Full-service Return Preparation

Tax Therapy, LLC
www.taxtherapy505.com

The following are included with full-service return preparation:

- IRS Form 1040 (with Schedule A Itemized Deductions or Standard Deduction) and 1st state return.
- Full (but optional) review and signature appointment (in office when permitted or by phone or video chat). Up to 45 minutes "face time" (plus 15 minutes for adding file notes) and can include planning for next year.
- E-filing of all returns and associated schedules.
- Mid-year withholding checkup (estimated calculations only).
- Up to 1.5 hours of off-season response time by phone, video chat, or e-mail. This can be used for tax planning or other questions that come up throughout the year.
- Discounts on research time and tax planning consultations.
- Client newsletter with tax tips and curated updates on tax law changes.
- Quarterly review of estimated tax payments and retirement plan contributions are included for Schedule C filers.

Add-on Items and Services

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The following are available for an additional fee:

- W4 consults
- Married Filing Separate Analysis
- Tax Scenario Analysis (selling a rental, retiring, etc.)
- Additional return copies (upon request)
- Notice Assurance (price depends on return complexity)
- Monthly Maintenance Plan (price depends on complexity)
- In-season blocks of consult time. We don’t typically do consults for non-clients during tax season. We are happy to consult with existing clients during tax season, but for matters other than return preparation a block of consult time must be purchased.