S. Landau Services
Steven Landau, E.A., CFP®
5606 14th Ave. NW, Suite C
Seattle, WA 98107-3715

PHONE: (206) 784-1070
FAX: (206) 789-1719

EMAIL: Steven@SLandauServices.com
WEB: www.SLandauServices.com

To our valued clients, January 4, 2021

Goodbye 2020! Most of us are glad to see you go! Just one last thing—we need to file taxes to close out the year.

Much like the rest of our lives, tax season will look a little different. In the interest of safety and health, we will not see clients in the office and will instead hold phone appointments.

New!

This year, you can complete and sign all of our required client forms online. No printer required! To complete them online, visit our home page, click **Forms & Links**, and then and choose **Forms**. The password for each form is "**Birds**". If you prefer to complete these forms on paper, please print the forms at the end of this packet.

We cannot start work on your return until we receive the completed forms and a $300 deposit. If you took advantage of the prepay offer in September, you're all set! Otherwise, please make a payment online or by check when you send your papers.

You can send us your tax documents in these ways:

- Online, using our SafeSend secure upload. Access it from our homepage www.SLandauServices.com by clicking **Send Secure Documents** button.
- By mail.
- By dropping them off in our locked mailbox to the left of our front door. **Parking is accessible from the alley on NW 56th St. in spots labeled "SLS."**

Once we have your tax papers and completed forms, please schedule a phone call appointment by visiting www.SLandauServices.com, and use the **Schedule Now** button. You will be redirected to our online calendar. Returning clients can book an *"Existing Tax Client: Start Your Return – Phone Call"* appointment. If you are a new client or if we haven't prepared your taxes before, please choose *"New Tax Client: First Appointment – Phone Call"* appointment. If you prefer, call the office to schedule.

When your return is ready, we will schedule a time to review it, answer questions, and discuss the coming year. Once we receive the signature forms and payment, we will electronically file the return(s), and you'll be done!

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

Sincerely,

Steven Landau

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

S. LANDAU SERVICES

S. Landau Services
Steven Landau, E.A., CFP®
5606 14th Ave. NW, Suite C
Seattle, WA 98107-3715

PHONE: (206) 784-1070
FAX: (206) 789-1719

EMAIL: Steven@SLandauServices.com
WEB: www.SLandauServices.com

Checklist of Things to Send for Your Tax Appointment

- ☐ **Current mailing address, email, phone *especially if changed from last year***
- ☐ Last year's tax return *(new clients)*
- ☐ Driver's license or passport (copy only if sending) *(new clients)*
- ☐ Social Security numbers and dates of birth for all dependents *(new clients/new dependents)*
- ☐ W-2 forms for wages and last paystub of the year (if available)
- ☐ 1099 forms for interest, dividends, retirement, unemployment, stock/mutual fund sales, gambling and other income
- ☐ Year-end statements from mutual funds and brokerage accounts
- ☐ IRA year-end statements
- ☐ K-1 forms from partnerships, S corporations, estates and trusts
- ☐ Rental or self-employment income and expenses
- ☐ Purchase and sale information for anything sold during the year (Bitcoin, car, eBay, etc.)
- ☐ Closing document/HUD statement from purchase, sale, or refinance of your home
- ☐ Information relating to foreign income and/or foreign bank accounts
- ☐ All other statements of income
- ☐ Medical expenses *(if anticipated to exceed 7.5% of your income)*
- ☐ Form 1099-SA from Health Savings Accounts showing amounts distributed to you
- ☐ Form 1095-A, Health Insurance Verification, if you purchased your coverage on the Marketplace Exchange
- ☐ Records of estimated taxes paid (dates and amounts)
- ☐ Property tax statements
- ☐ 1098 forms for mortgages or home equity lines of credit; **we'll also be asking you how the funds are being used**
- ☐ Donations of money to charity *(letter from organization for any single gift of $250 or more)*
- ☐ Donations of property to charity *(letter from organization for any single gift valued at $250 or more)*
- ☐ Volunteer expenses and mileage
- ☐ *Washington residents*: RTA tax from vehicle registration
- ☐ Amounts related to higher education (including Form 1098-T for tuition paid, Form 1098-E for student loan interest, and/or Form 1099-Q for 529 plan distributions)
- ☐ Investment-related expenses
- ☐ Child care provider's name, address, taxpayer identification number, and amount paid (including amounts paid for summer day camp)

S. Landau Services
Steven Landau, E.A., CFP®
5606 14th Ave. NW, Suite C
Seattle, WA 98107-3715

PHONE: (206) 784-1070
FAX: (206) 789-1719

EMAIL: Steven@SLandauServices.com
WEB: www.SLandauServices.com

FAIR MARKET VALUE GUIDE FOR NON-CASH CHARITABLE CONTRIBUTIONS

MEN'S CLOTHING
Accessories ..... $2 – $8
Belts/leather ..... $5 – $15
Belts/not leather ..... $2 – $6
Boots ..... $6 – $18
Coats ..... $15 – $60
Jackets ..... $8 – $25
Jeans ..... $4 – $21
Shirts ..... $3 – $12
Shoes ..... $4 – $25
Shorts ..... $4 – $10
Ski suit ..... $14 – $20
Slacks ..... $5 – $12
Sleepwear ..... $2 – $10
Suits ..... $15 – $40
Sweat clothes ..... $2 – $12
Sweaters ..... $5 – $15
Swimwear ..... $4 – $12
T-shirts ..... $1 – $6
Ties ..... $1 – $5
Tuxedo ..... $10 – $60
Wallets ..... $2 – $6

