

2023 FILING SEASON GUIDELINES

- For now, and through tax season, we are not accepting new clients. This allows us to focus on our existing clients. We will accept new clients during our off months (May, June, July, August, November, December) and encourage client referrals.
- All information should be submitted together with one delivery method and be complete enough to produce a final draft of a tax return.
- Clients should expect a two-week turnaround time for a tax return when complete information is provided.
- We will have a two-week deadline before the actual deadline to submit complete information to prepare a tax return. This gives us time to thoroughly review the information and returns, answer questions, and address any tax opportunities. Most importantly, produce a quality product in time for the deadline. Deadlines are as follows:
 - **March 1st, 2024** for business clients (Partnerships, LLCs, and S-Corporations)
 - **April 1st, 2024** for individual and trust clients
- If information is submitted after our two-week deadline, a \$500 rush fee will be charged if a return is requested before the deadline.
- We will have a print and delivery fee for paper-printed returns. Our administrative costs to print and mail a return have increased significantly over the years, along with inflation, and we've been left with no choice but to implement fees to outweigh the increased costs. Those fees are as follows:
 - \$25 for printed returns
 - \$45 for printed and mailed returns
 - \$35 for an additional copy of a return, \$55 for print and mailing of additional copies

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- Our minimum pricing and per-hour pricing have been updated beginning **January 1, 2024**, and are listed below. The current and forward-looking tax situation requires additional work, planning, and oversight to ensure our firm is leveraging and executing new opportunities to keep our clients' tax efficient. If your tax return fees are under the minimum or market value, we will slowly begin to bring the return fees to minimum and market values. Everyone's situation is different. Please let us know if you have any questions.
 - Business return minimum: \$1,050
 - Personal/Trust return minimum: \$600
 - Bookkeeping: \$100/hr
 - Peter's Advisory rate: \$150/hr
 - Leane/Chris Advisory rate: \$275/hr
 - Administrative rate: \$50/hr