FALL TUNE-UP SPECIAL OFFER

Let us help you have a better finish with your
2015 tax planning & investment/retirement
planning

Don't get a surprise on April 15th!

Don't get a surprise when you get to retirement
and do not have enough!

As the end of the year approaches, we would like to offer you a special deal for a limited time to help give you some peace of mind about your taxes and investment/retirement planning for 2015. We are offering to prepare a review of your tax and financial information to ensure you are on track for a smooth and comfortable year end for 2015. Now is the time to review your taxes and investment/retirement plan status as it allows enough time to make changes to achieve a better result.

We are offering a Fall Tune-Up for all existing clients as part of what we regularly do for you at no additional cost. We are offering a special rate for individuals and businesses who are not an existing client of our accounting firm of $297. This amount is later waived if you become a client. We will:

1. Discuss what's happened or will be happening in 2015 that will have a tax impact
2. Prepare an estimate of your 2015 tax return based on the information provided
3. Recommend estimate or withholding changes to get the best results possible
4. Review your most recent month's investment and/or retirement statement for year end planning. This includes timing of gains and losses, contributions to retirement plans, installation of new retirement plans
5. View and make recommendations on your general tax situation and/or your retirement/investment planning

Steps you should take:

1. Gather your latest paystubs from your job or business and/or your most recent year to date balance sheet and income statement from your business
2. Collect documentation relating to anything that may have a tax impact for 2015
3. E-mail Stephanie at sphillips@esullivan.net, or call our office at (301) 657-8080 to schedule an in-person or telephone appointment for a time that works best for you

What you will receive:

1. A written report detailing where you stand on taxes and investments/retirement planning
2. A written list of recommendations that should be done before year end
3. Peace of mind knowing you have done something to alleviate surprises and plan for your taxes and retirement

To receive this offer you must schedule your appointment and submit your information to us by **November 10, 2015**.

If you have any questions, feel free to call our office at (301) 657-8080.

Schedule your **Fall Tune-Up** today!

S&C SULLIVAN & COMPANY, CPAs