

****All Engagements signed within 3 weeks of a deadline are subject to an additional "rush fee" of \$495USD****

"The Everyday" Starting at \$660USD

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| <ul style="list-style-type: none"> ▪ Wages ▪ Scholarships ▪ Unemployment benefits ▪ Pension Income – US/Canada only ▪ Interest/Dividend income ▪ Child Care Expenses ▪ Child/Dependent Credits | <ul style="list-style-type: none"> ▪ Social Security Benefits ▪ Form 1116- Foreign Tax Credit (FTC) - paid ▪ 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 \$880USD

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| <ul style="list-style-type: none"> ▪ Itemized Deductions (1040 - Schedule A) ▪ Foreign pension income/distribution ▪ Up to 2: US Based 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 \$1225USD

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| <ul style="list-style-type: none"> ▪ Employee Stock Compensation (RSUs, Options) ▪ Capital gains/losses- no slip/foreign- up to 10 ▪ Foreign pension distribution with a cost base ▪ K-1/passthrough (up to 3 simple, 1 complex) ▪ 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 8621- Foreign Mutual Funds up to 8 ▪ State returns- up to 3 |
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"The Labyrinth" Starting at \$1825USD

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| <ul style="list-style-type: none"> ▪ Up to 4: (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 (basis calcs fee applies) | <ul style="list-style-type: none"> ▪ Form 8621- Foreign Mutual Funds >8 ▪ K-1/passthrough (up to 6 simple, 4 complex) ▪ State returns >3 ▪ Disposition of business property ▪ Disposition of rental property |
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Add-Ons

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| Dual Status/multiple jurisdiction/state allocations..... | add \$330USD |
| Form W7 (ITIN)/SS4 (EIN) Application..... | add \$85USD |
| Additional Forms K-1/passthrough – complex..... | add \$85USD/ea |

NOTE: Fees for the Canadian return(s) not included in the above pricing

NOTE: Time charges may apply to all complexity tiers @ \$415USD/hr (Platinum Services @ \$495USD/hr)

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

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The "Unusual Suspects"

"The Safety Net" return

Income under the filing threshold only \$330USD
No PFICs, Form 8938, business, rental, state return, etc.

"The Commuter" Return

Form 1040NR - US Wages only, one (1) state (non-resident) \$450USD
No other US source income - pensions, sale of stock, rental, etc.

"Dependent" return

Prepared in conjunction with the parent(s) return \$330USD
No kiddie tax, 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 \$65USD*
FinCEN Report 114 (up to 10 accounts) \$165USD
FinCEN Report 114 (>10 accounts) \$300USD
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 \$660USD
Form 3520A or 3520 alone starts at \$415USD
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) add \$330USD/ea
Standalone preparation starting at \$495USD/hr

Expatriation/Renunciation (Form 8854):

Preparation of Form 8854 starting at \$415USD

Specialty Items

Obtain IRS transcripts

Form 8821 or Form 2848 required add \$195USD/ea

Translation Services

As available starts at \$95USD/page

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 certification statement, late election(s) and submission
In accordance with IRS procedures starting at \$1225USD

Relief Procedures for Former Citizens

Preparation of submission in accordance with procedures starting at \$880USD

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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 | Please see Expat Tax Tools for pricing |
| Form 3115- change of accounting method | hourly \$415USD |
| Historic basis calculations (Gains/losses, SCorp, etc.) | hourly \$415USD |
| US Form 1120 Series (1120, 1120S, 1120F) – Corporations | starting at \$1430USD |
| US Form 1065 – Partnerships | starting at \$1430USD |
| Other US Entities (hourly \$565CAD/\$425USD/hr) Trusts/Estates (Fiduciary) Income Tax (Form 1041) Estate Tax (Forms 706, 706NA) Gift Tax and GST Tax (Form 709) | starting at \$935USD starting at \$935USD starting at \$495USD |
| Foreign Ownership of US Entity Information Reporting Form 5472: Prepared in addition to a return Standalone preparation | additional \$495USD/hr hourly \$605USD/hr |
| Foreign Partnership Information Reporting Form 8865: Prepared in addition to a return Standalone preparation | additional \$495USD/hr hourly \$605USD/hr |
| ³ Additional two (2) hours 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, Section 962 elections, etc.) Prepared in addition to a return (All Categories) Standalone preparation | additional \$495USD/hr hourly \$605USD/hr |
| ³ Additional two (2) hours required for first year and/or new to AET filers to review documents/transactions to determine scope of work | |

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