Preparation Pricing Guide



Tax prep designed for

clarity and confidence!



A more human approach to taxes.



My approach is **clear, structured, and focused on helping you not only file accurately**, but actually understand your financial picture. As a business owner and a mom, I know how important it is to have systems you can trust—especially when life is already busy.

I am here to simplify the process, provide honest guidance, and help you move forward with confidence.

Scope of work.



Tax preparation services.

Tax preparation services streamline your tax preparation and filing. By maintaining clear and up-to-date data, I help you **approach tax season with confidence**,

ensuring you maximize deductions and stay compliant. With precise records in place, you can make informed decisions that support your long-term financial success.

Initial consultation.

To better understand your tax needs and determine the best approach, I offer a **brief initial consultation for a fee of \$25, payable at the time of service.** During this session, we will review your current financial situation, discuss potential tax strategies, and outline the services I can provide to support your tax planning and preparation.

Preparation fees.



Yearly returns.

Flexible tax planning and preparation services are **designed to meet your unique financial needs and budget**, ensuring you receive the support and guidance you deserve.

Basic	Standard (<i>Most Popular</i>)	Advanced
<p>Individuals or small business owners with straightforward tax situations, such as W-2 or 1099 income, minimal deductions, and no complex income sources.</p>	<p>Suitable for clients with more diverse income streams, itemized deductions, small investments, or rental income.</p>	<p>Designed for clients with complex financial situations, including multiple business entities, extensive investments, rental properties, or international income.</p>
<p>Includes:</p> <ul style="list-style-type: none"> Preparation of Form 1040 with basic schedules (e.g., Schedule C with minimal expenses, Schedule SE) Basic review of income and deductions No additional planning or multi-state filings 	<p>Includes:</p> <ul style="list-style-type: none"> Preparation of Form 1040 with Schedule A, Schedule C, Schedule E, and associated forms Basic tax planning and review State return preparation (if applicable) Identification of potential deductions and credits 	<p>Includes:</p> <ul style="list-style-type: none"> Preparation of Form 1040 with multiple schedules (e.g., Schedule D, Schedule K-1, Form 1065, 1120, or 1120S) Detailed tax planning and strategy Multi-state filings and international considerations Audit support and representation (if needed)
<p>\$150-\$300</p>	<p>\$300-\$700</p>	<p>\$700-\$1,500+</p>

Amendments.

Amendment services are billed **based on the complexity and scope of the corrections needed**. We offer the following tiers to provide clear and transparent pricing.

Quick	Routine (<i>Most Popular</i>)	Complex
<p>Clients needing minor, straightforward fixes such as data entry errors or recent transaction updates.</p>	<p>Clients with disorganized records or discrepancies across multiple accounts or periods needing moderate corrections.</p>	<p>Clients with extensive, highly complex records requiring large-scale corrections or reconstruction.</p>
<p>Includes:</p> <ul style="list-style-type: none"> Correcting simple data entry mistakes Updating recent transactions Reconciling a few accounts 	<p>Includes:</p> <ul style="list-style-type: none"> Correcting discrepancies across multiple accounts or previous periods Reorganizing and categorizing records Minor reconciliation of long-back records 	<p>Includes:</p> <ul style="list-style-type: none"> Large-scale corrections involving multiple years Reconciling long-back or highly disorganized records Rebuilding or restructuring extensive data for accuracy
<p>\$250–\$500</p>	<p>\$500–\$1,000</p>	<p>\$1,000–\$3,000+</p>

Quarterly tax filing.

Quarterly tax services are for businesses needing assistance with **quarterly estimated tax payments and filings**, including small to growing businesses with regular tax obligations.

Essential	Growth (<i>Most Popular</i>)	Enterprise
Small, straightforward businesses with minimal transactions and simple tax needs.	Growing businesses with moderate complexity requiring more support and review.	High-volume or highly complex businesses with extensive transactions and multi-state or multi-entity needs.
<p>Includes:</p> <ul style="list-style-type: none"> Preparation and filing of quarterly estimated tax payments Calculation of estimated payments Basic communication with tax authorities if needed 	<p>Includes:</p> <ul style="list-style-type: none"> All Essential services Review of financial data for accuracy Communication with tax authorities on your behalf if needed 	<p>Includes:</p> <ul style="list-style-type: none"> All Growth services Customized tax planning and strategy Ongoing consultation and support for tax obligations
\$200–\$400 per quarter	\$400–\$800 per quarter	\$800–\$1,200+ per quarter

Payroll tax filing.

Payroll tax service ensures your business remains compliant with federal and state tax requirements. I handle the calculation, filing, and remittance of payroll taxes, including **quarterly deposits, tax returns (such as IRS Form 941), and year-end reports like W-2s and 1099s.**

Basic	Enhanced (<i>Most Popular</i>)	Ultimate
Small businesses with straightforward payroll needs and minimal transactions, typically with employees and simple payroll schedules.	Growing businesses with moderate payroll volume and multiple employees, requiring more comprehensive support.	High-volume or complex payroll businesses, multi-state operations, or those with multiple pay schedules and tax jurisdictions.

