

Simple Unique Accounting and Tax Solutions

Optimize Tax specializes in accounting & tax filing services for Individual, Business, Expats, Foreign Owned LLC.

Individual Tax

\$300.00 **\$225.00**

US Residents, Non Residents and Expats wanting to file personal Income Tax 1040 or 1040NR

Core Features

- » Employment(W2)
- » Bank Interest(1099-Int)
- » Dividends(1099-Div)
- » Education Loan

Custom pricing for below

- » Stock Sale
- » Rental Income
- » Self-Employed (Sch C)
- » US Expat Taxes

[Customize your plan](#)

Business

\$300.00 **\$225.00**

Partnership, Corporation or S Corporation Business Owners wanting to file business Taxes

Core Features

- » C -Corporation 1120
- » S- Corporation 1120 S
- » Partnership 1065
- » Trust 1041

Custom pricing for below

- » Compliance 5472
- » Compliance 8804/8805
- » Tax withholding 8813
- » Proforma 1120-F

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Bookkeeping

\$300.00 **\$225.00**

Dedicated Bookkeeper for Small Business and Start-ups

Core Features

- » Dedicated Bookkeeper
- » Monthly Financials
- » Unlimited Support
- » Bank Statement and CC Reconciliation

Custom pricing for below

- » Account Payable Invoice
- » Account Receivable Invoice
- » Business Tax Preparation
- » Personal Tax Preparation

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Other Services

Individual Tax Returns



Business Tax Returns



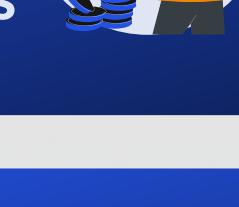
PFIC Reporting



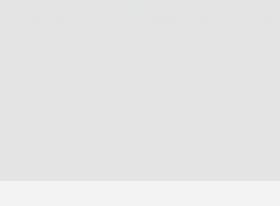
Catch Up and Streamlined Procedures



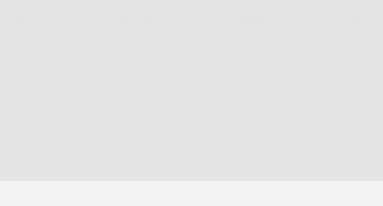
Gift and Estate Tax Returns



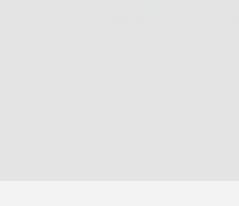
US Expats Tax Returns



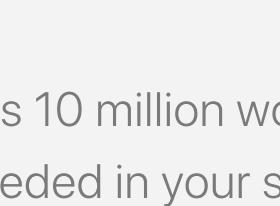
FATCA Reporting



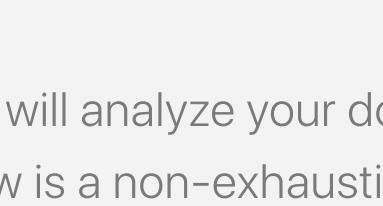
Foreign Owned LLC Tax Returns



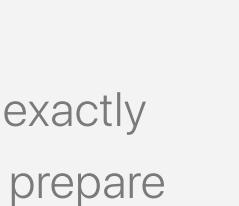
Foreign Bank Reporting



Start your Business



Consultation



Additional Forms You May Need

The IRS tax code is 10 million words long. Our experts will analyze your documents and let you know exactly what forms are needed in your specific scenario. Below is a non-exhaustive list of common forms we prepare in addition to the federal tax return.

FINANCIAL ACCOUNT REPORTING

FINCEN Form 114 (FBAR) (view) — up to 5 accounts	\$75
FATCA (Form 8938) (view) — up to 5 accounts	\$100

ADDITIONAL SERVICES YOU MAY NEED

State Tax Return (view)	\$150
Amended return Form 1040X (view) (In addition to regular package)	\$150
1040NR (view) includes one U.S tax form (W-2, 1099, etc)	\$500
Form 8621 (PFIC Income)	\$150 (for one), \$75 (for each after one)

BUSINESS AND TRUSTS

Foreign Corporation Informational Return (view) Form 5471	\$600
U.S. S-Corporation — Form 1120-S (Includes State)	\$800

OptimizeTax

Top rated US Tax firm on the independent review site Trustpilot — over 4,000+ reviews.

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