

# Surgent EA Review

Pass the Special Enrollment Exam

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**SURGENT**   
**EXAM**review

# WHAT IS AN ENROLLED AGENT?

An Enrolled Agent (EA) is a federally authorized tax practitioner who has technical expertise in the field of taxation and who is empowered by the US Department of the Treasury to represent taxpayers before all administrative levels of the IRS for audits, collections, and appeals.

“Enrolled” means to be licensed to practice by the federal government, an “Agent” means authorized to appear in the place of the taxpayer at the IRS. At present, only enrolled agents, attorneys, and CPAs may represent taxpayers before the IRS.

# WHY SHOULD I BECOME AN ENROLLED AGENT?

“Over the next decade, tax preparers are projected to be among the fastest growing occupations. As tax laws and regulations become more and more complex, more people turn to tax preparation services for assistance. However, because this is seasonal work, January to April, opportunities are limited during the rest of the year.

**Enrolled Agents are more likely to have year-round jobs.”** – *LA Times*

## AVERAGE ENROLLED AGENT EARNINGS BY STATE:

Low (NC): **\$21.70** per hour (\$45,130 per year)

High (NY): **\$30.70** per hours (\$63,864 per year)

The Enrolled Agent designation is the highest credential one can earn in the tax preparation industry!

**SALARIES  
BY STATE**

# WHY SHOULD I BECOME AN ENROLLED AGENT?

turbotax.intuit.com/tax-expert-network/



## What we're looking for



EA (enrolled agent), CPA (certified public accountant), or practicing attorney



Tax professional with 3+ years experience preparing federal and state individual 1040 tax returns for clients



Extensive knowledge of tax laws



Tech savvy and has experience with tax preparation software



Bilingual communication a plus (English / Spanish)

When asked, 92% of TurboTax Live experts chose

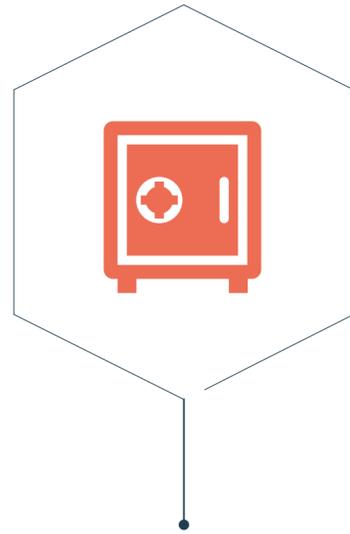
**to return for the next tax year.\***

What others in our tax expert network are saying

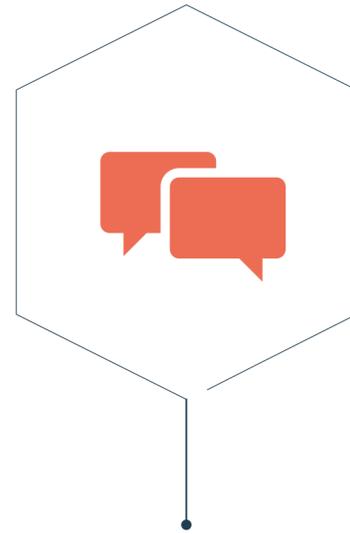
# WHAT IS REPRESENTATION BEFORE THE IRS?



