

Rates Per Form

Enter the rates for the forms listed below.

To use these rates for all returns, check the Per Form Charge box on the Global Billing Options. For a specific return, check the Per Form Charge box on Client-Specific Billing Options for that return.

Form	Rate
Form 1040 Worksheet	100.00
Form 1040 Individual Income Tax	
Form 1040 Schedule 1	50.00
Form 1040 Schedule 2	50.00
Form 1040 Schedule 3	50.00
Federal Information Worksheet	
Identity Verification Worksheet	5.00
Form W-2 Worksheet	2.00
Form W-2G Worksheet	2.00
Form 1099-K Pmt Card Transact Wks	2.00
Form 1099-MISC Worksheet	2.00
Form 1099-NEC Worksheet	2.00
Form 1099-G Worksheet	2.00
Form 1099-Q Worksheet	2.00
Form 1099-R Worksheet	2.00
IRA/ESA/QTP Distribution Info Wks	
Form 1099-MSA Worksheet	
Wages, Salaries & Tips Worksheet	
See FORMLIST	

Additional Information From Form 1040: Individual

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Earned Income Worksheet	
State Tax Refund Worksheet	
IRA Contributions Worksheet	
IRA Deduction Worksheet	
ROTH IRA Contribution Limit Wks	
Social Security IRA Worksheet	
Taxable IRA Distribution Worksheet	
Keogh/SEP/SIMPLE Contributions Wks	
Social Security Benefit Worksheet	
Lump-Sum Social Security Worksheet	
Earlier Year Lump-Sum Soc Sec Wks	
Other Income Statement	
Net Operating Loss Worksheet	
Net Operating Loss Classification	
Form 7206: SE Health Insurance Ded	
Student Loan Deduction Interest Wks	
Educator Expenses Worksheet	
Education Tuition and Fees Wks	
Tax Payments Worksheet	
Standard Ded. Wks for Dependents	
Dependency Support Worksheet	
Qual Dividends/Cap Gain Tax Wks	
Child Tax Credit Worksheet	
Electronic Filing Information Wks	
IRS E-file Authentication Stmt	
Form 8878 E-file Extension Applic	50.00
Form 8879 E-file Signature Auth	
TPG Bank Product Information Wks	
Refund Advantage Information Wks	
QuickCollect Information Wks	
Schedule A Itemized Deductions	75.00
Std Deduct with Qual Disaster Loss	
Medical Expenses Worksheet	
State and Local Tax Deduction Wks	
Computation of Exclusion-State Tax	
Form 1098 Mortgage Interest Stmt	
Deductible Home Mrtg Int Wks	
Noncash Contributions Statement	
Contributions of Motor Vehicles	
Charitable Ded Limits Wks-Current	
Charitable Ded Limits Wks-Carryover	
Charitable Contributions Summary	
Misc Itemized Deductions Stmt	
Schedule B Interest & Ordinary Divd	5.00
Interest Income Worksheet	
Dividend Income Worksheet	
Interest & Dividend Summary	
Seller-Financed Mortgage Int Stmt	
Form 8938 Stmtnt Foreign Fincl Assets	
8938 Continuation Statement	
Schedule C Business Profit & Loss	100.00
Schedule C Two-Year Comparison	5.00

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Schedule D Capital Gains & Losses	5.00
Schedule D Tax Summary	
Schedule D Wks - Line 19	
Schedule D Wks - Line 18	
Schedule D Tax Worksheet	5.00
Capital Loss Carryover Worksheet	
Capital Loss Carryover to 2021	
Summary of Compensation-Employer St	
Exercise of Stock Options Worksheet	
Schedule D Tax Refigured for AMT	
Form 1099-B Wks	
Capital Gain (Loss) Adjustment Wks	
Employer Stock Transaction Wks	
Form 8949 Sales/Disp of Cap Assets	
Home Sale Worksheet	25.00
Adjusted Basis of Home Sold Wks	
Schedule E Supplemental Income	75.00
Schedule E Worksheet	
Schedule E Two-Year Comparison	
Rental Real Estate Enterprise Stmt	
Schedule E, p2	
Schedule EIC Earned Income Credit	
Earned Income Credit Worksheet	50.00
Schedule F Farming Profit or Loss	25.00
Sch H Household Employment Taxes	
Schedule J Farm Income Averaging	
Sch J - Tax Optimization Wks	
Sch J - 2019 Sch D Tax	
Sch J - 2018 Sch D Tax	
Sch J - 2017 Sch D Tax	
Sch J Base Year Information Wks	
Schedule J Tax Wks	
Schedule K-1 Partnership	25.00
Schedule K-1 Partnership Addl 1	
Schedule K-1 Partnership Addl 2	
Publicly Traded Partnership Wks	
K-1P At-Risk Limitation Worksheet	
K-1P At-Risk Limitation Wks AMT	25.00
Partnership Supplemental Expenses	
Sec 59(e)(2) Expenditures Wks	
Schedule K-1 - S Corporations	25.00
Schedule K-1 S Corp Addl Info 1	
Schedule K-1 S Corp Addl Info 2	
K-1S At-Risk Limitation Worksheet	
K-1S At-Risk Limitation Wks AMT	
Sec 59(e)(2) Expenditures Wks	
Schedule K-1 - Estates and Trust	25.00
Schedule K-1-Estates and Trust-2019	
Sch LEP Req for Language Preference	
Schedule R Elderly, Disabled Credit	
Physicians Statement	
Schedule SE Self-Employment Tax	
Schedule SE Adjustments Worksheet	
Form 1040-ES Estimated Tax #1	2.00

