

2023 Xpitax Pricing Domestic

Xpitax has a multi-tiered pricing schedule based on complexity of outsourced tax returns.

Service	Tier 1	Tier 2	Tier 3	Tier 4
Individual	\$232 1-12 pages	\$410 13-60 pages	\$592 61-125 pages	Add: \$182 Each add'l: 50 pgs.
Corporate, S-Corp & Partnership	\$292 1-25 accts/inputs	\$410 26-50 accts/inputs	\$592 51-100 accts/inputs	Add: \$182 Each add'l: 50 accts/inputs
Fiduciary	\$232 1-12 pages	\$410 13-60 pages	\$592 61-125 pages	Add: \$182 Each add'l: 50 pgs.
Expat/Inpat/Dual & Form 1040NR	\$574 1 – 12 pages	\$756 13 – 60 pages	\$938 61 – 125 pages	Add: \$182 Each add'l: 50 pgs.
990 Tax Exempt	\$550 all returns			

1. Individual and Fiduciary: Prices are based upon the total number of source document pages (All pages in the pdf i.e.: organizer, original documents, blank pgs. etc.) that are scanned and submitted with a tax data file. Scanned documents must be the actual size of the original document. Each original scanned document is considered one page. Summary pages that include multiple sources of data will be assessed an additional tier. Copy of prior year tax return is not included in the overall page count. The Tier price includes federal and all required state filings.

2. Schedule D: as a default policy, Xpitax will input summary totals for gains and losses when there are more than 10 transactions combined for all 1099's for reporting. If requested that each transaction be input separately from all 1099's, there is a surcharge. Inputting details as follows:

- First 10 transactions – no additional cost
- 11 to 100 Transactions– surcharge assessed equal to next task tier
- Each additional 100 Transactions – surcharge assessed equal to next task tier

***Each Summary line item does NOT count towards the 10-transaction surcharge.**

***Schedule D attachments not provided**

3. Business Tax Returns: firms are required to provide a Final Adjusted Trial Balance. If the M-1 adjustments are not easily identifiable on the Final Adjusted Trial Balance, we also require a schedule detailing specific items that impact taxable income. All information must be submitted to Xpitax team via Axxess Workflow. The preparation of business tax returns does not include year-end reclass entries for tax reporting purposes (only federal tax journal entries) and trial balance preparation.

Business Tax Returns Cont'd: Tiers include Federal and Home state. For additional states, an increase in tier charge will be as follows:

The below applies 1120, 1120S and 1065 tasks	
3 additional States (For state returns 2,3 or 4)	One Additional Tier
6 additional States (For state returns 5,6 or 7)	Two Additional Tiers
9 additional States (For state returns 8,9 or 10)	Three Additional Tiers
Each additional 3 States (for additional states with a block of 3)	One add'l Tier to the above (\$182)

6. This pricing schedule is based on firms providing a rolled over tax data file. For clients whose data will need to be keyed from scratch (i.e. new client to firm and their data isn't currently in your tax software), there will be a surcharge assessed to the next task tier of the pricing schedule. However, we will key the prior year return, so that it can be rolled over, at no charge if this data is submitted between the months of May – January.

7. Firm-Specific Items: Not available for Onshore processing including completion of AICPA checklists or other forms of firm checklists will not be accommodated.

8. Tax Software Supported: CCH Profx and CCH Axxess Tax only

License Fee/Minimum Tax Fee:

- Up to 25 User Licenses at no charge for use of Axxess Workflow for Outsource. Axxess Tax Customers only: Up to 10 complimentary Axxess Tax licenses for Xpitax team.

Training, Consulting and Support Services:

- Outsource Platform Support Fee: \$1,000/annually
- Training 1 Hour Web-based: \$850
- Consulting 1 Hour Web-based: \$380
- CCH Axxess Tax Setup: \$380

For any questions regarding Xpitax Outsourcing, please visit website or call 800-739-9998.

2023 Xpitax Outsourcing effective 12/1/2022