WOMEN'S CLOTHING
Belts/leather ..... $5 – $15
Belts/not leather ..... $2 – $6
Boots ..... $6 – $18
Coats ..... $ 7 – $40
Dresses/evening wear . $10 – $60
Dresses/everyday ..... $4 – $20
Hospital wear ..... $3 – $5
Intimate apparel ..... $3 – $8
Jeans ..... $4 – $21
Purses ..... $3 – $20
Shirts/blouses ..... $2 – $12
Shoes ..... $4 – $25
Shorts ..... $1 – $9
Skirts ..... $3 – $12
Slacks ..... $3 – $12
Sleepwear ..... $4 – $12
Suits ..... $5 – $30
Sweat clothes ..... $2 – $12
Sweaters ..... $5 – $20
Swimwear ..... $4 – $12
Tanks ..... $1 – $6
T-shirts ..... $1 – $6
Vests ..... $3 – $9
Wedding dress ..... $25 – $60

CHILDREN'S CLOTHING
Belts/leather ..... $3 – $9
Belts/not leather ..... $1 – $2
Coats ..... $5 – $20
Dresses ..... $2 – $6
Jeans ..... $3 – $10
Pants ..... $2 – $12
Shirts ..... $2 – $6
Shoes ..... $2 – $8
Shorts ..... $1 – $6
Skirts ..... $1 – $6
Sleepwear ..... $1 – $6
Sweat clothes ..... $1 – $6
Sweaters ..... $1 – $6
Swimsuit ..... $1 – $6
T-shirts ..... $1 – $3
Vests ..... $1 – $3

INFANTS
0 – 4T ..... $3 – $5
Baby clothes ..... $1 – $15
Coat to 4T ..... $5 – $8

ELECTRICAL ITEMS
Calculator ..... $5 – $15
Camera ..... $20 – $200
Coffee maker ..... $4 – $15
Curling iron ..... $2 – $5
DVD player ..... $8 – $15
Lamps/floor ..... $5 – $30
Lamps/table ..... $4 – $12
Phone ..... $5 – $50
Radio ..... $5 – $20
Small appliances ..... $2 – $8
Stereo system ..... $15 – $75
Television ..... $60 – $170
Vacuum cleaner ..... $15 – $65
VCR ..... $8 – $15

COMPUTERS
Monitors ..... $5 – $50
Printers ..... $5 – $150
Systems ..... $100 – $400

KITCHEN ITEMS
Baking pans ..... $1 – $3
Gadgets ..... $1 – $2
Glasses/mugs ..... $1 – $2
Plates ..... $1 – $3
Pots and pans ..... $1 – $3

SPORTING GOODS
Bicycles ..... $12 – $60
Exercise equipment .. $5 – $200
Fishing rods ..... $5 – $25
Golf clubs ..... $2 – $25
Skates ..... $3 – $15
Skis ..... $5 – $50
Sled ..... $5 – $15
Tennis rackets ..... $3 – $10
Tricycles ..... $5 – $20
Wagon ..... $5 – $40

FURNITURE
Bed/complete (double) $50 – $170
Bed/complete (single) $35 – $100
Bedroom set
(complete) ..... $250 – $500
Chairs ..... $5 – $15
Chest ..... $25 – $95
China cabinet ..... $85 – $300
Coffee tables ..... $15 – $65
Crib with mattress ... $25 – $100
Desks ..... $25 – $140
Dining room set
(complete) ..... $150 – $900
Dressers ..... $25 – $100
End tables ..... $5 – $20
High chair ..... $10 – $50
Kitchen set ..... $35 – $120
Mattress/box spring ... $10 – $50
Play pen ..... $4 – $30
Recliners ..... $30 – $50
Sofa ..... $30 – $150
Wardrobe ..... $20 – $100
Wooden trunk ..... $5 – $70

TEXTILES
Bath towel ..... $2 – $6
Bedspreads ..... $8 – $24
Blankets ..... $2 – $15
Curtains ..... $2 – $12
Dish towel ..... $1 – $2
Drapes ..... $7 – $30
Mattress pads ..... $2 – $8
Pillows ..... $2 – $8
Quilts ..... $8 – $24
Rugs ..... $3 – $10
Sheets ..... $2 – $8
Tablecloth ..... $3 – $5
Throw rugs ..... $3 – $12
Towels ..... $2 – $6

BOOKS, RECORDS, ETC.
CDs ..... $2 – $5
DVDs ..... $2 – $5
Hard cover books ..... $1 – $3
Paperback books ..... $1 – $2
Records ..... $1 – $2

TOYS, GAMES
Puzzles ..... $1 – $2
Board games ..... $1 – $3
Stuffed animals ..... $1 – $2

APPLIANCES
Air conditioner ..... $20 – $90
Dryer ..... $45 – $90
Fan ..... $3 – $25
Gas stove ..... $50 – $125
Heaters ..... $8 – $22
Iron ..... $3 – $10
Microwave ..... $10 – $50
Refrigerator ..... $75 – $250
Toaster ..... $4 – $12
Washing machine .... $40 – $150

MISCELLANEOUS
Lawn mower ..... $25 – $100
Luggage ..... $5 – $15
Organ/Piano ..... $50 – $200
Pictures ..... $2 – $10
Riding mower ..... $50 – $300

Note: *The price ranges shown represent a compilation based on valuation guides published by various charitable organizations. The taxpayer is responsible for establishing actual value of items donated.*

PLANNING TIP:

Most cell phones today can take pictures. Take a picture of all items donated. Keep the electronic pictures for proof the items were in good or better condition at the time they were donated.

