Communications & Liaison

STAKEHOLDER LIAISON

Building a Sustainable Practice: Managing Risk and Strengthening Client Relationships Through Ethical Tax Practice

Wednesday, December 4, 2024

2:00 p.m. Eastern, 1:00 p.m. Central, 12:00 p.m. Mountain, 11:00 a.m. Arizona and Pacific , 10:00 a.m. Alaska, 9:00 a.m. Hawaii

(120 minutes including Q & A)

After completing this session, participants will be able to:

- Recognize and apply key Circular 230 provisions throughout the client engagement lifecycle to build a sustainable tax practice while maintaining professional standards and ethical compliance.
- Implement practical risk management strategies that protect both the practitioner and client while strengthening professional relationships and ensuring high-quality service delivery.
- Create and maintain systematic procedures for client engagement, from initial contact through completion, that integrate professional responsibility requirements with best practices for modern tax practice.
- Identify and address common ethical challenges at each stage of client engagement using established frameworks that promote both compliance and practice development.
- Plus, a live Q & A.

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Tax Professionals

2 CE credits **will** be offered for this webinar.
Category: Ethics

This webinar **will** be recorded as an archival video.

Offered with closed captioning. Closed Captioning displays the words that describe the audio portion of the program for viewers who are deaf or hard of hearing. Captions areavailable in English only.

Questions? Email us at:
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