



Department of the Treasury
Internal Revenue Service
Small Business / Self-Employed

Date:
02/01/2023
Preparer ID number:

Tax periods:

Person to contact:

Employee ID number:

Contact telephone number:

Contact fax number:

Contact hours:

Dear [Preparer]:

We're writing to confirm our educational Knock & Talk visit as part of the Paid Preparer Due Diligence Program scheduled during our telephone conversation on [date] .

Your visit is:

Date:
Time:
Location:

Please have the following available for the visit:

- All Forms 1040 you prepared for Tax Year [Insert Tax Year] claiming any of the following:
 - Earned Income Tax Credit (EITC)
 - American Opportunity Tax Credit (AOTC)
 - Child Tax Credit (CTC)
 - Additional Child Tax Credit (ACTC)
 - Credit for Other Dependents (ODC)
 - Head of Household filing status (HOH)
- Forms 8867, Paid Preparer's Due Diligence Checklist, credit computation worksheets, and any documentation that supports your clients' eligibility for the benefits listed above.

What to expect during the visit:

- Your due diligence requirements in preparation for the upcoming filing season.
- Common tax benefit mistakes and how to avoid them.
- Several returns you prepared containing the tax benefits listed above, their accompanying schedules and supporting documentation. If we find discrepancies, we will discuss changes you can make to ensure you're preparing accurate returns for your clients and what you can do to improve your due diligence. You will also have an opportunity to ask us questions.

As due diligence is the responsibility of every paid preparer, it would be valuable to have other preparers in your office join this educational opportunity. The visit is a complimentary education session and will benefit you, your colleagues, and your employees.

If you have questions, please call me at the number above.

Sincerely,

[Name]

[Employee title]