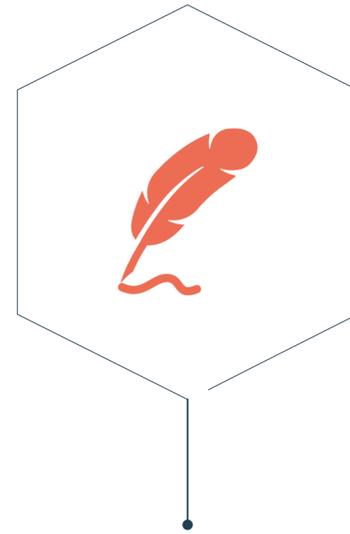
Acting on the taxpayer's behalf



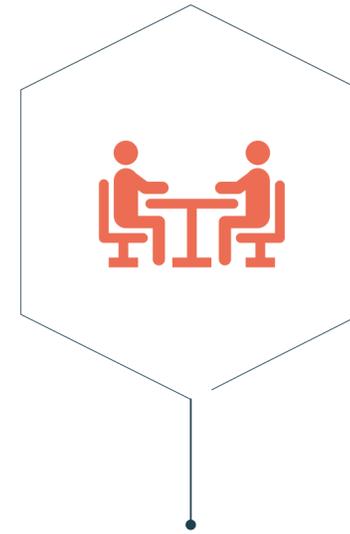
Protecting the taxpayer's rights



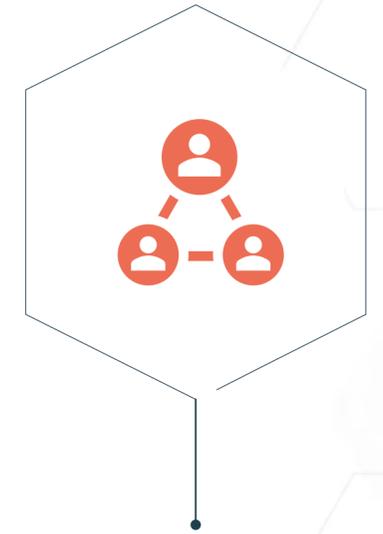
Communicating with the IRS for the taxpayer regarding his/her rights or abilities under law & regulations administered by the IRS



Preparing and filing necessary documents



Advising the taxpayer on return positions



Representing the taxpayer at hearings with the IRS in examination/ collection/ appeals

## ADDITIONALLY...

Applicants **do not need a degree** to become an Enrolled Agent  
*The cost of taking the Special Enrollment Exam is still relatively inexpensive compared to other professional examinations - \$185.00 per exam part*

An Enrolled Agent (EA) is a federally authorized tax practitioner who can practice anywhere in the United States

An EA has the same practice privileges before the IRS as a CPA and attorney

# WHAT IF YOU DON'T HAVE TAX KNOWLEDGE?

Surgent Income Tax School, formerly known as The Income Tax School, Inc., provides all the tax course knowledge required to become an Enrolled Agent.

Whether you are a true beginner or already have some tax knowledge, there is a pathway for you to become an EA.

**\*\*It's important to note that Surgent's EA Review Courses will teach you how to pass the three parts of the EA exam. They do not teach you how to interpret the tax law, prepare tax returns, or research tax issues.\*\***

# SURGENT INCOME TAX SCHOOL

## COMPREHENSIVE TAX COURSE

- Beginner Tax Course
- 48 hours of CE, 4 modules

## CHARTERED TAX PROFESSIONAL CERTIFICATE PROGRAM

- 5 courses: Comprehensive, Advanced I & II, Small Business I & II
- 152 hours of CE, 12 modules
- 300-hour experience requirement

## CHARTERED TAX CONSULTANT CERTIFICATE PROGRAM

- 3 courses: Comprehensive, Advanced I, Small Business I
- 100 hours of CE, 8 modules
- 200-hour experience requirement

## CHARTERED TAX ADVISOR CERTIFICATE PROGRAM

- 2 courses: Comprehensive, Advanced I
- 72 hours of CE, 6 modules
- 100-hour experience requirement

# The Special Enrollment (EA) Exam



# THE EA EXAM: THE PROBLEMS

1

The Enrolled Agent Exam is more a test on **how good a test taker you are**, as opposed to how good of a tax preparer you are. *Remember, studying for the EA Exam is not the same as learning taxation.*

2

**The examiners keep adding content.** The major review courses have not changed their learning approach in decades.

# THE EA EXAM: SURGENT'S SOLUTION

We created a revolutionary adaptive-learning technology to help candidates:



