



S. Landau Services
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To our valued client,

Tax year 2018 brings with it the largest tax law change since 1986. The Tax Cuts and Jobs Act will impact everyone's taxes. We look forward to helping navigate those changes for 2018 and beyond. In preparation, several forms require your attention. We cannot start work on your return until we receive these completed forms and a \$300 deposit. If you took advantage of the prepay offer, you're all set! Otherwise, please make a payment by check or online when you send your papers or at your appointment.

New!

- ❖ “Yes/No” Questionnaire. **Please sign and return or bring to your appointment or complete new online questionnaire, <https://www.taxguy.biz>**
- ❖ “Checklist of Things to Bring” to help compile other tax papers
- ❖ Valuation Guide for Non-Cash Contributions. **All donations must have a receipt.** Review the substantiation requirements available at my website. For a worksheet to calculate your non-cash donations, email Helen@SLandauServices.com.
- ❖ Direct Deposit form. This bank account can be used to make balance-due and estimated tax payments. ***New this year:*** You may pay your tax preparation fees from this account as well. **Please sign and return or bring to your appointment.**
- ❖ The Consent for Use of Tax Return Information. **Please sign and return or bring to your appointment**
- ❖ Engagement Letter details the scope of the work we are performing for you. **Please sign and return or bring to your appointment.**
- ❖ “Use Tax” acknowledgement. Purchases made outside your home state may require use tax payment. **Please sign and return or bring to your appointment.**
- ❖ Updated Pricing and Billing Policies as well as a partial price list
- ❖ Our Privacy Policy

New!



*Securities offered through H.D. Vest Investment ServicesSM, Member: SIPC,
Advisory Services offered through H.D. Vest Advisory ServicesSM

S. Landau Services is not a registered broker/dealer or registered investment advisory firm.



Once your materials are ready, please schedule a tax appointment on www.SLandauServices.com, using “Schedule Now”. You will be redirected to our online calendar. Returning clients can book a “*Quick paperwork drop-off with Helen*” appointment. For a longer appointment, choose “*Existing Tax Client Drop Off – Sit Down with Steven/Barry*”.

This tax season, all appointments will be held in our new office space on the main floor of the building. We’ve moved out of the upstairs office and Barry’s basement office has been closed as well. Please use the front door – facing 14th Ave. NW – to enter the office.

For new clients or if we haven’t prepared your taxes before, please choose “*New Tax Client – First Appointment.*” Of course, we welcome phone calls as well. **Parking is accessible from the alley on NW 56th St. in spaces marked “SLS.”**

At your pick-up appointment, we review your returns, answer questions and discuss the coming year. Once we receive the signature forms and payment, we will electronically file the return(s) and you are done! Electronic review of returns and e-signature options are also available; we’ll discuss those options at your tax appointment.

Thank you again for your business; I look forward to serving you.

Sincerely,

A handwritten signature in black ink, appearing to read 'S.L.', with a horizontal line extending to the right.

Steven Landau

P.S. Your referrals to friends and family who could use our services are always welcome!