

CPA Tax Preparation Services Offer

You may believe that having your tax returns prepared by an established CPA firm is out of your reach. You may also be unclear about how much such a service would cost and whether a firm has time for you. We would like you to consider our offer.

Why use a CPA firm?

Tax preparation can be done in a variety of ways. These include manually, with store bought or online software and by using the services of one of a variety tax preparation businesses. The benefits of retaining a CPA firm to prepare your returns include our high level of training, integrity, state certification, accountability within the profession, high levels of continuing education, high levels of technology, wealth of experience and high credibility with tax authorities and the fact that we have year round availability.

Another important benefit is that once you are working with an established CPA firm, you are in line to readily receive additional services as needed. You will have already built a relationship with someone who will be available to offer planning and advice on a wide variety of planned or completed transactions and events. When you are faced with those situations it can be extremely valuable to discuss what is going on with someone who is familiar with your situation and history.

Our CPA individual tax preparation offer

We are offering to prepare individual tax returns for new clients under the following terms. We will prepare basic tax federal and state tax returns, which includes forms 1040, 540 and at least schedules A, B and D plus electronically filing for a fixed fee of \$360. This is based on our average time to work through a basic return. In cases where more schedules are needed requiring additional work or consultations are needed, we will invoice the additional work at a rate of \$150 per hour. Because we use the latest technology, we can use our time very efficiently and pass on these savings to our clients rather than developing an arbitrary fee schedule by form prepared as is the practice of some tax preparers. We have a staff of highly experienced CPAs who are here year round doing a variety of work so we are able to give your return all of the personal attention it deserves and get it done in timely fashion.

Do you qualify?

Here is how it works:

- 1) Having your taxes prepared will not include a personal appointment. Instead, you will be gathering data and sending it or delivering it to us by March 20. We guarantee that your return will be completed without an extension unless needed data is missing.
- 2) You will be required to maintain an email account so that we can communicate in that manner.
- 3) You agree to complete an organizer and questionnaire that will help us to gather all of the information we need to do a complete job. After the first year, this will be coming to you in a customized format that includes reference amounts from the prior year.

*Members of American Institute
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