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Form 1040-ES Estimated Tax #2	2.00
Form 1040-ES Estimated Tax #3	2.00
Form 1040-ES Estimated Tax #4	2.00
Form 1040-ES Estimated Tax Wkst	2.00
Form 1040-V Payment Voucher	
Form 1040X Amended Individual Income	195.00
Form 1040X Addl Dependents Stmt	
Form 1045 Appl. for Tentative Refund	
Form 1045 Schedule A NOL	
Form 1045 Schedule B NOL Carryover	
Form 1095-A Health Ins Market Stmt	15.00
Form 1099-A Acq/Abandon Secured Prop	
Form 1099-C Cancellation of Debt	25.00
Canceled Debt Worksheet	
Statement of Insolvency	20.00
Canceled Debt Summary	
Form 1116 Foreign Tax Credit	
Foreign Tax Credit Comp Wks	
Foreign Tax Credit Suppl. Stmt	
Form 1116 AMT Foreign Tax Credit	
Foreign Tax Credit AMT Wks	
Sch B Form 1116 Carryover Schedule	
Form 1310 Claim Refund of Deceased	
Form 2106 Unreimbursed Employee Exps	25.00
Form 2106 Adjustments Worksheet	
Employee Home Office Worksheet	
Form 2120 Multiple Support Declar.	
Form 2210 Underpayment of Est. Tax	
Form 2210 Underpayment Penalty Stmt	
Form 2210 Annualized Income	
Form 2210-F Underpayment Farmer/Fish	
Late Penalties & Interest Wks	
Form 2439 Notice to Shareholders	
Form 2441 Child & Dependent Care Exp	15.00
Form 2555 Foreign Earned Income	
Form 2555 Foreign Earned Inc Alloc	
Form 2555 Foreign Earned Ded Alloc	
Form 2848 Power of Attorney	20.00
Form 3115 Appl for Change Acctg Meth	
Form 3468 Investment Credit	
Form 3800 Business Credit	
General Business Credit Worksheet	
Form 3903 Moving Expenses	
Form 4136 Fed Tax Paid on Fuels Cr	10.00
Form 4137 Taxes on Unreported Tips	
Form 4255 Recapture of Investment Cr	
Form 4506 Request for Copy of Return	
Form 4506-T Request for Transcript	
Form 4562 Depreciation and Amortiz	
Car & Truck / Vehicle Expenses Wks	
Depreciation Asset Entry Worksheet	
Depreciation Reports-By Form	
Depreciation AMT Reports-By Form	
Depreciation Reports-All Assets	

