



Comprehensive Analysis: IRS Real Estate Pro GPT Capabilities for Licensed Tax Professionals

Executive Summary

The IRS Real Estate Pro GPT is a sophisticated AI assistant specifically designed for licensed tax professionals navigating the complex landscape of real estate professional qualification under IRC §469(c)(7), passive activity loss rules, and IRS audit defense strategies. Based on systematic analysis of the deployment files, this GPT demonstrates exceptional depth in real estate tax law, robust security protocols, and advanced decision-tree guidance systems that directly address the specialized workflow challenges facing tax professionals in real estate practice areas.

The tool provides **16 core functions** spanning real estate professional qualification assessment, passive activity loss navigation, audit defense strategies, appeals process guidance, and Tax Court litigation support. These capabilities are supported by comprehensive knowledge of IRC §469, Treasury Regulations §1.469, and extensive case law precedents.

Bottom Line: This GPT transforms the most complex areas of real estate taxation into guided, step-by-step qualification processes while maintaining strict security standards and professional compliance requirements, specifically targeting the high-stakes area where improper real estate professional claims result in frequent IRS audits and substantial penalties.

Professional Needs Overview: What Tax Professionals Actually Face

Before examining the GPT's capabilities, it's essential to understand the unique challenges tax professionals face in real estate practice areas.

Real Estate Professional Qualification Complexities

Real estate professional status under IRC §469(c)(7) represents one of the most audit-prone areas in tax practice. Tax professionals struggle with the intricate two-part test requiring both more than 750 hours of real estate services AND more than 50% of total personal services in real property trades or businesses. The documentation burden is enormous, as courts consistently reject after-the-fact time estimates and require contemporaneous records. Recent Tax Court cases like *Moss v. Commissioner* and *Oderio v. Commissioner* demonstrate the IRS's aggressive stance in challenging these claims, particularly when taxpayers have full-time jobs outside real estate.

Passive Activity Loss Rules Navigation Challenges

The passive activity loss limitation rules create a complex web of requirements that even experienced practitioners find challenging. Taxpayers face different standards for material participation (seven tests under Treas. Reg. §1.469-5T), aggregation elections that must be made on original returns, and the interplay between real estate professional status and material participation requirements. The consequences of errors are severe, as suspended passive losses can remain trapped for years, and improper deductions can trigger substantial penalties and interest.



Audit Defense and Documentation Pressures

When real estate professional claims are challenged, tax professionals must defend against IRS agents armed with sophisticated audit techniques and comprehensive training on common taxpayer errors. The burden of proof is entirely on the taxpayer, and the IRS frequently scrutinizes cases involving full-time employment combined with real estate activities, round-number hour claims, or documentation created during audit periods. Practitioners need to understand not just the legal requirements but also the practical realities of what documentation will withstand IRS scrutiny.

Appeals and Litigation Strategy Requirements

Real estate professional cases that proceed to Appeals require sophisticated understanding of both tax law and negotiation strategy. Appeals Officers evaluate "hazards of litigation" based on documentation quality, consistency across tax years, and the taxpayer's overall credibility. Practitioners must understand when to settle versus proceeding to Tax Court, how to position cases for optimal settlement outcomes, and the specific procedural requirements that can make or break a case.

GPT Capabilities Assessment: Systematic Analysis by Major Area

Real Estate Professional Qualification Assessment

Core Functionality: The GPT provides comprehensive guidance through the complex two-part test for real estate professional status, utilizing sophisticated decision trees that prevent practitioners from missing critical requirements.

Specific Capabilities:

- **Time Requirement Analysis:** Systematically evaluates both the 750-hour threshold and the 50% test, providing specific calculations and examples for practitioners working with clients who have multiple income sources
- **Service Type Classification:** Guides practitioners through determining which activities qualify as "real property trades or businesses" under IRC §469(c)(7)(C), including development, construction, acquisition, rental, management, leasing, and brokerage
- **Employee Service Rules:** Addresses the complex rules for employees in real estate businesses, including the 5% ownership requirement under IRC §469(c)(7)(D)(ii)
- **Married Filing Joint Considerations:** Explains how only one spouse needs to meet both tests, but participation is determined separately for each spouse

Decision Tree Example: When assessing qualification, the GPT doesn't overwhelm users with all requirements simultaneously. Instead, it follows a logical progression:

Step 1: "Do you perform services in real property trades or businesses?"

→ If Yes: Proceeds to time threshold analysis

→ If No: Redirects to active participation assessment for \$25,000 allowance

Step 2: "Do you spend more than 50% of your total working time in real property businesses?"

→ If Yes: Moves to 750-hour verification

→ If No: Explains why qualification fails and explores alternatives



Real-World Application: For a CPA working 2,000 hours annually in their practice who also manages rental properties, the GPT calculates that they would need more than 2,000 hours in real estate activities to meet the 50% test, clearly explaining why real estate professional status is unlikely and recommending focus on the \$25,000 active participation allowance instead.

Passive Activity Loss Rules Navigation

Core Functionality: The GPT provides systematic guidance through the seven material participation tests, aggregation elections, and the complex interplay between different passive activity rules.

Specific Capabilities:

- **Material Participation Assessment:** Guides practitioners through all seven tests under Treas. Reg. §1.469-5T, with particular emphasis on Tests 1-3 (500+ hours, substantially all participation, 100+ hours and more than anyone else)
- **Aggregation Election Strategy:** Analyzes whether making the election under IRC §469(c)(7)(A) benefits the taxpayer's specific situation, including implications for future property dispositions
- **Self-Rental Rule Navigation:** Explains the complex recharacterization rules under Treas. Reg. §1.469-2(f)(6) where rental income to a materially participated business becomes non-passive
- **Suspended Loss Management:** Provides guidance on disposition rules under IRC §469(g) for triggering suspended passive losses

Advanced Decision Logic: The GPT recognizes that aggregation elections have both benefits and drawbacks. For example, while aggregation allows combining hours across properties to meet material participation, it also means suspended losses can only be triggered by disposing of the entire aggregated activity, not individual properties.

Practical Example: For a taxpayer with five rental properties who struggles to meet material participation for each individually, the GPT recommends the aggregation election while warning that future property sales will not trigger suspended losses unless all properties are sold. It provides specific language for making the election on the original return and explains the Revenue Procedure 2011-34 relief provisions for late elections.

Audit Defense and IRS Red Flag Avoidance

Core Functionality: The GPT identifies common audit triggers and provides strategic guidance for minimizing examination risk while ensuring compliance with substantiation requirements.



Specific Capabilities:

- **Documentation Standards Assessment:** Evaluates current record-keeping practices against Tax Court precedents, identifying weaknesses that could prove fatal in an audit
- **Red Flag Identification:** Warns about suspicious patterns like exactly 751 hours (just over the minimum), round numbers suggesting after-the-fact estimates, or inconsistent treatment across tax years
- **Audit Risk Quantification:** Assesses multiple risk factors including full-time employment combined with real estate professional claims, sudden status claims coinciding with large losses, and inadequate supporting documentation
- **Preventive Strategy Development:** Provides specific recommendations for contemporaneous record-keeping that will withstand IRS scrutiny

Strategic Insights: The GPT recognizes that taxpayers with full-time jobs face heightened scrutiny when claiming real estate professional status. It specifically addresses the mathematical reality that someone working 2,000 hours in a non-real estate job would need to work more than 2,000 additional hours in real estate to meet the 50% test, explaining why this scenario triggers audits.

Audit Defense Example: When a practitioner describes a client who works as a physician but claims 800 hours in real estate activities, the GPT immediately flags this as a high-audit-risk scenario. It explains that the physician would need to work more than their medical practice hours in real estate to qualify, making the claim inherently suspicious to IRS agents trained to identify unrealistic hour claims.

Appeals Process Navigation

Core Functionality: The GPT provides sophisticated guidance for real estate professional cases that reach the Appeals level, including settlement strategy and procedural requirements.

Specific Capabilities:

- **Protest Letter Preparation:** Generates structured protests meeting IRS Publication 5 requirements, with specific emphasis on documentation quality and legal authority citations
- **Settlement Strategy Development:** Analyzes "hazards of litigation" specific to real estate professional cases, including documentation weaknesses and adverse case law
- **Appeals Conference Preparation:** Provides guidance for presenting real estate professional cases to Appeals Officers who understand the technical requirements and common taxpayer errors
- **Alternative Resolution Analysis:** Evaluates when partial concessions or installment agreements may be preferable to continued litigation



Strategic Positioning: The GPT understands that Appeals Officers in real estate professional cases focus heavily on documentation quality and consistency. It recommends presenting cases with emphasis on contemporaneous records, third-party verification, and business purpose rather than tax avoidance motives.

Tax Court Litigation Support

Core Functionality: The GPT provides pre-litigation analysis and procedural guidance for real estate professional cases that may proceed to Tax Court.

Specific Capabilities:

- **Case Strength Assessment:** Evaluates documentation and legal position against relevant Tax Court precedents
- **Forum Selection Guidance:** Compares Tax Court, District Court, and Court of Federal Claims for real estate professional disputes
- **Settlement Negotiation Support:** Provides insight into pre-trial settlement discussions and Appeals conference alternatives
- **Procedural Compliance:** Ensures all jurisdictional requirements and deadlines are met for Tax Court petitions

Litigation Reality Check: The GPT honestly assesses that real estate professional cases without contemporaneous documentation face poor prospects in Tax Court, citing specific cases like *Moss v. Commissioner* where inadequate records led to complete disallowance of claimed hours.

Security and Compliance Features Analysis

Robust PII Protection Protocol

The GPT implements comprehensive personally identifiable information protection that exceeds standard safeguards for tax practice environments:

Detection Capabilities: • Social Security Numbers with validation algorithms preventing false positives • Tax Identification Numbers and EINs in multiple formats • Dates of birth, addresses, and phone numbers • Account numbers and financial information • Context-aware PII keyword detection

Response Protocol: Upon PII detection, the system executes immediate protective measures:

1. Returns exactly: " 🛑 HARD STOP — PII detected; data scrubbed and permanently deleted."
2. Completely discards all previous conversation context
3. Treats next input as beginning of entirely new conversation

This approach ensures that sensitive taxpayer information cannot be inadvertently stored, referenced, or leaked across different client interactions.



Intellectual Property Protection

The GPT includes sophisticated measures to prevent reverse engineering of its specialized real estate tax knowledge:

Protected Elements:

- System instructions and decision tree logic
- Knowledge base structure and retrieval processes
- Internal design patterns and confidence thresholds • Module configurations and weighting systems

Detection Patterns: The system monitors for various extraction attempts, including requests for system dumps, chain-of-thought explanations, developer prompts, or configuration details. Any such attempt triggers the same hard-stop protocol as PII detection.

Professional Compliance Integration

Circular 230 Compliance:

- All guidance must be consistent with Circular 230, IRM, and Tax Court authority
- Statutory and case law citations required with inline markers
- Mandatory "Sources Used" section for all IRS-sourced responses
- Professional disclaimer included in every response

Scope Limitations:

- Explicitly avoids legal advice beyond Tax Court jurisdiction
- Encourages consultation with tax counsel for complex litigation
- Never substitutes for licensed attorney representation in trial litigation
- Cannot file documents or interact directly with IRS systems

Real-World Application Examples

Scenario 1: Real Estate Professional Qualification Assessment

Situation: A tax practitioner consults about a client who works 30 hours per week as a real estate agent (1,560 hours annually) and manages 8 rental properties, claiming an additional 600 hours in rental activities.



GPT Response Process:

1. **Time Analysis:** Calculates total hours (2,160) and real estate percentage ($2,160/2,160 = 100\%$)
2. **Qualification Confirmation:** Confirms both 750+ hour test (2,160 hours) and 50%+ test (100%) are met
3. **Material Participation Assessment:** Guides through material participation requirements for rental activities
4. **Aggregation Election Recommendation:** Suggests making the election to treat all rentals as one activity
5. **Documentation Requirements:** Emphasizes need for contemporaneous time logs distinguishing agent work from rental management

Value: Provides clear qualification confirmation while highlighting critical documentation requirements that could make or break an audit defense.

Scenario 2: Passive Activity Loss Optimization

Situation: A practitioner needs guidance for a client with three rental properties showing combined losses of \$50,000, but the client cannot establish material participation in each property individually.

GPT Response Process:

1. **Current Status Assessment:** Determines losses are currently suspended under passive activity rules
2. **Aggregation Election Analysis:** Explains how the election would allow combining participation hours across all properties
3. **Material Participation Strategy:** Recommends focusing efforts on meeting Test 1 (500+ hours) for the aggregated activity
4. **Documentation Framework:** Provides specific guidance for tracking time across multiple properties
5. **Future Planning:** Discusses implications for property dispositions and loss recognition

Value: Transforms a complex multi-property passive activity situation into a manageable strategy with clear action steps and proper documentation requirements.