**FOCUS ON IMPROVING THEIR WEAK AREAS**



**REDUCE STUDY TIME**



**INCREASE PASS RATES**

**OFFICIAL NAEA REVIEW PROVIDER**



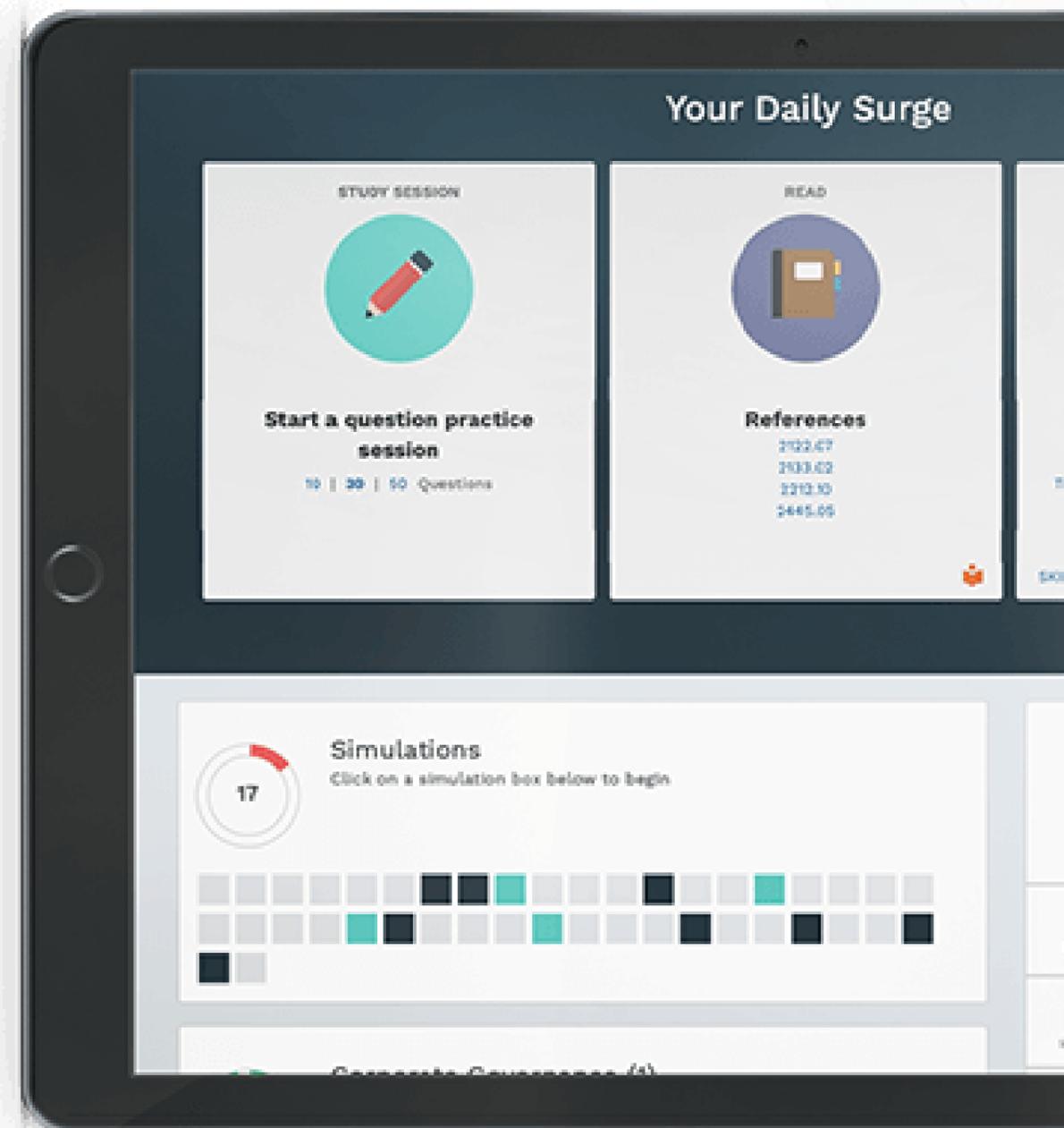
# A.S.A.P. TECHNOLOGY™

puts each student on their fastest path to the finish line

Personalized study plans that optimize in real time

Content that's fully aligned to the EA Exam and always up-to-date

Proprietary software that's proven to increase students' comprehension while reducing their study time



