SCHOOL CREEK TAXES

INDIVIDUAL TAX PREPARATION PRICING

Straightforward Pricing • Personal Service

All individual tax preparation tiers include a Federal Form 1040, Pennsylvania PA-40, and one local Earned Income Tax (EIT) return, when applicable.

Pricing is based on your overall tax situation, not simply the number of forms required.

TIER 1 — ESSENTIAL TAX RETURN $185

For individuals and retirees with straightforward income who use the standard deduction and do not require additional tax credits or complex calculations.

- **Wages & Retirement Income:** Employment wages (W-2), Social Security (SSA-1099), pensions and IRA distributions (1099-R), unemployment (1099-G).
- **Basic Investment Income:** Interest and dividends without investment sales (1099-INT, 1099-DIV).
- **Education & Health:** Student loan interest (1098-E), tuition statements without education credit calculations (1098-T), routine HSA reporting (1099-SA/8889), standard Marketplace insurance reconciliation (1095-A/8962).
- **Other Standard Items:** Gambling winnings (W-2G), Tax-free education savings distributions (1099-Q)

TIER 2 — FAMILY, CREDITS & SIMPLE INVESTMENTS $275

Includes Tier 1 services, plus:

- **Family & Dependents:** Qualifying dependents, Head of Household filing status, Child Tax Credit (Schedule 8812).
- **Tax Credits:** Earned Income Credit (EIC), child and dependent care expenses (Form 2441), education credits (Form 8863).
- **Simple Investment Sales:** Up to three individual stock or mutual fund sales with documented cost basis and no adjustments (Schedule D/Form 8949).
- **Special Marketplace Situations:** Shared policy allocations or eligible year-of-marriage calculations (Form 8962).

TIER 3 — ADVANCED INDIVIDUAL RETURN $365

Includes applicable Tier 1 and Tier 2 services, plus:

- **Itemized Deductions:** Mortgage interest, property taxes, charitable contributions, and other qualifying deductions (Schedule A).
- **Investment & Digital Asset Sales:** More than three investment sales, transactions requiring additional calculations, and digital asset sales (Schedule D/Form 8949, Form 1099-DA when issued).
- **Property & Debt Transactions:** Personal residence sales and cancellation of debt (Forms 1099-S, 1099-C; Form 982 when applicable).
- **Pass-Through Income:** Partnership, S corporation, estate, or trust income (Schedule K-1).

BUSINESS & RENTAL INCOME ADD-ONS

The following fees are added to the applicable individual tax preparation tier.

SCHEDULE C — SELF-EMPLOYMENT & SMALL BUSINESS

- **Micro Side Hustle — +$75:** Small, occasional self-employment activity with minimal expenses, organized records, and no depreciation or complex deductions.
- **Simple Small Business — +$135:** Regular self-employment income with routine business expenses, organized records, and no complex deductions or depreciation.
- **Standard Business — +$195:** More involved business reporting, including vehicle expenses, home office deductions, or routine depreciation, as applicable.

SCHEDULE E — RENTAL PROPERTY

- **Existing Rental — +$115 per property:** Established rental with organized income and expenses and a complete, reliable prior-year depreciation schedule.
- **New Rental — +$175 per property:** New or newly acquired rental requiring straightforward initial depreciation setup.

Complex rental situations, property dispositions, or incomplete depreciation records may require an individual quote.

ADDITIONAL PREPARATION OPTIONS

- **Dependent Return — $65:** When a parent or guardian also files with School Creek Taxes.
- **Federal-Only Return — Starting at $125:** For taxpayers who do not require state or local return preparation.
- **PA Property Tax/Rent Rebate Application — $35:** Preparation of Pennsylvania's Property Tax/Rent Rebate application (Form PA-1000).

IMPORTANT PRICING INFORMATION

Final pricing is determined after reviewing your tax situation and documents. Pricing assumes complete, organized records. Unusual or complex circumstances may require an individual quote.

A Clearer Path Through Tax Season

www.schoolcreektaxes.com | (484) 272-7728