



2024 Tax Preparation Pricing:

Here at Daniel Alan Tax, we charge based on your return “package”. There are 3 categories, 4 levels, and additional fees if they apply to you. If you have any questions, please contact us and we can answer them before we start. Here is how it works:

Everybody will have a category and level. These are based on your Filing Status/Situation, your Number of Tax Documents, and how many credits you are eligible for. There are also the additional fees included below for not as common forms, and discounts for using the SmartVault. You do not need to pick your level; we will determine your level for you once we have gone through your return.

Single: If you file as Single or Head of Household Level 1: \$190 <ul style="list-style-type: none"> • 1-5 Simple Docs Level 2: \$215 <ul style="list-style-type: none"> • 6-7 Simple Docs • 1 Complex Doc • 1 Tax Credit Level 3: \$240 <ul style="list-style-type: none"> • 8-12 Simple Docs • 2-3 Complex Docs • 2-3 Tax Credits Level 4: \$290 <ul style="list-style-type: none"> • 13-20 Simple docs • 4-6 Complex Docs • 4-6 Tax Credits 	Married: If you file as Married Filing Joint or Separately Level 1: \$190 <ul style="list-style-type: none"> • 1-6 Simple Docs Level 2: \$215 <ul style="list-style-type: none"> • 7-9 Simple Docs • 1-2 Complex Docs • 1-2 Tax Credits Level 3: \$265 <ul style="list-style-type: none"> • 10-15 Simple Docs • 3-4 Complex Docs • 3-4 Tax Credits Level 4: \$315 <ul style="list-style-type: none"> • 16-20 Simple docs • 5-6 Complex Docs • 5-6 Tax Credits 	Retired: If you have retired from your job or receive Social Security Level 1: \$190 <ul style="list-style-type: none"> • 1-8 Simple Docs Level 2: \$215 <ul style="list-style-type: none"> • 9-11 Simple Docs • 1-2 Complex Docs • 1-2 Tax Credits Level 3: \$240 <ul style="list-style-type: none"> • 12-16 Simple Docs • 3-4 Complex Docs • 3-4 Tax Credits Level 4: \$290 <ul style="list-style-type: none"> • 17-25 Simple docs • 5-6 Complex Docs • 5-6 Tax Credits 	Simple Docs Include: W-2, all 1099s, Mortgage 1098 Complex Docs Include: K-1, 1095-A, 1098-T Tax Credits Include: Child Dependent Care, Education, Energy, Foreign Tax, (Earned Income and Child Tax Credits are included for all)
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Additional Fees:

- \$50 For each Schedule C, E, or F (Small Business, Rental Unit, or Farm)
 - \$50 per hour Bookkeeping fee which can be reduced if all income/expenses are organized.
 - \$25 For Schedule A
 - \$25 per hour prep fee which can be reduced if all donations/medical bills are organized.
 - \$50 Per hour prep fee for Schedule D (fee does not apply to stock sales from Form 1099-B)
 - \$20 For each additional state tax return (1 state is included with tax return prep fee)
 - \$15 To ship tax returns
 - \$5 For each simple document and \$20 for each complex document or credit over the level 4 limit
- SmartVault Discount
- \$15 discount for uploading documents through the SmartVault