Tax Crew Organizer

This organizer is designed to help you collect and report the information needed to prepare your tax return. Please enter your information in the worksheets that apply to you. Returning clients: You can leave blank sections that haven't changed from your previous tax return (e.g. address, SSN, birth date, phone, dependents). If information has changed from the prior year, enter complete information in that section of the organizer.

To complete the organizer electronically, download a copy to your device first so your entries will be saved. Use the method that is the most convenient for you to submit your completed organizer and documents:

- Upload to our SmartVault client portal. This is the most secure method to submit your documents. If you don't have a portal login yet, just send an email request to info@mytaxcrew.com
- Mail or ship to Tax Crew 10 Santa Clara San Clemente CA 92672
- Fax to 949.309.2902
- Email to info@mytaxcrew.com

THANK YOU FOR CHOOSING TAX CREW

New clients: Who referred you to Tax Crew?

Tax Crew **10 Santa Clara San Clemente CA 92672**

Phone/Text 949.234.0095 info@mytaxcrew.com www.mytaxcrew.com

Save time with these tips:

- Only complete sections that apply to you
- If you're sending us a tax document, you don't have to duplicate the information on the organizer
- To send documents digitally, scan to a single PDF file. You can use Apple Notes or a free PDF App like Camscanner

Please send us copies of any of the following documents that you received

☐ All W-2's. (Your company may issue more than one)	☐ K-1s for Partnership, S-Corps, or Trusts
☐ 1099 R Retirement Account Distributions	☐ Statements or Forms You Have Questions About
☐ 1095 A for ACA Marketplace Health Insurance Plans	☐ Voided Check for Direct Deposit if New Account
☐ 1098 Mortgage Interest Paid	☐ **New Clients:** Copy of Last Year's Federal & State Tax Returns
☐ Property Taxes Paid (if not reported on your 1098)	☐ Flight data
☐ 1099 DIV Dividend Income	☐ Local Tax Forms & Instructions If You Want Us to Prepare
☐ 1099 INT Interest Income	☐ Payment (credit card information or check)
☐ 1099 B for Security Sales (stocks, mutual funds, etc.)	☐ Completed Organizer & Signature Below

Please sign below

We will prepare your federal income tax return and any state and local returns you may require from the information that you provide. You agree to provide us with all income and deductible expense information necessary to prepare your return, and any changes to your contact (e.g., new address, phone, email, etc.) or banking information. In preparing your return(s), we will not audit or verify the data you submit although we may ask for clarification. We will use our judgment in resolving questions where the tax law is unclear or where there may be different interpretations of the law.

It is important that you review the return carefully before signing to make sure the information is correct. Unless otherwise stated, the services for preparation of your return do not include auditing, review, or any other verification or assurance. Full payment of your tax preparation fee is required before we will electronically file your return or release a copy of the return.

Deadlines & Extension requests: We process tax returns in the order that we receive organizers. The volume of organizers we receive increases significantly during the three weeks before the filing deadline. To guarantee completion of your return by the due date, please provide your tax organizer and documents to us by March 23. For tax information received after March 23, we will make every effort to complete your return by April 15, but will file an extension request if necessary.

Please email us (info@mytaxcrew.com) **before** April 1 if you have not submitted a tax organizer but need to file an extension request. Even with a filing extension, the IRS and states will charge penalties and interest if you have paid less than 100% of your current tax liability by April 15. IRS and states do not accept extension requests after April 15.

This engagement letter will apply for all future years unless the agreement is terminated or amended in writing by you or us. We appreciate the opportunity to prepare your tax return.

Taxpayer Signature	Date	Spouse Signature	Date

Privacy Policy

The privacy of your client information is always important to us, and we adhere to professional standards of confidentiality. We collect nonpublic personal information about you that is provided by you or obtained by us with your authorization. This information may come from various sources, including information we receive from personal interviews, tax organizers, worksheets and other documents necessary to provide professional services to you. We do not disclose any nonpublic personal information about our clients or former clients, except as permitted or required by law, or when necessary to process transactions requested by you. We restrict access to nonpublic personal information about you to members of our firm who need to know that information in order to provide you professional services. We retain records relating to the professional services that we provide you in accordance with accounting and government standards. We employ physical, electronic and procedural safeguards to protect your nonpublic personal information.

