

# MONEY MANAGEMENT ASSOCIATES, LLC

Since 1984

## 2023 Client Price List

### Basic 1040 Tax Bundle **\$220.00**

Includes form 1040, 1 state resident return (NJ or PA), unlimited w2's and 1099R's, interest income and/or dividends/and/or capital gains distributions under \$1500, taxable social security, unemployment benefits, non-itemized charitable deductions, student loan interest calculations, child tax credit, credit for other dependents, required due diligence checklist, and all other income/deductions not requiring any individual specialized forms (see below).

### Basic 1040 Tax Bundle without a state tax return (not requiring any specialized forms) **\$135.00**

### Basic NJ or PA resident tax return without a federal tax return (not including any required NJ or PA specialized forms) **\$90.00**

### NJ or PA part year or non-resident resident tax return (not including any required NJ or PA specialized forms) **\$35.00 each**

### Full time college students (documentation required) and/or dependents under 24 years old filing with parent **\$80.00**

### All other state resident, part year or non-resident tax returns **\$50.00 and up**

### Payment Options

\*Expected at the time of completed return and before E-filing\*

Cash/Check/Money Order/Zelle/Debit Card **No Charge**  
 Credit Card **Additional 3% Surcharge**  
 Process payment w/active checking or savings account **\$40.00**

### Other Fees

Notary Services **\$10.00 per document**  
 Consultation Fee **45.00/hour**  
 Extra Copy of Tax Return **\$5.00**

### Most Common Individual Specialized Forms include but are not limited to:

1040X	<b>\$50.00</b>
Schedule A Itemized Deductions	<b>\$50.00</b>
Schedule B Interest/Dividends over \$1500	<b>\$50.00</b>
Schedule C – Sole Proprietor/Single Member LLCs	<b>\$75.00 ea</b>
QBI – Qualified Business Income Worksheet	<b>\$25.00</b>
Schedule D – Capital Gains	<b>\$28.00</b>
Schedule E – Rental Property	<b>\$75.00 ea property</b>
Schedule EIC -Earned Income Credit	<b>\$75.00</b>
Schedule SE – Self Employment Tax	<b>\$18.00 ea</b>
Form 2441 – Child and Dependent Credit	<b>\$25.00</b>
Form 2210 – Underpayment of Estimated Tax	<b>\$25.00</b>
Form 4562 – Depreciation	<b>\$30.00 ea property</b>
Form 5405 – Repayment of Homebuyer Credit	<b>\$16.00</b>
Form 5695 – Residential Energy Credit	<b>\$16.00</b>
Form 6251 – Alternative Minimum Tax	<b>\$25.00</b>
Form 8379 – Injured Spouse	<b>\$25.00</b>
Form 8582 – Carryover Rental Losses	<b>\$20.00</b>
Form 8812 Additional Child Tax Credit	<b>\$14.00</b>
Form 8814 - Kiddie Tax	<b>\$20.00</b>
Form 8829 – Office in Home	<b>\$30.00</b>
Form 8880 – Retirement Plan Credit	<b>\$12.00</b>
Form 8863 – Education Credits	<b>\$25.00</b>
Form 8889 – Health Savings Account	<b>\$20.00</b>
Form 8949 – Sales of Stock	<b>\$8.00 per transaction</b>
Form 8959 – Additional Medicare Tax	<b>\$25.00</b>
Form 8960 – Net investment tax	<b>\$25.00</b>
Form 8962 – Premium Tax Credit	<b>\$20.00</b>
Other Income (i.e., 1099K, 1099 NEC, etc.)	<b>\$10.00</b>

### Most Common NJ and PA Specialized Forms include but are not limited to:

NJ EITC	<b>\$20.00</b>
NJ Form 2450	<b>\$20.00</b>
NJ Sch COJ	<b>\$20.00</b>
NJ Child and Dependent Care Credit	<b>\$20.00</b>
PA Form UE	<b>\$20.00</b>
PA Local Tax	<b>\$20.00</b>

### Business Forms:

1065 Basic 2 Person partnership incl 2 K1's	<b>\$275</b>
NJ Partnership Basic 2 Person Partnership incl 2K1's	<b>\$95</b>
Additional K1's	<b>\$10 each</b>
Additional Forms	<b>\$20 and up as required</b>