



20•20
tax training

Build Your Own Tax Program Menu 2017

INDIVIDUAL TAXES

	<u>Level</u>	<u>CPE Hours</u>
Capital Gains and Losses	Level 1	1
Compensation	Level 1	1
Filing Status, Personal Exemptions & Dependency.....	Level 1	1
Individual Tax Credits	Level 1	1.5
Interest & Dividends.....	Level 1	1
Adjustments to Income.....	Level 1	1
Rental Properties	Level 1	1.5
Self-Employment	Level 1	1
Standard & Itemized Deductions	Level 1	2
Alternative Minimum Taxes	Level 2	2
Home Foreclosure and Cancellation of Debt	Level 2	4
Adjustments to Income.....	Level 2	2
Selected Schedule C & Rental Property Topics.....	Level 2	2
Alternative Minimum Taxes	Level 3	2
Equity Based Compensation	Level 3	2
Passive Activities & At Risk Rules	Level 3	2
Retirement Contributions and Distributions.....	Level 3	2
Tax Planning.....	Level 4	2
Divorce.....	Level 4	1
Foreign Taxes	Level 4	2
Preparation of an Individual Tax Return.....	Level 1	2

LLC & PARTNERSHIPS

	<u>Level</u>	<u>CPE Hours</u>
Introduction to LLCs and Partnerships.....	Level 2	3
Basis and At-Risk	Level 4	2
Capital Accounts.....	Level 4	1
Partner Distributions.....	Level 4	1
Partner Contributions.....	Level 4	1
Payments to Partners.....	Level 4	1
Sale of Partnership Interest.....	Plug & Play*	2
Special Allocations and Substantial Economic Effect.....	Plug & Play*	1
IRC 754 Elections	Plug & Play*	1.5
Case studies.....	Plug & Play*	4

CORPORATE TAXES

	<u>Level</u>	<u>CPE Hours</u>
Introduction to Business Tax Topics	Level 1	1
Schedule K & M-1	Level 1	2
Depreciation	Level 1	2
C Corporations.....	Level 2	2
S Corporations	Level 2	2
Basis Fundamentals - S Corporation	Level 2	2
Depreciation	Level 2	2
Schedule K & M-1	Level 2	2
State Apportionments	Level 2	2
Advising on Business Creation	Level 3	3
Basis	Level 3	3
Deferred Taxes.....	Level 3	2
Built in Gains.....	Level 3	1
State Tax Nexus	Level 4	1
Various Tax Elections	Level 4	2
Prepare an S Corporation Tax Return	Level 1	3
Prepare a C Corporation Tax Return	Plug & Play*	3
Equity vs Asset Sales & Exchanges.....	Level 4	4
Accounting Methods.....	Level 4	2

OTHER MATERIAL

	<u>Level</u>	<u>CPE Hours</u>
Introduction to Estates, Gifts & Trusts	Level 3	2
Estates, Gifts & Trusts	Level 4	4
Tax Exempt Organizations Plug & Play*	Level 4	4

FOUNDATION SKILLS

	<u>Level</u>	<u>CPE Hours</u>
Professionalism	Level 1	2
Documentation	Level 1	1
Self Management & Organization	Level 2	2
Communication - Business Writing	Level 2	2
Time Management.....	Level 3	1
Providing Feedback	Level 3	1
Reviewing Tax Returns	Level 3	1
Project Planning	Level 3	1
Conflict Management	Level 4	1.5
Work Life Balance	Level 4	2
Supervision - Delegating & Teaching	Level 4	2
Meeting People & Networking	Level 4	1

* Plug and Play denotes optional material that can be added or substituted for modules in our off the shelf programs.



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