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Tax Practice Pricing Workbook

Build a fee schedule that supports your income, capacity, and client experience.



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Your Pricing Objectives

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Complete these statements:

My tax-practice revenue goal is: $ _____

My target number of clients is: _____

My desired average fee is: $ _____

My maximum weekly hours during tax season are: _____

The clients I primarily want to serve are: _____

I want my practice to compete based on:

- ☐ price
- ☐ convenience
- ☐ expertise
- ☐ service
- ☐ specialization

NOTES

TAX PRACTICE PRICING WORKBOOK

Capacity Calculator

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Item	Amount
Total available tax-season hours	
Less administrative and marketing hours	
Less education and management hours	
Net production hours	
Average total hours per engagement	
Realistic return capacity	

FORMULA Net production hours / average engagement hours = return capacity.

WORKING NOTES

Revenue Per Engagement

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Scenario	Revenue Goal	Capacity	Required Average
Conservative	$		$
Target	$		$
Growth	$		$

FORMULA Revenue goal / capacity = required average revenue per engagement.

WORKING NOTES

Cost Inventory

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Estimate annual costs:

Tax software $ _____

Practice-management software $ _____

Data security and storage $ _____

Insurance $ _____

Education and credentials $ _____

Marketing $ _____

Equipment and office $ _____

Payment fees $ _____

Contractors or staff $ _____

Other $ _____

Total annual cost: $ _____

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Minimum Fee Builder

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My minimum engagement includes:

- [ ] Intake and organizer
- [ ] Federal return
- [ ] One state return
- [ ] Electronic filing
- [ ] Results summary
- [ ] Review meeting
- [ ] Post-filing support
- [ ] Estimated-tax calculation

My minimum fee is: $ _____

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Complexity Schedule

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Complexity Item	Internal Price
Additional state	$
Schedule C	$
Rental activity	$
Investment sales	$
K-1	$
Depreciation schedule	$
Cryptocurrency reporting	$
Prior-year return	$
Amended return	$
Notice review	$

NOTES

Friction and Exception Fees

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Additional Work	Fee or Method
Disorganized records	
Bookkeeping reconstruction	
Late-season submission	
Expedited service	
Additional consultation	
Material scope change	
Multiple document batches	
Client changes after completion	

NOTES

Essential Package

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Package name: _____

Ideal client: _____

Included services:

_____

_____

_____

_____

Excluded services:

_____

_____

_____

_____

Price: $ _____



Guided Package

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Package name: _____

Ideal client: _____

Included services:

_____

_____

_____

_____

Support or meeting access:

_____

_____

_____

_____

Price: $ _____



Year-Round Package

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Package name: _____

Ideal client: _____

Included services:

_____

_____

_____

_____

Quarterly or year-round support:

_____

_____

_____

_____

Price: $ _____ annually or $ _____ monthly



Quote Script

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Complete the script:

"Based on what you described, your engagement falls within our _____ package. The fee is $ _____ and includes _____.

This fee assumes _____. If we identify _____, I will discuss the revised scope and fee with you before completing that work.

The next step is _____."

REHEARSAL NOTES

Pricing Test

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Apply your fee schedule to ten sample clients.

Client	Calculated Fee	Estimated Hours	Effective Rate	Adjustment Needed?
1	$		$	
2	$		$	
3	$		$	
4	$		$	
5	$		$	
6	$		$	
7	$		$	
8	$		$	
9	$		$	
10	$		$	

NOTES

30-Day Implementation Plan

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Week 1	Calculate economics and capacity	COMPLETION DATE _____
Week 2	Build minimum fee and add-ons	COMPLETION DATE _____
Week 3	Create packages and scripts	COMPLETION DATE _____
Week 4	Test, revise, and communicate	COMPLETION DATE _____

Final decisions:

Minimum fee:

$ _____

Target average fee:

$ _____

Annual review month:

_____

New pricing effective date:

_____





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Charge for the practice you're building.

You've done the math most preparers skip: your real capacity, your true costs, the price of complexity, and packages that make your value easy to say yes to. Now quote it with confidence.

Explore the Tax Business Blueprint Program at MuseSpring.com.