

Directions for completing this form: Place the title of your workshop in the space indicated, followed by the name and contact information for each of the presenters. Provide a brief description of your workshop by placing the cursor on the line below “Brief Description” and commence typing. To complete the “Topical Outline”, place cursor next to each Roman numeral and begin typing. Then place the cursor next to the “a.” to begin listing sub-topics. To list more than one sub-topic, push “Enter” and “b.” should appear on the next line, and so on. Place the cursor on the line under “Notes” to begin providing your notes. To list bibliographic information, place the cursor next to “1.” and start typing. Push “Enter” to move on to “2.” and etc.

ABA / NLADA 2010 Equal Justice Conference

“Identifying & Addressing Tax Issues Resounding In Multiple Legal Contexts”

Presented by

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Brief Description:

Legal services and pro bono providers necessarily focus on the immediate needs of clients. Yet they do not always have the resources or expertise to identify tax issues that arise in a myriad of contexts, effectively counsel clients regarding these issues, or provide the framework necessary to resolve them. Presenters will discuss the settings in which tax issues may arise, offer basic tax resources, present common tax credits and deductions, empower attendees with the necessary tools to offer basic tax counsel, and identify strategies for collaborating with tax specialists.

Topical Outline: “Identifying & Addressing Tax Issues Resounding In Multiple Legal Contexts”

- I. Identifying & addressing tax issues resounding in multiple legal contexts
 - a. Frame issue and workshop focus
 - i. Legal services and pro bono providers are tasked with solving immediate client needs
 - ii. Resources and expertise of legal services and pro bono providers are not necessarily focused on tax issues
 - iii. Tax issues arise frequently
 - iv. Introduction of workshop focus
- II. Why is this so important?
 - a. Effective counseling
 - b. Cost reductions
- III. Common settings in which tax issues may arise
 - a. Family law cases – tax issues re: divorce

- b. Personal injury judgment – taxability of settlement
 - c. Bankruptcy and collections
 - d. Social security levies
 - e. Low-income clients in general
- IV. IRS tax resources
- a. IRS Publication 17
 - b. Other useful IRS Publications
 - c. IRS Tax Tips via email
- V. Common tax credits and deductions
- a. Credits
 - i. First-time homeowner credit
 - ii. Homestead credit
 - iii. Home heating credit
 - iv. Daycare credit
 - v. Earned income credit
 - vi. Additional child tax credit
 - b. Deductions
 - i. Charitable deductions
 - ii. Job-related expenses
 - iii. Moving expenses
 - iv. Medical and dental expenses
- VI. Effectively counseling clients with relevant tax issues
- a. Ask the right questions
 - b. Do your research
 - c. Know your deadlines
- VII. Identifying strategies for collaborating with tax specialists
- a. Properly frame issue/client need
 - b. List of no-cost or low-cost referrals
 - i. Attorneys
 - ii. Accountants
 - c. Low-income taxpayer clinic
 - d. Local IRS service center
 - e. Taxpayer advocate

Notes:

Bibliography & Website Links:

IRS Publication 17, found at <http://www.irs.gov/pub/irs-pdf/p17.pdf>

www.irs.gov