

From: Richard Joslin <[REDACTED]>
To: jeffrey E. <jeevacation@gmail.com>
Subject: RE: Re:
Date: Mon, 17 Apr 2017 23:00:36 +0000
Attachments: luman.pdf; epp.pdf

Estate planning is generally non-deductible (personal) and any portion that would be deductible is not deductible for AMT. Your agreement precludes investment advice. If Alan's fees are deductible he would itemize the portion that might be planning/ deductible. However, he does not do so. Here are a couple of cases. Last, I indicated in the past that such fees could be deductible for the Medicare tax. You instructed to not claim the deduction.

From: jeffrey E. [mailto:jeevacation@gmail.com]
Sent: Monday, April 17, 2017 6:27 PM
To: Richard Joslin <[REDACTED]>
Subject: Re: Re:

thanks . . . Maybe I was mistaken, but I thought your position was that my fees for leons planning was NOT deductible. / was it the alt min limitation. ?

On Mon, Apr 17, 2017 at 6:24 PM, Richard Joslin <[REDACTED]> wrote:

Yes – falls under this bucket 3) in connection with the determination, collection or [refund](#) of any tax

From: jeffrey E. [mailto:jeevacation@gmail.com]
Sent: Monday, April 17, 2017 6:22 PM
To: Richard Joslin <[REDACTED]>
Subject: Re: Re:

so do we agree that a fee for filing the delinquent 8865s and other docs. would be deductible. ? I think so . just checking with you.

On Mon, Apr 17, 2017 at 6:18 PM, Richard Joslin <[REDACTED]> wrote:

The foreign filings are required reporting for income tax purposes and are to be filed with income tax return, Tax return prep is deductible. Whether timely or delinquent makes no difference.

From: jeffrey E. [mailto:jeevacation@gmail.com]
Sent: Monday, April 17, 2017 6:15 PM
To: Richard Joslin <[REDACTED]>
Subject: Re:

fees for audits? fees for preparation of the 8854 delinquent returns?

On Mon, Apr 17, 2017 at 6:13 PM, Richard Joslin <[REDACTED]> wrote:

Income tax planning and fees for services to calculate the income tax are deductible

From: jeffrey E. [mailto:jeevacation@gmail.com]
Sent: Monday, April 17, 2017 6:09 PM
To: Richard Joslin <[REDACTED]>
Subject:

are fees for tax planning deductible?

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