

2025 Tax Season Pricing Menu

main\$tree
FINANCIAL PLANNING

Individual Income Tax Returns

Starting at \$725 per (individual) Return

Married Filing Jointly-\$125 additional fee

Married Filing Separately is \$725 per return

The following forms are included in the base return price:

- ◆ Schedule A / Itemized Deductions
- ◆ Schedule B / Interest & Dividends
- ◆ Schedule D / Capital Gains & Losses
- ◆ 1040-ES / Estimated Taxes (Safe Harbor)
- ◆ State Tax Form / *Resident State Tax Return*

Additional Forms \$245 each

- ◆ Schedule C / Profit or Loss from Business
- ◆ Schedule E Part 1 / Supplemental Income and Loss
- ◆ State Tax Form(s) / *Additional State(s) Tax Return*
- ◆ Schedule F / Profit or Loss from Farming

State Returns: (per form)

- ◆ State: Non-Resident State Return- \$250
- ◆ Local: Local Tax Return(s)- Ohio, PA - \$150

Additional Forms \$95 each

- ◆ Schedule E Part 2 / Income or Loss from Partnerships & S Corps
- ◆ Schedule H / Household
- ◆ Employment Taxes Form 8606 / Nondeductible IRAs
- ◆ Credits & Deductions

Complexity Rate \$450/hr

MSFP may charge an additional rate for complexity including, but not limited to, the following situations:

- ◆ Tax Planning
- ◆ Tax Elections
- ◆ Missing or Incorrect Depreciation Adjustments
- ◆ Change in Accounting Method
- ◆ Non-covered Shares
- ◆ Missing Cost Basis
- ◆ Amended Tax Returns
- ◆ Filing Status Analysis
- ◆ ISOs and RSUs

Trust Tax Returns

Starting at \$990 per Return

Complexity Rate \$450/hr

MSFP may charge an additional rate for complexity including, but not limited to, the following situations:

- ◆ Fiscal-year Reporting
- ◆ Section 645 Election
- ◆ Charitable Remainder Trust Reporting
- ◆ Final Return
- ◆ Alternative Valuation Date
- ◆ Generation Skipping Tax

Corporate returns

Starting at \$1,400 per Return

- ◆ Form 1065 / Partnership
- ◆ Form 990 / Organization Exempt from Income Tax
- ◆ Form 1120-S / S Corporation
- ◆ Form 1120 / Corporation

Complexity Rate \$450/hr

MSFP may charge an additional rate for complexity including, but not limited to, the following situations:

- ◆ Income apportionment
- ◆ Basis
- ◆ Transfer of owners
- ◆ Formation/Dissolution
- ◆ Disposal of business assets
- ◆ Net profit analysis/modification for retirement

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