SFS Service Fees

Standard fees for Shields Financial Services (the “Accountant”) **beginning 1/1/2023**, are shown below. Actual services and the corresponding fees and terms are situation-dependent and subject to change in accordance with the Client Agreement, Section XVI. The Client’s continued use of the Accountant’s Services implies complete consent to any fees assessed by the Accountant.

ACCOUNTING/ADVISORY\*

BUSINESS ADVISORY: see service types on SFS webpage under Advisory. Includes non-tax research and correspondence time. \* **($125/hour)**.

INDIVIDUAL/NON-PROFIT ADVISORY: see service types on SFS webpage under Advisory. Includes non-tax research, including correspondence time. \* **($100/hour)**.

ACCOUNTING SERVICES: Accounting services are performed using **QuickBooks Online only**. Clients using other software including QuickBooks Desktop must transition to QuickBooks Online to utilize the Accounting services unless otherwise stated in the Client Agreement. Time incurred for conversions to QuickBooks Online the associated setup process are billed separately under the applicable Advisory rate.

* Full-service bookkeeping **($200/month)**
* Full-service reporting and financial analysis **($200/month)**

OTHER SERVICES: All other non-tax services not mentioned above will be considered advisory services billable at the hourly rates noted above.

TAX SERVICE FEES\*

* Simple 1040 Income Tax Return (no schedules) .………………..…………………………………. $110
* Regular 1040 Income Tax Return ………………..….…....………………………………….................. $225
* 1040 Supporting schedules w/ supporting forms.….……….............................. $55 per schedule
* State Income Tax Return(s) ...…………………….……………….………………………… $55 per return
* Estimated Access Fee (1040/other)..………....………………….………………………...……... $50/$70
* Tax strategy report & analysis………………………………..……………………………………………..$150
* Travel/mileage fees (if applicable) ...……………..……………………………………………………. [TBD]
* Expedited prep/untimely information fee^…..…...………………………………………………... [TBD]
* Other tax services/returns [not mentioned above] ………..…………………….………. $100/hour
* Other non-tax services ………………………………………………………………………………..[see pg. 1]

All return prep services include a wrap-up meeting to review the return, discuss observations that may include tax planning opportunities, and to address any concerns or questions. Additional services or information requested after this meeting are subject to either the tax or advisory hourly rate as determined by the Accountant.

\*Fees shown above assume Client’s full compliance with all Client obligations and responsibilities set forth in the Client Agreement. Excessive research/analysis time incurred to complete the Returns are billable at the ‘other tax services’ hourly rate above. Access fees are subject to change at the third-party software provider’s discretion. Invoices are due upon receipt.

^**Additional charges may be assessed for expedited returns or services (defined as ‘to be completed within ten (10) business days’ from the Client’s initial request’), or if information requested by the Accountant is NOT addressed timely by the Client (as defined by Client Agreement Section II) within ten (10) business days of applicable filing deadlines.**