Welcome! REV 11/30/2023

Thank you very much for your inquiry regarding our CPA services.

We are providing some initial information to describe our firm, processes, rates and team mission. Our team is available to answer questions about our tax preparation process by phone or email. 623-815-4749 or acctgtaxes@lindarozetcpa.net

If you have a technical tax matter (such as an amended tax return or tax planning analysis), we can schedule you for a consult with Linda and that consult fee is $85.00. These consults with our CPA are reserved for technical matters and specialized or advanced tax matters to best serve our clients. We are sorry we do not reserve appointments just to meet and greet. Due to the complexity of everyone's tax situation, we can only provide fee estimates until we see all of your data.

Here is our general fee structure for tax preparation. (We e-file all eligible tax returns):

W2's (one or two) $75

Schedule A Itemized deductions with no other schedules-$135

Extra Schedules Average - $30- $50

One additional schedule besides Sched A, such as Education, Stock Gains/Losses-$175

Self-employment tax returns -$225

Rental Properties-$200-$250

Earned Income Tax Credit returns -$200

S-Corp Return - $425

THERE ARE NO HIDDEN FEES. FEES INCLUDE E-FILING AND DIRECT DEPOSIT OF REFUNDS. WE DO NOT OFFER REFUND ADVANCE LOANS.

We take pride in the reasonable prices that we offer as a CPA firm, as well as the service we provide in the thorough time we take to prepare each tax return that we complete. We all work together to minimize our clients tax liability and/or maximize their refunds within the scope of the laws.

If you are trying to prepare for next year, our team will assist you with a tax organizer to arrange your data in a format to submit for tax preparation, prior to your appointment.

We are currently scheduling for the upcoming season and expect to fill by March 10th for the April cutoff. We will gladly file extensions for information received after this date.

We offer zoom, phone or in person tax interviews or on a drop off basis. We do not prepare taxes while clients are waiting.
We will need to have a copy of your last filed tax return.

Linda Rozet, CPA, our principal, has been in business for 26 years and has quite an established clientele. Therefore, our turnaround times can reach two-three weeks during the peak of the season. As a general rule we cannot give an exact completion time for your tax preparation but will provide an ESTIMATED completion time. We focus more on doing a quality job and take the time needed to handle all client's tax situation with the resources needed for the best outcome.

Most new clients will be meeting with either Carole or Ellen, who are our other two experienced tax preparers. We prepare taxes as a team, so all tax returns are reviewed and signed by our CPA.

We look forward to meeting you and working with you! Linda Rozet, CPA and Team