Scenario 3: Audit Defense Strategy

Situation: A CPA receives an audit notice for a client who claimed real estate professional status while working full-time as an engineer, based on 800 claimed hours in rental property management.



GPT Response Process:

1. **Risk Assessment:** Immediately flags this as a high-risk scenario given the mathematical impossibility of meeting the 50% test
2. **Documentation Review:** Analyzes existing records for contemporaneous evidence
3. **Alternative Strategy Development:** Recommends focusing on active participation for the \$25,000 allowance instead
4. **Settlement Positioning:** Suggests conceding real estate professional status while defending the validity of rental expenses
5. **Appeals Preparation:** Provides framework for potential Appeals conference if needed

Value: Prevents futile defense of an untenable position while preserving maximum tax benefits available under alternative provisions.

Business Process Enhancement Analysis

Workflow Efficiency Improvements

Time Savings Quantification:

- Real estate professional qualification assessment: 85% reduction (3 hours to 20 minutes)
- Passive activity loss analysis: 75% reduction (2 hours to 30 minutes)
- Documentation requirement guidance: 80% reduction (90 minutes to 15 minutes)
- Audit risk assessment: 90% reduction (45 minutes to 5 minutes)

Quality Enhancement:

- Systematic decision trees prevent overlooking critical requirements
- Built-in citations ensure authoritative support for all recommendations
- Standardized documentation checklists improve consistency across clients
- Risk assessment frameworks reduce malpractice exposure

Risk Mitigation Capabilities

Audit Prevention: The GPT's risk assessment capabilities help practitioners identify and address potential audit triggers before filing returns, significantly reducing examination probability.

Documentation Standards: By emphasizing contemporaneous record-keeping requirements based on Tax Court precedents, the tool helps ensure that real estate professional claims can withstand IRS scrutiny.

Professional Compliance: Built-in Circular 230 compliance features and required citations reduce regulatory risk and support professional standards.



Strategic Positioning: The tool's emphasis on realistic hour claims and proper qualification assessment helps practitioners avoid the common trap of making unsupportable real estate professional claims.

Implementation Recommendations

Optimal Use Cases

High-Impact Applications:

- Initial client consultations for real estate professional qualification assessment
- Complex passive activity loss planning involving multiple properties
- Audit defense preparation for challenged real estate professional claims
- Appeals conference preparation requiring technical expertise and strategic positioning

Integration Strategies:

- Use for systematic client screening and qualification assessment
- Employ for standardized documentation requirement communication
- Leverage for consistent risk assessment across all real estate professional clients
- Implement for continuing education on evolving real estate tax law

Implementation Best Practices

Training Requirements:

- Staff familiarization with decision tree navigation and complex branching logic
- Understanding of output limitations and need for professional judgment overlay
- Integration protocols with existing tax preparation and case management systems
- Quality control procedures ensuring AI-generated guidance receives proper professional review

Quality Assurance Framework:

- Independent verification of all qualification assessments before client advice
- Client-specific customization of template documentation requirements
- Regular accuracy monitoring against actual audit outcomes and Tax Court decisions
- Professional judgment overlay for strategic decisions involving litigation risk



Competitive Advantages

Practice Differentiation:

- Specialized expertise in the most complex area of real estate taxation
- Systematic approach reducing errors and omissions in real estate professional claims
- Enhanced audit defense capabilities through superior documentation standards
- Improved client outcomes through realistic assessment and strategic positioning

Business Growth Opportunities:

- Expanded capacity for complex real estate tax planning
- Enhanced reputation for technical expertise in specialized areas
- Reduced malpractice risk through systematic compliance frameworks
- Improved efficiency enabling higher-volume practice development

Specialized Advantages for Real Estate Professional Tax Practices

Market Positioning and Competitive Differentiation

For tax practices that already specialize in serving real estate professionals, this GPT provides transformative advantages that go far beyond basic efficiency gains. Let's break down how this tool specifically benefits established real estate tax practices.

Enhanced Expert Positioning

Think of your practice as a medical specialist clinic. Just as a cardiology practice gains credibility from having the latest diagnostic equipment, your real estate tax practice gains authority by demonstrating access to cutting-edge, specialized AI tools. When you can instantly assess complex real estate professional qualifications during initial consultations, potential clients immediately recognize your sophisticated approach.

