**Tax Client Action Plan**

[ ]  Get 8821 Signed. [ ]  Get 2848 Signed.

[ ]  Offer the IRS Account Tracking Product.

[ ]  Prepare the following prior year returns:

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[ ]  Prepare the following amended returns for the following reasons:

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[ ]  Apply for First Time Penalty Abatement. Year:\_\_\_\_\_\_\_ Amount:\_\_\_\_\_\_\_\_\_\_\_\_

 [ ]  By Phone. Call PPS/PPL 866-860-4259 (must have 2848 on file or call with client)

 [ ]  With IRS Form 843.

 [ ]  Give the client a script to call on their own.

[ ]  CP2000/AUR detected. Review with client. Year:\_\_\_\_\_\_\_

[ ]  Client’s account flagged for audit review. Review with client.

Years:\_\_\_\_\_\_\_ Notes:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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[ ]  Additional issues or opportunities to discuss with client:

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