Individual Tax Organizer

Personal Information

You:

First name	Last name	Social Security Number
Date of Birth		Occupation
Phone Number		Email Address

Marital Status: ☐ Single ☐ Married ☐ Divorced ☐ Legally separated ☐ Widowed

Spouse:

First name	Last name	Social Security Number
Date of Birth		Occupation
Phone Number		Email Address

Mailing Address:

Address	City	State	Zip code

Did your address change? ☐ Yes ☐ No Date changed

Dependents

Dependent 1:

First name	Last name	Social Security Number
Date of Birth		Relationship
Income (if over $4,400)		Number of Months Resided in Home

Was a full-time college student? ☐ Yes ☐ No Filed their own return? ☐ Yes ☐ No

Dependent 2:

First name	Last name	Social Security Number
Date of Birth		Relationship
Income (if over $4,400)		Number of Months Resided in Home

Was a full-time college student? ☐ Yes ☐ No Filed their own return? ☐ Yes ☐ No

Dependent 3:

First name	Last name	Social Security Number
Date of Birth		Relationship
Income (if over $4,400)		Number of Months Resided in Home

Was a full-time college student? ☐ Yes ☐ No Filed their own return? ☐ Yes ☐ No

Dependent 4:

First name	Last name	Social Security Number
Date of Birth		Relationship
Income (if over $4,400)		Number of Months Resided in Home

Was a full-time college student? ☐ Yes ☐ No Filed their own return? ☐ Yes ☐ No

Income Sources - provide any tax forms (W-2s, 1099s) received

Work Income

- ☐ Had a Job (W-2)
- ☐ Self-Employed (1099-NEC, 1099-MISC, 1099-K)

Investment & Savings

- ☐ Brokerage Accounts (1099-B, 1099 Consolidated)
- ☐ Interest Income (1099-INT) - no statement issued if total interest is less than $10 Amount received
- ☐ Dividend Income (1099-DIV)
- ☐ Exercised Incentive Stock Options (Form 3921)
- ☐ Sold Real Estate (1099-S)

Less Common Investment & Savings

- ☐ Received 1099-OID
- ☐ Undistributed Capital Gains (Form 2439)
- ☐ Foreign Accounts - see Foreign Accounts Worksheet on page 10

Retirement Plans and Social Security

- ☐ IRA, 401k, Pension Plan Withdrawals (1099-R)
  - Amount transferred to charity - QCD
- ☐ Social Security Benefits (SSA-1099)

Rentals, Royalties, and Farm

- ☐ Rental Properties & Royalties (1099-MISC)
- ☐ Farm Income & Rental

Other Income

- ☐ Unemployment & Government Payments (1099-G)
- ☐ Received K-1
- ☐ HSA/MSA Withdrawal (1099-SA)
- ☐ Gambling Winnings (W-2G)
  - Amount not reported on W-2G
- ☐ Received Alimony
  - Amount of Alimony — Date of Divorce or Separation
- ☐ Jury Duty
  - Amount Received — Amount Repaid to Employer
- ☐ Sold Main Home (gain or loss)
  - Date Purchased — Purchase Amount — Other Expenses
- ☐ Home Foreclosure or Debt Cancellation (1099-A, 1099-C)
- ☐ 529 Plan or Coverdell ESA Withdrawal (1099-Q)
- ☐ Other

Deductions and Credits

Home

- [ ] Home Loan Interest (Form 1098)
- [ ] Property Taxes

Main Home	Additional Homes

Family

- [ ] Child Care Credit

1. Child's Name	Daycare Name
Daycare Provider SSN/EIN	Daycare Address
Total Amount Paid	
2. Child's Name	Daycare Name
Daycare Provider SSN/EIN	Daycare Address
Total Amount Paid	
3. Child's Name	Daycare Name
Daycare Provider SSN/EIN	Daycare Address
Total Amount Paid	