RECORDKEEPING RULES FOR CHARITABLE CONTRIBUTIONS

To help substantiate a deduction for the fair market value of used items donated to charity, make a list of each item donated on a separate sheet of paper along with the following information.

- Name and address of charity.
- Date items were donated to the charity.
- Description of each item donated.
- Fair market value of each item at the time they were donated (see the list on this page).
- Date each donated item was originally purchased or acquired.
- Cost or other basis of each item donated.

No deduction is allowed for a charitable contribution of clothing or household items unless the clothing or household item is in good used condition or better. The IRS is authorized by regulation to deny a deduction for any contribution of clothing or a household item that has minimal monetary value, such as used socks and undergarments.

Special notice regarding the substantiation of certain charitable donations

Every gift of $250 or more must have proof of payment (canceled check, bank/credit card statement, or receipt) and REQUIRES a letter or email from the organization acknowledging the gift. The letter MUST include language to the effect:

"No goods or services were received in exchange for the donation."

If there was an exchange of goods or services, the value must be stated in a letter or email addressed to you **prior to having us file your tax return**. Without this documentation, your deduction is not allowed.

If you frequently give at the $250 level, consider making those gifts in the amount of $249 instead. Multiple, smaller gifts totaling $250 or more do NOT require this extra step (for example, checks for $50 per week to church do not require that you receive a letter; your canceled check is sufficient proof.)

If you are contemplating a large gift – particularly if you're considering bundling several years' gifts into one year – let's discuss the use of charitable gift funds and/or appreciated securities to make the most out of your donation.

There are numerous court cases where the acknowledgement from the charity was received AFTER the taxpayer filed their return; the IRS wins every time.

S. LANDAU SERVICES

S. Landau Services
Steven Landau, E.A., CFP®
5606 14th Ave. NW, Suite C
Seattle, WA 98107-3715

PHONE: (206) 784-1070
FAX: (206) 789-1719

EMAIL: Steven@SLandauServices.com
WEB: www.SLandauServices.com

Pricing and Billing Policies in effect: October 1, 2020

For all full-service tax clients (those for whom this firm prepares a Federal and state income tax return, if applicable), the following policies apply:

Realizing that financial matters do not have a "time" or a "season," we encourage all clients to contact our office with any questions that may have an impact on their tax situation. To accommodate as many inquiries as possible, the full-service tax service includes approximately 30 minutes of discussion, question/answer, or limited research (separate from the preparation of your current year returns) at NO CHARGE. Once that period has been exhausted in a calendar year, phone calls, meetings and research are billed at the current hourly rate, presently $250 per hour, plus expenses. Billing occurs on the first of the following month, with payment expected within 15 days of receipt of our invoice. Minimum monthly billing (for any month with hourly charges) is $65. If we don't receive payment by the last day of the month, we will send a second notice with a $15 late fee. Additionally, we will perform no further work, including tax return preparation, until the account is back in good standing.

We calculate income tax return preparation fees on a per-form basis. Each form used in computing a tax return has a fee associated with it. Tax return fees are generally the sum of the per-form fees. Unusual or extensive research, including cost basis research and/or calculation, and special handling (such as mailing returns to tax agencies on your behalf, etc.) is billed at the hourly rate plus expenses.

For clients that are NOT full-service tax clients the following policies apply:

Work is performed for an hourly fee. As of October 1, 2020, that rate is $250 per hour plus expenses. Billing occurs on the first of the following month, with payment expected within 15 days of receipt of our invoice. For any month with hourly charges, our minimum monthly billing is $65. If we don't receive payment by the last day of the month, we will send a second notice with a $15 late fee. Additionally, we will perform no further work, including tax return preparation, until the account is back in good standing.

For all clients:

We require twenty-four hours' notice to cancel or reschedule an appointment. We may assess a $75 fee for a short-notice cancellation, late arrival, or appointment no-show.

Fees can be paid with cash, check, or via credit card. We accept credit cards by phone, in person, or on our website.

We negotiate other work can be negotiated on a per-project basis.

Thank you for allowing this firm to be of service to you. Your trust is greatly appreciated. We provide this notice is provided to reduce misunderstandings.

