Nexxus Financial Resource Ventures - Certified Public Accountant Schedule of Charges - January 2023

This is my fee schedule. I provide this schedule in advance to avoid misunderstandings about rates. The fee charged will be the higher of either the time involved or the amounts on the schedule for each form completed. Rates are subject to change without notice. The fee for your tax return does not include services rendered in connection with other consultations, audits, phone calls, or counseling during the year. These are billed separately. Payment for returns is due when the work has been completed. Past due accounts will be charged 2% per month, which is equivalent to 24% per year.

Personal Returns

1040 & 540	Standard deduction, no itemized deductions or Schedule B	260	
1040 & 540	Long form; itemized deductions including Schedule B	400	
Schedule B	Schedule B required, passive income greater than \$1,500	70	
8889	Health Savings Accounts	50	
Kiddie Tax	Child, claimed by parents, (>\$2,000 investment income)	150	
Schedule CA	C.A. Adjustments form	60	
Other States	Out-of-State return	180	
540NR	(Partial year) Surcharge in addition to fee above	100	
2441	Child and Dependent Care Expense Deduction	70	
8812	Additional Child Tax Credit	65	
1040 pg 2	Recovery Rebate Credit	20	
Schedule C	Income from business	360	
Schedule SE	Self-employment Social Security	60	
8829	Business use of home	125	
3805V	State Net Operating Loss carryforward	110	
	Federal Net Operating Loss carryforward	110	
	SEP/Keogh deductions calculations	60	
8606	Non-deductible IRA	Each 50	
8995	Qualified Business Income Deduction	90	
Schedule F	Farm	150	
Schedule D	Capital Gain/Losses each brokerage +\$80 cryto brokerage +\$80	Min: 180	
Schedule D	Sale of employee option stock	Each: 100	
4952 & CA 3526	Investment Interest Expense Deduction	80	
8960	Net Investment Income Tax	80	
8959	Additional Medicare Tax	90	
8582	Passive activity loss limitations	165	
3801	3801 (California Passive Losses)	110	
Schedule E	K-1 from partnerships and corporations	Each 75	
Schedule E	Rental, per rental property including depreciation, each rental	125	
6251	Alternative Minimum Tax is the determining tax	200	
8801/CA3510	Alternative Minimum Tax Credit	170	
2210/CA 5805	Avoidance or computation of penalty, underpayment of estimated tax	70	
8283	Non-Cash charitable contributions over \$500	Each 50	
8936	Electric Car Credit	90	
2555	Exclusion of income earned abroad	150	
1116	Foreign Tax Credit	100	
4797	Sale of depreciable property	Per item 395	
6252	Installment sales of depreciable property (1st year)	425	
6252	Succeeding years	100	
8824	Section 1031 like-kind exchanges	975	
8824	Section 1031 exchange and installment sale combined	1075	
982	Repossession/Foreclosure	975	
Schedule H	Household Employment taxes, including W-2	160	
8962	Premium Tax Credit	120	
Schedules not liste	ed elsewhere	Each: 90	

Other Charges

Extensions	Extension of time to file	Min: 100
W-4	Computation for withholding	120
571-L	Business Property Statement	300
Mailing	Mail return fee	100

Commercial Real Estate Services				
Broker Opinion of Value of a business	2000			
Business brokering: We will market and sell your business for you				
Seller Representation for commercial real estate sales	Price Sold			
Landlord representation for commercial leasing	Commission rate			
Tenant representation for commercial leasing	Commission			

Bookkeeping and Accounting packages

Sapphire	Serve as Chief Financial Officer	20% of equity	2% of revenue
Gold	Monthly bookkeeping, annual tax strate	egy meeting with CPA,	Min: 6000
	complete set of financial statements for	r tax preparation	
Diamond	Accounting systems design, implement	Min: 3600	
Garnet	Fraud investigation, clean up existing books		Min: 9000
Sales tax returns	File sales tax return with CDTFA every quarter		Min: 1400
Issue 1099's	Produce 1099-INT, 1099-DIV, 1099-NE	EC, 1099-MISC	Min: 350
Entity Returns			
990	Federal Tax Exempt Organization Tax	Returns	Min: 500
199	CA Exempt Organization Annual Inform	nation Returns	Min: 300
706	Estate Tax Returns		Min: 5000
709	Gift Tax Returns		Min: 500
1041 & 541	Fiduciary Returns		Min: 700
1065	Partnership, Federal		Min: 500
565	Partnership, California		Min: 300
CA 568	Partnership LLC or SMLLC		Min: 300
1120	Corporation, Federal		Min: 500
CA 100	CA C Corporation return		Min: 300
1120S	S Corporation		Min: 400
CA 100S	CA S Corporation return		Min: 300
Tax preparation, ana	lysis and projection hourly billing rate		\$350
CPA: Phone consultations or face-to-face meeting hourly billing rate			\$350
Tax law research hourly billing rate			\$350

ASSET MANAGEMENT			Interest rate	%
Passive Income	Income option	Capital amount \$		
	Growth option	Capital amount \$		
Fiduciary	Trustee service: 1	1.0% of trust assets annually		Min: \$4000
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Tax resolution or representation with the IRS, FTB, or CDTFA hourly billing rate

Client Name: Total Fees \$ 0

\$350