- [ ] Adoption Credit

Child's Name	Birth Year
SSN, ATIN, or ITIN	Adoption Expenses
Does child have special needs? ☐ Yes ☐ No	Is child a U.S. citizen? ☐ Yes ☐ No

- [ ] Paid Alimony

Recipient's Name	Recipient's SSN
Alimony Amount	Date of Divorce/Separation

Charitable Donations

- [ ] Cash/Check Donations

Total Amount Donated

- [ ] Non-Cash Donations

1. Organization Name		Organization Address
Description		Date of Contribution
Donation Value	Cost Basis	Date Acquired
2. Organization Name		Organization Address
Description		Date of Contribution
Donation Value	Cost Basis	Date Acquired

Retirement

- [ ] Retirement Contributions

Traditional IRA	Amount converted to Roth IRA
Roth IRA	
SEP	
Solo 401(k)	

Deductions and Credits (continued)

Education and Work

- [ ] College Tuition & Expenses (1098-T)

Cost of Supplies (purchased at school)	Cost of Supplies (purchased elsewhere)

Did you receive financial aid not reported on a 1098-T? ☐ Yes ☐ No

- [ ] Student Loan Interest (1098-E)
- [ ] Educator Expenses

Amount Spent

Vehicles & Personal Property

- [ ] Major Purchases

1. Description	Sales Tax Paid
2. Description	Sales Tax Paid

- [ ] Car Registration Fees

1. Make & Model	Amount
2. Make & Model	Amount

- [ ] Casualties and Thefts

Description of Event	Date
Property Lost or Damaged	Cost

Energy Efficiency Credits

- [ ] Home Energy Credits

Exterior Doors	Exterior Windows	Metal/Asphalt Roof
Insulation	Building Property	Furnace Fan
Furnace/Water Boiler	Solar Heating	Wind Energy Property
Heat Pump	Fuel Cell Property	Fuel Cell Capacity

- [ ] Energy Efficient Vehicles

Make	Model	Year
VIN	Date Purchased	Credit Amount

- [ ] Energy Efficient Charging Station

Cost

Medical

- [ ] Contributions to HSA/MSA (Form 5498-SA)

Amount

- [ ] Medical & Dental Expenses

Medical Professionals	Prescription Drugs	Labs and X-rays
Medical Facilities	Medical Supplies	Glasses & Contacts
Medical & Dental Ins.	LTC Ins. (You)	LTC Ins. (Spouse)
Travel Expenses	No. of Miles Traveled	Other

- [ ] Affordable Care Act (1095-A)

Airline Crew – residents of AL AR CA HI MN NY PA	
Layover transportation (van driver tips, cabs, rental cars, Lyft/Uber)	
Union and professional organization dues	
Work related publications/education	
Uniform/luggage purchase, cleaning, repair, alterations	
Work equipment/supplies	
Business phone & internet (50%-75% of monthly base fee X 12 months)	
Mileage between home & co-terminals. Commuting expenses to/from primary work location are not deductible.	

Temporary assignment/monthly base swaps/out of base pickups/initial, upgrade and recurrent training:

Number of days at TDY, temp base, training		Out of pocket lodging/utility costs	
City code of temporary/training location		Personal car miles driven to/from/at temp location	
Out of pocket (non-reimbursed) transportation costs		Other unreimbursed expenses	

FLIGHT DATA

To calculate your per diem deduction, please send us the following in a digital file (no printouts). Attach your downloaded file (per instructions below) to an email message and forward to info@godiem.com. Include your name & mention that you're a Tax Crew client.

American Airlines

Flight Attendants: On JetNet, navigate to Departments > Flight Service >Tools > Crew Sequence History
1. On the portal page, select Links > Crew Sequence History. Select the Contract Year > All Contract Months. Click Retrieve.
2. From the Reports menu, select Comma Separated Values (.csv). You r Sequence History will download to your device.

