

Question	Answer
And how can I find the state jurisdictional requirements (without too much effort)?	A good resource to look into requirements may be the state bar associations or court requirements
I missed a few minutes at the end. Did I qualify for CPE?	As long as you were logged in for 50 minutes during the engagement letter presentation you will qualify
Is "clearly a looney tune" a technical term?	correct
I am referring to the actual resolution phase.	Depends on your relationship with them. Most of the time I wouldn't start until they made a payment.
Angelene sorry I already did the process to request through FOIA back in October and no answer yet. My ID was requested again which a sent back on November. Should I keep waiting?	Did you get any response to your FOIA? They generally respond within 20 days. If they have not you may want to do one again
Awesome! Do I enter a code for that price or is it available during checkout?	during checkout
If we're handling both the Federal and State, should we have separate letters? Or can we rope them both in one?	For representation cases we recommend having separate engagement letters
how long the engagement letter has to be?	For tax preparation our letters are about 1 page long. For resolution cases 2-3 pages depending upon the case scenario
What does FOIA mean?	Freedom of Information Act
I'm an employee. I use engagement letters in the division that I manage, however, I also prepare taxes for my employer's clients and at the moment she is not enforcing the engagement letters. How will that affect me if I'm the tax preparer of those business/individual tax returns? Should I be sending an engagement letter if I'm preparing that tax return even if it's technically not my customer?	From your scenario, I would recommend the engagement letters to your employer. It might be a matter of you preparing the forms and having the employer's clients sign them when they send in tax documents for the return preparation
How soon after the engagemnet is completed should the POA be revoked?	Generally, we withdraw the POA around 30 days after the case is completed. We consider the case completed once our resolution posts in the clients file or we recieve a letter that the IRS has finalized the resolution we requested

What was the engagement letter software mentioned?	He modifies the template in Pitbulltax
Loved learning from Bob McK	He was a crowd favorite for sure
WHAT IS THE ENTIRE COST FOR THE COURSE?	Hi Brenda, which course are you referring to?
when will you have the December dates?	hoping to close the contract next week.
Where do I find the slide presentation to save? I logged on late and did not see a screen with them.	https://astps.s3.amazonaws.com/Engagement+Letters_ASTPS+2023.pdf?inf_contact_key=9687598d71ae94ea20f05f1ba7312680680f8914173f9191b1c0223e68310bb1
how do I get the engagement letter he just talked about	https://astps.s3.amazonaws.com/Engagement+Letters_ASTPS+2023.pdf?inf_contact_key=9687598d71ae94ea20f05f1ba7312680680f8914173f9191b1c0223e68310bb1
Please provide the link to the accelerator for the \$300 down	https://www.astps.org/accelerator/
1/2 of the people they hire won't make it through training....the other 1/2 will quit in a year or so!!	I noticed some of the new people when calling practitioner's priority so at least a few made it haha
If the client is Married Filing Jointly, is it necessary to have both the Taxpayer and Spouse sign the Engagement Letter, or is it OK if just the Taxpayer signs?	I would encourage having both taxpayer sign because you are preparing the return for both parties
if the engagement letter doesn't indicate the year, do we need to get new engagement letter every year or old one would be OK?	I would get new ones by the year so that way there is a scope to your client engagements
Are engagement letters enforceable for cross state representations	I would make sure the engagement letter complies with the regulations for your state and the client's state
Could these agreements be done via email? I've worked at a tax resolution firm before, and they handled the engagement letter via email. And had the client respond with "I agree", which served as their signature. In your opinion, would these agreements hold up?	I would recommend that they physically sign a document and send it back. A signature is harder to dispute than someone typing in the words "I agree" if an issue arises.
No just a letter asking to fax my ID again back on november. Nothing else since that	I would wait a little while longer before re-submitting. That response confirmed they have it so I would give them probably another month.

Do you have a list of people who practice tax resolution in NJ? I do not want to work with a certain client on this.	If you contact lydia@astps.org she should be able to help you find someone in your area
If you are doing tax representation and want to talk about the taxpayer to the tax preparer that works for a separate firm, what type of disclosure letter should we use with our engagement letter? Isn't 7216 for tax preparation, not representation?	If you need contact with the client's accountant, both you and the client need to follow the regulations in 7216. The client should be giving both of you written authorization to discuss their matters and what you are able to discuss.
If one terminates the Engagement Letter, do you refund any of the Retainer Fees?	It depends upon the scenario and the terms in the engagement letter
This is my first season preparing taxes for my own business and the first time I will have to use an engagement letter. How detailed should it be for a current single year tax return?	It does not have to be detailed individually for return preparation, but include clauses of what your client expectations are (providing accurate records, that they have supporting documents for clients providing you a prepared profit and losses..etc.
where is a good place to see what is privileged info (I'm a CPA)	It is in the US tax code https://www.law.cornell.edu/uscode/text/26/7525
Do you have the location for the Fall Super Conference in Dallas this year?	It is not announced yet, but it will be in Southlake
Do you have any general idea where the December live session will be?	Most likely Houston
There are a lot of Ethics issues being covered. Does this count for Ethics CE?	no
Is the prerequisite part of orientation session?	No the orientation is a walk through of the course schedule, materials, and homework., The prerequisites should be done before stage 1
If we do all our work on a desktop, are we going to have to load all our programs to a laptop for the accelerator?	No. There will be a few videos and the stages will be through zoom like this webinar.
"Pitbull"?	Pitbulltax software
Is this going to go past 12? We have 12 and 12:15 appts.	Probably not

