UNIVERSITY of DENVER
STURM COLLEGE OF LAW
Professional Mentoring Program

2019/20 Graduate Tax Program Professional Mentoring Program

Discussion Topics

Mentors and students are encouraged to discuss whatever they like. The following topics are suggested.

For Beginning Students

Welcome to the Profession

- Discuss what tax practice is;
- Discuss the role of tax professionals in our society;
- Discuss how to keep balance in one's life during the program; and
- Discuss the Student's preparation for courses in the program.

Research and Writing

- Discuss methods of doing efficient tax research; and
- Discuss the merits of various tax research services (such as Checkpoint, CCH and BNA); and
- Discuss relevant issues surrounding tax writing, such as how to write for various audiences, and the use of e-mail in daily tax practice.

Low Income Taxpayer Clinic

- Discuss whether the Student plans to participate in the Low-Income Taxpayer Clinic during his or her time in the program; and
- Discuss what the Student could gain from participating in the Clinic.

Introduction to the Tax Profession

These discussion topics for Beginning Students focus on easing the students' transition into the tax profession by providing them basic information about the tax profession, tax practice and tax education.

Career Overview

- Discuss the differences between the practice of tax in legal and accounting settings;
- Discuss, to the extent knowledgeable, differences between large firm, small firm, government, in-house and non-profit practice as well as non-traditional tax positions;
- Discuss the Student's long-term career goals and ways to achieve those goals;
- Discuss different career paths and identify resources for exploring options; and
- Discuss how finding a job after graduation starts now!

Ethics

- Discuss broadly the ethics rules tax professionals must follow;
- Discuss recurring ethical issues the Mentor encounters in practice; and
- Discuss a real-life ethics situation in which the Mentor has been involved.

Introduction to the Tax Community

- Discuss as applicable the American Bar Association, Colorado Bar Association, the American Institute of CPAs, Future Tax Leaders, and other professional groups known to the Mentor; and
- Discuss Continuing Legal Education (CLE) and Continuing Professional Education (CPE) requirements and ways to satisfy those requirements.

Professionalism

- Discuss the role of professionalism in a tax professional's career;
- Discuss the consequences of a lack of professionalism;
- Discuss the "unwritten" customary rules of civility and etiquette among tax professionals; and
- Discuss establishing a reputation and how reputation can impact a tax professional's practice.

For Continuing Students

Networking

- Discuss the importance of networking to one's tax career;
- Discuss specific examples of how the Mentor's networking has helped his or her career;
- Discuss the pitfalls and benefits of social networking;
- Evaluate the Student's social networking; and
- Discuss how the resources of the program can be helpful to the Student's networking.

On the Job Interaction

- Discuss how new hires and interns should act to maximize their chances of succeeding during their first year at a job; and
- Discuss ways new hires and interns can develop a friendly, yet professional, relationship with supervisors.

Career Paths

- Discuss what the Student's career goals were before the program, during his or her first quarter in the program, and currently, identifying how and why the goals have changed;
- Discuss resources available to the Student to pursue his or her current goals; and
- Discuss reconciling job expectations with actual experience and maximizing career satisfaction.

Interacting with Clients, Other Accountants and Attorneys, and Refining Career Goals

These discussion topics for Continuing Students are designed to educate students about interacting with clients, other accountants and attorneys, and to focus on a more specific career path.

Ethics

- Discuss common malpractice and grievance traps and ways to avoid them;
- For attorneys, discuss the role of the Office of Attorney Regulation Counsel, the grievance and investigation process;
- Discuss malpractice insurance;
- Discuss potential resources for dealing with complicated ethical issues, including conflicts of interests; and
- Discuss practices to maintain client confidentiality.

Evaluation of New Business

- Discuss the Mentor's process for evaluating and engaging new clients;
- Discuss the best ways to evaluate a potential engagement and how to decide whether to accept a proffered engagement; and
- Discuss specific examples of times when the Mentor misevaluated an engagement and what the Mentor learned from this experience.

Practical Aspects of Working in Tax

- Discuss the roles and responsibilities of support staff and other office personnel and how to establish good working relationships with others in the same office;
- Discuss office politics and common pitfalls to avoid while working in a tax practice; and
- Discuss the advantages and disadvantages of various types of tax practice and the role of in-house tax professionals.

For Graduating Students

Job Searching & Student Debt

- Discuss job search strategies, distinguishing the effective and less effective; and
- Discuss practical ways to manage student debt.

Client Development

- Discuss how client development is the lifeblood of a professional practice and how it can impact prospects for promotion; and
- Discuss methods of client development that have been successful for the Mentor and discuss other techniques for business development, including any relevant ethical concerns and best professional practices.

Client Communication

- Discuss the importance of client communication and how to maintain good ongoing communication, including the use of retention and fee agreements, keeping clients informed about matters, confirming things in writing, being on time, etc.;
- Discuss proper counseling techniques, and duties and responsibilities of advising clients;
- Discuss techniques for dealing with an unreasonable, dishonest, or otherwise difficult client; and
- Discuss the responsibilities of the client and the tax professional in decision making and the best ways to involve a client in his or her case.

Finding a Job and Transitioning to Practice

These discussion topics for Graduating Students strive to bridge the final gap between graduate school and the tax profession. Discussions focus on job searching and transitioning into practice.

Ethics

- Discuss common malpractice and grievance traps and ways to avoid them;
- For attorneys, discuss the role of the Office of Attorney Regulation Counsel, the grievance and investigation process;
- Discuss malpractice insurance;
- Discuss potential resources for dealing with complicated ethical issues, including conflicts of interests; and
- Discuss practices to maintain client confidentiality.

Introduction to the Tax Community

- Discuss as applicable the American Bar Association, Colorado Bar Association, the American Institute of CPAs, Future Tax Leaders, and other professional groups known to the Mentor; and
- Discuss Continuing Legal Education (CLE) and Continuing Professional Education (CPE) requirements and ways to satisfy those requirements.

Life Balance Issues & Time Management

- Discuss techniques for finding a balance between career and personal life;
- Discuss the Mentor's non-legal formal and informal extra-curricular activities and how they combine with tax practice; and
- Discuss good time management skills and techniques.

Welcome to Tax Practice

- Discuss the Student's short-term and long-term goals moving into tax practice;
- Discuss how the Mentor-Student relationship transitions from the program to practice.

Active Meetings
(*Can be done during any year*)

Networking Meeting
- Attend a bar association meeting, a Future Tax Leaders event, or an alumni event together; and
- Discuss and practice networking together.

Visit the Mentor's Office
- Visit the Mentor's office; and
- Discuss support staff roles, research resources, billing systems, and electronic and hard-copy document management.

Attend a Professional Sports Game
- Attend a Broncos, Nuggets, Rockies, Avalanche, or Rapids game together.

Calendar

Graduate Tax Program Professional Mentoring Program

Name	Date
Meeting #1	October 2nd – November 2nd
Meeting #2	January 15th – February 15th
Meeting #3	April 8th – May 8th
Meeting #4	July 1st – August 1st