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. Up to 45 minutes "face time" (plus 15 minutes for adding file notes). Basic tax planning can be done at this appointment.
- 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.

The following are available for an additional fee:

- Notice Assurance
- Married Filing Separate Analysis
- Tax Scenario/Planning Analysis (selling a rental, retiring, etc.)
- Additional return copies (upon request)
- 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.