S. LANDAU SERVICES

S. Landau Services
Steven Landau, E.A., CFP®
5606 14th Ave. NW, Suite C
Seattle, WA 98107-3715

PHONE: (206) 784-1070
FAX: (206) 789-1719

EMAIL: Steven@SLandauServices.com
WEB: www.SLandauServices.com

Price Schedule in effect: October 1, 2020

Personal income tax returns – selected form pricing (not exhaustive)

Form 1040, U.S. Individual Income Tax Return – base rate		$375
Schedule A, Itemized Deductions		50
Schedule B, Interest and Dividends		15
Schedule C, Self-Employment Income (each)		195
Schedule SE, Self-Employment Tax (each)		15
Form 8829, Business Use of Home (each)		40
Schedule D, Capital Gains and Losses		50
Form 8949, Sales and Other Dispositions of Capital Assets (each)		15
Schedule E, Supplemental Income and Loss (rental income, per property)		175
Schedule H, Household Employment Taxes		40
Form W-2, 1099-R, Social Security (each)		15
Schedule K-1 (partnership, estate, trust, S corp) (each)	*Starting at:*	35
Form 6251, Alternative Minimum Tax		40
Form 1095-A, Health Insurance Verification		25
Depreciation schedules, asset tracking (Schedules C & E)		varies
Various credits (education, childcare, etc.)		varies
Worksheets (carryovers, special tax calculations, etc.)		varies
Other forms and schedules	*available upon request*	
Form 1040X, Amended U.S. Individual Income Tax Return	*Starting at:*	$375
State income tax returns	*Starting at:*	$130
Extensions		$25

Foreign Bank Account Report

Treasury Department Form 114, Foreign Bank Account Report	*Starting at:*	$125

Re-work a return

Revise and recompile a return upon discovery of new information	*Starting at:*	$95

(over ↺)

S. Landau Services
Steven Landau, E.A., CFP®
5606 14th Ave. NW, Suite C
Seattle, WA 98107-3715

PHONE: (206) 784-1070
FAX: (206) 789-1719

EMAIL: Steven@SLandauServices.com
WEB: www.SLandauServices.com

Price Schedule in effect: October 1, 2020

Business, Entity, and Gift Tax returns

Form 1120S, U.S. Income Tax Return for an S Corporation	*Starting at:*	$700
Form 1065, U.S. Return of Partnership Income	*Starting at:*	$700
Form 1120H, U.S. Income Tax Return for Homeowners Assoc.	*Starting at:*	$350
Form 1041, U.S. Income Tax Return for Estates and Trusts	*Starting at:*	$600
Form 709 Gift Tax Returns	*Starting at:*	$250
Washington & Seattle B&O/Excise Tax Return	*Starting at:*	$35
Extensions		$25

Employment-related taxes

Form W-2, Wage and Tax Statement	First form:	$55
	Each add'l:	$20
Form 1099-MISC, Miscellaneous Income	First form:	$55
	Each add'l:	$20
Form 940, Employer's Annual Federal Unemployment (FUTA) Tax Return		$75
Form 941, Employer's QUARTERLY Federal Tax Return		$75
Form 944, Employer's ANNUAL Federal Tax Return		$75

Rush work surcharge

Required information is received less than 15 days prior to due date	*Starting at:*	$195

Hourly rate

Consultations, research, scenario modeling, etc.	$250

S. LANDAU SERVICES

S. Landau Services
Steven Landau, E.A., CFP®
5606 14th Ave. NW, Suite C
Seattle, WA 98107-3715

PHONE: (206) 784-1070
FAX: (206) 789-1719

EMAIL: Steven@SLandauServices.com
WEB: www.SLandauServices.com

S. Landau Services Privacy Policy

Your non-public personal information is collected from various sources:

• Information received from you on tax organizers, worksheets, client questionnaires, applications, and other financial documentation you provide.

• Information you provide via personal interviews telephone conversations, faxes and e-mails.

• Information about your transactions with the firm.

• Information received about you from consumer reporting agencies (if background or credit checks are conducted on your behalf).

DISCLOSURE/USE

Because Steven Landau is affiliated with Avantax Wealth Management℠ (**Avantax**) for his investment and wealth management services, all email to and from our organization is "cloned" and available to Avantax. Unless you specifically authorize us to disclose your tax return information to generate financial products and services recommendations, your non-public personal information is not otherwise disclosed to any person or party, except as required by law or to facilitate filing your tax return.

Upon closing your account, your non-public personal information will not be disclosed to any person or party unless required by law.

SECURITY

Access to your information is restricted in a variety of ways:

• Only to those employees who have a need to know in order to provide products or services to you.

• Physical security, electronic security safeguards and strict procedural measures consistent with federal standards are in place to protect your non-public personal information.

Your privacy is important. Please trust that protecting your information is equally important. Please call if you have any questions.

Rev 1-4-2021

S. LANDAU SERVICES

S. Landau Services
Steven Landau, E.A., CFP®
5606 14th Ave. NW, Suite C
Seattle, WA 98107-3715

PHONE: (206) 784-1070
FAX: (206) 789-1719

EMAIL: Steven@SLandauServices.com
WEB: www.SLandauServices.com

January 4, 2021

Engagement Letter for 2020 Individual Tax Return Preparation Services

This letter is to confirm Our understanding of the terms and objectives of the engagement between Esselless, LLC (doing business as "S. Landau Services") (hereinafter referred to as "We", "Us" or "Our") and _____ (hereinafter referred to as "You" or "Your"), and the nature and limitations of the services We will provide.

We will prepare Your 2020 individual federal, state, municipal and school district income tax returns and use tax returns from information You furnish to Us. If required, We will prepare Your 2021 estimated income tax payment vouchers based on Your 2020 income tax returns. We will not review or adjust the estimated income tax payment amounts during the year for changes in Your tax situation. You agree to call Us if You would like Us to re-calculate Your 2021 estimated income tax payment amounts based on Your most up-to-date tax information. This service may be subject to an additional fee. We will not audit or otherwise verify the data You submit, although it may be necessary to ask You for clarification of some of the information.