Will I be able to get a copy of this recording? I am afraid I need to step away with a client.	Replays are only available to members you can learn more here! https://www.astps.org/membership/
can I alternate between virtual and in person?	Stage 1, 3 and 4 all virtual. Stage 2 is either virtual or in person (you choose)
Happy to here Angelene!	Thank you Sally!
engagement letters are required by insurance co's if you have a claim.	That is why they are so important. Besides outlining our services and expectations they help us in the legal arena if anything goes wrong
I had a conversation with an attorney at my malpractice carrier (Camico) who expressed the opinion that an engagement letter is not a contract. Couldn't believe what I heard!!!	That's crazy. If both parties are signing the letter and creating a legal agreement for a monetary amount that is a contract.
I have not downloaded the presentation materials yet. Are there any samples of engagement letters in the download? If not, can ASTPS provide any sample letters?	There are a couple examples in the materials. https://astps.s3.amazonaws.com/Engagement+Letters_ASTPS+2023.pdf?inf_contact_key=9687598d71ae94ea20f05f1ba7312680680f8914173f9191b1c0223e68310bb1
I thought there was no privilege provisions for non-attorneys	There is the ability for the taxpayer to deem certain items as privileged. For criminal scenarios only attorney client privilege applies.
Is it possible to get a copy of today's webinar questions and answers?	They will be included with the video recording in the member webinar library
How can I get the Questions and Answers?	They'll be posted for membership in the webinar library
Do you guys list individuals or the company as the designee on the 8821?	We list specific staff members on the 8821s
In my opinion - winner should be announced for each webinar so that winner could get benefit. Winner after YE seems not good as we need to wait a year.	We post the standings as we go
Your thoughts about accepting a payment plan? Does representation begin with 1st payment or when balance is paid in full?	We typically dont do payment plans for the initial investigation. When we do them it is usually for the actual resolution.
When having initial discussions with a client to see if they are a good fit, does it make sense	We would do an engagement letter for the preparation of the 8821 and the transcript

to have an engagement letter prior to pulling transcripts?	evaluation. Then prepare a second one once you decide to take the case on.
You many need a POA with years prior to the those you are currently working with so that you can discuss with the IRS those items that originated in those prior years that affect the current years at issue.	Yes that is correct, or if you have a form 8821 on those years you can get records and potentially file an updated POA if other years arise
If you prepare a tax return, and client is audited on that tax return, do I give the client a new engagement letter if I represent the client before the IRS for the audit?	Yes that is correct. The audit representation would be a new engagement
So you simultaneously submit the 8821 and 2848; 8821 to define years of access to information and 2848 limited to actual years of representation as stipulated in the Engagement Letter?	Yes that is what we do so we can keep representation within the scope of the engagement.
IRS is allowed to ask for a copy of POA/TP engagement letter? Did not know this!	Yes they can. They can ask for them if you are deducting resolution fees on client collection financial statements too.
so would you use an 8821 and POA?	Yes we do
could you have a poa and an 8821 on the same perios	yes you can
I assume the webinar is over and I can go?	yes you can
Since you have to do compliance on representation issues, it makes sense to extend the POA past the tax periods you are engaging for! You can always withdraw your POA.	yes you can, however you can also get records with the form 8821 if you do not want to extend the POA periods
if you suspect fraud, should that be in the engagement for purpose of withdrawal of your services	Yes you should have a clause in your engagement letters that you have the ability to terminate the contract at your discretion
Do I get access to the dates in advance? sorry if this was already mentioned.	Yes! they are listed on the website.
I registered for the Accelerator last year but couldn't really fully attend. Could I register again for this year?	Yes, at the return attendee price!

Is there a problem if I get only one spouse to sign??	You are leaving yourself open to issues with the non-signing spouse. If for instance they do not provide you proper information and did not sign the engagement letter which has the clause that they are providing all income documents at the time of preparation.
How can I find out what POA's the IRS has from me on file for client's of various CPA firms that I worked for?	You can do a FOIA request of your CAF file. The IRS can send you a list of all the 2848s and 8821s they have on file for you
can you withdraw your 2848 for a year that is not in the engagement letter for which the IRS believes you are to be representing them	You can withdraw the 2848 and submit a new one.
Can you change the 2848 for fewer years after covering more years previously	You can withdraw the old one and file a new one.
Would I need a lawyer to edit these engagemnt letters? Could I expect to be reasonably protected if I drafted these letter competely on my own? (assuming they're legal, of course)	You do not need an attorney for engagement letters. You must just clearly outline the scope of what you are doing for the client and what you expect of the client (ex: for preparation - that the client is providing all records necessary to prepare the return and will not hold you responsible for any errors or omissions if items were not provided)
Regarding signatures on an engagement, I have typically only had the client(s) sign the engagement. Should I as the service provider and party to the engagement also sign to create a bona fide contract, or is the clients' signature sufficient?	You should be signing the engagement letters as well. That helps create the contract aspect. You are both signing in agreement of the terms