

Tippie College of Business

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# Intro to Tax

# Tax Memo Writing Assignment

**Barb Wester, Assistant Director**

**Accounting Writing & Communications Program**

# Skill building occurs through increasing complexity of communication assignments

	1 <sup>st</sup> Sem. Junior	2 <sup>nd</sup> Sem. Junior	Senior Year	M.Ac. Year
Writing	<u>Structured documents w/ takeaways:</u> Standard memos, basic tax memos w/ instructor-provided issues section	<u>Unstructured document w/ thesis and evidence:</u> 2-page argumentative essay (x2)	<u>Enhanced writing:</u> Group writing, tax memos w/ student-created issues section, integrating data visualization in written documents, addressing counterarguments	<u>Advanced writing:</u> Integrating more rigorous research, relating ideas, identifying implications, writing on a PPT slide deck
Presentation	<u>Recorded individual interview question response</u>		Recorded group presentations for data visualization tasks and risk analysis	Live group presentations to external audience
Data Visualization and PPT Slide Design	<u>PPT slide design (text only)</u>	One basic visualization w/ Excel in a written document	Three visualization assignments w/ Excel or Tableau, PPT slide design (text + visuals)	Advanced visualization within a slide deck, client-ready PPT slide design

# Why a tax memo?

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Understand the basics of document organization

Practice language precision

Writing for a “busy boss” audience

# Tax Memo Requirements

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Not like a memo in Income Measurement

- Strict formatting and section requirements

Writing directly to supervisor

Law and Findings section needs claim/positioning statements

2 pages, maximum

# Facts and Issue Sections

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## Facts Section

Be specific and thorough, but brief

- Enough to provide context, but not a life's story

No exact language from the prompt!

## Question/Issue Section

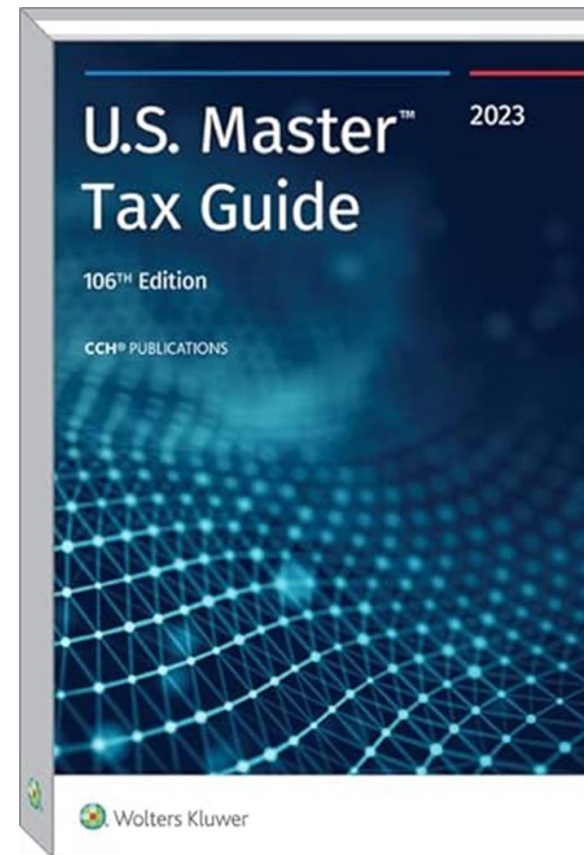
Copy and paste (it's okay here) questions 1-5 from the assignment

# Law and 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 and Findings Section

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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

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List any additional information you would need to make a more specific determination.



**IOWA**