

Tax Therapy, LLC

Quote Request

Name: _____

E-mail: _____

Phone: _____

Filing Status: Single
 Head of Household
 Widow(er)

Married - File Jointly
Married - File Separate
Not Sure

of Dependents: _____

We are happy to provide an estimate. Our fees are based on the complexity of your return. Please complete the information on the next page as accurately as possible. Please note that additional forms may be required to complete your return that are not noted on this request. Therefore our fees are not complete until your return is completed and ready to file.

Minimum tax return fee (Form 1040) is \$165 and includes the first state tax return.

You may fax or e-mail your quote request:

[505-352-0362](tel:505-352-0362)

info@taxtherapy505.com

We offer both in person and virtual appointments.

Did you know we also offer other helpful services?

- ✓ Audit Representation
- ✓ IRS & State Installment Agreements
- ✓ Tax Planning for Individuals & Small Businesses
- ✓ Tax Compliance Consulting for Small Businesses

Please answer the following questions as completely and accurately as possible:

Are you self-employed? If not please go to the next page.

Number of businesses?

Profit/Loss Statement Available?

Office in Home?

Vehicle Expenses?

Are you an LLC or an S-Corp?

Employees?

Inventory?

Additional Notes/Questions:

Tax Therapy, LLC

Quote Request

Check all forms you typically receive and, where applicable, indicate how many of each form you receive.

✓	Form Type	#
_____	W2	_____
_____	1099-SSA	_____
_____	1099-R	_____
_____	1099-Misc	_____
_____	1099-Int/Div	_____
_____	1099-B/Cons	_____
_____	K1(s)	_____
_____	Unemployment	_____
_____	Gambling Winnings	_____
_____	Healthcare Marketplace Insurance	_____
_____	Education Expenses	_____
_____	Rental/Investment Properties	_____
_____	Office in Home	_____
_____	Childcare Expenses	_____
_____	Mortgage Interest	_____
_____	Real Estate Taxes	_____
_____	Charitable Donations	_____
_____	Household Employees	_____
_____	States to File: NM	_____
_____	Calculations for Estimated Tax Payments	_____

Additional Notes/Questions: