

CENTRAL CHAPTER

PA: PX-000501L , NJ: 20CE00159200, NY: 002280, IRS: E3S5R

Ethics: Engaging & Terminating Clients & Social

Tuesday, September 22, 2026

Best Western Eden Resort

222 Eden Road
Lancaster, PA 17601
717-569-6444

Registration: 3:00-3:30 PM
CPE: 3:30-5:30 PM
Social: 5:30-6:15 PM*
Dinner: 6:15 PM**

*Social includes open bar & hors d'oeuvres

**Buffet dinner will be served

ATTENTION!

PSTAP Members who attend at least 4 Central chapter meetings during the 2026 calendar year will receive a complimentary Deluxe Edition of THE TAXBOOK! Please note, books will be distributed at the January 2027 meeting. You must attend that meeting to get your book.

CPE: 2 Hours Federal Ethics

Registration Deadline: September 18, 2026

SPEAKER: James F. Tice, EA, PSTAP President Elect

.....
NAME: _____ ID # _____ PTIN # _____

Address: _____ City/State/Zip _____

Email Address: _____ Telephone: (____) _____ Fax: (____) _____

☐ **Member (\$30)**

☐ **STAFF (\$40)**

☐ **Non-Member (\$55)**

Amount Enclosed: \$ _____

☐ Check made payable to: CENTRAL CHAPTER PSTAP/PSPA is enclosed.

☐ Credit Card: _____ MC/Visa/Amex/Disc Acct # _____
Exp: _____ CVV#: _____ Signature: _____

**Attention! Mailing Address: MAIL Form To PSTAP Executive Office, 150 Corporate Center Dr.,
Camp Hill, PA 17011 Fax: 717-614-8663 Questions?: 1-800-270-3352**

Course Description:

Navigating client relationships with ethical integrity is crucial for tax professionals. This course examines the ethical considerations involved in engaging, maintaining, and terminating client relationships, highlighting best practices for fostering productive interactions. Participants will explore effective strategies for attracting new clients, conducting meaningful conversations, and ensuring transparency through engagement and termination letters. This session provides both a practical framework and real-world scenarios to help professionals manage client interactions with confidence.

Speaker Bio: James F. Tice, EA, PSTAP President Elect

Mr. James Tice is a distinguished leader in the firm's tax practice. He specializes in organizing, preparing, and supervising complex tax planning and compliance for various tax-exempt organizations and small businesses. Mr. Tice frequently lectures on a wide range of topics, including tax, business, and ethics. He has been actively involved with the Pennsylvania Society of Tax & Accounting Professionals since 2005 and has been enrolled to practice before the IRS since 2012.