

2026 TAX PREPARATION FEE INVOICE

Review with the client to determine the appropriate preparation fee.

	☐ STANDARD — \$89	☐ PLUS — \$109	☐ COMPLEX — \$129	ADDITIONAL FEES	AMOUNT
	INCLUDES:	INCLUDES EVERYTHING IN STANDARD, PLUS:	INCLUDES EVERYTHING IN PLUS, PLUS:	MAY APPLY FOR:	
	W2 (UP TO 4)	1 Rental - Schedule E	2 Rental - Schedule E	3 or more rentals	
	SSA1099	1 Business - Schedule C	2 Business - Schedule C	3 or more Schedule C	
	1099-R (UP TO 6)	Primary Home Sale	College/Education - Students	3 or brokerage accounts	
	1099-MISC	3-6 1099 DIV	6 or more 1099 DIV	3 or more 1099DA	
	1099-DIV (UP TO 3)	3-6 1099 INT	6 or more 1099 INT	Additional State Return	
	1099-INT (UP TO 3)	3-6 W2G	6 or more W2G	Additional K-1 forms	
	W2G (UP TO 3)		Up to 2 K-1 forms	Rental Home Sale	
	SCHEDULE A		Up to 3 brokerage accounts	Additional 1099R or W2	
	IL State Return		Up to 3 1099 DA	SEP IRA Contributions	
				Other Forms not covered	
	NOT INCLUDED IN STANDAR OR PLUS:			ADDITIONAL FEE TOTAL	
	No 1099B - stock sales		3+ 1099NEC/109K/1099MISC	OTHER	_____
	No 1099DA - Digital Asset Sales			OTHER	_____
	No Schedule E or C			OTHER	_____
	MISSING DOCS — You will have 1 opportunity to provide all documents at once. If we need to call for follow-up or additional documents, there will be a \$25 fee.				
	CLIENT PAYMENT SLIP — TAKE COMPLETED FORM TO ADMIN FOR PAYMENT				
	CLIENT LAST NAME:	_____	PREPARER INITIALS: _____	DATE: _____	
	PREPARATION FEE:	_____	ADDITIONAL FEES: _____		
					TOTAL DUE: _____

Thank you for choosing Merlak Tax!