



## Practice Preservation (2 CPE)

July 27, 2021

2:00 PM to 3:40 PM PT

### COURSE DESCRIPTION

In depth discussion on the issues that tax practitioners faced during the 2020 tax year and what it took to manage and overcome the issues. There will also be discussion on what practitioners will be facing during the 2021 tax year filing season and how to prepare to handle the issues. The discussion will continue to address practitioner errors and how to best prevent them.

Discussion will focus on the need for a practice preservation plan and also touch on some of the IRS systemic problems. There will be a review of a USTCP case study that prompts a question on “Why do I prepare tax returns for a living?” There will be some discussion on important must haves for the self-employed practitioner.

### Learning Objectives:

- ✓ Upon completion of the session, attendees should come away with a better understanding of the issues of preserving a practice and how tax pros can implement routines and safeguards into their business model.



### **Kenneth Portera, EA**

Kenneth Portera, EA has been preparing taxes for over 30 years and is the founder and owner/operator of Kenneth Portera & Associates LLC, a year-round tax preparation and accounting practice which he started in 2009.