SPW Tax Services Pricing Model

Overview

SPW Tax provides integrated tax preparation and tax planning services designed to complement our comprehensive wealth management offering. Our pricing model is structured to reflect complexity, promote proactive planning, and create operational efficiency that benefits both clients and our internal team.

All fees below reflect annual tax preparation services unless otherwise noted. Final pricing may vary based on complexity, documentation quality, and scope of engagement.

Tax Preparation Pricing Schedule

Service	Fee	Notes
Individual Return (Form 1040)	$1,000	Includes federal return and one state return
Joint Return (MFJ)	$1,200	Includes federal return and one state return
Additional State Return	$250 each	Per state beyond the first
K-1 (Partnership, S-Corp, Trust)	$250 each	Per entity
Rental Property (Schedule E)	$300 each	Includes depreciation
Schedule C (Self-Employed)	$500–$750	Varies by complexity
Stock Options / RSUs	$300–$500	Includes AMT, 83(b), and related reporting
Crypto Transactions	$200–$500	Based on transaction volume
Trust or Estate Coordination	$500–$1,000	Planning and coordination with legal counsel
Business Return – S-Corp / Partnership	$2,000–$3,000	Includes basis tracking
Business Return – C-Corp	$2,500–$3,500	Includes retained earnings and planning considerations

Extension Filing Incentive

Clients who elect to file a federal and applicable state tax extension will receive a 20% discount on their tax preparation fee. Filing extensions allows SPW Tax to deliver a more deliberate, comprehensive review process while balancing workflow capacity throughout the year. This structure supports higher service quality, increased planning depth, and improved responsiveness.

Additional Terms

• Tax preparation services are distinct from ongoing proactive tax planning services, which may be included as part of a comprehensive wealth management engagement.

• Fees are subject to revision based on material scope changes.

• Engagement letters will outline the specific services included for each client.

• SPW Tax Services are available only to clients who maintain an active advisory relationship with a Stratos Private Wealth advisor.