

Titan Tax Service LLC
1767 72nd Street
Brooklyn NY, 11204



Dear Clients,

It's that time of the year again! My FB and IG likes have started going through the roof. My jokes are funnier. I've become the popular guy again. You guessed it. IT'S TAX SEASON! Mr. Joe (dad) is now heavily involved and at your service. You have access to drop off, pick up and espresso at your convenience. If Ms. Josephine (mom) is cooking, you're always welcome to stay for dinner.

Another year is upon us and I hope 2017 brings health and happiness to you and your loved ones. It's hard to believe that another year has passed. With life moving faster than ever, proper planning is essential! Planning for marriage, children and retirement can be difficult and overwhelming. Having the right financial support system makes all the difference. The proper system brings protection from the unknown and peace of mind. I encourage you to take full advantage of my free financial advice throughout the year.

With every New Year there are many new changes in the tax law that may or may not benefit you. Congress has been especially busy in rewriting the laws over the past few years, and some provisions are expiring in the next year, while others are just taking effect. Keeping up with all the changes is a full time job in itself. It's comforting to know that someone will spend the necessary time to walk you through any financial opportunities that may arise and keep you away from any financial red zones.

Insurance must be part of everyone's financial package. Payouts are tax deductible and tax free. Some of the benefits include: mortgage protection, income replacement, funeral expenses, college funding, nursing home care and certain illnesses. Policies also build cash value in the event you need to borrow money. Whole Life Policies are currently paying interest of 3.5%.

I will personally audit any tax returns/policies from other preparers in order to assure you that any favorable opportunities were not missed free of charge. Contact me any time to set up an appointment, or visit us on the web. Your referral is my best compliment! ***If you bring 3 clients in 1 tax year your RETURN is free.*** Thank you and I look forward to working with you.

Sincerely,

Mike

Titan Tax Service LLC
-Certified Tax Preparer
-Licensed Life, Health & Disability Broker
-Licensed Securities Broker
(718) 938-0279
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WWW.THETAXTITAN.COM
Cash is preferred

Please remember to bring the following:

- Last year's tax return
- Copy of drivers license or state id
- W-2 forms
- 1099 from pensions, IRA distribution, bank interest and/or stock dividends
- Self employment income and expenses (Kindly provide totals)
- W-2 G from any gambling winnings
- 1099 from any stock transactions (Kindly provide totals and cost basis)
- Social Security Statements
- 1098 Mortgage Statements (Condo/co-op owners will receive one 1098 from the bank and one from the management company)
- Social Security number and D.O.B. for any new dependents
- Child Care Provider Information (Name, Address, SSN or EIN and amount paid)
- Traditional or Roth IRA contributions
- Student loan interest paid
- Qualified college tuition paid for each student
- Estimated payments made for Federal and State
- Rental income and expenses (Kindly provide totals)
- Unemployment statements
- Schedule K-1 from Partnership, S-Corp. (Should be complete by January 31)
- Total amounts for charitable contributions
- Total amounts for non reimbursed business expenses
- Copies of any Life/Health/Disability Policies (to ensure proper coverage)
- Current Retirement Plan Statement (for a complete account review)