

Tax Client Action Plan

Get 8821 Signed. Get 2848 Signed.

Offer the IRS Account Tracking Product.

Prepare the following prior year returns:

Prepare the following amended returns for the following reasons:

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: _____

Additional issues or opportunities to discuss with client:
