



ATSOURCE tax preparation fees are computed as follows:

1. An estimate will be given to clients after we review prior year tax returns. Returning clients can assume roughly the same fees as prior year (assuming no significant changes in tax situation).
2. Total billable time incurred (including tax prep and planning, client specific correspondence, and document retrieval) will be compiled.
3. Client fees will be the higher of the estimate or total billable time incurred (#1 or #2 above).

Hourly Bill Rates (as applied to #2 above):

| | <u>CPA</u> |
|---|------------|
| January | \$180 |
| February and September | \$240 |
| March and October | \$360 |
| April | \$480 |
| Off Season (May through August, November & December) | \$150 |

Administrative staff & interns bill at 33% and Pro Tax Staff bill at 66% of the CPA rates.

- We require a valid credit card number on file (for fee payment) prior to the start of services.
- Invoices are sent (via email if possible) at the end of each work week.
- All fees will be collected prior to the filing of tax returns (or client delivery).
- Bill rates are always applied based on dates of service and in increments of 1/10 of one hour.
- Bill rates double the 11-15th of each deadline month: March, April, September, and October.

Answers to frequently asked questions and example of fees:

- **Most individual tax returns should take about an hour if clients are prepared.**
 - 15-20 min input
 - 20-30 min tax interview
 - 15-20 to print, sign, and file
- Business tax returns normally take 2 to 3 hours but can vary depending on the type of entity and the completeness of client financial information.
- We recommend clients with a good idea of their estimated tax refund or liability to file extensions in order to minimize tax fees as our hourly bill rates increase progressively during tax season.
- We can tell clients prior to a tax appointment what his or her fees will be if tax returns are completed within a scheduled tax appointment.
- Document retrieval is billable time so please keep your tax documents in a safe place or make document requests outside of tax season to minimize fees.
- It is best if clients deliver tax docs at one time to minimize doc management time and confusion.
- Accounting services are billed separately and are not available February thru April.
- **EXAMPLE OF FEES - A client with a \$350 tax fee estimate:**
 - Can do almost 3 hours of tax and financial planning in Nov or Dec and do an hour of tax prep in May thru Aug and still pay only \$350.
 - Can do an hour of tax prep mid March and will pay around \$350.
 - Or will pay \$480/hour for tax prep at the tax deadline in April.

Please call if you have any further questions!
(714) 962-9888



2017 MONTHLY BILL RATES

| Week | CPA | Pro Staff & Min Fees | Interns & Admin |
|---------------------|------------|-------------------------------------|--------------------------------|
| January | \$180 | \$120 | \$60 |
| February | \$240 | \$160 | \$80 |
| March | \$360 | \$240 | \$120 |
| April | \$480 | \$320 | \$160 |
| May - August | \$150 | \$100 | \$50 |
| September | \$240 | \$160 | \$80 |
| October | \$360 | \$240 | \$120 |
| November - December | \$150 | \$100 | \$50 |

Please call our office if you have any questions: (714) 962-9888.