

INTRO TO TAX WRITING **ASSIGNMENT**

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WHY A TAX MEMO?

UNDERSTAND BASICS OF DOCUMENT
ORGANIZATION

PRACTICE LANGUAGE PRECISION

WRITING FOR A “BUSY BOSS” AUDIENCE

TAX MEMO REQUIREMENTS

NOT LIKE MEMO IN INCOME MEASUREMENT

- STRICT FORMATTING AND SECTION REQUIREMENTS

WRITING DIRECTLY TO SUPERVISOR

LAW & FINDINGS SECTION NEEDS CLAIM/POSITIONING
STATEMENTS

FACTS AND ISSUE SECTIONS

FACTS SECTION

BE SPECIFIC AND THOROUGH, BUT BRIEF

- ENOUGH TO PROVIDE CONTEXT, NOT A LIFE'S STORY

NO EXACT LANGUAGE FROM THE PROMPT!

QUESTION/ISSUE SECTION

COPY AND PASTE (IT'S OKAY HERE) QUESTIONS 1-5
FROM THE ASSIGNMENT

LAW & FINDINGS SECTION

CONSIDER EACH NUMBERED QUESTION (1-5) ONE
AT A TIME

USE TAX LAW AS SUPPORT FOR YOUR FINDING,
NOT AS THE CLAIM

- CITE MASTER TAX GUIDE PARAGRAPH NUMBER

LAW & FINDINGS SECTION

BEGIN EACH ANSWER WITH A
FINDING/CLAIM BASED ON THE CLIENT'S
SITUATION

EX: THE CLIENT'S NET GAIN MAY BE TAXABLE
IF... (THEN CITE LAW IN THE NEXT SENTENCE)

ADDITIONAL INFORMATION SECTION

LIST ANY ADDITIONAL INFORMATION YOU
WOULD NEED TO MAKE A MORE SPECIFIC
DETERMINATION

HELP AND RESOURCES

WRITING CONSULTANT: HELENE DONTA

VIRTUAL WALK-IN OFFICE HOURS:

WEDNESDAY FEB 23 TBA

FRIDAY FEB 25 1-4 OVER ZOOM

[HTTPS://UIOWA.ZOOM.US/J/92230639374](https://uiowa.zoom.us/j/92230639374)

VISIT ANY TUTOR FOR ANY COMMUNICATION
ASSIGNMENT IN THE [FRANK CENTER](#)