

JK Associates Additional Fee Schedule

As a JK Associates client, we provide a lot of service outside the preparation and filing of your tax return. For example, we encourage our clients to ask us questions proactively – we would rather you make tax decisions understanding the consequences than be surprised at tax time. We will also explain IRS or MD tax notices you receive.

However, we cannot offer extended services without a fee. We list below some sample situations that will require us to charge you additional fees. We do not charge a fee for correcting mistakes that are our fault.

| Service | Minimum Fee |
|---|-------------|
| Mailing documents to you (returning your tax documents, your tax return, signature forms, organizers) | \$15 |
| Printing additional hard copies of your return (under 100 pages) | \$30 |
| Estimated tax projections beyond safe-harbor estimates | \$75 |
| Calling the IRS to check on your return or refund | \$100 |
| Calling MD to check on your return or refund | \$75 |
| Submitting Forms 8821 (Tax Info Authorization) or 2848 (Power of Attorney) to the IRS | \$25 |
| Responding to IRS letters | \$150 |
| Changing returns after we have provided you with form 8879* | \$15 |
| Amending a return we prepared* | \$100 |
| "Quick question" phone calls that require additional work on our part | \$50 |

*unless it is our mistake

There are steps you can take yourself:

IRS "Where's My Refund" tool: <https://www.irs.gov/refunds>

MD Refund Status: <https://interactive.marylandtaxes.gov/indiv/refundstatus/home.aspx>

Request IRS Transcripts: <https://www.irs.gov/individuals/get-transcript>