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Depreciation AMT Reports-All Assets	
Next Year Depreciation Reports	
Next Year AMT Depreciation Reports	
Sec 179 Limitation Worksheet	
Sec 179 Expense Report	
Form 4684 Casualties and Theft	
Form 4684 p2 Casualties and Theft	
Form 4684 p3 Casualties and Theft	
Form 4684 p4 Casualties and Theft	
Form 4684 Casualty Worksheet	
Form 4797 Sales of Business Property	
Form 4797, p2	
Additional Form 4797	
Disposition Worksheet	
Form 4835 Farm Rental Income & Exps	
Form 4852 Substitute for W-2, 1099R	
Form 4868 Application for Extension	
Form 4868 EF Information Worksheet	50.00
Form 4952 Investment Int Exp Deduct	
Form 4952 Worksheet	
Form 4952 AMT Worksheet	
Form 4970 Tax -Accum Distr of Trusts	
Form 4972 Lump-Sum Distribution Tax	
Form 4972 Worksheet	
Form 5329 Add'l Tax - Qualified Plan	
Form 5405 First-Time Homebuyer Cr	
Form 5405, Copy 2	75.00
Form 5471 Info Ret of Foreign Corp	
Schedule E, Form 5471	
Schedule G-1, Form 5471	
Schedule H, Form 5471	
Schedule I-1, Form 5471	
Schedule J, Form 5471	
Schedule M, Form 5471	
Schedule O, Form 5471	
Schedule P, Form 5471	
Schedule Q, Form 5471	
Schedule R, Form 5471	
Form 5695 Residential Energy Credit	
Joint Occupant Max Residential Cr	
Form 5884 Work Opportunity Credit	
Form 6198 At-Risk Limitations	
Form 6198 Worksheet	
Form 6251 Alternative Minimum Tax	
Alternative Minimum Tax Worksheet	
Foreign Earned Income Tax Wks	
Form 6252 Installment Sale Income	
Form 6478 Biofuel Producer Credit	
Form 6765 Increasing Research Act Cr	
Form 6781 Sec 1256 Gains and Losses	
Form 7203, S Corp Basis Limitations	
Form 8283 Noncash Charitable Contrib	
Form 8332 Release of Exemption Claim	
Form 8379 Injured Spouse Allocation	

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Form 8396 Mortgage Interest Credit	25.00
Form 8453 Declaration for e-file	
Form 8582 Passive Activ Loss Limit Modified Adjusted Gross Income Wks	
Form 8582 Worksheets 1-5	
Form 8582 pg 2 Wkst 4 for CRD	
Form 8582 Worksheets 6-7	
Form 8582 AMT Passive Loss Limit	
Form 8582 AMT Worksheets 1-5	
Form 8582 AMT pg 2 Wkst 4 for CRD	
Form 8582 AMT Worksheets 6-7	
Form 8582-CR Passive Activ Cr Limit	
Form 8582-CR Entry Worksheets	
Form 8582-CR Worksheets A	
Form 8582-CR Worksheets 1-6	
Form 8582-CR Worksheets 7-9	
Form 8586 Low-Income Housing Credit	
Form 8594 Asset Acquisition Stmt	
Form 8606 Nondeductible IRAs	
Form 8615 Children Investment Income Form 8615 Worksheet	
Form 8615 Schedule D Worksheet	
Form 8615 QDCG Worksheet	
Form 8615 Line 7 Worksheet	
Form 8615 Line 7 Sch D Worksheet	
Form 8615 Line 7 QDCG Worksheet	
Form 8615 Parent's Inv & Cap Gain Wk	
Form 8621 Shr of Passive Frgn Inv Co	
Form 8801 Prior Year Minimum Tax Cr	
Schedule 8812 Child Tax Credit	
Form 8814 Election Report Child Int	
Form 8815 Series EE & I US Savings	
Form 8821 Tax Info Authorization	
Form 8822 Change of Address	20.00
Form 8824 Like-Kind Exchanges	
Form 8829 Business Use of Home Exps Form 8829 Worksheet	
Form 8833 Treaty Based Disclosure	
Form 8834 Qual Elec Vehicle Credit	15.00
Form 8835 Renew Elec Prod Credit	
Form 8839 Qualified Adoption Exps	
Form 8845 Indian Employment Credit	
Form 8846 Employer Tax-Empl Tips Cr	
Form 8850 Pre-Screening Notice	
Form 8853 Archer MSAs, Long-Term Care MSA Contribution Limitation	
Form 8853 Long-Term Care Ins Contr.	
Form 8853 Taxpayer Statement	
Form 8853 Spouse Statement	
Form 8853 Joint Statement	
Form 8854 Init & Annual Expat Stmt	
Form 8857 Innocent Spouse Relief	
Form 8859 Carryfwd DC Homebuyer Cr	
Form 8862 Claim Ref Cr Aft Disallow	