In order for Us to complete Your returns in time to meet the April 15, 2021 filing deadline it is Your responsibility to provide Us with all the information required for the preparation of complete and accurate income tax returns by March 14, 2021. If We do not have all of Your information by March 14, 2021 it is likely that Your return will be placed on extension; in this instance, balance due calculations and first quarter estimate amounts may not be available in time to make these payments on time. You have the final responsibility for Your income tax returns and, therefore, You agree to review them carefully for accuracy, completeness, and propriety before You sign and file them (or authorize Us to file them). You agree to retain all documents, canceled checks and other data that form the basis of your income tax returns. These documents may be necessary to prove the accuracy and completeness of Your income tax returns to a taxing authority. By submitting this information to Us you are representing that you have written documentation of the data submitted. If You do not provide Us with requested documentation in a timely fashion We may choose to terminate this engagement.

You hereby acknowledge, agree and understand that We may choose not to retain any supporting documentation for Your tax returns other than documents supporting federal withholding taxes. You understand and agree that document retention is Your sole responsibility and You hereby indemnify and hold Us harmless from any and all claims, including attorney fees, resulting directly or indirectly from the failure to retain any supporting documentation. You understand and acknowledge that failure to provide supporting documentation to the IRS or other taxing authorities when and as requested may result in imposition of additional taxes, penalty and interest and You agree that You will be solely responsible for such items (including any costs of defense) and hereby release Us from any liability whatsoever for failing to retain such documentation.

(over ⮌)

Your income tax returns may be selected for examination by various taxing authorities. Any proposed adjustments by the examining agent are subject to certain rights of appeal. The cost of preparing your return does not include representation before the IRS or any taxing authority.

All parties to this engagement letter agree that the courts of King County, Washington have jurisdiction over the parties and all disputes between Us. All parties to this engagement letter agree to submit all disputes to the federal or state courts resident in King County, Washington. All parties to this engagement letter also agree that the laws of the State of Washington shall govern all such disputes. In the event that any portion of this engagement letter is deemed invalid or unenforceable, said finding shall not operate to invalidate the remainder of this engagement letter. In the event any claim is made against Us by any third party in connection with Our relationship, You agree to indemnify and hold Us harmless for any and all costs, expenses, interest, penalties or other damages that We may incur by reason of such claim including, but not limited to, court costs and attorney fees.

Our fees for the services outlined above will be based on the current schedule of per-form charges (available upon request) and on the amount of time required to perform extra services (for example research or compiling of receipts) at Our standard billing rates (enclosed). You agree to pay the amount of the invoice for services rendered under this engagement letter at the time Your completed income tax returns are delivered to You. No returns shall be delivered without payment. We are not responsible for any late fees, penalties, or interest for not providing You your return if payment is not made when the return is prepared. If all required documentation and information needed to complete Your return(s) is not presented to Us by March 14, 2021 (or, in the case of a return on extension October 1, 2021) and You request that We attempt to still have Your return ready to file on-time, a minimum $195 rush fee will be added to Your invoice. Furthermore, no assurance can be made that returns prepared under such "rush" status will be available to file on time.

All information You provide to Us in connection with this engagement will be maintained by Us on a strictly confidential basis pursuant to Our Privacy Policy, a copy of which is enclosed with this engagement letter, which governs the terms of Our management of Your personal information.

This engagement ends upon the earlier of the completion of the above stated work or December 31, 2021.

Sincerely,

Steven Landau
President, Esselless, LLC
DBA S Landau Services

We appreciate the opportunity to be of service to You. Please sign and date the enclosed copy of this engagement letter and return it to Us in the envelope provided to acknowledge Your agreement with the terms of this engagement. It is Our policy not to initiate services until after We have received the executed engagement letter.

Accepted By: _____ Date: _____
Print & Sign Name

_____ Date: _____
Print & Sign Name (spouse, if applicable)

S. Landau Services Tax Year 2020 Client Checklist

Please complete the following checklist as it pertains to You, Your Spouse, and Your Dependents for 2020.