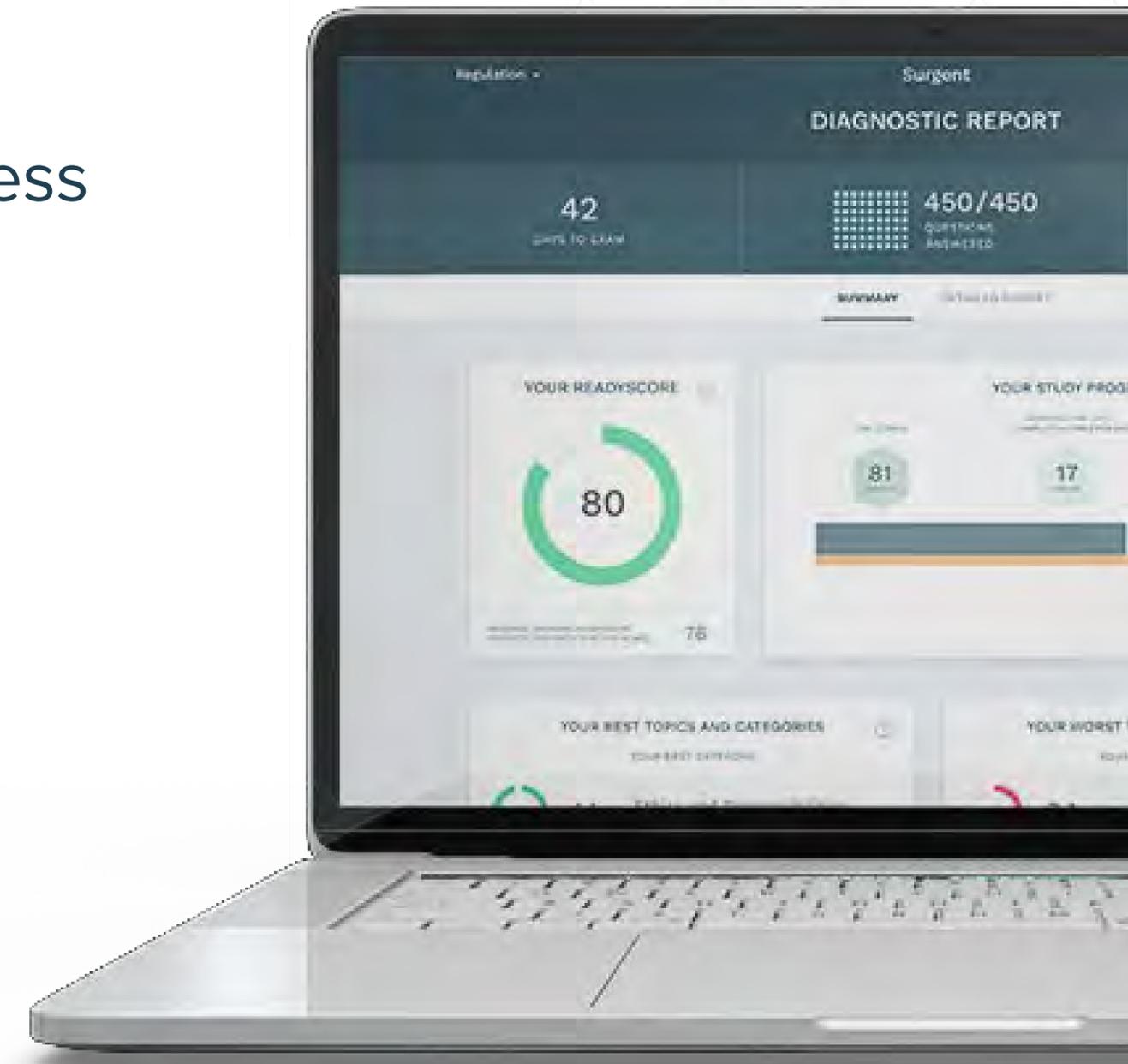
# ReadySCORE™

takes the guesswork out of EA Exam readiness

Award-winning ReadySCORE clearly indicates a candidate's EA Exam readiness by estimating how they'd score on the exam if they were to take it that day.

ReadySCORE is presented:

- By content area
- By topic
- Overall





# Developing a **Study Plan**

# SEQUENCE

## PART 1

- Prelim Work & Taxpayer Data, Inc & Assets, Ded & Credits, Taxation & Advice, Specialized Returns
- Average study time: 45 hours\* (644 Qs\*2.5x\*1.5min)

## PART 3

- Pract. & Procedures, Representation before IRS, Types of Representation, Completion of the Filing Process
- Average study time: 30 hours\* (354 Qs\*2.5x\*1.5min)

## PART 2

- Business Entities, Business Financial Info, Specialized Returns/Taxpayers
- Average study time: 90 hours\* (860 Qs\*3x\*2min)

\*Estimated time to progress through required quantity of Multiple Choice Questions and mapped learning to IRS Pub's based upon comprehensive student data in Surgent EA Review

# STUDY PLAN – PART 1

## WEEK 1:

Complete Assessment (35% of questions)

➔ 6 hours @ 1.5 minutes per question

## WEEKS 2-4:

- Continue study in Adaptive Learning Phase averaging 60 questions per day, five days a week
- Schedule your test at Prometric

## WEEK 5:

- Change study to Customized, choosing questions missed last time seen
- Use Reading Lessons to access IRS publications for questions missed last time seen

