

PALLER FINANCIAL SERVICES, INC.
2025 - STANDARD RATES

Introductory meetings are complimentary.

Income Tax Preparation

Personal Tax Preparation – Base Rate of \$995 per return. Additional time incurred will be billed at the standard hourly rate.

Business and Trust – Base Rate of \$1,500 per return. Additional time incurred will be billed at the standard hourly rate.

Tax planning, accounting assistance or financial analysis will be billed at \$325 per professional hour.

Tax Notices - \$650 per notice. Incidental assistance is complimentary.

Planning and Analysis:

- Support Services - two hour minimum at \$325 per professional hour.
- Financial Analysis – Base rate of \$995
- Business Planning – Base rate of \$995
- 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 the agreed upon objectives. Price quoted upon initial consultation.

Business Accounting Support and Senior Support Services - \$200 per professional hour. Once the scope of work is determined then a flat periodic fee will be quoted.

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

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.