Name(s): _____

Dependents and Filing Status		**YES**	**NO**	**Explanation/Details**
1	Did your address change during the year?			
2	Did your marital status change during the year?			
3	Did your dependents change? ***Provide birthdate and SSN for a new child or dependent.***			
4	Did any of your dependents file their own tax return or have wages?			
5	Are you supporting anyone not living with you?			
6	Are you the parent(s) of a child with special needs? ***If so, please elaborate.***			
7	Are you separated or divorced with child(ren)? ***IRS Form 8332 may be required if you are not the custodial parent.***			
Income		**YES**	**NO**	**Explanation/Details**
8	At any time during 2020, did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency, *e.g.*, Bitcoin? **Provide coin types, dates, quantities, and prices.**			
9	Did you change employment in 2020?			
10	Did you receive a Form 1099-NEC or have self-employment income or losses? ***Include income from Lyft, Uber, Etsy, etc. Income & expenses required.***			
11	Did you start a business, purchase a rental property or farm, or acquire interest in an S corporation or partnership? ***Income & expenses and/or Schedule K-1 required.***			
12	Did you receive any disability or unemployment payments?			
13	Did you receive or pay alimony? ***Provide the date of your divorce.***			Divorce date:
14	Did you maintain a foreign bank or investment account *at any time* in 2020?			
	If so, did you receive any foreign income, including interest? ***Excludes U.S. mutual funds.***			
	Did the account balance(s) reach $10,000 at **any time** during 2020?			
15	Did you receive ANY interest or dividend income? ***No amount is too small!***			
16	Did you buy or sell any stocks, bonds, or other investment property?			
17	Did you acquire, exercise, or sell any employer-based stock or options, *e.g.*, RSUs, ISOs, ESPPs, NQSOs? ***Please elaborate.***			
	Do you have stock acquired from ISOs exercised in a prior year?			
18	Did a lender cancel or forgive any of your debt?			
19	Did you make any withdrawals from an education savings account or 529 plan?			
20	Do you own a second residence, land, or other real estate?			
	Did you sell any personal, investment, or business-use real estate? ***Provide Form 1099-S if you received one.***			
	Did you receive ANY rental income directly from tenants or indirectly from a property manager or company like Airbnb, VRBO, etc.? ***Provide income & expenses and Form 1099-MISCs.***			
21	Did you receive CARES Act stimulus payments ("Economic Impact Payment") as an individual, as a couple, or for a child? How much were the payments?			
22	Did you or your business receive a CARES Act loan, *e.g.*, Paycheck Protection Plan or Economic Injury Disaster Loan?			
23	Did you receive a Coronavirus-Related distribution from a retirement plan? Do you intend to recontribute some or all of the withdrawal?			

(over ⮌)

S. Landau Services Tax Year 2020 Client Checklist

Please complete the following checklist as it pertains to You, Your Spouse, and Your Dependents for 2020.

Adjustments to Income		**YES**	**NO**	**Explanation/Details**
24	Did you or your dependent(s) have any higher education expenses? If so, when were they paid?			
25	Did you pay any student loan interest?			
26	Did you make any contributions to a Health Savings Account (HSA) *outside of work*?			Taxpayer: Spouse:
	Did you make or receive any distributions from an HSA? ***If so, Form 1099-SA is required.***			
	If so, were all proceeds used for qualified medical expenses for you or your dependent(s)?			
27	Did you purchase a motor vehicle, boat, or RV?			
28	Did you pay out-of-pocket medical expenses that may qualify to meet the deduction threshold (7.5% of your income)? ***Include Long-Term Care premiums in your estimate.***			
29	Do you have any medical or charity mileage?			
30	*Did you purchase, sell, or refinance your principal home or second home?			
	*Do you have a home equity loan or line of credit?			
	*If so, were all proceeds used to build, improve or acquire *that* home?			
	**The Tax Cuts and Jobs Act requires more detail about how you use proceeds from mortgages, refinancings, home equity loans, and HELOCs.*			
31	Did you make capital improvements to or build your primary residence?			
32	Did you make any charitable contributions? ***Special substantiation rules apply for any single donation of $250 or more.***			
33	Are you self-employed **and** using an area of your home regularly and exclusively for business purposes? ***If so, provide square footage of entire home and of the dedicated home office space. This does not apply to working from home as a W-2 employee.***			Home square footage: Home office square footage:
34	If self-employed, do you have records for all business-related expenses, including travel and/or mileage? ***Please report meals at 100% of their cost.***			
35	Are you self-employed and using your car for business purposes? ***Provide business mileage.***			
	If so, are you paying interest on a car loan?			
Retirement		**YES**	**NO**	**Explanation/Details**
36	Did anyone in the family receive Social Security benefits?			
37	Did you receive a distribution from a retirement plan like a 401(k), IRA, SEP?			
	Did you make a Qualified Charitable Distribution from an IRA? ***Details, please.***			Taxpayer: Spouse:
38	Did you convert part or all of your traditional IRA/SEP/SIMPLE IRA into a Roth IRA in 2020? This is sometimes called a "backdoor Roth."			Taxpayer: Spouse:
	Do you have IRAs with any non-deductible or after-tax contributions, *i.e.*, 'basis'?			Taxpayer: Spouse:
39	Have you contributed, or do you plan to contribute, to <u>any</u> IRA, SEP, Keogh, Roth, or SIMPLE plan for the tax year 2020? ***Please indicate who, type & amount.***			Taxpayer: Spouse:
Miscellaneous		**YES**	**NO**	**Explanation/Details**
40	Did you receive any notices from the IRS or any state taxing agency? *Details, please.*			

(continued on next page)

S. Landau Services Tax Year 2020 Client Checklist

Please complete the following checklist as it pertains to You, Your Spouse, and Your Dependents for 2020.

Miscellaneous (continued)		**YES**	**NO**	**Explanation/Details**
41	Did you make any estimated federal or state tax payments? ***Provide dates & dollar amounts.***			
42	Were you a resident of, did you work in or from, or did you have income in more than one state?			
43	Are you a citizen or resident of a country other than the United States?			
44	Did you pay anyone for domestic or medical services in your home (nanny, housekeeper, etc.)? ***Provide documentation of any taxes paid or estimated taxes paid on these wages, including Form W-2.***			
45	Did you incur any day care costs for your dependents so you could work? *This may include after-school activities and day camps.* ***Provide the amounts paid, names, addresses, and tax ID numbers with your tax records.***			
46	Did you gift more than $15,000 to one or more people, including college savings 529 plan contributions? ***Details, please.***			
47	Do you think you may qualify for any energy-related credits, such as for purchases of solar panels, an electric car, or home energy improvements?			
48	Did you use or purchase health insurance from the Marketplace Exchange during 2020? ***If so, Form 1095-A is required.***			
49	Did you: Have gambling winnings? Surrender any US savings bonds? Have any tip income not reported to your employer? Have any worthless securities or uncollectible bad debts? Adopt a child or begin the adoption process? Experience a disaster/casualty loss in a Presidentially-declared disaster area? Did you receive a financial gift from any non-U.S. person?			
50	Do you anticipate your 2021 income to be substantially different from your 2020 income?			