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Form 8863 Education Credits	20.00
Form 8867 Pd Prep Due Diligence Cklt	35.00
Pd Preparer's Due Diligence Wks-EIC	20.00
Pd Preparer's Due Diligence Wks-CTC	
Pd Preparer's Due Diligence Wks-AOC	
Pd Preparer's Due Diligence Wks-HOH	
Form 8880 Qualified Retire Saving Cr	
Form 8881 Pension Plan Startup Costs	
Form 8885 Health Coverage Tax Credit	
Form 8888 Direct Deposit of Refund	
Form 8889 Health Savings Accounts	
Form 8903 Domestic Production Activ	
Form 8908 Energy Efficient Home Cr	
Form 8910 Alternative Motor Vehicle	
Alternative Motor Vehicle Credit	
Form 8911 Alternative Fuel Vehicle	
Form 8915C 2018 Disaster Retire Plan	
Form 8915D 2019 Disaster Retire Plan	
8915E 2020 Disaster Retire Plan Wks	
Form 8915F Disaster Retire Plan	
Form 8919 Uncollected and Medicare	
Form 8936 Qual Plug-in Elec Veh Cr	
Form 8936 Schedule A	
Form 8941 Small Emp Hlth Ins Prem Cr	
Form 8941 Worksheet	
Form 8948 Expl for Not Filing Electr	
Form 8958 Alloc Tx Amts betwn Indiv	
Form 8959 Additional Medicare Tax	
Form 8960 Net Investment Income Tax	
Form 8960 Worksheet	
Form 8960 Line 7 Worksheet	
Form 8962 Health Ins Premium Tax Cr	
Form 8994 Emp Cr for Fam & Med Leave	
Form 8995 Qual Bus Inc Ded Simpl Cmp	
Form 8995-A Qual Bus Inc Deduction	
Schedule A , Form 8995-A	
Schedule B , Form 8995-A	
Schedule C , Form 8995-A	
Schedule D , Form 8995-A	
Qual Business Income Component Wks	
Qual Bus Inc Deduction Summary	
Form 8997 Stmt of QOF Investments	
Form 9000 Alt. Media Preference	
Form 9465 Installment Agreement Req	
Form 982 Reduction of Tax Attributes	
Form 14039 Identity Theft Affidavit	
Form 14039B Identity Theft Affidavit	
Form W-2/W-2G Summary	
Form 1099-MISC Summary	
Form 1099-Q Summary	
Form 1099-R Summary	
Tax-Exempt Report	
Disposition Report	
Form SS-4 Application for EIN	

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FORM

13-95
FORM

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Form W-7 Application for Indiv TIN	
Federal Carryover Worksheet	65.00
Roth IRA Carryover Worksheet	
Additional Information	
IRC 59(e) Amortize Preference Items	
IRC 83(b) Include Gross Income	
IRC 165(i) Carry Back Casualty	
IRC 168(b) (2) Use 150% Decline Bal	
IRC 168(b) (3) Use Straight Line Depr	
IRC 168(g) (7) Use Alternative Depr	
IRC 168(k) (5) Spec Depr for Plants	
IRC 168(k) (7) & 168(i) (3) (D) Sp Depr	
IRC 172(b) (3) Forego NOL Carrybacks	
IRC 179(e) Qualified Real Property	
IRC 195(b) (1) (d) Amortize Start-up	
IRC 307(b) (2) Apport Basis Stock Rts	
IRC 451(f) Defer Crop Ins for Sch F	
IRC 451(f) Defer Crop Ins for 4835	
IRC 451(g) Defer Livestock Sale	
IRC 469(c) (7) (A) Single RE Activ	
IRC 1033(a) (2) Defer Gain Invol Conv	
IRC 1367-1 Alternate Basis Ordering	
IRC 1.266-1 Capitalize Carrying Chgs	
IRC 1.1012-1 Value Regul Invest Co	
IRC 1.263(a)-1(f) De Minimis Safe Har	
IRC 1.263(a)-3(h) Safe Harbor Sm Taxp	
IRC 1.263(a)-3(n) Cap. Repair/Mainten	
Miscellaneous Statement	
What-If Worksheet	
Planner Summary	15.00
Plan-Information & Wages	
Plan-Investment Income	
Plan-Business Income	
Plan-Rental & Other Income	
Plan-Passive Activity Wks	
Plan-Adjustments to Income	
Plan-Itemized Deductions	15.00
Plan-Taxes & Payments	15.00
Plan-Credits	
Plan-Alternative Minimum Tax	
Form W-4 Employee Withholding Allow	
Form W-4 Worksheet	
Form W-4 W/H Cert for Pens/Ann Pmts	15.00
Tax Summary Report	15.00
Two Year Comparison Worksheet	
Tax History Report	2.00
Compare to U.S. Averages	2.00
MFJ vs MFS Worksheet	
Part-Year Resident State Alloc Wks	5.00
Nonresident State Allocation Wkst	15.00
Form 8915F-1 Disaster Retire Plan	15.00
Form 8915F-2 Disaster Retire Plan	
Form 8915F-3 Disaster Retire Plan	
Form 3800, Part 3	