

Months 1-6
Comprehensive
Tax Course
20 lessons

Months 7-9
Advanced I
Tax Course
10 lessons

Months 10-12
Small Business I
Tax Course
10 lessons

Months 13-15
Advanced II
Tax Course
10 lessons

Months 16-18
Small Business II
Tax Course
10 lessons

**EARN CTP
Designation**

>>> **COMPLETE 1 chapter a week to stay on track for your certificate** >>>

- Learn to prepare tax returns and research issues for most Form 1040 individual non-business taxpayers; plus the basics of Schedule C/self-employed tax returns.
- Topics include: Form 1040: Filing Requirements, Most Types of Income and How to Report that Income, Adjustments to Income, Deductions, Credits, Affordable Care Act, Withholdings, and Earned Income Credit.
- After completing Modules 1 & 2, consider working as an assistant to a veteran tax preparer to gain on the job experience.
- Consider earning IRS AFSP Record of Completion to be able to communicate with the IRS for your clients - annually by 12/31.
- Now you can work as a paid tax preparer while you continue learning to prepare more involved individual tax returns and research complex tax issues.
- Topics include: Affordable Care Act, Clergy, Employee Business Expenses, Investments, Schedules C and E.
- You're ready to move on to small business tax returns!
- You'll get an introduction to the various forms of business entities and learn how to prepare returns for partnerships and corporations.
- Topics include: Business Organization, Understanding the Balance Sheet, Schedule C, the Basics of Forms 1065, 1120 and 1120-S, Employment Taxes, and Dispositions.
- Keep working toward your 300 hour experience requirement.
- Learning to prepare more complex individual returns will have you in demand with your clients!
- Topics include: Amended Returns, Special Needs and Concerns of Seniors, Tax Issues for High Income Taxpayers, Net Operating Losses, Tax Issues for Divorced and Separated Taxpayers, and Responding to the IRS.
- Keep working toward your 300 hour experience requirement.
- Your last course! Learning more about small business tax returns will ensure that you always have a steady stream of clients.
- Topics include: A more in-depth study of Forms 1065, 1120, and 1120-S, a basic review of Forms 990-EZ and 1041.
- Keep working toward your 300 hour experience requirement.
- Congratulations! You are now a Chartered Tax Professional!
- Submit Affidavit of Tax Preparer Experience Requirement - 300 hours over 2 tax seasons.
- Consider taking an Enrolled Agent (EA) exam prep course and then sit for the EA exam!
- Don't forget to complete your continuing education (CE) requirements each year to maintain your designation!

Become a Chartered Tax Professional in 18 months...

*Small Business I can be completed as the 2nd course & Advanced I as the 3rd course in the sequence. Notify instructor if this is your preference.