_____ Date: _____

Print & Sign Name

_____ Date: _____

Print & Sign Name (spouse, if applicable)

S. LANDAU SERVICES

S. Landau Services
Steven Landau, E.A., CFP®
5606 14th Ave. NW, Suite C
Seattle, WA 98107-3715

PHONE: (206) 784-1070
FAX: (206) 789-1719

EMAIL: Steven@SLandauServices.com
WEB: www.SLandauServices.com

PLEASE READ: Providing your consent to our disclosure of your Tax Return Information is OPTIONAL. Please understand, however, that we will not be able to communicate with you using email if you choose not to consent to our disclosure of your Tax Return Information. All future communication between us would need to be by telephone and/or mail. Because Steven Landau is affiliated with Avantax, all email correspondence is securely archived for supervisory review by Avantax. This means that a disclosure of your otherwise protected information is occurring. Avantax will not contact you or otherwise market to you based on your decision.

Consent for Disclosure of Tax Return Information

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot disclose your tax return information to third parties for purposes other than the preparation and filing of your tax return without your consent. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution.

You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will not be valid. If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature.

Consent

I/We, _____, authorize ***Steven Landau and/or Barry Davis*** (**Preparer**) to disclose all of my Tax Return Information, which includes, but may not be limited to, all communications with Preparer and any information Preparer derives or generates from Tax Return Information in connection with my 2020 Tax Return(s) (collectively, **Tax Return Information**) to: (a) Avantax Investment Services℠ (**AIS**), a registered broker-dealer; (b) Avantax Advisory Services℠ (**AAS**), a registered investment adviser; and/or (c) affiliates of those entities (collectively, **Avantax**), all of which are headquartered at 3200 Olympus Blvd Suite 100 Dallas, TX 75019. Services are dependent upon the licenses held by the Preparer. I acknowledge that I may request a more limited disclosure of Tax Return Information.

I understand that ***S. Landau Services*** is not a registered broker-dealer or a registered investment adviser.

I understand that Steven Landau is affiliated with Avantax as an independent contractor solely for the purpose of offering financial products and services. Avantax does not offer, provide, or supervise tax advice or tax preparation services, and any services provided by Avantax will be pursuant to a written agreement directly with the relevant Avantax entity.

(over ⮌)

I acknowledge that if I make an investment through Avantax that Steven Landau will receive a part of any management fees, commissions, or other fees paid on investments I make. I understand that I am under no obligation whatsoever to follow any recommendations made or to purchase any other products or services offered by or through Preparer.

I understand that the Tax Return Information may not be disclosed or used by Preparer for any purpose other than as permitted by this consent document.

Purposes

1. This consent allows Steven Landau to disclose my Tax Return Information to Avantax for the purpose of providing me with information pertaining to various financial services and products, which may include, but are not limited to, financial planning, investment advice, and investment products (e.g., stocks, bonds, mutual funds, insurance, and annuities). Without limiting the foregoing, this consent allows Steven Landau to download my Tax Return Information into financial planning or other software or systems owned or operated by Steven Landau or Avantax for the purpose of assessing my financial situation or providing me with potential investment recommendations, whether or not I open an account or purchase any products or services through Avantax, and whether or not such recommendations are actually made.

2. Avantax may capture, retain, and review my electronic communications with Preparer or other people affiliated with ***S. Landau Services***. These communications may include email and attachments which contain Tax Return Information. Avantax will protect the confidential nature of this information by disclosing it only in response to the lawful requests of United States federal or state agencies, or otherwise as required by law.

3. I understand that Avantax and its authorized third-party vendors will retain and store my Tax Return Information in hard copy and/or electronically as required by applicable regulations, or longer as determined in the sole discretion of Avantax.

The default duration of this consent is one year from the date of signature. If I prefer a different duration, I will specify the duration of my consent here: I specify the duration of the above consent to be _____ from the date of signature.

Please choose one option:

[ ] I/we consent to the use of my/our Tax Return Information for this purpose.

[ ] I/we do not consent to the use of my/our Tax Return Information for this purpose.

Signed By: _____ Date: _____
Print & Sign Name

_____ Date: _____
Print & Sign Name (spouse, if applicable)

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (**TIGTA**) by telephone at 1-800-366-4484, or by email at complaints@tigta.treas.gov.

S. LANDAU SERVICES

S. Landau Services
Steven Landau, E.A., CFP®
5606 14th Ave. NW, Suite C
Seattle, WA 98107-3715

PHONE: (206) 784-1070
FAX: (206) 789-1719

EMAIL: Steven@SLandauServices.com
WEB: www.SLandauServices.com

PLEASE READ: Providing your consent to our use of your Tax Return Information is OPTIONAL. Please understand, however, that we will not be able to communicate with you about potential tax and wealth management options if you choose not to consent to our use of your Tax Return Information. Avantax will not contact you or otherwise market to you based on your decision.

