

July 7, 2008

Build Expertise

1) Casting call for Advanced Tax Interview Technique video

The world's best tax professionals are needed to participate in the Advanced Interview Technique Video. Because of our success with the filming of the Basic Tax Interview Technique video last year, we are looking for tax professionals with advanced people skills to participate in our next training video.

Please pass the [attached casting call instructions](#) ("Indication of Interest") to tax professionals in your office(s). Tax professionals must send both a video clip per the instructions and an "Indication of Interest Document." The chosen tax professionals will participate in the filming of the video the entire week of August 4. Expenses for travel, lodging, meals, and time will be covered.

All submittals must be received no later than close of business on Wednesday, July 16. For questions about submittals, please contact Theresa Bolin at 816-854-5832.

This information will also be communicated via [eNews](#).

Recommended Action: Please share the attached casting call instructions with tax professionals.
Deadline: July 16, 2008.

2) 'TAX in the news'

The H&R Block Tax Institute (tax research) personnel are the company's key resources for information about tax law: what's new, how to interpret it and where to learn more. Associates in this department at World Headquarters — all of whom are tax professionals — spend time scouring various resources and putting pertinent tax information into a weekly newsletter called "TAX in the news."

The [attached article](#) contains is the most recent "TAX in the news" issue and includes information about:

- **New Features on the Tax Research Website:** Check out the changes to the login screen and main menu
- **Audit Services:** What's the big deal about obtaining power of attorney?
- **A Reduced Extension Period for Pass-through Returns:** New regulations reduce the extension period for partnership and estate and trust income tax returns to five months.
- **Disaster Relief for Missouri**
- **State News:** Kansas requires employers with 250 or more employees to electronically file quarterly wage and unemployment taxes, as well as make payments online.

This information will also be communicated via [eNews](#).

Past issues of "TAX in the news" are located on the [Knowledge Development](#) site under Tax Research/New Tax Developments.

Recommended Action: Please read "TAX in the news."
Deadline: n/a

Win Speed of Refund

1) Tax Year 2004 Peace of Mind (POM) claims

The 2004 Peace of Mind (POM) terms and conditions state that "POM does not apply to assessments of additional taxes that occur three years from the filing deadline for the return, (or four years for the following state or territory tax assessments only: AZ, CA, CO, KY, LA, MI, MN, MT, NM, OH, TN, WI, AND PR) not including extensions."

With this in mind, please be aware of the upcoming deadline for 2004 tax returns (filed in 2005) with possible POM claim implications. July 31, 2008, is the deadline for 2004 POM claims. Claims created and/or submitted after that date may be subject to denial.

Additional time has been granted to the states listed above. This is due to their extended statute of limitations. For these states only, the 2004 POM agreement remains in effect until July 31, 2009. This extension of time is limited to the above-mentioned states only and is limited to the tax year 2004 contracts only.

Recommended Action: n/a
Deadline: n/a

2) Block establishes new process to help with ITINs/CAAs

A new process has been developed for obtaining help on questions and issues related to Individual Taxpayer Identification Numbers (ITINs) and Certifying Acceptance Agents (CAAs). Please read the [attached documents](#) to understand the resources available to you.

Recommended Action: Read the attached resources.
Deadline: n/a

Build a Great Organization

Two franchise tax professionals make this year's list of MVPs

For several years, H&R Block has recognized its Mission Values Participants (MVPs) – those tax professionals who really shine when it comes to putting H&R Block's mission and values into action. Two franchise tax pros were among the honorees this year.

Debra Stivers, Gosport, Indiana. The franchisee is **Doris Herring**.
Connie Richards, Sedona, Ariz. The franchisee is **Connie Phillips**.

Congratulations to these individuals for being recognized as H&R Block MVPs.

You can read more about the MVP recognition on [BlockCentral](#).

Recommended Action: n/a
Deadline: n/a

Announcements

Latest edition of BlockTalk is available

[Attached](#) is the latest edition of [BlockTalk](#), a communication from Interim CEO Alan Bennett to keep you up to date on H&R Block business activities.

Recommended Action: Please read [BlockTalk](#).
Deadline: n/a

Your feedback is always welcome

Please send your thoughts to [Franchise News \(FranchiseNews@hrblock.com\)](mailto:FranchiseNews@hrblock.com).

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