

## Online Student Pricing Guide

Tax Courses	Chapters/Hours	Price	
		Without Book	With Book
<b>Individual Tax Returns</b>			
<a href="#">Basic Tax Course</a>	15 Chapters- 45 Hrs	\$399	\$438
<a href="#">IRS Preparer Competency Exam Review – Coming soon!</a>	Banks of Questions	\$149	N/A
<a href="#">Comprehensive Tax Course (covers all subjects on IRS Exam)</a>	20 Chapters- 60 Hrs	\$499	\$548
<a href="#">Advanced I Tax Course</a>	10 Chapters- 30 Hrs	\$349	\$399
<a href="#">Advanced II Tax Course</a>	10 Chapters- 30 Hrs	\$349	\$399
<a href="#">California Advanced I Tax Course</a>	10 Chapters- 30 Hrs	\$399	\$449
<a href="#">Comprehensive Tax Course with State Supplement</a>	20 Chapters- 60 Hrs	\$524	\$588
<a href="#">State Supplements (Select States Available)</a>	20 Chapters- 15-20 Hrs	\$149	\$164
<b>Small Business Tax Returns</b>			
<a href="#">Small Business I Tax Course</a>	10 Chapters- 30 Hrs	\$349	\$399
<a href="#">Small Business II Tax Course</a>	10 Chapters- 30 Hrs	\$349	\$399
<a href="#">California Small Business I Tax Course</a>	10 Chapters- 30 Hrs	\$399	\$449
<a href="#">Advanced I Tax Course</a>	10 Chapters- 30 Hrs	\$349	\$399
<a href="#">Advanced II Tax Course</a>	10 Chapters- 30 Hrs	\$349	\$399
<a href="#">California Advanced I Tax Course</a>	10 Chapters- 30 Hrs	\$399	\$449
<b>Bundle Packages – Individual Tax Returns</b>			
<a href="#">Comprehensive and Advanced I</a>	30 Chapters- 90 Hrs	\$679	\$757
<a href="#">California Comprehensive and Advanced I</a>	30 Chapters- 90 Hrs	\$699	\$789
<a href="#">Oregon Comprehensive and Advanced I</a>	30 Chapters- 90 Hrs	\$699	\$789
<b>Bundle Packages – Individual &amp; Small Business Tax Returns</b>			
<a href="#">Comprehensive and Small Business I</a>	30 Chapters- 90 Hrs	\$679	\$757
<a href="#">California Comprehensive and Small Business I</a>	30 Chapters- 90 Hrs	\$699	\$789
<a href="#">Oregon Comprehensive and Small Business I</a>	30 Chapters- 110 Hrs	\$699	\$789
<a href="#">Advanced I and Advanced II</a>	20 Chapters- 60 Hrs	\$559	\$637
<a href="#">Small Business I and Small Business II</a>	20 Chapters- 60 Hrs	\$559	\$637
<b>Certificate Program</b>			
<a href="#">Chartered Tax Professional (5 courses)</a>	60 Chapters- 180 Hrs		\$1,799
<a href="#">California Chartered Tax Professional (5 courses)</a>	60 Chapters- 180 Hrs		\$1,899
<a href="#">Oregon Chartered Tax Professional (5 courses)</a>	60 Chapters- 200 Hrs		\$1,899
<b>California Continuing Education</b>			
<a href="#">California Small Business and Ethics</a>	15 Hrs Federal;	\$79	
<a href="#">Continuing Education Tax Course</a>	5 Hrs CA State		

<a href="#">Tax Guidelines for California Small Businesses</a>	15 Hrs Federal;	\$79	
<a href="#">Continuing Education Tax Course</a>	5 Hrs CA State		
<b>Additional Items</b>			
<a href="#">EA Exam Preparation Study Guide and Review by FastForward Academy</a>	N/A	Price Varies	
<a href="#">EA Exam Preparation Course by Exam Matrix</a>	N/A	Price Varies	
<a href="#">Online Tax Course Extension – extend course for another term</a>	N/A	\$65	
<b>Tax Seminars &amp; Webinars</b>	<b>Number of Hours</b>	<b>Price</b>	
(book not available for seminars below)			
Choose Any (3) \$39 Seminars for Only \$99!	9 Hrs	\$99	
<a href="#">Ethics</a>	3 Hrs	\$39	
<a href="#">Earned Income Tax Credit</a>	3 Hrs	\$39	
<a href="#">Rental Property</a>	3 Hrs	\$39	
<a href="#">Clergy</a>	3 Hrs	\$39	
<a href="#">Retirement Plans</a>	3 Hrs	\$39	
<a href="#">Schedule C - Sole Proprietorships</a>	3 Hrs	\$39	
<a href="#">Employee Business Expenses</a>	3 Hrs	\$39	
<a href="#">Amended Tax Returns for Individuals</a>	3 Hrs	\$39	
<a href="#">Special Needs and Concerns for Seniors</a>	3 Hrs	\$39	
<a href="#">Tax Issues for High Income Taxpayers</a>	3 Hrs	\$39	
<a href="#">Net Operating Losses</a>	3 Hrs	\$39	
<a href="#">Schedule D - Special Issues</a>	3 Hrs	\$39	
<a href="#">Tax Issues for Divorced or Separated Taxpayers</a>	3 Hrs	\$39	
<a href="#">Tax Planning, Savings Strategy, and Updates</a>	3 Hrs	\$39	
<a href="#">Responding to the IRS</a>	3 Hrs	\$39	
<a href="#">State Returns: Resident, Part-year, and Nonresident</a>	3 Hrs	\$39	
<a href="#">Non-resident Alien Returns - Form 1040NR</a>	3 Hrs	\$39	
<a href="#">Employment Taxes</a>	3 Hrs	\$39	
<a href="#">California Business Tax Liabilities and Issues for Employers</a>	4 Hrs CA State	\$39	
<a href="#">Partnerships</a>	3 Hrs	\$39	
<a href="#">Corporations</a>	3 Hrs	\$39	
<a href="#">S-Corporations</a>	3 Hrs	\$39	

