

Guo Tax and Accounting Solutions Pricing List

Monthly Packages/Plans
Valid for Engagements Entered into Between 01-Jan-2024 and 31-Dec-2024

Business Packages

BOOKKEEPING AND TAX SERVICES	Full-Service Bookkeeping	Weekly Bookkeeping	Monthly Bookkeeping
	\$4,000/month	\$2,750 / month	\$1,250 / month
Recording bank and credit card transactions	daily	weekly	monthly
Reconciling bank and credit card accounts	daily	weekly	monthly
Prepare and email management reports	weekly	monthly	quarterly
Cash flow assessment	weekly	monthly	quarterly
General Ledger review	weekly	monthly	quarterly
Fixed asset management and depreciation	monthly	monthly	quarterly
Loan amortization and interst calculation	monthly	monthly	quarterly
Goal Planning, budgeting and projection meeting	monthly	monthly	quarterly
Tax planning / estimates	Comprehensive	Comprehensive	"Quick 'n Dirty"
Email and phone support	included	included	included
Required Business Federal Income Tax Return	included	included	included
First State tax return (additional fees for multiple states)	Full return included	Full return included	Full return included
Sales tax filing (Nexus Study Extra at hourly consulting rate)	yes	yes	add on fee of \$175
Filing of annual forms 1099 (\$20 per form extra)	unlimited	up to 10	up to 5
IRS Audit support on returns we prepare (hourly rate with retainer if we are not at fault)	yes	yes	yes
Accounting Clean-up (then hourly rate with retainer)	up to 6 hours/year	up to 3 hours/year	up to 3 hours/year
Accounts receivable tracking / automated collection letters	included	included	included

MicroBusiness and Individual Plans

BOOKKEEPING AND TAX SERVICES	Micro Growth	Micro DIY	Individual
	\$500/month	\$210/month	\$125 / month
Individual income tax return (Standard)	with Schedule C	with Schedule C	form 1040
IRS Audit support on returns we prepare (hourly rate with retainer if we are not at fault)	yes	yes	yes
Tax planning / consulting	Quarterly quick calc	Semi-annual quick calc	up to 2 hours consulting per year
General Ledger review	quarterly	quarterly with suggestions	X
Goal Planning / budgeting and projection meeting	quarterly	quarterly	X
Fixed asset management and depreciation	annually	annually	X
Loan amortization and interst calculation	annually	annually	X
Recording bank and credit card transactions	quarterly	X	X
Reconciling bank and credit card accounts	quarterly	X	X
Prepare and email management reports	quarterly	X	X
Cash flow assessment	quarterly	X	X

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Other Pricing
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Al A Carte and Hourly Rates

BOOKKEEPING AND TAX SERVICES	DESCRIPTION	PRICE
Al A Carte		
Take Two© Review	Review Prior 2 Year's Returns for Amendment Opportunities	FREE
Communications	Periodic Tax Updates and Monthly Newsletters (sign up on our website)	FREE
Basic Tax Return	IRS Form 1040 and Schedules 1-3, B, and 1 State Return	\$ 325
Itemized Basic Tax Return	Basic Tax Return PLUS Schedule A	\$ 400
Standard Tax Return	Itemized Basic Tax Return PLUS Schedule D	\$ 450
Complex Tax Return	Standard Tax Return PLUS Non-Business Forms and Schedules	\$ 550
Additional State Tax Return	Additional State Tax Return Beyond the 1 included (including local and city returns)	\$ 85
E-File Fee	The Fee for E-Filing a Tax Return	FREE
Amended Tax Return 2018 or earlier	2018 or earlier Form 1040X (plus \$120 for each State)	\$ 500
Amended Tax Return 2019 or later	2019 or later Form 1040X (plus \$100 for each State)	\$ 475
Sole-Proprietor/Rental Real Estate add on (less than \$10M in Revenue or Assets)	Add on for EACH Schedule C or E page 1 (up to 1 Schedule C business per form. Up to 3 Rentals per form)	\$ 225
Sole-Proprietor/Rental Real Estate add on (greater than or equal to \$10M in Revenue or Assets)	Add on for EACH Schedule C or E page 1 (up to 1 Schedule C business per form. Up to 3 Rentals per form)	\$ 1125
Partnership Return (less than \$10M in Revenue or Assets)	Form 1065 (Plus \$50 per member/partner)	\$ 1000
S Corporation Return (less than \$10M in Revenue or Assets)	Form 1120S (Plus \$50 per member/shareholder)	\$ 1000
C Corporation Return (less than \$10M in Revenue or Assets)	Form 1120	\$ 1475
Partnership Return (greater than or equal to \$10M in Revenue or Assets)	Form 1065 (Plus \$100 per member/partner)	\$ 2250
S Corporation Return (greater than or equal to \$10M in Revenue or Assets)	Form 1120S (Plus \$100 per member/shareholder)	\$ 2250
C Corporation Return (greater than or equal to \$10M in Revenue or Assets)	Form 1120	\$ 3319
Treas Reg §§ 301.7701-1 thru 301.7701-3 "Check the Box" Election	Form 2553 or 8832	\$ 425
IRC §1031 Like-Kind Exchange	Form 8824	\$ 3200
Change in Accounting Request	Form 3115 (catching up depreciation, changing between accounting systems)	\$ 1850
IRS Transcript Monitoring **NEW**	Provide Transcript monitoring and potential advanced notice of Examinations, Letters, Etc.	\$30/ Month or \$300/per year if paid in advance
Other Specialty Forms	As Discussed In Advance	TBD
Hourly Rates		
Bookkeeping	Fresh Bookkeeping in the Current Quarter (5 hour retainer)	\$ 185
Bookkeeping Clean-up	Clean-Up or Bookkeeping in Prior Quarters (5 hour retainer)	\$ 215
Consulting	Hourly Rate for Consulting (each hour paid in advance)	\$ 185
IRS/State Tax Resolution	Help on Issues Where We Are Not at Fault (5 hour retainer)	\$ 375