

2017

Break down of costs/Tips to reduce costs

We will continue to do our best to keep your preparation fees reasonable. We mainly bill according to our hourly rate. However there are some fixed costs that you may see on your invoices. Some of those are as follows:

Letters to Mortgage Companies for financing - \$50.00
1031 Exchange forms or calculations - \$400 each (included in your prep fee)
Out of state returns - \$40 for each state other than Oregon
Rush fee is 25% of your previous years' bill with a minimum of \$250

If you had a payment plan in place or previous balance due, it must be paid in full prior to us completing any further work.

Here are some tips to help you minimize your tax preparation fees:

We will be strictly adhering to our policy that we MUST have your signed engagement letters to be put in line for preparation.

Bring all your data into us at one time – it takes time to open your file and reacquaint ourselves with your data and progress with your return.

Have your data as well organized as possible – USE the checklists and your organizer. ☺

If in doubt, bring it with you! If you think we might need some information but you aren't sure, bring it with you or write it down. It is better to have more information than we need than too little.

Be sure to alert us to changes in your address, phone number, bank account information, e-mail, marital situation or dependents.

Check the backup of your QB data files before you bring them to the office or upload them to ShareFile, to be sure you have the most current back up or copy of data on your thumb drive or uploaded.

When you call, let us know the nature of your call that way we can direct you to the appropriate staff member to be the most efficient and cost effective for you.

It is helpful to use e-mail to give us a heads up on questions or issues you'll want to discuss at your interview.

Be sure to include your tax organizer when you bring in your tax data. We use it as a guideline.

Be sure to review the asset list we enclosed with your engagement letters. It really helps keep your asset list cleaned up and accurate.