

“The Everyday” Starting at \$660CAD/\$550USD

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| <ul style="list-style-type: none"> ▪ Wages ▪ Scholarships ▪ Unemployment benefits ▪ Pension Income – US only ▪ Interest/Dividend income ▪ Child Care Expenses ▪ Child/Dependent Credits | <ul style="list-style-type: none"> ▪ Form 1116- Foreign Tax Credit (FTC) ▪ Form 2555- Foreign earned income exclusion ▪ Form 8843- Exempt Individuals – up to 2 ▪ Form 8833- up to 2 ▪ Education expenses/credits ▪ State return – 1 |
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“The Usual Suspect” Starting at \$900CAD/\$750USD

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| <ul style="list-style-type: none"> ▪ Spouse/dependents requiring Form W-7 ▪ Foreign pension income ▪ Up to 2: Sch E- Rental properties US based Sch C-Sole proprietorship income US based Sch F- Farming Activities ▪ Capital gains/losses (reported on a 1099B) | <ul style="list-style-type: none"> ▪ Form 8621- Foreign Mutual Funds- up to 3 ▪ Form 8833-Treaty Based Disclosure- up to 4 ▪ Simple Additional FTC interest/dividends only ▪ Net Investment Income Tax (NIIT) ▪ Form 8938-Report of Foreign Financial Assets ▪ State return- up to 2 |
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“The Developer” Starting at \$1200CAD/\$1000USD

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| <ul style="list-style-type: none"> ▪ Employer Stock Options ▪ Capital gains/losses- no slip/foreign- up to 10 ▪ Foreign pension distribution with a cost base ▪ K-1 investments ▪ Cancellation of Debt ▪ Abandonment of Property ▪ Additional FTC Complex | <ul style="list-style-type: none"> ▪ Up to 2:(includes Form 8858)- Foreign Sch C- Sole proprietorship income Foreign Sch E- Rental properties Foreign Sch F- Farming Activities ▪ Form 8833-Treaty Based Disclosure- >5 ▪ Form 8621- Foreign Mutual Funds- up to 8 ▪ State returns- up to 3 |
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“The Labyrinth” Starting at \$1800CAD/\$1500USD

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| <ul style="list-style-type: none"> ▪ More than 2: (includes Form 8858 if applicable) Sch C- Sole proprietorship income Sch E- Rental properties Sch F- Farming activities ▪ Capital gains/losses- no slip/foreign >10 | <ul style="list-style-type: none"> ▪ Form 8621- Foreign Mutual Funds >8 ▪ Foreign pass-through investments ▪ State returns >3 ▪ Disposition of business property ▪ Disposition of rental property |
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Add-Ons

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| Additional Schedules C, E, F (includes 8858)..... | add \$300CAD/\$250USD each |
| Form W7 (ITIN)/SS4 (EIN) Application..... | add \$75CAD/\$60USD |
| Obtain IRS transcripts..... | add \$195CAD/\$160USD |
| Late Bird Special (engagements signed within two (2) weeks of a deadline)..... | add \$250CAD/\$200USD |
| Priority Service Status (Rush Fee – full payment of all fees required up front)..... | add \$500CAD/\$400USD |
| Translation Services (as available) | starts at \$75CAD/\$60USD/page |

NOTE: Fees for the Canadian return(s) not included in the above pricing
NOTE: Time charges may apply to all complexity tiers at \$440CAD/\$350USD per hour

NOTE: FEES INCLUDE ONLY TAX PREPARATION – SEE OUR AUDIT ASSISTANCE AND REPRESENTATION POLICY AND VALUE ADD SERVICE BUNDLES FOR RATES FOR ADDITIONAL SERVICES

The "Unusual Suspects"

"The Safety Net" return

 Income under the filing threshold only \$240CAD/\$200USD
No PFICs, Form 8938, business, rental, state return, etc.
"The Commuter" Return

 Form 1040NR - US Wages only, one (1) state (non-resident) \$360CAD/\$300USD
No other US source income - pensions, sale of stock, rental, etc.
"Dependent" return

 Prepared in conjunction with the parent(s) return \$240CAD/\$200USD
No PFICs, Form 8938, business, rental, etc.
US Non-resident couple with Jointly owned Rental Property:

 Spouses/Partners owning US rental property 50% off second return

International Information Returns

Foreign Bank Account Reporting (FBAR)
Initial Set-up fee (one time) *add \$75CAD/\$60USD*
 FinCEN Report 114 (up to 10 accounts) \$150CAD/\$125USD
 FinCEN Report 114 (11-25 accounts) \$300CAD/\$250USD
 FinCEN greater than 25 accounts additional charges may apply
¹Completed worksheet(s) required. Time charges @regular rates apply if completed worksheet(s) not provided to AET.
Foreign Trust Reporting (Form(s) 3520A/3520):

 Form 3520A/3520 package starts at \$660CAD/\$550USD
 Form 3520A or 3520 alone starts at \$440CAD/\$350USD
²PFIC calculations not included - Please see [Expat Tax Tools](#) for standalone PFIC pricing or return pricing if prepared in addition to a tax return
Foreign Disregarded Entity/Branch Information Reporting Form 8858:

 Additional Schedules C, E, F (includes 8858) \$300CAD/\$250USD each
 Standalone preparation starting at \$440CAD/\$350USD/hr
Expatriation/Renunciation (Form 8854):

 Preparation of Form 8854 -hourly starting at \$480CAD/\$400USD

Specialty Items

Dual Status/Multiple Jurisdiction Allocations:

 Federal Dual Status return starting at add \$345CAD/\$275USD
 Income/deductions/credit/state allocations starting at add \$200CAD/\$160USD
COVID-19 Assistance/Loan reconciliations:

 PPP/EIDL/Etc. Loan/expense reconciliations hourly \$440CAD/\$350USD
Form 1040NR Additional Preparation Items:

 Article XXV Treaty position (prepare additional 1040) add 70% of fee for additional 1040 return

Compliance Programs

Streamlined Foreign/Domestic Offshore Procedures

 Preparation of submission in accordance with procedures starting at \$1195CAD/\$995USD
Relief Procedures for Former Citizens

 Preparation of submission in accordance with procedures starting at \$750CAD/\$600USD

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Platinum Service Team

American Expat Tax Services' Platinum Service Division is a team of highly specialized and skilled associates that are dedicated to providing the services listed below. Our Platinum Service Division is available to collaborate with and assist other Tax Professionals, Accountants, Attorneys and Clients that require complex computations and analyses, multi-tier entity structure reporting and multiple intra-company transactions. Be sure to engage our team early to avoid being placed on the Platinum Service Team waiting list.

Engagements signed within 4 weeks of a deadline are subject to additional fees

| Platinum Services | |
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| Passive Foreign Investment Corporation (PFIC): Form 8621 (per form) | Please see Expat Tax Tools for pricing |
| Form 3115- change of accounting method | hourly \$440CAD/\$350USD |
| Historic basis calculations (SCorp, Passive loss, etc.) | hourly \$440CAD/\$350USD |
| US Form 1120 Series (1120, 1120S, 1120F) – Corporations | starting at \$1500CAD/\$1200USD |
| US Form 1065 – Partnerships | starting at \$1500CAD/\$1200USD |
| Other US Entities | |
| Trusts/Estates (Fiduciary) Income Tax (Form 1041) | hourly \$500CAD/\$400USD/hr |
| Estate Tax (Forms 706, 706NA) | hourly \$500CAD/\$400USD/hr |
| Gift Tax and GST Tax (Form 709) | hourly \$375CAD/\$300USD/hr |
| Foreign Ownership of US Entity Information Reporting Form 5472: | |
| Prepared in addition to a return | additional \$500CAD/\$400USD/hr |
| Standalone preparation | hourly \$625CAD/\$500USD/hr |
| Foreign Partnership Information Reporting Form 8865: | |
| Prepared in addition to a return | additional \$500CAD/\$400USD/hr |
| Standalone preparation | hourly \$625CAD/\$500USD/hr |
| ³ Two (2) hour retainer required for first year and/or new to AET filers to review documents/transactions to determine scope of work | |
| Foreign Corporation Information Reporting Form 5471: | |
| (Section 965, GILTI calculations) | |
| Prepared in addition to a return (All Categories) | additional \$500CAD/\$400USD/hr |
| Standalone preparation | hourly \$625CAD/\$500USD/hr |
| ³ Two (2) hour retainer required for first year and/or new to AET filers to review documents/transactions to determine scope of work | |

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NOTE: Additional time charges may apply to all complexity tiers at \$440CAD/\$350USD per hour

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