
From: Richard Joslin [REDACTED]
Sent: Tuesday, April 18, 2017 12:38 AM
To: jeffrey E.
Subject: Re: Re:

Were fees paid to you in 2016? Did not consider.

SE tax? Do you mean Medicare tax. LDB does not pay SE tax.=His income is exempt given that it is earned via limited partnership inter=st.

On Apr 17, 2017, at 7:16 PM, jeffrey E. <jeevacation@gmail.com <mailto:jeevacation@g=ail.com> > wrote:

but what about my fees for income tax planning? = sorry to bother you , i am also reviewing what you sent= Im trying to figure out why we began the self employment tax with A=I . I dont have the calcuatios but I will fo=ard some questions later. .

On Mon, Apr 17, 2017 at 7:00 PM, Richard Joslin =span dir="ltr"> <[REDACTED]>
<mailto:[REDACTED]> > wrote:

Estate planning is generally non-dedu=tible (peronal) and any portion that would be deductible is not dedu=tible for AMT. Your agreement precludes investment advice. If Alan's fees are deductible he would itemize the p=rtion that might be planning/ deductible . However, he does not do so. Her= 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 mista=en, but I thought your position was that my fees for leons planning =as NOT deductible. / was it the alt min limitation. = ?

On Mon, Apr 17, 2017 at 6:24 PM, Richard Joslin <=a href="mailto:[REDACTED]" target="_blank">[REDACTED]> > wrote:

tax

Yes – falls under this bucket 3) in connection with the determination, collection or refund of any

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]>
target="_blank">[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]>
target="_blank">[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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please no=e

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