



Flex Tax and Consulting Group (Flex-Tax, Inc.)  
P: (415) 860-6288 | F: (415) 688-2297 | E: [info@flectcg.com](mailto:info@flectcg.com)  
1160 Battery Street, East Building, Suite 100, San Francisco, CA 94111

## **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.

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## **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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## **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:** \$20 per transaction

- 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:** \$175 per schedule

### **Schedule E: Rental Real Estate**

**Fee:** \$150 per schedule

### **Form 4797: Sale of Real Estate**

**Fee:** \$200

### **Real Property Election**

**Fee:** \$75

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## **Foreign Reporting Services**

### **Form 5471: Stock Ownership in Foreign Corporation**

**Fee:** \$2,000 (Discounts for minor shareholders)

### **Form 5472/1120: Single Member LLCs with Nonresident Owners**

**Fee:** \$50

### **Form 8833: Tax Treaty Exemption**

**Fee:** \$200

### **Treasury Form 114 (FBAR)**

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

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

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

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