



BUSINESS STRATEGY AND TAXES 2023 FILING

Business Strategy and Consulting

You can book business strategy sessions by the hour or in a block set of hours as detailed and priced below.

This includes covering topics such as assisting with reviews of business plans, funding and credit, business 101 and so forth.

1 hour \$89

3 hours \$225

5 hours \$350

10 hours \$675

Bookkeeping and Payroll

Monthly basic bookkeeping is priced starting at \$79 per hour per month paid monthly in advance. Minimum is 1 hour per month.

Bookkeeping clean-up is priced on amount of work needed.

Payroll costs include subscriptions to software and increase depending on employee numbers. We can facilitate 401k deductions and 401k plans through our financial planning services. Costs for payroll start at \$79 per month for up to 2 employees.

Software and initial business set up

Our helping hand business set-up with QuickBooks includes assistance with state and federal tax payment structure. Depending on company structure, fees start at \$399.

This includes 1 hour of training basics and documentation you 'need-to-know'.



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Tax Returns*

All fees quoted are starting rates and may be increased due to complexity.

Personal

- Individual and joint personal return - \$199
- State returns - \$99
- City/Borough returns - \$99
- Amended tax year federal filing - \$199
- Additional forms not detailed below - \$49

Business

- Schedule C add-on - \$99
- Partnership - \$299
- S Corp - \$299
- Any additional forms - \$99 each form

International/cross-border fees

IRS filings

- US Individual and joint personal standard returns - \$269
- US State tax return (if applicable) - \$119
- Overseas non-resident filing - \$299
- PFICs (price per PFIC held) - \$199 per PFIC form completion
- FBAR filing - \$79 per individual up to 10 accounts (additional accounts after 10 - \$5 each)

HMRC filings

- UK Individual tax return starting cost - \$499
- CGT calculations and form completion - \$199
- Property sale declaration and CGT calculation - \$299

*This price list does not include the following forms which are priced separately on request-
8854 Expatriation, 3520 Non-US trust accounts, 8621 Non-US Mutual funds,, or any US business filings. Streamlined procedure or 962 elections/GILTI tax forms are complex and will be billed hourly. Any investigatory work required or research, a fee needed a fee of \$249 per hour is billed in quarterly increments.

NOTE: We report information provided to us, by you so it is your responsibility to provide us with accurate documentation for filing and reporting.

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