

Kansas Chapter

**NATP**<sup>TM</sup>National Association of  
Tax Professionals**INSIDE THIS ISSUE:**

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## The President's Message

### BY TAMMY HARMON, EA

I hope this newsletter finds you on the verge of finally seeing the light at the end of a very long tax season tunnel. I'm not sure we ever really saw the light after last year's filing season, and then tax season started again. Boy, was it something! 2021 brought a whole new dimension to this profession. If you haven't quit or retired by this point (if you have, I'm somewhat jealous), I wish you congratulations! We survived continuing pandemic issues, stressed-out clients, endless stimulus questions, and my favorite--tax law changes in the middle of tax season! Now we have to regroup, relearn, and get ready for next year, which I'm reluctant to tell you is only a few months away.

Learn from the mistakes of this year, and prepare your office for a new round of fun. Review your client list to make

sure you serve clients who are a good fit for your business. Get organized with a solid CRM system—update engagement letters and security policies to protect yourself and your clients. Evaluate office workflow procedures and make adjustments. We all adapted our office environments to meet pandemic demands—now we have to evaluate whether to keep these adjustments in place or go back to earlier procedures. Like many weekends, I spent quite a bit of time at the soccer fields watching my kids play. The morning games called for a hoodie and even a blanket as Fall is finally starting to arrive. By afternoon, I was swapping out the hoodie for a portable neck fan as the temperature crept back up to 90. Anyone who has been a sports parent can tell you they have a whole arsenal in the trunk of

their car to prepare for any sports environment. We have chairs, stadium seats, snacks, weather pods, portable tents, umbrellas, winter coats, heated vests, hand warmers, and cooling rags. We have all of these items with us all of the time as we never know what the weekend will bring us. These past couple of tax seasons have shown us that we never know what the year will bring. All we can do is prepare for anything, stay positive, and strive for the best.

Get educated. We never stop learning in this profession, and staying on top of the latest changes in tax law has been beyond important this last year. This year will bring just as much new fun to the table. Our chapter has been busy planning a full Fall lineup of education opportunities, which will allow you to learn a variety of updates, timely topics and

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[www.facebook.com/groups/ksnatp](https://www.facebook.com/groups/ksnatp)

# The President's Message

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reconnect with colleagues. Don't miss our IRS Symposium on October 20th, Annual Meeting on November 12th, Tri-State Luncheon on November 17th, and Fall Seminar featuring national speaker John Sheeley on December 3rd. We can't wait to see you!

Take some time for yourself. We are all stressed out at this point for obvious reasons. While we are constantly trying to serve our clients, we also have to remember that we are no good to them if we can't care for ourselves. Try to take some time in the next coming months to unwind and do something for yourself. Last year, my husband helped me fulfill a bucket list hobby and bought me a kayak. After a stressful week, there is no greater relaxation than paddling out to a quiet lake area and just floating and enjoying nature. While kayaking may not be for everyone, find your thing, and relax.

Congrats to everyone for surviving another tax season. We look forward to seeing you at one of our events, and best wishes for a productive but slower-paced fall!



## Important Dates

WHAT	DATE/TIME	WHERE
IRS Symposium	Oct. 20 8 AM - 5PM CST	JCCC Regnier Center
Annual Seminar	Nov. 12 8 AM - 5 PM CST	Tanganyika Wildlife Park
Tri-State Luncheon	Nov. 17 9 AM - 1 PM CST	Wichita & Overland Park
Fall Seminar	Dec. 3 8 AM - 5 PM CST	Olathe - Main Event

Register for either meeting here: [NATP Registration](#)

*"Without changing our pattern of thought, we will not be able to solve the problems we created with our current patterns of thought" - Albert Einstein*





# Pulling Client Transcripts

BY CHRIS JONES, EA

Many of my clients are small business owners who make (or should make) estimated tax payments. If your small business clients are like mine, they occasionally confuse “estimated tax payments” with “tax payments” as they rush through my tax organizer. They mistakenly include the prior-year tax return payment with their current-year estimated tax payments. Several months after filing their tax return, these clients will call with a concerned tone because the IRS has adjusted their return...they owe more money, or, worse, their refund has evaporated into a balance due. Ouch.

This type of conversation is never good. My client thinks I made a mistake, but I have to inform them they gave me the wrong information. I always feel bad since I realize how easy it is to confuse the types of tax payments. This is bad for client relationships and a waste of time since I am a sucker for helping straighten out a problem with the IRS.

Enter Form 8821 and his big sister, Form 2848. Form 8821 allows us to pull IRS

transcripts, while Form 2848 also allows us to call the IRS on our client’s behalf.

A couple of years ago, I began requesting a signed Form 8821 to pull my client’s transcript *before* filing their return. We request signed forms starting in November to allow time for the IRS to process them. The results have been very positive:

- We catch our client’s estimated tax payment errors before e-filing, which feels good.
- Comparing Economic Impact Payments (EIPs) to client tax organizers reduced delays in finalizing tax returns. Most clients left this information blank. I don’t blame them.
- We added higher value service tiers to pull IRS transcripts throughout the year to catch potential IRS flags.

I encourage you to begin pulling your client’s transcripts if you do not already. It adds value to your service and opens the door to higher service fees.

*”Opportunities multiply as they are seized” - Sun Tzu*

# EVERY DOLLAR MATTERS



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Kansas Chapter



National Association of Tax Professionals

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KANSAS STATE ANIMALS



**DID YOU KNOW?**

- Located in Greensburg, Kansas, The Big Well is known as the largest hand-dug well in the world. In 1987, workers dug the well using hand tools resulting in a well 32 feet in diameter and 109 feet deep.
- Standing in a particular spot in White Cloud, Kansas, you'll be able to simultaneously see four states: Iowa, Nebraska, Missouri, and Kansas.
- Early in the 1900s, a newly-dug well began emitting gas. Two University of Kansas professors determined that it was helium. This was very uplifting.
- Amelia Earhart was from Atchison, Kansas. She was the first woman to be granted a pilot's license and to fly over the Atlantic Ocean solo.

**KANSAS NATP TAX PROFESSIONALS SCHOLARSHIP**

Did you know that KS-NATP awards up to \$1,000 in scholarships per year?

If you would like to earn the Enrolled Agent (EA) designation and meet the other requirements of the scholarship, you can apply for a \$250 scholarship at the KSNATP.com website:

<https://ksnatp.com/files/Scholarship-Application-2021.pdf>

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