<p>Includes:</p> <p>Quarterly payroll tax deposit calculations and filings (federal and state, if applicable)</p> <p>Filing of quarterly payroll tax returns (e.g., IRS Form 941)</p> <p>Remittance of taxes to appropriate agencies</p>	<p>Includes:</p> <p>All Basic services</p> <p>Monthly payroll tax deposit calculations and review</p> <p>Filing of all quarterly payroll tax returns (e.g., IRS Form 941, state filings)</p> <p>Year-end reconciliation and W-2/W-3 preparation</p>	<p>Includes:</p> <p>All Enhanced services</p> <p>Customized payroll tax planning and compliance strategy</p> <p>Ongoing support for notices, audits, and multi-state filings</p> <p>Preparation and filing of year-end payroll tax documents (e.g., W-2s, 1099s, W-3s)</p>
<p>\$150–\$300 per quarter</p>	<p>\$300–\$600 per quarter</p>	<p>\$600–\$1,200+ per quarter</p>

Both quarterly and payroll tax filings will follow this schedule for file dates each year:

<p>Q1 (Jan–Mar):</p> <p>April 15th</p>	<p>Q2 (Apr–Jun):</p> <p>June 15th</p>	<p>Q3 (Jul–Sep):</p> <p>September 15th</p>	<p>Q4 (Oct–Dec):</p> <p>January 15th</p>
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Additional services.



Tax consulting.

Organize and review your financial situation, providing accurate, strategic advice to optimize your tax position. This ensures you are well-prepared for tax filing season, maximize applicable deductions, and stay compliant—saving you time, reducing stress, and supporting your overall financial health.

Starter	Pro (<i>Most Popular</i>)	Elite
Ideal for individuals or small business owners seeking quick advice or clarification on specific tax questions.	Suitable for clients wanting strategic planning, review of past returns, and personalized recommendations for tax savings.	Designed for clients with complex needs, including ongoing support, multi-year planning, and representation.
<p>Includes:</p> <ul style="list-style-type: none"> 30-minute virtual or in-person session General guidance on tax questions Basic tips for tax savings 	<p>Includes:</p> <ul style="list-style-type: none"> 1-hour detailed review of financial situation and prior-year returns Customized tax-saving strategies Basic multi-year planning advice 	<p>Includes:</p> <ul style="list-style-type: none"> Multiple sessions tailored to your needs In-depth tax strategy development Support during audits or IRS correspondence Ongoing consultation throughout the year
Starting at: \$50 per session	Starting at: \$150 per session	Starting at: \$500 for multiple sessions

Hourly services.

Specialized support is provided on an hourly basis. These services include **business formation, audit preparation, and licensing assistance**. Below are the rates and brief descriptions to help you understand what's available:



Business Formation & Registration Support

Assistance with setting up your business entity, including LLC registration, corporation formation, and obtaining necessary licenses or permits. Ensures your business is compliant and properly established from the start.

\$100–\$150 per hour



Audit Preparation & Support

Expert help organizing your financial records, reviewing compliance, and preparing documentation to ensure a smooth and successful audit process with the IRS or state agencies.

\$125–\$200 per hour



Legal or Licensing Support

Guidance on acquiring, renewing, or maintaining essential business licenses and permits, making sure your business remains compliant with all regulatory requirements.

\$100–\$175 per hour

Additional fees disclaimer.

Bank, e-file, and other applicable fees are not included in the base price and can be paid directly by the client. These fees may be deducted from your refund or billed separately, with prior notice provided.

Tax filing prices are for a single year; **multiple years will incur additional fees.**

For amended, previous-year, or payroll tax returns, payment is required upfront, plus a **\$92 processing fee per amended return** to cover administrative and filing costs.

A few important notes.



Payment methods & policies.

Consulting and hourly service fees are **billed after the appointment via email invoice, due within 30 days.** Late fees may apply after this period.

For tax preparation, **fees can be deducted from your refund (with prior consent)** or paid upfront through invoicing via email. Payments can be made with debit, credit, or ACH transfer. Your return won't be processed until the invoice is paid in full.

If upfront payment is not possible, **I am exploring financing options through providers like Affirm** to offer more flexibility.

Payment reminders & flexibility.

Clients will **receive automated notices for upcoming payments**. If you need a payment plan or face difficulties, please contact me—I am happy to discuss flexible options.

Referral program.

Referrals are appreciated! When your referral becomes a client, you can **earn rewards such as gift cards, cash, or merchandise**. Contact me for details.

Discounts for eligible groups.

A 20% discount is available for tax prep and consulting services for **healthcare professionals, educators, first responders, military personnel, individuals with disabilities, and low-income clients** (proof required).

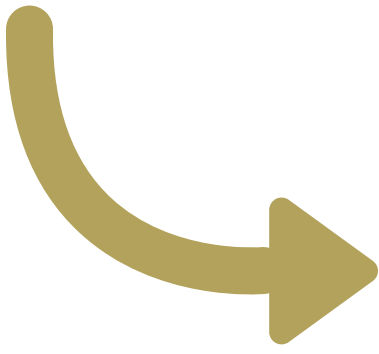
Privacy & disclaimer.

Client data is **kept confidential and only used for services**. These services provide guidance but do not replace legal, tax, or financial advice—consult other professionals for specific issues.

Booking your consultation.



You can schedule your initial consultation easily through the **website or by scanning the QR code below**:



Contact details.



If you have any **questions, need further assistance, or would like to discuss your specific tax support needs**, please do not hesitate to reach out. I look forward to supporting your business and helping you achieve your financial goals!

Spots fill quickly during tax season—**schedule your consultation today!**



(402) 719-4679



laura.spale@thespaleagency.com



www.thespaleagency.com