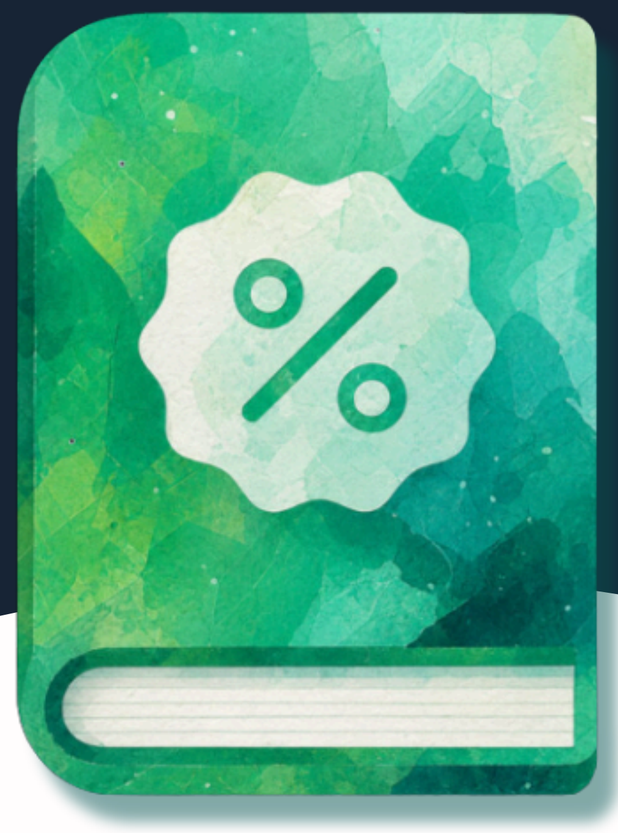
Chicory Wealth

Tax Planning

Chicory's friendly and experienced **full-service tax team** is here to guide you with clarity and care. Our tax experts partner closely with your advisor so every dollar works with intention – moving you closer towards your vision for the future.



Tax Preparation & Filing

*Fees starting at

Individual Tax Return – $840*

Personal income tax returns for a single filer (Single, Married Filing Separately, or Head of Household).

Married Filing Jointly – $940*

Joint income tax returns for married partners filing jointly.

Trusts and Estates – $1,300*

Fiduciary tax returns for trusts or estates.

Business – $1,500*

Business tax returns for corporations, partnerships, or LLCs.**

** An additional $200/hr rate applies for pre-filing bookkeeping or accounting services

Additional Services

Contact us for fees

- Schedule E (rentals, royalties)
- Schedule C (ex. sole proprietor(s))
- Complex or Multiple K-1s (i.e- partnerships, S-corp, trust and estates)
- Schedule F (Farms)
- Capital Gain Analysis & Planning
- Donor Advised Fund (DAF) Planning & Analysis
- Business Entity Analysis
- Depreciation Schedules
- Stock Options (NQO & ISO), ESPP, RSUs
- Amended Returns
- Representation before the IRS and State-Taxing Authorities

Get in Touch!

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