THE CRYPTO TAX AUTHORITY

The Crypto Audit-Ready Client Kit

Cleaner records in, safer returns out.

Professional Briefing for CPAs

Dear Colleague,

I m Rafael Stuchiner a retired NYC tax attorney with an LL.M. in Taxation (NYU). For the past several years I ve taught and consulted in crypto tax compliance.

I built a simple client education + documentation system for one reason: so your crypto clients show up prepared with clean, usable records and support instead of a last-minute pile of wallets, exchanges, and mystery transfers.

THE PROBLEM YOU ALREADY KNOW

When crypto is messy, the CPA often gets stuck with:

- missing cost basis / zero basis outputs
- miscategorized transfers
- inconsistent balances across wallets/exchanges
- forensic reconstruction under deadline pressure
- the worst part: being asked to sign a return that doesn t feel fully supported

WHAT THIS IS (AND WHAT IT ISN T)

This is not tax prep. I do not prepare returns, sign returns, or replace the client s CPA.

What I do is train the client to deliver a **Crypto Audit-Ready Package** so you can work:

- faster
- with better documentation
- with fewer surprises and less uncompensated cleanup

Think of me as a batting coach: I don t play the game for you I help the client stop striking out before they get to your desk.

THE METHOD (MY FOUR PILLARS FRAMEWORK)

1) Clear Classification

Helping them understand what s generally taxable vs. non-taxable, and how to stop handing you gray-area chaos (DeFi, bridges, NFTs, airdrops, etc.).

2) Data Integrity & Cleanup

Building one reliable source of truth by consolidating wallets/exchanges and fixing common issues (missing history, duplicates, transfers misread as sales).

3) Planning & Optimization (only after data is clean)

Basic building blocks like timing, harvesting concepts, and accounting method awareness so they can have a more intelligent conversation with you (if you offer advisory).

4) Compliance Architecture

A repeatable documentation habit: organized records, plain-English notes for unusual facts, and support that doesn t rely on memory.

WHAT YOU (TYPICALLY) RECEIVE FROM A CLIENT WHO COMPLETES THIS

Depending on their activity, you can expect:

- one consolidated activity spreadsheet
- original exchange CSVs (where available)
- a short Cost Basis & Adjustments Summary (plain language)
- Memo to File notes for unusual items / gray areas

HOW THIS HELPS YOUR FIRM

- less time wasted on cleanup you can t easily bill
- fewer surprise issues right before filing
- better support if questions arise later
- a client who is more realistic, organized, and easier to manage

INVITATION (SIMPLE NEXT STEP)

I run a 75-minute masterclass for investors and traders teaching the core framework. It s normally $97.

I d like to offer you a free seat, so you can see exactly:

- how I train clients
- the standards I set
- what audit-ready looks like in real life

If you like the approach, I m also happy to do a free private class for your clients as a collaborative event.

Just reply with one of these:

- Free seat (send me the link/details)
- Client class (let s schedule a private session for my clients)
- Quick call (15 minutes to see if this fits my practice)

Warmly,
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