



TaxAnxiety.com Inc, - IRS Education Sponsor #36
 NASBA Sponsor Identification #112311

Solving the Tax Puzzle – Internet Live Course

Instructor(s): Eva Rosenberg, EA and Roger. B. Adams, EA_____

Registration Information: <http://irsexams.com/registration/>

Part 1	Part 2	Part 3	All Three Parts	Volume Discounts
Personal Taxation \$300	Business Taxation \$450	Representation, Practice and Procedures \$300	\$650	15% for 2 – 4 people
Sign Up Now	Sign Up Now	Sign Up Now	Sign Up Now	30% for 10 or more
Up to 24 CPE	Up to 36 CPE	Up to 24 CPE (inc 4 Ethics)	\$12.50/unit CPE	

Class Location/Delivery Method: Online – Group-Internet-Based

CPE: 2 hours per session *that you attend* - This is not available as a self-study course. You must attend the sessions to get the credit. Note: NASBA requires polling several times each hour for proof of attendance.

Part 1 – up to 24 hours **NASBA Field of Study:** Taxes

Part 2 – up to 36 hours **NASBA Field of Study:** Taxes

Part 3 – up to 24 hours **NASBA Field of Study:** Taxes (20) Regulatory Ethics (4)

Refund policy: <http://irsexams.com/refund-policy/> To get a refund, you must request it within **30 days** or **4 scheduled class sessions**, whichever come first. **Your entire registration will be refunded**, less the cost of the books and disks you have received, or software that has been downloaded - \$175.00 to \$300.00 depending on the class. **There is a minimum cancellation fee of \$75.00** (We cannot accept used books and discs.)

Who should attend: Practitioners at all levels regardless of practice concentration wanting to learn more about tax law, practice and procedure. Additionally, CPAs in industry who require more in-depth knowledge of taxation and practical application of tax law, and IRS representation in order to assist clients with tax debts, disputes and examinations.

Learning objectives:

- Keep tax professionals updated with respect to tax laws relevant to the current year's tax return filings, rules of practice and representation. Goal is to provide answers to tax professionals' specific questions about client issues.

Topics covered:

- Tax Law, Tax Procedure, Tax preparation, IRS Ethical Standards
- See more detail for each Course:

Topics Part 1

Personal Taxation

- Lecture 1 – The big Picture – Overview of the U.S. tax return
- Lecture 2 – First piece – Exemptions & Filing Requirements & Names
- Lecture 3 – Favorite piece – Income – Interest, Dividends, Social Security Income, Retirement Income
- Lecture 4 – Juicy piece – Overview of Adjustments to Income
- Lecture 5 – Sample piece – Reviews of the Tax Return Samples 1, 2, 3.
- Lecture 6 – Misunderstood piece- Itemized Deductions and Employee Business Expenses
- Lecture 7 – Special piece – Credits, Additional Taxes
- Lecture 8 – Giving piece – Estate and Gift Taxes
- Lecture 9 – Missing piece – Understanding Basis
- Lecture 10 – Political piece – Understanding Depreciation
- Lecture 11 – Making your piece – Fundamentals of Capital Gains & Losses
- Lecture 12 – Extra piece – More Sales and Exchanges

Topics Part 2

Business Taxation

- Lectures 9 – 12 of Part I – Assets, Depreciation, Sales and Exchanges
- Lecture 1 – The big Picture – Overview of Business Entities, Pros and Cons of using each Format
- Lecture 2 – First piece – Accounting 101 – Understanding the Balance Sheet and Income Statement
- Lecture 3 – Favorite piece – Business Income – and how to reconcile it to third party information
- Lecture 4 – Juicy piece – Business Expenses – All those luscious write-offs
- Lecture 5 – Misunderstood piece – Office in Home – and how it applies to each business entity
- Lecture 6 – Custom Piece – Specific Businesses – Farms, truckers, Internet Marketers
- Lecture 7 – Exempt Piece – Exempt Organizations – and the new filing rules
- Lecture 8 – Fun piece – Discussing the Schedule C Tax Sample and your results – and how to do it better
- Lecture 9 – Shared piece – Partnerships – General, Limited, LLCs, JVs and Married Couples
- Lecture 10 – Joining piece – Getting into and out of Partnerships
- Lecture 11 – Sharing piece – Discussing the 1065 Tax Sample and your results – and how to do it better
- Lecture 12 – Incorporated piece – C Corporations – including PSCs and holding companies
- Lecture 13 – Reconciling Piece – Discussing the Form 1120 Tax Sample, reconciling Schedules L, M-1, M-2
- Lecture 14 – Small Business Piece- S Corporations – Small Business or S Corporations – special issues for shareholder-employees
- Lecture 15 – Filing Piece – Reconciling Piece – Discussing the Form 1120S Tax Sample and your results – and how to do it better – and reconciling Schedules L, M-1, M-2
- Lecture 16 – Freedom Piece – Business retirement plans – and how they work with each entity
- Lecture 17 – Trusting Piece – Estate and Trusts – Form 1041

Topics Part 3

Representation, Practice and Procedures

- Lecture 1 – The big Picture – Overview of Circular 230 responsibilities and privileges and the POA
- Lecture 2 – Juicy piece – E-Services – for enrolled and for unenrolled preparers
- Lecture 3 – Worst piece – Sanction and Penalties and your defenses
- Lecture 4 – Favorite piece – Legal Authority and Research, Statutes, Communications, FOIA
- Lecture 5 – Fascinating piece- Working with Non-Filers
- Lecture 6 – Mystery piece – Getting ready for an audit
- Lecture 7 – Reconciling Piece – Reviewing the Audit Workpapers
- Lecture 8 – Fixing piece – What to do after a bad audit – Appeals, mediation and...
- Lecture 9 – Misunderstood piece- Collections – dealing with notices, unpaid taxes and balances due
- Lecture 10 – Courtly piece – Tax Court and Beyond and Reviewing your Tax Court Petition
- Lecture 11 – Shared piece – Reviewing your Forms 9465, 433s and 656
- Lecture 12 – Making your piece – Final Questions and Pulling it all together

Level: Basic

NASBA Field of Study: Taxes, Regulatory Ethics

Prerequisites: PTIN

Advance Preparation: Homework is outlined for each session, including IRS forms, publications, and Small Business Taxes Made Easy



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