

TaxWizardUSA — Pricing Sheet

Standard structure, and the different structure for attorneys & law firms. "From" prices are starting prices, quoted in writing after a short scoping call.

Standard structure — Tax preparation

- **Individual — Form 1040: from \$175.** E-file included. Schedules A, B, C, D, E and SE are priced by complexity — every fee is quoted in writing before we start.
- **S Corporation — Form 1120-S: from \$325.** K-1s for each shareholder included.
- **C Corporation — Form 1120: from \$400.** Quoted in writing upfront.
- **Partnership — Form 1065: from \$400.** K-1s for each partner included; quoted in writing upfront.

Standard structure — Bookkeeping & cleanup

- **Monthly bookkeeping: from \$225/mo.** QuickBooks Online (Simple Start) included. Covers the first 1,000 transactions a month; +\$35 per additional 100. QuickBooks level step-ups: Essentials +\$35/mo, Plus +\$75/mo, Advanced +\$215/mo.
 - **Cleanup & catch-up: starting at \$350.** For books that have fallen behind — quoted after a records review, before any monthly plan begins.
 - **Year-End Ready Review: \$265.** A structured review of the books ahead of filing season.
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A different structure — Attorneys & Law Firms

Law firms carry client money in trust, and their books answer to the bar as well as the IRS — so this practice prices differently. Every plan runs on QuickBooks Online or Xero and includes operating + trust accounting, individual client ledgers, and a monthly three-way trust reconciliation. The practice is fronted by Marufa Akter, Nationwide Attorney Specialist — (202) 946-1707. The specialist title is a TaxWizardUSA service designation for bookkeeping and tax coordination; it does not involve legal advice or representation.

Start here — cleanup & catch-up (one-time)

- **Attorney cleanup: from \$495.** Priced at the greater of \$495 or your monthly plan rate per month of catch-up. Trust-account reconstruction — client ledgers rebuilt and the three-way reconciliation brought current — is included when your records allow; severely commingled records are quoted separately after a records review.
- **Trust-account-only service: from \$225/mo.** For firms whose operating books are handled in-house: client ledgers and the monthly three-way reconciliation.

Monthly bookkeeping

- **Solo: from \$275/mo.** One attorney. Up to 2 bank/credit accounts plus 1 trust account; monthly close and partner reports.
- **Small Firm: from \$695/mo.** 2–5 attorneys. Up to 4 operating accounts plus trust; client-cost (hard/soft) tracking per matter; quarterly partner distribution summary.
- **Growing Firm: from \$1,195/mo.** 6–15 attorneys or multiple trust accounts. Everything in Small Firm, plus a monthly partner meeting packet and 1099 tracking for experts and co-counsel.
- **Larger / multi-office: from \$1,495/mo.** Custom scope, quoted after a scoping call. Advisory time at \$125/hr.

Firm tax returns (annual)

- **Form 1065: from \$1,250.** Partnership / multi-member LLC. Includes up to 4 K-1s; +\$75 per additional K-1; +\$250 per additional state return.
- **Form 1120-S: from \$1,150.** S corporation / LLC taxed as S. Includes up to 4 K-1s; +\$75 per additional K-1; +\$250 per additional state return.
- **Single-member LLC / Schedule C: from \$450.** Monthly-plan clients in good standing receive 10% off the return fee.

What adjusts the monthly price

- Each additional trust (IOLTA) account beyond the first: **+\$75/mo.**
- Each additional operating account beyond your tier: **+\$40/mo.**
- Transactions over 1,000 a month: **+\$35 per additional 100.**
- Software level: the base price is the same on QuickBooks Online or Xero. QuickBooks Online levels: Simple Start included; Essentials +\$35/mo, Plus +\$75/mo, Advanced +\$215/mo.
- Add-ons: payroll coordination from \$75/mo · bill pay / AP management from \$95/mo · client-cost recovery report \$150 · advisory & special projects \$125/hr.

Instant Quote: taxwizardsusa.com/attorney-calculator.html — **Free handbook:**

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Terms that apply to both structures

Prices shown as "from" or "starting at" are starting prices; items shown at a flat price (the \$265 Year-End Ready Review, the \$150 client-cost recovery report) are fixed. Your final quote is given in writing after a short scoping call, based on transaction volume, the number of accounts, and the condition of the books. Monthly plans are month-to-month — cancel with 30 days' notice. Cleanup is quoted after a records review, then completed and paid before the first monthly cycle. Entity returns under the standard structure include all K-1s; firm returns under the attorney structure include up to 4 K-1s (see that section). Attorney engagements are coordinated by Marufa Akter; all services are provided through Triumph Business and Tax Solutions LLC. Trust-account compliance responsibility stays with the firm and its attorneys — we keep the client ledgers and reconciliations that compliance requires, to your jurisdiction's rules. Billing runs through HoneyBook; clients pay by credit card.

Rafael Rodriguez, Jr., MBA is a tax preparer, not a CPA — the CPA is a higher, state-licensed credential. Services requiring a CPA are performed by our licensed CPA on staff.

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