## Self-Study and Online for Individual Students

### Money Back Guarantee and Enrollment Terms for Self-Study and Online for Individual Students

#### Self-Study and Online for Individual Students

The term for courses over 45 hours is 6 months from date of registration. The term for courses with hours from 31 – 45 hours is 4 months from date of registration. The term for courses up to 30 hours is 3 months from date of registration. The term for CPE seminars of 6 hours or less is 1 month from the date of registration. The term for California CE courses is 3 months from the date of registration. Course extensions are limited to 2 months from the date of registration. Students will receive training in the subjects outlined in the promotional literature. Completion of the course does not guarantee employment, nor are graduates required to work for the Company.

Within 15 calendar days following the receipt by e-mail of your e-learning student User ID, you may cancel your enrollment and receive **a full refund of all tuition and fees**, less S/H, provided that you have also shipped the printed books and materials back to us in re-sellable condition within that same time frame.

If you cancel your enrollment after 15 days of receipt of your student User ID, the following refund policies will apply:

1. If you cancel your enrollment before you have completed more than 50% of the course, you will receive a prorated refund of tuition less our \$100 registration fee, \$50 book fee and shipping & handling charges.
2. If you cancel after completing more than 50% of the course you will not be entitled to a refund.

Refunds must be requested by giving notice of cancellation within the time frame specified for the course completion or one year of the date of enrollment, whichever is earlier. Refund requests should be e-mailed to [schooladmin@theincometaxschool.com](mailto:schooladmin@theincometaxschool.com)

Students who do not finish the course within the allotted time frame must pay a \$65 reinstatement fee to continue on for an additional

## Oregon Self-Study and Online for Individual Students

### Money Back Guarantee and Enrollment Terms for Oregon Students

**Oregon Self-Study and Online for Individual Students Program Information:** This course is an 80-Hour Basic Income Tax Course. This Distance Education course is delivered through an online platform. Upon registration and payment of tuition and fees, each student will receive a unique User Identification Number and Password. Books will be shipped to the student at no additional charge. Classes begin upon registration and payment of tuition and fees. Registrations are accepted year-round. The course is 80-hours in length and is expected to be completed within a 4-month period.

**Terms of Contract:** The effective date of this contract is the date of enrollment. The total cost of the course is \$524 (Registration Fee: \$79 and Tuition: \$445), plus \$64 for books and materials. Full payment of tuition and fees is expected at the time of enrollment. The school accepts payments in the form of a money order, cashier's check or credit card.

### Oregon State Cancellation and Refund Policies Distance Education Instruction

#### Distance Learning Instruction 581-045-0027

1. A student may cancel enrollment by giving written notice to the school within 5 business days after the date of enrollment or prior to delivery to the student of any lesson materials, whichever occurs later. If cancellation occurs during that five-day period, all monies paid to the school by the student shall be refunded.
2. When an enrollment application has been accepted by the school and not canceled under the provisions of section (1) of this rule, the following schedules of maximum charges may be assessed by the school:
  1. If termination occurs in the period between the delivery of lesson materials and receipt by the school of the first completed lesson materials, the school may charge an amount equal to 15 percent of the total tuition cost, or \$150, whichever is less; that being established as its registration fee
  2. If termination occurs after receipt by the school of the first completed lesson materials and up to 50 percent of the completed lesson assignments, the student shall be entitled to a pro rata refund of the total tuition cost of the distance learning portion of the program. The school may retain the established registration fee
  3. If termination occurs after receipt by the school of 50 percent or more of the completed lesson assignments, the school may retain 100 percent of the total tuition costs plus the established registration fee; and
  4. Calculation of the pro rata refund under subsections (2)(a)-(c) of this rule is determined by dividing the total number of lessons comprising the period of enrollment for which the student has been charged into the total number of such lessons not submitted by the student.