Consent for Use of Tax Return Information

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot use your tax return information for purposes other than the preparation and filing of your tax return without your consent.

You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will not be valid. Your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature.

Consent

I/We, _____, authorize ***Steven Landau and/or Barry Davis*** (**Preparer**) to use all of my Tax Return Information, which includes but may not be limited to, all communications with Preparer and any information Preparer derives or generates from Tax Return Information in connection with my 2020 Tax Return(s) (collectively, **Tax Return Information**) for the purpose of providing me with information pertaining to various financial services and products, which may include, but is not limited to, financial planning, investment advice, and investment products (e.g., stocks, bonds, mutual funds, insurance, and annuities). Services are dependent upon the licenses held by your tax preparer. Information will be distributed in various ways including, but not limited to: newsletter, email, postal mail, website, phone, or other means of communication.

I understand that Steven Landau is affiliated with Avantax Investment Services℠, a registered broker-dealer, as an independent contractor solely for the purpose of offering financial products and services.

I understand that Steven Landau may use all of my Tax Return Information in connection with his/her affiliation with (a) Avantax Investment Services℠ (**AIS**); (b) Avantax Advisory Services℠ (**AAS**), a registered investment adviser; or (c) affiliates of those entities (collectively, **Avantax**), all of which are headquartered at 3200 Olympus Blvd Suite 100 Dallas, TX 75019. Avantax does not offer, provide, or supervise tax advice or tax preparation services, and any services provided by Avantax will be pursuant to a written agreement directly with the relevant Avantax entity.

(over ⮌)

I understand that **S. Landau Services** is not a registered broker-dealer or a registered investment adviser.

I acknowledge that if I make an investment through Avantax that Steven Landau will receive a part of any management fees, commissions, or other fees paid on investments I make. I understand that I am under no obligation whatsoever to follow any recommendations made or to purchase any other products or services offered by or through Preparer.

I understand that the Tax Return Information may not be disclosed or used by Preparer for any purpose other than as permitted by this consent document.

The default duration of this consent is one year from the date of signature. If I prefer a different duration, I will specify the duration of my consent here: I specify the duration of the above consent to be _____ from the date of signature.

Please choose one option:

[ ] I/we consent to the use of my/our Tax Return Information for this purpose.

[ ] I/we do not consent to the use of my/our Tax Return Information for this purpose.

Signed By: _____ Date: _____
Print & Sign Name

_____ Date: _____
Print & Sign Name (spouse, if applicable)

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (**TIGTA**) by telephone at 1-800-366-4484, or by email at complaints@tigta.treas.gov.

S. LANDAU SERVICES

S. Landau Services
Steven Landau, E.A., CFP®
5606 14th Ave. NW, Suite C
Seattle, WA 98107-3715

PHONE: (206) 784-1070
FAX: (206) 789-1719

EMAIL: Steven@SLandauServices.com
WEB: www.SLandauServices.com

Tax Year 2020
Direct Deposit Verification

Name(s): _____

Please confirm that the details we have on file are correct or strike out and write in any changes. If you wish to add (or change) Direct Deposit instructions, please enclose a VOIDED check from the account you wish to use.

This account will be used to deposit any refunds you may receive from the IRS or state income tax agencies.

Bank Name: _____

Account Number**:** _____

Account Type: _____

Routing Number: _____

Optional

- ☐ Check here if you would like Federal balance-due amount paid from this account
- ☐ Check here if you would like Federal quarterly estimates paid from this account
- ☐ Check here if you would like **state** balance-due amount paid from this account *(if available)*
- ☐ Check here if you would like our fees for tax preparation taken from this account (after reviewing & approving final invoice)

_____ Date: _____
Print & Sign Name

_____ Date: _____
Print & Sign Name (spouse, if applicable)

S. LANDAU SERVICES

S. Landau Services
Steven Landau, E.A., CFP®
5606 14th Ave. NW, Suite C
Seattle, WA 98107-3715

PHONE: (206) 784-1070
FAX: (206) 789-1719

EMAIL: Steven@SLandauServices.com
WEB: www.SLandauServices.com

Tax Year 2020
Use Tax Verification

If, during 2020, you made any out-of-state purchases of goods or services that you used, stored or consumed in your home state (e.g. Internet purchases, purchases from radio or TV ads, catalog purchases, etc.) and if you paid **no** sales tax in any state on that purchase, you are required to determine the state use tax that that you owe on that purchase.

In other words, if you bought something and didn't pay sales tax on it *somewhere*, your state of residence wants you to pay them the equivalent tax, called a use tax. As your preparer, I am obligated to inquire whether you have any unpaid use tax. If you do, we either include it on your state income tax return or file a separate use tax return (depending on your state of residence).

Please choose one option:

☐ In calendar year 2020, I had no out-of-state purchases that require payment of state use tax.

☐ In calendar year 2020, I made purchases in the amount of $ _____ upon which I am required to pay state use tax.

_____ Date: _____
Print & Sign Name

_____ Date: _____
Print & Sign Name (spouse, if applicable)

For Washington Clients: Returning this form is OPTIONAL