

Professional



We have a PFIC solution to fit your needs

Form Preparation:

	Per Form
1-75 transactions	\$150 USD
76-150 transactions	\$165 USD
150+ transactions	Every additional 75 transactions increases price by 10%

- We offer discounts starting at 11 forms
- For an hourly fee, we will consult with your team or respond to IRS queries regarding the calculations or forms as part of regular audit, Streamlined or OVDP filings
- Kovel engagements welcome

Cloud based Solution

Unlimited forms and unlimited clients

\$850 USD annual licensing fee includes the first user and the first 100 calculations for free.

Additional users are at \$100 USD each.

Forms calculated over the 100 included with the license are subject to the following form fees:

Forms 101 - 200	\$9.95 USD
Forms 201 - 300	\$8.95 USD
Forms 301 - 400	\$7.95 USD
Forms 401 - 500	\$6.95 USD
Forms 500+	\$4.95 USD

To ensure the maximum security, the PFIC data is stored on our servers, but the application will not save client sensitive information. The client's name, Social Security Number, and address can be entered at the time of generating the forms.



For additional information please contact:

Mary Beth Lougen, EA, USTCP: 1-844-312-8670 Ext 402 • b.lougen@form8621.com • www.form8621.com

Fast



Our **form preparation service** can complete forms and statements **within days—not weeks**. You simply provide us with the statements or transaction spreadsheets as well as instructions for making any elections.

Our **software subscription** gives you the ability to create PFIC forms in **less than an hour**—complete with printable calculation statements. It's so simple even your junior staff or non-tax professionals can prepare the forms for you. Some of the features include:

- Computations performed per share as required by the IRS regulations
- Spot rate conversions for 150+ currencies
- All statements required by the IRS
- Forms Guide that acts like a road map for the numbers
- Calculations for §1291 default taxation, QEF with purging elections and Mark-to-Market
- Forms included are 2006 to present
- Offshore Voluntary Disclosure Program Alternate Resolution

Why Form 8621 Calculator?

Our software takes the pain out of PFIC calculations and turns it into an exercise in **data entry** so your practice can be more productive



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Increase revenues



Leverage our expertise to increase your productivity

We have spent years deciphering the Internal Revenue Code §1291-1298 and developed an application that simplifies the code to data entry. Our revolutionary software handles the complex and multi-layered calculations that comply with the regulations in seconds with mathematical precision.

Increased Productivity = Increased Revenues

Preparing Form 8621 in a short period with complete confidence in the accuracy of the numbers means:

- shorten your turn around time
- increase productivity
- relieve the stress and headaches of dealing with your client's PFICs

Providing your staff with the best tools means they can concentrate on their clients and work to make the business more successful. Form 8621 Calculator is one of the **only new tools** that can impact on your bottom line in a dramatic way.



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Cost efficient



Stop wasting time and money. Make PFICs a profitable part of your practice.

Expat Tax Tool's Form 8621 Calculator **is the only commercially available application** that completes all of the time-consuming Form 8621 calculations so your clients can be compliant. Instead of wasting time with tedious calculations, *Form 8621 Calculator* allows you to bring efficiency and accuracy to your office.

Choose the solution that is best for you:

- ETT experts prepare your forms for a reasonable fee
- Purchase an annual subscription and prepare client forms in-house



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