Any inquiry a student may have regarding this contract may be made in writing to The Income Tax School, Inc. or to the Superintendent of Public Instruction, Oregon Department of Education, 255 Capitol NE, Salem, OR 97310-0203 or by calling (503) 947-5601.

I have read and received a copy of this enrollment agreement and the student completion and placement data as required in OAR 581-045-0018(1)(a-d). I have also read and received a copy of the following: Course Catalog– Volume 2007

### **Course Catalog – Volume 2007**

Additionally, I understand the following:

1. That tuition charges will accrue based on the hours that the program is offered (3-hours per Federal chapter and 1-hour per State chapter) by the school and that I have contracted/scheduled to complete, rather than my actual attendance;
2. That any refund calculation is based on the total number of completed chapters;
3. Students are required to complete no less than 3 chapters (a combination of 2 Federal and 1 State chapter or 1 Federal and 2 State chapters) per week. The expected completion time for this course, including completion of exams, is 16-weeks or 4-months.
4. Students who fail to complete a minimum of 3 chapters per week will be contacted by an instructor to determine the cause of the delay in completing assignments.
5. It is expected that all students will complete this course within a 4-month period. However, the school will allow students as long as 6-months from the date of enrollment to complete the course. This extra time is allotted in case of extenuating circumstances or issues which may cause the student an unexpected delay in completing the course.
6. At the end of the 6-month period (also known as the “course termination date”) the student’s User Identification Number and Password will be deactivated. If the student wishes to complete the course, he/she will be required to request a reinstatement in writing via email, addressed to [schooladmin@peoplestax.com](mailto:schooladmin@peoplestax.com). The student will be required to pay the registration fee (\$79); however, the tuition (\$499) will be waived. A student may request a reinstatement only once.

## Chartered Tax Professional Self-Study and Online Students

### Money Back Guarantee and Enrollment Terms for Chartered Tax Professionals

#### Chartered Tax Professional Self-Study and Online Students

The term for this 180 hour program is 18 months from date of registration. Students will receive training in the subjects outlined in the promotional literature. Completion of the course does not guarantee employment, nor are graduates required to work for the Company.

Within 15 calendar days following the receipt by e-mail of your e-learning student User ID, you may cancel your enrollment and receive a **full refund of all tuition and fees**, less S/H, provided that you have also shipped the printed books and materials back to us in re-sellable condition within that same 15 day time frame.

If you cancel your enrollment after 15 days of receipt of your student User ID, the following refund policies will apply:

1. If you cancel your enrollment before you have completed more than 50% of the course you are currently enrolled within The Chartered Tax Professional Program, you will receive a prorated refund of tuition of the course you are currently enrolled in as well as courses you have not completed. The refund will be calculated for the remaining courses not completed as follows: discounted price of each course (listed below), less our \$100 registration fee, \$50 book fee for each course book you received and shipping & handling charges.
2. If you cancel after completing more than 50% of a course within The Chartered Tax Professional program, you will not be entitled to a refund for that course, but will be entitled to a prorated refund of any courses not completed. The refund will be calculated as follows: discounted price of each course, less our \$100 registration fee, \$50 book fee for each course book you received and shipping & handling charges.
3. Discounted retail price of each course is as follows and include the \$50 course book fees.
  - Comprehensive Income Tax Course- \$499
  - Advanced I Income Tax Course- \$325
  - Advanced II Income Tax Course- \$325
  - Small Business I Income Tax Course- \$325
  - Small Business II Income Tax Course- \$325

Refunds must be requested by giving notice of cancellation within the time frame specified for the course completion or one year of the date of enrollment, whichever is earlier. Refund requests should be e-mailed to [schooladmin@theincometaxschool.com](mailto:schooladmin@theincometaxschool.com)

Students who do not finish any one (1) course within The Chartered Tax Professional program may request an extension. Extensions of course length are 3 months for 30 hour courses and 6 months for 60 hour courses, and there can be no more than one extension issued per course within The Chartered Tax Professional program. Extensions are \$65. If a student needs new course materials to complete their course extension, the book fee is \$65 in addition to the extension fee. **Students have 60 days after the expiration of their course date to be granted an extension.**

## **Virginia Live Classroom for Individual Students**

### **Money Back Guarantee and Enrollment Terms for Virginia Students**

#### **Live Classroom for Individual Students**

The live classroom course is offered tuition free and is subject to cancellation in the event of insufficient enrollment. Students will receive training in the subjects outlined in the promotional literature. Completion of the course does not guarantee employment, nor are graduates required to work for the Company. A nonrefundable \$29 registration fee and \$50 book and material fee apply unless Peoples Income Tax cancels the class, in which case, the registration fee will be refunded and upon return of any issued books in resalable condition, all material and book fees will be refunded in full.