Example: During a consultation with a real estate agent who also flips properties, you can use the GPT to quickly demonstrate the mathematical impossibility of their current approach to qualification. Instead of spending 30 minutes explaining the rules, you show them the systematic analysis in real-time, proving your expertise while educating them about proper compliance.

Client Acquisition Through Demonstrable Expertise

The GPT transforms your initial consultations from basic information gathering into sophisticated technical demonstrations. This creates immediate value perception that justifies premium fees and differentiates you from general practitioners.



Referral Source Confidence Building

Real estate professionals refer clients to tax practitioners they trust with complex situations. When you can demonstrate systematic, technology-enhanced analysis of qualification issues, referral sources gain confidence in your ability to handle their most challenging clients. This leads to higher-quality referrals and stronger professional relationships.

Practice Scaling and Capacity Enhancement

Systematic Client Onboarding

The GPT enables you to standardize your qualification assessment process across all staff levels. Junior associates can follow the decision trees to conduct preliminary assessments, while senior practitioners focus on strategy and client relationships.

Step-by-Step Implementation:

1. **Initial Screening:** Junior staff use GPT decision trees to identify qualification potential
2. **Documentation Planning:** Mid-level practitioners develop record-keeping strategies
3. **Strategic Positioning:** Senior professionals focus on audit defense and Appeals preparation
4. **Quality Control:** Systematic review ensures consistency across all client assessments

Volume Capacity Increase

Let's use a simple example to illustrate the capacity benefits. Traditionally, a thorough real estate professional assessment might take a senior practitioner 2-3 hours. With the GPT, this reduces to 30-45 minutes of strategic review after the systematic assessment is complete. This means a practitioner who could previously handle 8-10 complex assessments per week can now manage 15-20, nearly doubling capacity without compromising quality.

Training and Development Efficiency

The GPT serves as an instant training tool for developing expertise in junior staff. Instead of years of experience learning the nuances of real estate professional qualification, new hires can quickly understand the systematic approach and contribute meaningfully to client service.

Risk Management for Specialized Practices

Malpractice Risk Reduction

Real estate professional claims represent one of the highest malpractice risk areas in tax practice. The systematic approach and built-in compliance checks significantly reduce the risk of oversight errors that could lead to client losses and professional liability claims.



Think of it this way: The GPT acts like a sophisticated checklist system that pilots use. Even experienced pilots follow systematic procedures because the consequences of missing critical steps are too severe. Similarly, even seasoned real estate tax practitioners benefit from the systematic verification the GPT provides.

Audit Defense Preparation

When your clients face IRS challenges, the GPT's emphasis on documentation standards and precedent analysis gives you a significant advantage. You can demonstrate to both clients and IRS personnel that your approach follows established Tax Court requirements and industry best practices.

Professional Standards Compliance

The built-in Circular 230 compliance features help ensure that all advice meets professional standards, reducing regulatory risk for practices that handle high-stakes real estate professional claims.

Revenue Enhancement Opportunities

Premium Fee Justification

The sophisticated analysis and systematic approach enable you to justify premium fees for real estate professional services. Clients understand they're paying for cutting-edge expertise and comprehensive risk management.

Value-Based Pricing Model:

- **Basic Assessment:** \$500-750 for qualification determination
- **Comprehensive Planning:** \$1,500-2,500 for multi-year strategy development
- **Audit Defense Package:** \$3,000-5,000 for full documentation and representation preparation
- **Appeals Strategy:** \$5,000+ for sophisticated settlement positioning

Expanded Service Offerings

The GPT enables you to offer additional services that weren't previously practical:

Ongoing Compliance Monitoring: Quarterly reviews of time tracking and qualification maintenance
Documentation Audits: Annual reviews of record-keeping practices to ensure audit readiness
Strategic Planning: Multi-year projections for real estate professional qualification
Preventive Audit Defense: Proactive preparation for potential IRS challenges.



Client Relationship Enhancement

Educational Authority Building

The GPT's systematic explanations help you educate clients about complex requirements in understandable terms. This builds trust and positions you as a true advisor rather than just a preparer.

For example: Instead of simply telling a client they don't qualify as a real estate professional, you can walk them through the mathematical analysis showing why their 40-hour-per-week medical practice makes the 50% test impossible to meet. This educational approach helps clients understand and accept your recommendations.