Pilots: Login to the APA website (www.alliedpilots.org). On the homepage, select the Committees link.
1. Select Scheduling > Sabre Application link. Log in and from the top right of the DECS page, select Go To > Log Book .
2. Click the link 'Use the Group Tree to drill into . . .' to open filtering options. In the drop-down, enter the date range that you'd like to export. Click the 'Filter & Hide' button. You'll see the filtered file listed under 'Group Tree'. Click the icon to download the file.
3. Select Microsoft Excel (97-2003) in the 'File Format' drop-down and the 'All Pages' radio button. Click the 'Export' button.

Delta Air Lines

Flight Attendants: Sign into iCrew and from the 'Schedules' drop-down, select 'F/A Preference'. On the next page, click on 'Schedule Leg Data Extract'. You'll see two options. Choose the second option: 'email Schedule Leg Data to your company account. Enter 'YES' for this (second) option and click the 'OK' button. You'll receive the confirmation message 'Email request submitted'. Log in to your company email. You'll receive an email with your 'Schedule Leg Data' attached. Forward the email you receive directly to info@godiem.com (do not download to your device).

Pilots: On DeltaNet select 'Self Service' from 'My Links'. On the Self Service page, select 'My Money'. Select 'Pilot Activity Statements (PAS). On the PAS page, select the tax year you want to extract and 'All' for the month. Click the 'Retrieve' button. Click the checkbox next to 'Pay Period' to select all the months for the year. Click the 'Export' button. This will create a Zip file that you can save to your desktop.

United Airlines

Flying Together > Tools and Resources > My Info/Manager's Toolbox > Per Diem >Per Diem Letter. Send us a copy of the Per Diem Letter with your tax documents or upload to your SmartVault.

All Other Airlines

Copy and paste your flight information to our Flight Data Submission Form and submit the form electronically to info@godiem.com. You'll find a copy of the form, with instructions, in the Public Documents folder in your SmartVault portal or on the Tax Center link at www.mytaxcrew.com

Alaska Airlines

Flight Attendants: Pay Detail Reports (make sure to include page 2 if applicable)
Pilots: Time sheets (make sure to include page 2 if applicable)

FedEx Flight data is in your Trip Recap (or Trip Summary). Navigate to your VIPS Trips Recaps. Select calendar option and click the link for each trip..

Hawaiian Airlines CrewTrac > Options > Schedule Detail > Select months from dropdown and 'Hide Drops' from Print Options. On the next screen select "Show Printer Friendly Version".

JetBlue Rainmaker > Crew Pay Report. Select Bid Period and Detail for the trips you flew.

Net Jets Provide the Crew Member Duty Report CRC Online > Crew My Pages.

SkyWest SKEDPLUS > Options> Crew Time Report. Enter date range (make sure to include any year end carry-in or carry- out trips).

Southwest

Flight Attendants: (Do not use the Flight Data Submission Form) Monthly Payroll Reports. Contact your payroll depart-ment and ask them to email you the reports in .doc or .rtf format. Forward the email to info@godiem.com. Include your name and 'Tax Crew client' in the subject line.
Pilots: (Do not use the Flight Data Submission Form) SWAPA > My Stuff > Logbook Export > select Tax Year > select XLS to export > save file to your computer. Email the file to info@godiem.com. Include your name and 'Tax Crew client' in the subject line.
UPS: Flight Ops > Fligh Payroll Registers. Make sure you include trips for the entire calendar year.

UPS Pairing Detail Report from FlightOps > CrewApp > SchedView.

Self Employment/Small Business Worksheet

Work Description

Type of Work	Business Name

Income

- ☐ 1099-NEC
- ☐ 1099-MISC
- ☐ 1099-K
- ☐ Cash and Checks   Amount Earned in Cash and Checks

Expenses

Advertising	Commissions and Fees
Business Insurance	Interest - Mortgage
Interest - Other	Legal & Professional Fees
Office Expenses	Rent - Vehicles, Equipment, etc.
Rent - Business Property	Repairs & Maintenance
Supplies	Taxes & Licenses
Business Travel	Business Meals
Utilities	Inventory
Bank Charges	Dues & Subscriptions
Telephone	Miscellaneous

Labor:

Contract Labor Expenses	Did you pay any contractor $600+? ☐ Yes ☐ No
Did you have any employees? ☐ Yes ☐ No	Wages Paid

Vehicle:

Make & Model	Date Purchased/Leased
Miles Driven (work and personal)	Miles Driven (work only)
Parking & Toll Expenses	Other Vehicle Expenses

Depreciable Assets:

1. Description	Date Purchased	Cost
2. Description	Date Purchased	Cost

Home Office:

Square Footage of Home Office	Square Footage of Entire Home

Other Expenses:

1. Description	Cost
2. Description	Cost
3. Description	Cost

Rental Property Worksheet

	Property 1	Property 2	Property 3	Property 4
Property address				
City, state, Zip				
Type of Property (single family, multi-family, land, commercial, short term)				
During the tax year # of:				
days available for rent/rented				
days of personal use				
Percentage ownership				
Percentage rental use				
Qualified trade or business under Section 199A? *				
Rents received				
Expenses				
Advertising				
Travel				
Cleaning / Maintenance				
Commissions				
Insurance				
Legal/Professional Fees				
Management Fees				
Mortgage Interest				
Repairs				
Supplies				
Real Estate Tax				
Other taxes				
Utilities				
Other:				

Capital improvements, remodels, assets placed in service during the tax year

Description	In-service date	Cost	Property 1,2,34

Sale of Rental Property - If you sold a rental property during the tax year, please send us copies of the Closing Disclosure (Settlement Statement) from both the purchase and the sale of the property.

Vehicle Expense

Vehicle make & model		Date first placed in service	
Total miles driven for the year		Do you have evidence to support the deduction?	☐ Yes ☐ No
Total miles driven for all rental property business		Is the evidence written?	☐ Yes ☐ No

***Section 199A Qualified Trade of Business**

For purposes of the 199A deduction (20% of qualified business income), an enterprise is a trade or business if it qualifies as such under Internal Revenue Code Section 162. The section doesn't expressly define "trade or business", rather it's determined on a case-by-case basis based on various factors. Generally, a qualifying enterprise is an activity conducted "on a regular, continuous and substantial basis" with the aim of earning a profit.

Because of ambiguity on whether rental property qualifies under Section 199A, the IRS issued Revenue Procedure 2019-38 to establish a safe harbor. Under the revenue procedure, a rental real estate enterprise (RREE) is deemed a trade or business if the taxpayer (you or a "relevant pass-through entity" in which you own an interest):

- Maintains separate books and records for the enterprise;
- Performs at least 250 hours of rental services per year (for an enterprise that's at least four years old, this requirement is satisfied if you meet the 250-hour test in at least three of the last five years);
- Keeps logs, time reports or other contemporaneous records detailing the services performed; and,
- Files a statement with his or her tax return.

Revenue Procedure 2019-38 lists the types of services that count toward the 250-hour minimum. It also clarifies that they may be performed by the owner or by employees or contractors. Generally, taxpayers must either treat each rental property as a separate enterprise or treat all *similar* properties as a single enterprise. Commercial and residential properties, for example, can't be combined in the same enterprise.

Foreign Accounts Worksheet - required if total assets in non-U.S. accounts exceeds $10,000

Account #1:	
Name of Foreign Bank	Address
Account Type	Account Number
Date Account Opened (if in 2023)	Date Account Closed (if in 2023)
Maximum Value (Include Currency)	End Year Balance (Include Currency)
Is the account owned jointly? ☐ Yes ☐ No	

Account #2:	
Name of Foreign Bank	Address
Account Type	Account Number
Date Account Opened (if in 2023)	Date Account Closed (if in 2023)
Maximum Value (Include Currency)	End Year Balance (Include Currency)
Is the account owned jointly? ☐ Yes ☐ No	

Account #3:	
Name of Foreign Bank	Address
Account Type	Account Number
Date Account Opened (if in 2023)	Date Account Closed (if in 2023)
Maximum Value (Include Currency)	End Year Balance (Include Currency)
Is the account owned jointly? ☐ Yes ☐ No	

