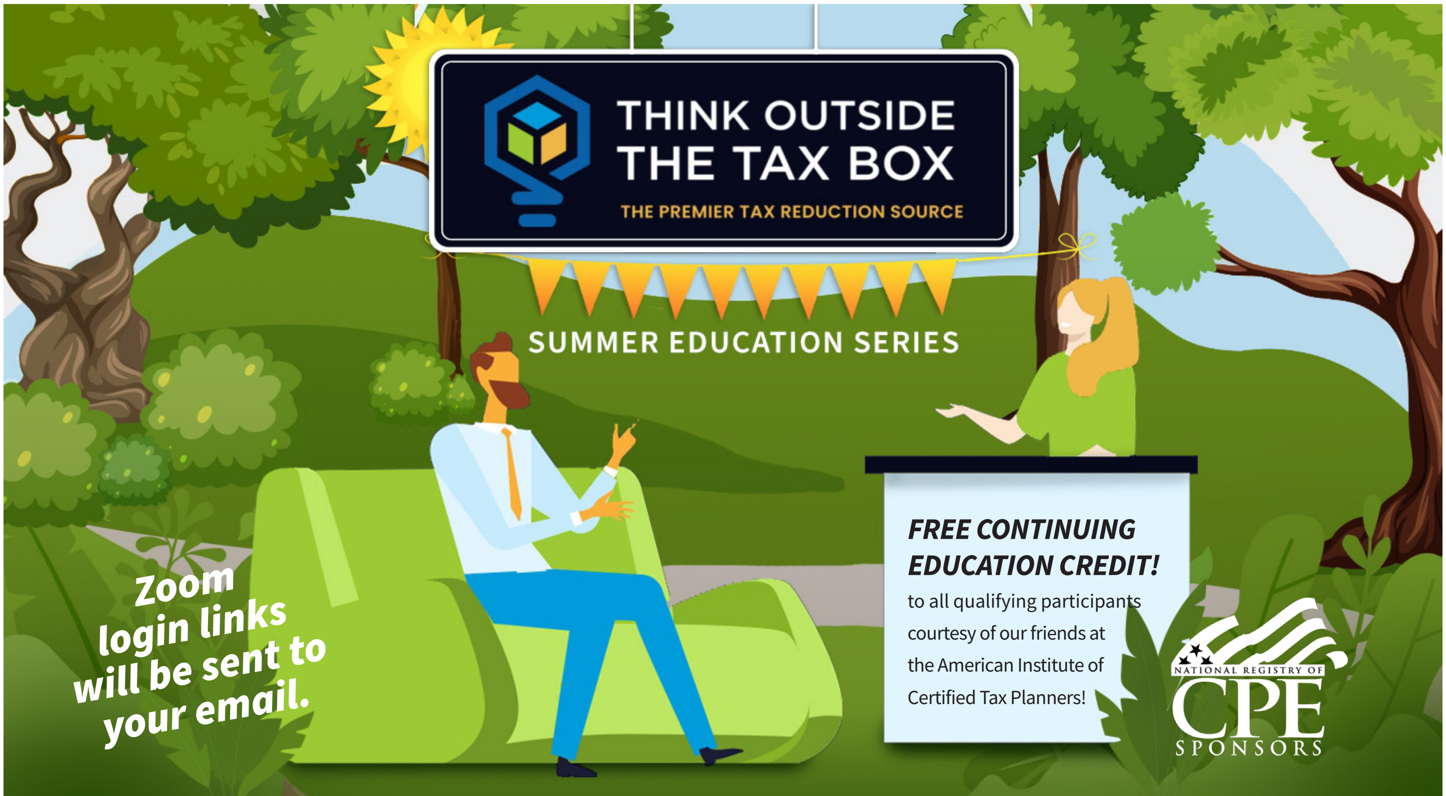

2022 SUMMER EDUCATION SERIES

MAY 25th, 2022 | 12:00 - 1:00 pm PST

Why Client Experience Matters in Every Tax Pros Firm

Alison Ball & Chris Farrell, brought to us by Liscio

Learn how making a simple change in how you ask clients to securely send documents to you can result in them responding in as little as six minutes. Your staff will get more done, your clients will love working with you, and your firm will be positioned to thrive.

TOTTB recommends and uses Liscio services.

JUNE 22nd, 2022 | 12:00 - 2:00 pm PST

Reilly's Rules of Tax Planning (and Life)

Peter Reilly, hosted by Dominique Molina

Editor-in-Chief, Dominique Molina hosts regular contributor and all-around great guy, Peter Reilly, as he discusses some of the biggest "Do's and Don'ts" in the tax world. Peter's decades long experience as a tax professional combined with his journalistic inquisitiveness have helped him create a clear, easily understood set of rules based on his own experiences and his research of hundreds of tax cases. These rules have not only been his guide for tax preparation and planning but in his day-to-day life as well!

JULY 20th, 2022 | 12:00 - 2:00 pm PST

Taxpayer Penalty Relief And Use of Form 8275 To Avoid Penalties

Lucien P. Gauthier, Esq., LL.M., CPA, Founder Boston Tax Institute

Obtain penalty relief for taxpayers using the "advice" or "disability" exception in U.S. v. Robert W. Boyle in the context of the 20% taxpayer accuracy-related penalty under S 6662, the late filing penalty under S 6651(a)(1), and other penalties; the First Time Abate Administrative Waiver to obtain abatement of late file, late pay, and late deposits penalties; the hierarchy of preparation and advice standards; and the use of Form 8275 (Disclosure Statement) to avoid taxpayer and preparer penalties in the first instance.

AUGUST 18th, 2022 | 12:00 - 2:00 pm PST

Eight Tax Questions to Ask Your Client Before They Get Married!

TaxMama® Eva Rosenberg

Learn how to ask the tough questions before your client(s) officially tie the knot! Alert your client to potential IRS offsets, like past-due taxes, child-care, and student loans. Save your clients time and feel more confident in charging them for your planning services. They can walk into the marriage with their eyes open!

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