## WEEK 6:

Take Practice Exam at least twice and then sit for actual exam

# STUDY PLAN: PART 3

## WEEK 1:

Complete Assessment (35% of questions) over 2 days

- 6 hours @ 1.5 minutes per question
- 60 questions per day for the remaining three days

## WEEK 2:

- Continue to study in Adaptive Learning Phase averaging 60 questions per day, five days a week.
- Schedule your test at Prometric

## WEEK 3:

- Change study to Customized, choosing questions missed last time seen
- Use Reading Lessons to access IRS publications (Circ. 230) for questions missed last time seen

## WEEK 4:

Take Practice Exam at least twice and then sit for actual exam

# STUDY PLAN: PART 2

## WEEK 1:

Complete Assessment (35% of questions)

- 6 hours @ 3.0 minutes per question

## WEEKS 2-6:

- Continue study in Adaptive Learning Phase averaging 60 questions per day, five days a week
- Schedule your test at Prometric

## WEEK 7:

- Change study to Customized, choosing questions missed last time seen
- Use Reading Lessons to access IRS publications for questions missed last time seen

## WEEK 8:

Take Practice Exam at least twice and then sit for actual exam

# STUDY PLAN

## **SATURDAYS AND SUNDAYS:**

If doing a marathon study, break into morning and evening sessions of 2.5 hours each

## **WEEKDAYS:**

- 30 minutes at lunch every day, 1-2 hours in the evening
- The more studying you can do in the morning and midday, the less you need to study at night