Account #4:	
Name of Foreign Bank	Address
Account Type	Account Number
Date Account Opened (if in 2023)	Date Account Closed (if in 2023)
Maximum Value (Include Currency)	End Year Balance (Include Currency)
Is the account owned jointly? ☐ Yes ☐ No	

Account #5:	
Name of Foreign Bank	Address
Account Type	Account Number
Date Account Opened (if in 2023)	Date Account Closed (if in 2023)
Maximum Value (Include Currency)	End Year Balance (Include Currency)
Is the account owned jointly? ☐ Yes ☐ No	

Additional Questions

Estimated Taxes Paid:

		Federal Taxes	State Taxes	Local Taxes
1st Quarter	(Apr)			
2nd Quarter	(Jun)			
3rd Quarter	(Sep)			
4th Quarter	(Jan)			

Direct Deposit & Electronic Payment:

If you're entitled to a refund, would you like to receive it as a direct deposit? ☐ Yes ☐ No

Bank Name Account Type

Routing Number Account Number

If you owe on your tax return, would you like IRS (and state) to direct debit payment(s)? ○ Yes ○ No

Notes Relating to Income Received:

Other Questions or Concerns:

State Credits and Deductions

AZ	Credit for contributions to Qualifying Charitable Organizations or to Qualifying Foster Care Charitable Organizations. Include the name/address of organization(s) and amount of contribution(s).				
CT	State property tax credit (maximum $300 credit)				
	Property	CT Tax Town/District	Address or Year/Make/Model	Date Paid	**Amount**
	Home				
	Auto 1/Auto 2		/	/	/
DE	Clothing and expenses incurred for service as an active volunteer firefighter				
GA	Amount spent on home care services for persons over 62				
HI	Cost of child restraint system – include copy of purchase receipt				
	Renewable Energy Technologies Credit – include purchase information				
ID	Cost of insulation purchased last year and installed in primary residence				
IL	Homeowners: please provide PIN (Property Index Number) from your property tax statement				
LA	Please include a copy of the insurance statement showing the charges for LA Citizens assessments not previously claimed				
MA	Please provide Form 1099-HC. The information on this form is needed to avoid a tax penalty				
	Qualified commuter expenses paid for public transportation (MBTA transit/rail, tolls paid through FastLane account)				
MI	Homeowners: Please provide the property tax statement showing the Taxable Value of Homestead, or enter the value here:				
MN	Please send us your Certificate of Rent Paid (renters) or Statement of Property Taxes Payable (homeowners) for THIS year				
MT	First Time Homebuyers Savings Account contributions				
NH	If you earned interest and/or dividends of more than $2,400, NH requires that you file a state investment income return				
OH	Job training expenses incurred during 12-month period after job furlough				

Education Credits for K-12th Grade

You may claim a credit on your state return in these states for the following qualified expenses:

AZ- Fees and donations to a public or charter school located in Arizona for extracurricular or character education programs.
IL – Tuition, fees, book rental, band and lab equipment rental fees paid directly to private, public or religious schools.
IA – Tuition and textbook costs paid to an Iowa accredited not-for-profit school. Certain extracurricular program expenses qualify, such as activity fees, club dues, and school sports fees.
IN – Fees for non-public private, parochial or home school for grades K-12.
LA – Cost of tuition, fees, books, materials, supplies and school uniforms.
MN – Tuition and fees paid to private or public schools. Also costs of education supplies including up to $400 towards the purchase of a home computer and educational software.
WI – Fees for tuition and textbooks paid to a private school, excluding amounts paid with a voucher.

