

R & I TAX & BOOKKEEPING SERVICE, INC.

"Financial Peace of Mind"

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2026 SERVICES, PRICING & BILLING GUIDE



Professional accounting and tax service at an economical price.

RITBSINC believes small businesses, families, churches, nonprofit organizations and growing companies should be able to receive professional financial services without being priced out of the help they need.

This booklet establishes our proposed 2026 pricing structure and explains what is normally rendered at each price level. Final scope and fees are confirmed in the client's engagement agreement.

Our Pricing Promise

- Clear starting prices and service levels.
- A \$400 minimum monthly accounting level so even the small business client has an affordable professional option.
- Complex clients pay for the additional work they require instead of increasing prices for every client.
- Cleanup is priced separately from normal monthly accounting and is reassessed after the books are corrected.
- Additional work is identified and approved rather than silently added to a monthly package.

1. Monthly Accounting & Bookkeeping

Monthly pricing is based on the amount and complexity of work actually required. The service descriptions below are guides; the signed engagement agreement controls the exact work included.

Service Level	Monthly Fee	Services Normally Rendered
Small Business Essentials	\$400-\$500	Monthly bookkeeping; reconciliation of limited bank/credit accounts; transaction categorization; basic Profit & Loss and Balance Sheet; year-end tax-ready books; routine client communication.
Standard Accounting	\$550-\$750	Everything in Essentials plus moderate transaction volume, additional accounts, recurring financial reporting, routine Washington reporting support when included, and greater accounting oversight.
Full-Service Accounting	\$800-\$1,100	Expanded bookkeeping/accounting, multiple accounts, more detailed financial statements, recurring compliance support, accounting-system assistance, and increased client support.
Advanced Accounting	\$1,250-\$1,750	Higher transaction volume, payroll coordination, multiple accounts, more complex reconciliations, expanded reporting, business/accounting support, and additional compliance activity.
Complex / Controller-Level	\$2,000-\$2,500+	Complex businesses, multiple entities or funds, extensive reporting, management-level accounting support, high transaction volume, specialized accounting needs, and customized oversight.

\$400 Minimum Accounting Rule

The \$400 level is for a genuinely small, organized business. It is not unlimited accounting. Businesses with multiple entities, extensive payroll, inventory, large transaction volume, numerous accounts, substantial accounts payable/receivable, job costing, fund accounting or significant compliance work are placed in the appropriate higher service level.

2. Cleanup & Catch-Up Accounting

Cleanup is not included automatically in the regular monthly accounting fee. Historical records may require reconciliation, correction, reclassification, reconstruction or review before current accounting can be dependable.

Cleanup Service	Billing Method	Services Rendered
Initial Cleanup Assessment	\$300 minimum / credited when applicable	Review of accounting file and records; identify missing periods, unreconciled accounts, duplicate or incorrect transactions, payroll/tax issues and estimated scope.
Partial-Year Cleanup	Written quote	Correction and reconciliation of the months requiring work; account review; transaction corrections; opening-balance and classification adjustments as needed.
Full-Year Cleanup	Based on annual accounting scope	When an entire year must be corrected, billing may reflect the accounting work required for that full year. Records are reconciled, corrected and brought to a usable current position.
Reconstruction From Bank Statements	Additional quote	Reconstruct income and expenses when the client has not maintained usable books. This is accounting work and is separate from tax preparation.

After Cleanup Is Completed

RITBSINC does not intend to keep a client at cleanup-level pricing after the historical problem is resolved. Once the books are corrected, we reassess the client's normal ongoing needs and adjust recurring billing to the appropriate monthly service level.

3. Individual Federal Income Tax Preparation

The \$150 tax appointment amount is a deposit toward tax preparation, not the total price of every return. Final fees increase when additional schedules, businesses, rentals, states or complex transactions require more professional work.

Tax Service	Starting Fee	Services Rendered
Basic Form 1040	\$300	Preparation of a straightforward individual federal income tax return from complete client-provided records; electronic filing when eligible; client review.
1040 + Schedule A	\$375+	Individual return plus itemized deduction reporting and supporting review.
1040 + Schedule D / Investments	\$400+	Individual return plus investment/capital-gain reporting based on complete brokerage and basis information.
1040 + Schedule C	\$500+	Individual return plus one sole-proprietor business schedule from completed business income/expense records.
1040 + Schedule E Rental	\$500+	Individual return plus one rental property, including rental income/expenses and applicable depreciation information.
Additional Rental Property	+\$150+ each	Additional Schedule E property review and reporting.
1040 + Schedule F Farm	\$550+	Individual return plus farm income, expense and asset reporting from organized records.
1040 with K-1	\$450+	Individual return including pass-through K-1 reporting; complex/multiple K-1s may increase the fee.
Multi-State Individual	\$500+	Federal return plus additional state filing requirements; additional states may be billed separately.