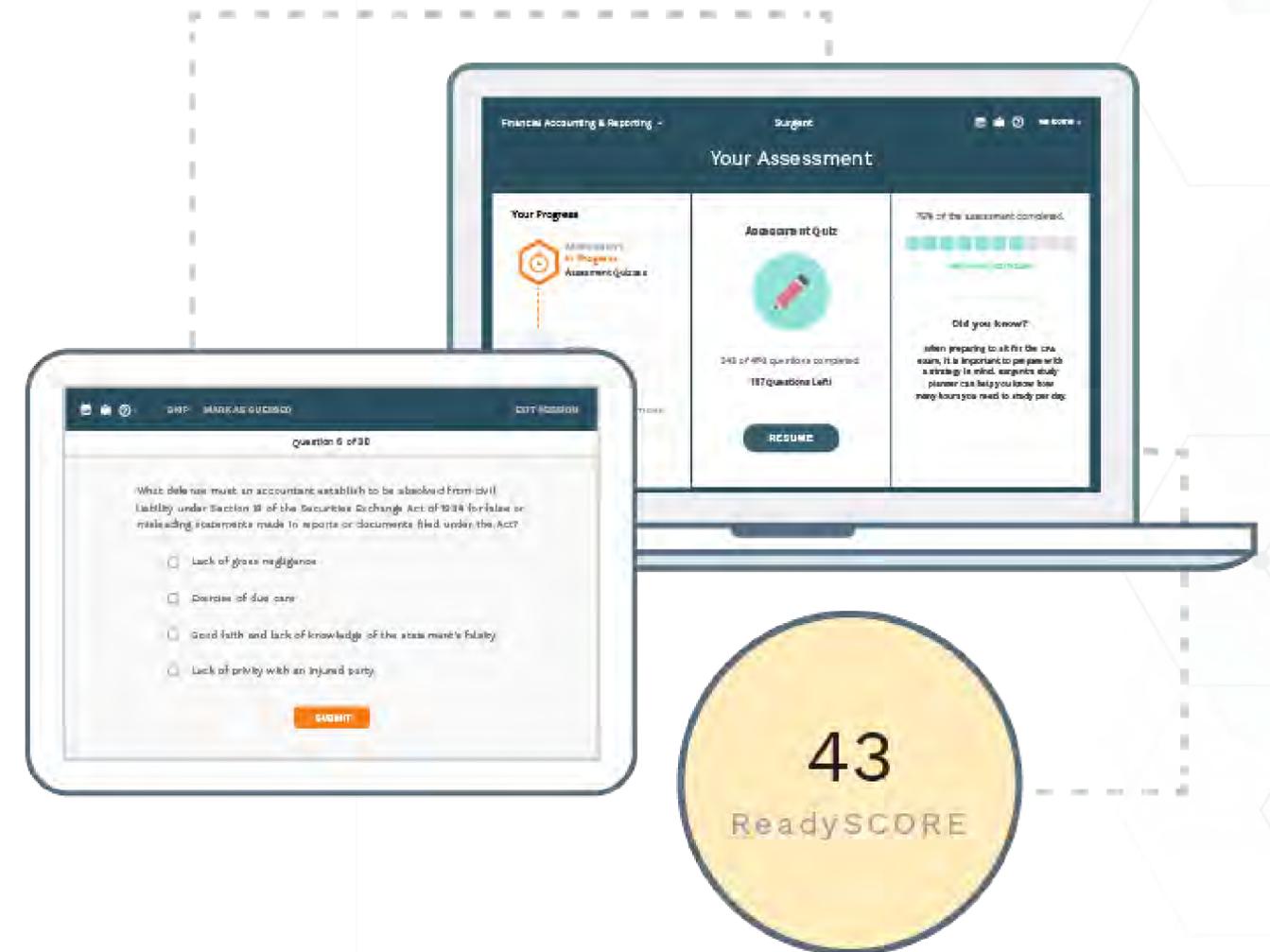
# The **Surgent Method**

# ASSESSMENT PHASE

Candidates complete a series of quizzes with content pulled from all exam categories.

A.S.A.P. Technology analyzes results alongside real exam scoring and calculates a baseline ReadySCORE.

Students receive a diagnostic report, which details their starting strengths and weaknesses and estimates needed study hours.



# STUDY PHASE

Our course builds a personalized plan to close identified knowledge gaps.

Real-time algorithms continue to optimize study plans based on progress.

Students can see their ReadySCORE improve as they study.

High quality study content includes multiple-choice questions, bite-sized video lectures, IRS Publications, and textbook.

71% ReadySCORE

# REVIEW PHASE

Unlimited practice exams— designed to match the actual EA Exam and ensure candidates are totally ready to pass come exam day.

Once students achieve a passing ReadySCORE, they know they're ready to pass.



# WHAT IS YOUR INVESTMENT TO BECOME AN ENROLLED AGENT?

## Step 1: Surgent Income Tax School Tax Preparer Training Programs

PROGRAM:	<b>Comprehensive Tax Course</b>	<b>Chartered Tax Advisor</b>	<b>Chartered Tax Consultant</b>	<b>Chartered Tax Professional</b>
STUDY HOURS:	48	73	101	157
PRICE:	\$497	\$737	\$937	\$1497

## Step 2: EA Exam Review Prep (Premier Pass Package)

PROGRAM:	<b>Surgent EA Prep</b>	<b>Surgent EA Prep</b>	<b>Surgent EA Prep</b>	<b>Surgent EA Prep</b>
STUDY HOURS:	165	165	165	165
PRICE:	\$699	\$699	\$699	\$699

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<b>Total Study Hours:</b>	<b>213</b>	<b>238</b>	<b>266</b>	<b>322</b>
<b>Total Investment:</b>	<b>\$1196</b>	<b>\$1436</b>	<b>\$1636</b>	<b>\$2196</b>

# FREE TRIALS TEST THE WATERS

**FREE TRIAL** for Surgent Income Tax School's Comprehensive Tax Course

- <https://www.theincometaxschool.com/try-the-comprehensive-tax-course-free-trial/>

**FREE TRIAL** for Surgent's EA Review

- <https://www.surgent.com/ea-exam-review/free-trial/>

# CONTACT US

**SEAN MULLEN**

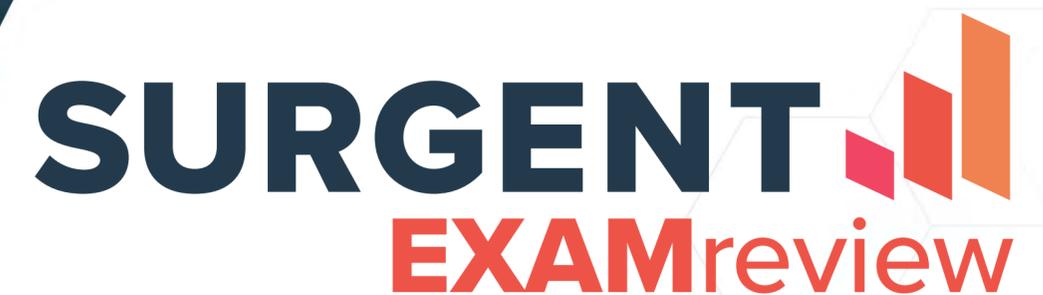
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