Student's Name & Grade	Expenses	School Name & Address

Education Savings Accounts

Type of account (Coverdell, 529, pre-paid tuition)	Name (for state plans)	Account number	Beneficiary	Amount

Renter's Credits for Residents of CA IN MA MN NJ NY WI

CA	Check here ☐ if you paid rent on a California residence					
MN & WI	Send us your Certificate of Rent Paid or Rental Certificate					
MA, NJ, NY	Enter total amount of rent you paid					
IN	Landlord's name		phone number			
	Landlord's address					
	Total monthly rent		# months rented		Your share of monthly rent	

Pricing Information & Payment Method

All preparation fees must be paid prior to filing return and releasing copies

Federal Return	**$175**
Married filing jointly (add) – we'll calculate whether MFJ or MFS is more beneficial for you	**$30**
First State Return	**$40**
Additional State Returns (part-year resident, non-resident returns)	**$40**
Crew Deductions and Per Diem Report (add if you're a resident of AL, AR, CA, HI, MN, NY, PA and claiming work/crew/per diem deductions)	**$40**
Dependent Tax Returns - children under age 19, or under age 24 and a college student, with earned income (e.g. W-2 or 1099-MISC income)	**$50**

Local return (for city/local returns)		**$50**	Health Coverage Exemptions	**8965**	**$30**
Alternative Motor Vehicle Credit	**8910**	**$40**	Health Insurance Premium Tax Credit	**8962**	**$40**
Business use of home	**8829**	**$30**	Household employee taxes	**H**	**$40**
Cancelled Debt Exclusion from Income	**982**	**$50**	Injured spouse/Innocent spouse	**8379**	**$40**
Charitable non-cash contributions over $500	**8283**	**$40**	Installment Gain	**6252**	**$60**
Childcare credit	**2441**	**$40**	Interest income (no charge for first 4 1099s)		**$5/1099**
Child's investment income (kiddie tax)	**8615**	**$50**	Investment interest expense	**4952**	**$30**
Child Tax Credit & Advance Child Tax Credit Calculation	**8812**	**$40**	Non-deductible IRA	**8606**	**$30**
Depreciation Report		**$10/asset**	Parents reporting child's income	**8814**	**$50**
Dividend income (per 1099 or security if listed separately)		**$5**	Partnership/S-Corp/Estate (per schedule)	**K-1**	**$40**
Earned Income Credit	**EIC**	**$40**	Passive activity loss limitations	**8582**	**$40**
Education credit	**8863**	**$40**	Rental Property (per property)	**E**	**$60**
Farm Income	**F**	**$70-120**	Residential Energy Credit	**5695**	**$30**
Foreign Bank Report FINCEN 114 for 1st 3 accounts. $10/additional account		**$30**	Sale of business assets	**4797**	**$60**
			Sec 1256 Contracts and Straddles	**6781**	**$40**
Foreign earned income exclusion	**2555**	**$70**	Self-employed/small business	**C**	**$80-150**
Foreign Financial Assets for 1st 3 accounts. $10/add acct	**8938**	**$30**	Stock/bond sales (first 5 sales) $3/each additional sale	**D**	**$50**
Gambling income (per W-2G)		**$5/W-2G**	Retirement account distributions/rollovers		**$30**
Amended Tax Returns	**1040**	**$150**	**Paper filing copy of tax return (if you opt not to e-file, or for tax years no longer accepted electronically)**		**$30**
Tax Planning/Consultations $240 per hour, billed in 15-minute increments					

☐ **Go paperless!** Save $10 off your preparation fees with our **no mail/no paper** option. We'll upload a copy of your tax return and documents to your SmartVault. We won't return anything by USPS. We recommend sending us copies of documents if you choose this option.	**-$10**
☐ **Protection Plus Audit Insurance - Program details are available in the SmartVault Public Documents folder**	**$25**
Total	

Most forms and fees are listed above. Additional fees may apply if other forms or additional work are required to complete your tax return.

Corporate/Partnership/Trust/Estate Returns: Pricing varies depending on the complexity of the return.

Audit Representation: Audit representation fees begin at $150 for basic correspondence audits or phone calls to IRS and state tax agencies. Fees increase depending on the type and complexity of the audit. Office and field audit costs average $1,900. Protection Plus Audit Insurance covers all audit representation costs if the IRS or a state tax agency audits your return.

Payment Method

Check or Money Order Make payable to Tax Crew. ($25 charge for returned checks)

Credit/Debit Card. (AMEX, Visa, MasterCard, Discover)

Card Number	Expiration Date	Security Code
Cardholder Name (if different than taxpayer)	Signature	