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!

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

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.