To order *Managing Risk* by Karen Eckstein for £40 (plus £4 delivery for orders under £100):

Call 01244 342179

Order online at www.claritaxbooks.com

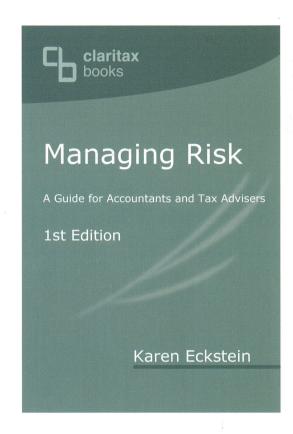
Email orders@claritaxbooks.com

**Post** this form to Claritax Books, 6 Grosvenor Park Road, Chester, CH1 1QQ, UK

Name:
Address:
Postcode:
Tel:
Email:
Delivery Address (if different):
Postcode:
Payment method:
<ul><li>☐ Please invoice me</li><li>☐ Cheque enclosed (payable to Claritax Books Ltd)</li></ul>
Signed:
Data



First published 2019



A short, practical guide to managing professional indemnity risks for accountants and other tax professionals.

This brand new book, released early in 2019, includes commentary on, and key extracts from, guidance issued by the CIOT and other professional organisations.

## **Topics covered include:**

- ✔ Professional standards
- ✔ Dealing with client irregularities
- ✔ Disclosure and confidentiality issues
- ✓ Conflicts of interest
- Ceasing to act
- Second opinions
- ✔ Record keeping
- ✓ Engagement letters (content and systems)
- ✓ Liability caps
- Managing staff absence

**Karen Eckstein** is a consultant with Womble Bond Dickinson LLP. She is a frequent lecturer and has written on the topic of risk management for the professional tax press.

## **Table of contents:**

- ✓ Introduction
- ✓ Why is risk management important?
- ✓ Where do claims come from?
- ✓ Systems to minimise risk of claims
- ✓ When things go wrong
- ✔ Appendices:
  - Sample file review form
  - Professional conduct in relation to taxation (summary, key extracts, and weblink)
  - Professional rules and practice guidelines (summary, key extracts and weblink)
  - Industry research
  - File opening form
  - Cancellation notice and checklist

Visit www.claritaxbooks.com for fuller contents and a sample extract.

Launched in 2011, **Claritax Books** has grown to become a leading provider of high quality tax commentary. Claritax titles are provided to most of the top 100 accounting firms in the UK (including all the top 20), and are also bought by many smaller firms as well as by lawyers, financial advisers and other tax professionals.

To order, return the form overleaf, phone 01244 342179 or visit www.claritaxbooks.com