



Expat, Resident, Nonresident Alien, and Dual Status Tax Services

You are given a detailed, fixed-fee written quote based on the schedule below and the information you provide before our work begins. If additional forms are required after work has started, we will notify you and obtain your approval for any fee adjustments.

Our **engagement letter** is a secure, web-based form that:

- Describes each form we will prepare for you.
- Allows you to exclude forms or include multiple forms as needed.
- Automatically adjusts the fee for any changes.
- Provides a platform to ask questions or make clarifications before acceptance.

Pricing Schedule

Form 1040: Resident Return

Fee: \$400 - \$700 (With Low-Income Discounts)

- Includes all supplemental forms and schedules required for proper reporting (except separately listed forms).

Form 1040NR: Nonresident Return

Fee: \$400 - \$700 (With Low-Income Discounts)

- Includes all supplemental forms and schedules required for proper reporting (except separately listed forms).

Form 1040/1040NR & Form 1040NR/1040: Dual Status Returns

Fee: \$400 - \$700 (With Low-Income Discounts)

- Required when residency changes during the year (e.g., arrival or departure).

Choice Between Dual Status and Joint Return

Fee: \$600

- Includes preparation of both joint federal income tax and dual status returns.
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Flex Tax and Consulting Group (Flex-Tax, Inc.)

P: (415) 860-6288 | F: (415) 688-2297 | E: info@flectcg.com

1160 Battery Street, East Building, Suite 100, San Francisco, CA 94111

State and Local Tax Services

State Income Tax Returns

Fee: \$99

- Preparation of state income tax returns for residents and nonresidents, including treaty-exempt income.

Local Tax Returns

Fee: \$100

- Includes property tax refunds or rent credits where applicable.
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Additional Forms and Services

Capital Gains and Losses

Fee: \$10 per transaction or \$150 maximum

- Requires an Excel spreadsheet from your broker for transactions exceeding five.

Foreign Earned Income Exclusion/Foreign Tax Credit

Fee: \$200

- Includes computation of Form 2555 and Form 1116 for the best combined benefit.

First Year Choice and Joint Return Elections

Fee: \$50

Form W-7 & W-7 COA (ITIN Application)

Fee: \$295

- Includes Certificate of Accuracy prepared by Certifying Acceptance Agent (CAA).
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Specialized Reporting Services

Schedule C: Business Income and Expenses

Fee: \$150 per schedule

Schedule E: Rental Real Estate

Fee: \$150 per schedule

Form 4797: Sale of Real Estate

Fee: \$150

Real Property Election

Fee: \$75

Foreign Reporting Services

Form 5471: Stock Ownership in Foreign Corporation

Fee: \$1,000 - \$1,200 (Discounts for minor shareholders)

Form 5472/1120: Single Member LLCs with Nonresident Owners

Fee: \$375

Form 8833: Tax Treaty Exemption

Fee: \$200

Treasury Form 114 (FBAR)

Fee: \$175 (\$20 per account if more than four)

Additional Compliance Services

Form 3520/3520-A: Foreign Trusts

Fee: \$750/\$300 for gifts

Form 8288-B: Withholding Exemption on Sale of Real Estate

Fee: \$500



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Form 8621: Passive Foreign Investment Companies (PFICs)

Fee: \$175 per fund

Form 8858: Foreign Single-Member LLC

Fee: \$700

Form 8938: Specified Foreign Financial Assets

Fee: \$125 (\$20 per account if more than four)

For more complex services such as **Offshore/Domestic Streamlined Procedures**, fees begin at **\$1,500 plus additional form charges**.

This pricing format ensures transparency and clarity while allowing clients to navigate their options easily.