

PALLER FINANCIAL SERVICES, INC.
2024 - STANDARD RATES

Introductory meetings are complimentary.

Income Tax Preparation - \$295 per professional hour, administrative and support services is not considered chargeable time.

Personal Tax Preparation – Base Rate of \$595 per return for two professional hours. Additional time incurred will be billed at \$295 per hour.

Business and Trust – Base Rate of \$737.50 per return for two and one-half professional hours. Additional time incurred will be billed at \$295 per hour.

Tax planning, accounting assistance or financial analysis will be billed at \$295 per professional hour.

Representation for Tax Audits and Correspondence - \$295 per professional hour. Incidental assistance is complimentary.

Planning and Analysis

Ad hoc and Support Services - A one hour minimum at \$295 per professional hour.

Financial Analysis – The base rate of \$595 for two professional hours.

Business Planning – The base rate of \$595 for two professional hours.

401k support will be charged on a project-by-project basis.

Formal Comprehensive Financial Plan –

Client-directed written analysis of the financial implications in consideration of their objectives. \$2,695

Business Accounting Support and Senior Support Services - \$100 per hour. If the scope of work is regular and reoccurring a flat fixed rate will be determined based on the project.

Asset management through Charles Schwab – A competitive percentage of the assets under management. A separate Investment Advisory Agreement will be executed for these services.

Out-of-pocket expenses - Postage, delivery and copies, de-minimis amounts are not charged. Shipping of overnight and large packages are passed through at their actual costs.

Warranty work – IF an error or omission is as a result of our oversight then any time incurred to correct the matter is not charged for. Should a financial issue arise that is *because of the clients or other third parties lapse* then time incurred will be billed in accordance with the above.

Our goal is to be fair and reasonable.

We reserve the right to adjust actual calculated invoices as necessary to be competitive in the marketplace.