

BurkeAccounting – Tax Preparation Pricing Summary

1. Core Pricing Structure

- Base price: \$20 for simple W-2 type individual returns.
- Additional fee: a small percentage of the tax outcome (refund or amount owed, positive or negative).
- Complexity: additional charges may apply for more complex returns (multiple forms, self-employment income, rentals, investments, itemized deductions, etc.).
- Maximum cap: total fee for a single tax return will not exceed \$270.

2. What Counts as a Simple W-2 Return

- One or more W-2s from employers.
- Standard deduction (no itemizing).
- Basic credits (for example: education credits, child tax credit, earned income credit).
- No self-employment, rental, or complex investment income.

3. Examples (Approximate Ranges)

- Simple W-2 Return: typically \$20–\$60.
- W-2 + Side-Gig / 1099 Income: typically \$80–\$200 depending on organization and time required.
- Complex Return (multiple schedules, rentals, investments, self-employment): capped at \$270.

4. What Affects Your Final Fee

- Number and type of forms (W-2, 1099-NEC, 1099-K, 1099-DIV, 1099-B, etc.).
- How organized your documents are when provided.
- Time required to prepare and review your return.
- The final tax outcome (refund or tax due).

5. Important Notes

- BurkeAccounting is a non-CPA tax preparer based in Oklahoma.
- Pricing described here is general guidance; final fees are confirmed in writing before filing.
- This summary is for convenience only and does not change any engagement terms.