

# HOW OUR PRICING WORKS

PACKAGE PRICING

# How our pricing works

## Less complex

Fewer income sources,  
credits & deductions



## More complex

More income sources,  
credits & deductions

Base	Deluxe	Complex	Premium	Advanced
Up to three jobs, includes Saver's Credit	Multiple jobs, interest, and dividends	Pensions, IRAs, education credits, and student loan interest	Dependents, itemized deductions, and childcare expenses	Investors, self-employed, rental properties, royalties, and partnerships
<b>Typical tax forms</b> 1040, 8880, Schedule 1	<b>Typical tax forms</b> 1040, 8880, 8889, Schedules 1, 2, 3	<b>Typical tax forms</b> 1040, 1095-A, 5329, 8606, 8863, 8880, 8889, 8962, Schedules 1, 2, 3	<b>Typical tax forms</b> 1040, 1095-A, 2441, 5329, 5695, 8283, 8606, 8863, 8880, 8889, 8962, Schedules 1, 2, 3, Schedule A	<b>Typical tax forms</b> 1040, 1095-A, 2441, 4562, 4797, 5329, 5695, 8283, 8606, 8829, 8863, 8880, 8889, 8949, 8962, Schedules 1, 2, 3, Schedules A, B, C, Schedules D, E, F, Schedules K-1, SE

## Included in every package!

- ✓ Maximum Refund Guarantee
- ✓ Lifetime Accuracy Guarantee®
- ✓ IRS Audit Assistance
- ✓ Year-round service
- ✓ 24/7 access to documents
- ✓ Online data storage

### Additional fees where applicable

Fees may apply for each state/local filing, Child Tax Credit, Earned Income Credit with Dependents, products, and services. Ask a Tax Pro or see our Additional Services section for details. The Advanced package charges per instance for each Schedule C, Schedule F, Schedule K-1, Schedule D transaction, rental property, and royalty.

Form	Description
Form 1040	Main form and framework to display filing status, dependent status, income, deductions, credits, taxes, and tax payments
Form 1095-A	Health Insurance from the Marketplace
Form 2441	Child and Dependent Care Credit
Form 4562	Depreciation and Amortization
Form 4797	Sale of a Business Asset
Form 5329	Pensions/Annuities
Form 5695	Residential energy credits (solar, insulation, exterior windows and doors, etc.)
Form 8283	Noncash charitable contributions in excess of \$500
Form 8582	Passive Activity Loss Limitations for taxpayers who invested into Partnerships, S-Corporations, Rental Properties, etc.
Form 8606	Nondeductible IRAs
Form 8829	Business Use of Home
Form 8863	Education Credits
Form 8880	Saver's Credit (contributions to a 401-k retirement account or IRA)
Form 8889	Pre-tax contributions to a Health Savings Account
Form 8949	Sale of Capital Assets to report each sale of stock, mutual fund, cryptocurrency, etc. (total amounts transferred to Schedule D)
Form 8962	Premium Tax Credit to Reconcile Health Insurance from Marketplace
Schedule 1	Additional Income & Adjustments to Income (Unemployment Income, Educator Expenses, Student Loan Interest, Gambling Income, etc.)
Schedule 2	Additional Taxes (Pensions/Annuities, Health Insurance from Marketplace, Self-Employment Tax, HSAs, etc.)
Schedule 3	Additional Credits and Payments (Education Credits, Daycare Expenses, Saver's Credit, HSAs)
Schedule 8812	Child Tax Credit and Credit for Other Dependents
Schedule A	Itemized Deductions (e.g. Taxes, Home Mortgage Interest, Charitable Donations, Medical/Dental Expenses)
Schedule B	Interest and Dividends Above \$1,500
Schedule C	Profit or Loss from Business or Self-Employment
Schedule D	Capital Gains and Losses (stocks, virtual currency, bonds, real estate, land, vehicles, etc.)
Schedule E	Supplemental Income and Loss (Rental Properties, Royalties, Partnership Income, etc.)
Schedule F	Profit or Loss from Farming Business
Schedule K-1	Partnerships, S-Corporations, Estates, and Trusts
Schedule SE	Taxes for Self-Employment