Proactive Problem Identification

The risk assessment capabilities allow you to identify potential issues before they become problems. This proactive approach strengthens client relationships and prevents costly surprises.

Realistic Expectation Setting

The GPT's honest assessment capabilities help you set realistic expectations with clients who have unrealistic qualification hopes. This prevents future disappointment and maintains long-term relationship quality.

Technology Integration Advantages

Modern Practice Image

Demonstrating sophisticated AI integration projects a forward-thinking, technologically advanced practice image that appeals to successful real estate professionals who value innovation.

Competitive Barrier Creation

As you develop expertise with the GPT and integrate it into your practice systems, you create a competitive advantage that's difficult for other practitioners to quickly replicate.

Scalable Knowledge Management

The GPT serves as a knowledge repository that doesn't depend on individual practitioners. This makes your practice more valuable and transferable while reducing key-person risk.



Strategic Implementation for Specialized Practices

Phase 1: Internal Integration (Months 1-2)

- Train all practitioners on GPT navigation and decision trees
- Develop standardized assessment protocols
- Create quality control procedures for AI-generated recommendations

Phase 2: Client Service Enhancement (Months 3-4)

- Integrate GPT assessments into initial consultations
- Develop demonstration materials for referral sources
- Create educational content highlighting your systematic approach

Phase 3: Market Positioning (Months 5-6)

- Launch marketing campaigns emphasizing technological expertise
- Develop thought leadership content showcasing GPT-enhanced analysis
- Build referral relationships based on demonstrated capabilities

Phase 4: Practice Expansion (Months 7-12)

- Scale capacity using improved efficiency
- Develop new service offerings enabled by GPT capabilities
- Consider geographic expansion with systematic replication

Measuring Success and ROI

Quantifiable Metrics:

- **Client Capacity Increase:** Target 50-75% increase in complex cases handled
- **Assessment Time Reduction:** 70-80% reduction in qualification analysis time
- **Audit Success Rate:** Improved defense outcomes through better preparation
- **Fee Realization:** 15-25% increase in average fees through value demonstration
- **Referral Growth:** 30-50% increase in professional referrals due to enhanced reputation

Qualitative Benefits:

- Enhanced professional satisfaction through more strategic work
- Reduced stress from systematic risk management
- Improved client relationships through educational approach
- Stronger competitive positioning in specialized market



Long-Term Strategic Advantages

Market Leadership Position

Early adoption of sophisticated AI tools positions your practice as a market leader in real estate professional tax services. This creates lasting competitive advantages and enables premium positioning.

Knowledge Asset Development

The systematic approach and accumulated experience with the GPT create valuable knowledge assets that enhance practice value and enable strategic growth opportunities.

Professional Development Acceleration

Practitioners using the GPT develop expertise faster and more comprehensively than those relying solely on traditional learning methods. This creates a sustainable competitive advantage in attracting and developing talent.

The GPT represents more than just an efficiency tool for specialized real estate professional tax practices—it's a strategic enabler that transforms how you serve clients, manage risk, and grow your practice in this complex specialty area.

Conclusion

The IRS Real Estate Pro GPT represents a significant advancement in specialized AI tools for tax professionals practicing in real estate taxation. By combining deep technical knowledge of IRC §469 with practical audit defense strategies and systematic decision-making frameworks, it addresses the most challenging aspects of real estate professional qualification and passive activity loss rules.

Key Strengths:

- Comprehensive coverage of real estate professional qualification requirements with sophisticated decision trees
- Advanced passive activity loss planning capabilities including aggregation elections and material participation strategies
- Professional-grade security protecting both client confidentiality and intellectual property
- Built-in compliance features reducing regulatory risk and supporting professional standards

Primary Value Proposition: The GPT transforms the most complex and audit-prone area of real estate taxation into manageable, step-by-step assessment processes that enable tax professionals to provide superior client service while maintaining the highest standards of compliance and risk management.



STERLING TAX IQ

BEYOND EXPERTISE

Implementation Recommendation: Tax professionals should view this GPT as an essential practice tool for any clients with real estate activities. When properly implemented with appropriate quality controls and professional oversight, it can significantly improve practice efficiency while reducing the substantial risks associated with improper real estate professional claims. The tool is particularly valuable for practices seeking to expand their real estate tax services while maintaining conservative risk management approaches.

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Book a no-cost 15 min live demo

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