4. Business & Nonprofit Tax Preparation

Return / Service	Starting Fee	Services Rendered
Partnership - Form 1065	\$850+	Federal partnership return and partner K-1 preparation from complete, tax-ready books and required partner information.
S Corporation - Form 1120-S	\$950+	Federal S corporation return and shareholder K-1 preparation from complete books, payroll and shareholder records.
C Corporation - Form 1120	\$1,000+	Federal corporate return from complete tax-ready financial records.
Estate / Trust - Form 1041	\$750+	Fiduciary return preparation based on complete income, deduction, beneficiary and trust/estate information.
Nonprofit - Form 990-N	\$250+	Electronic postcard filing when the organization qualifies and provides complete information.
Nonprofit - Form 990-EZ	\$600+	Short-form exempt organization return from complete accounting and organizational records.
Nonprofit - Form 990	\$1,000+	Full exempt organization return; schedules and complexity may increase the fee.
Prior-Year Individual Return	\$350+ per year	Preparation of an unfiled prior-year individual return; bookkeeping/reconstruction is separate.
Prior-Year Business Return	Normal return fee + complexity	Business return preparation for a prior year; cleanup and reconstruction are billed separately.
Amended Individual - 1040-X	\$350+	Review of original filing and preparation of amended individual return; additional research may increase fee.
Amended Business Return	\$650+	Review and amendment of business return; fee varies by entity and reason for amendment.

Tax Preparation Does Not Include Bookkeeping

Business tax fees assume the client provides usable accounting records, including a Profit & Loss Statement and other required financial information. If RITBSINC must create or repair the books before preparing the return, that accounting work is billed separately.

5. Payroll & Employee Services

Payroll Service	2026 Pricing	Services Rendered
Payroll Setup	Quoted by scope	Employer/employee setup, payroll-system configuration, employee forms and applicable registration review.
Recurring Payroll Processing	\$150/month base + \$15-\$25 per employee	Routine payroll processing based on agreed frequency and employee count; software and third-party fees may be separate.
Federal Payroll Reporting	Included by package or quoted	Applicable Forms 941/940 and related payroll-tax reporting when included in engagement.
Washington Payroll Reporting	Included by package or quoted	Applicable Employment Security, Labor & Industries and other Washington payroll reporting when included.
W-2 / W-3 Year-End Reporting	Package or quote	Year-end employee wage reporting from complete payroll records.
1099 Reporting	Package or quote	Contractor year-end reporting from complete vendor records and W-9 information.
Gusto / Payroll Software Assistance	Quote by scope	Setup, education, troubleshooting and payroll-system support as agreed.

Payroll Responsibility

Payroll pricing depends on employee count, payroll frequency, reporting obligations and condition of the records. Corrections to prior payroll, late filings, amended reports and payroll cleanup are additional services.

6. Consultations, Software & Professional Assistance

Service	Fee	Services Rendered
Administrative / Preliminary Intake	\$150 when booked as published service	Preparation for tax/accounting service, document readiness, TaxDome education and basic onboarding.
30-Minute Professional Consultation	\$100 proposed	Focused professional consultation on a defined accounting, tax, payroll or business matter.
60-Minute Consultation with Linda	\$200 proposed	Dedicated professional consultation, review of questions and recommended next steps.
Specialized Tax / Business Advisory	\$250/hour proposed	Higher-level research, planning, entity, tax or business advisory requiring professional analysis.
Accounting + Bookkeeping Intake	\$300	Initial accounting meeting, needs assessment, review of current system and preliminary scope.
QuickBooks / Xero Setup & Training	Quote by scope	Accounting software setup, conversion assistance, education, workflow review and troubleshooting.
TaxDome / Software Education	Quote or included with onboarding	Portal/software education, document upload assistance, secure communication and workflow support.
Out-of-Office Appointment	\$500 minimum proposed	Professional time away from the office; travel/special circumstances may affect final fee.

8. Deposits, Billing & Additional Work

Deposits

- The \$150 tax appointment deposit reserves tax-preparation time and is applied toward the final tax-preparation bill when applicable.
- Appointment and consultation fees compensate RITBSINC for professional time reserved and are nonrefundable once earned under the applicable service terms.
- Accounting projects, cleanup work and larger special projects may require a separate deposit before work begins.

Additional Work

- Monthly accounting covers only the services listed in the client's engagement agreement.
- Cleanup, prior-period reconstruction, amended filings, tax notices, additional entities, extra properties, additional states, special reports, research and other out-of-scope work are billed separately.
- When practical, RITBSINC will communicate the additional scope and fee before performing substantial additional work.
- Government charges, software subscriptions, merchant charges and other third-party fees are separate unless specifically included.

Why We Use Service Levels

RITBSINC wants the small business owner to be able to afford professional accounting. We therefore maintain a \$400 minimum small-business accounting level while charging larger and more complicated businesses according to the additional work they require. This allows us to remain economical without asking small clients to subsidize complex engagements.