BIG TREES TAXES
TAX PREPARATION • TAX PLANNING • IRS REPRESENTATION

Tax Preparation Pricing List for the 2026 Tax Year | 2027 Filing Season

Our pricing guide is intended to help clients understand the cost of professional tax preparation. Final fees depend on the forms required, the complexity of the return, and any additional services needed. We will discuss anticipated fees before beginning work.

Service - Individual Returns	Starting Fee
Federal Form 1040 — Base Preparation	$250
California Form 540	$50
Schedule A — Itemized Deductions	$50
Schedule C — Sole Proprietorship / Self Employment*	$150
Schedule E — Rental Property**	$125
Form 4562 - Depreciation and Amortization	$50
Form 8949/Schedule D — Complex Capital Gains***	$75
Form 8829 - Business Use of Home (Home Office)	$75
Schedule K-1 — Partnership, S Corporation, or Trust	$75
Form 7203 - S Corporation Shareholder Stock and Debt Basis Limitations	$100
Form 8283 - Noncash Charitable Contributions	$50
Form 8995A Qualified Business Income (QBI)	$100
Tax Credit Eligibility & Filing Status Due Diligence****	$75
Form 8606 Nondeductible IRAs	$75
Additional State Return	$100

**Schedule C - The listed fee applies to a basic small business with organized financial records, straightforward income and expenses, and limited additional reporting requirements. Businesses with more complex activities, extensive transactions, depreciation, or records requiring reconciliation will receive an individualized quote before preparation begins.*
***Schedule E - The listed fee applies to a straightforward rental property with organized records. Multiple properties, complicated depreciation, or property sales would be quoted separately.*
****Form 8949/Schedule D - applies to 15 transactions. Overage transactions will be billed hourly at the planning & advisory rate.*
*****Refundable Tax Credits & Filing Status Due Diligence — Additional fees may apply to returns requiring enhanced eligibility verification and documentation for the Earned Income Tax Credit (EITC), Child Tax Credit (CTC), Additional Child Tax Credit (ACTC), American Opportunity Tax Credit (AOTC), or Head of Household filing status. Fees reflect the additional time required for client interviews, eligibility review, and documentation.*

Service - Business Returns	Starting Fee
Form 1120-S — S Corporation (Federal & state)*	$800
Form 1065 — Partnership (Federal & state)*	$900
Form 1120 — C Corporation (Federal & state)*	$900
Form 1041 — Trust or Estate (Federal & state)*	$700

**Business and fiduciary tax preparation fees begin at the amounts listed above and assume organized financial records and straightforward reporting requirements. More complex returns, including partnerships with special allocations, multiple ownership interests, or complicated transactions, will be quoted individually before preparation begins.*

2027 Hourly Rate for Individual Tax Planning & Advice $150
2027 Hourly Rate for Business Tax Planning & Advice $175

Comprehensive Bookkeeping & Outsourced Accounting

Service	Starting Fee
Basic Monthly Bookkeeping	$300/month
Comprehensive Bookkeeping & Financial Management	Individually Quoted
Sales Tax Preparation & Filing	Individually Quoted
Inventory & Cost of Goods Sold Accounting	Individually Quoted
Bookkeeping Cleanup & Catch-Up	Individually Quoted
Payroll Processing & Tax Reporting†	Individually Quoted

Basic monthly bookkeeping includes routine transaction categorization, account reconciliations, and standard financial reporting for businesses with organized records and straightforward activity.

Additional services, including accounts payable, accounts receivable, daily transaction management, sales tax reporting, and inventory accounting, are priced according to the scope and complexity of the engagement.

† Payroll services are available exclusively to clients with an ongoing monthly bookkeeping engagement.

All bookkeeping engagements are billed monthly. Fees are established in advance based on the services requested and the anticipated workload.