

Frequently Taxed Questions

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Identification and qualifications

I am not an attorney or Certified Public Accountant (CPA). I have a BA in Economics from Dartmouth College and an MBA from NYU Stern School of Business. I am a CFA Charterholder and a member of the CFA Institute of New York. I have prepared tax returns for clients of the IRS VITA program for several tax seasons as a certified volunteer. I am a registered commercial tax preparer in the state of New York and have met the continuing education requirements for the 2025 tax season. I am an Authorized IRS e-file Provider, which means I can file tax returns electronically.

If you are audited or receive any notices from the IRS or your state tax authority, I will assist you in a behind-the-scenes manner related to a tax return I prepared. I will not represent you before the IRS or state tax authority. Please see [IRS Publication 947](#) for a detailed discussion of who may represent a taxpayer before the IRS. I will provide this behind-the-scenes assistance at no additional cost to you.

Price List for Preparation of 2025 Tax Returns

Cost: flat rate of \$450 for preparation of one federal and one state return.

Bundle this with an hour of custom coaching (to take place during May-July 2025 or later at your option) for \$550.

This year I am only preparing simple tax returns.

Simple tax returns include: W-2 income, most 1099 income (e.g., income from investments, unemployment, retirement plan distributions, Social Security), and only one federal and one state per tax return. I am happy to prepare returns of the self-employed so long as your books and records are already fully organized. I am not filing extensions this year and will need all your tax documents in hand by March 15th at the latest. You should have the ability to print documents, sign them, scan your signed documents, and upload to a secure file sharing portal (online identify verification for e-signatures does not always work).

Unfortunately, this year I will not be able to help file state tax returns for California, Connecticut, Maryland, Nevada, Ohio, or Oregon. The regulatory requirements in those areas add a level of complexity my business may tackle in future years.

I will also not tackle more complex tax returns this year, as I want to ensure the highest level of quality and need time to ramp up other aspects of this service offering. I am not yet prepared to work on tax returns involving military or militia income, rental real estate, corporate returns, trusts, estates, agricultural businesses, ex-pats, K-1 partnership income, multi-state income, or prior year filings. If you are unsure whether your return is simple, please email me (stephanie@frequentlytaxedquestions.com) and we can discuss.

I am not affiliated with any provider of refund anticipation loans or checks.