



# The Income Tax School

## Online Student Pricing Guide

### Types of Courses

- [Federal Courses](#)
- [California Qualifying Education](#)
- [California Continuing Education](#)
- [Oregon Qualifying Education](#)
- [Chartered Tax Professional Programs](#)
- [CPE Seminars](#)
- [Federal Course Packages](#)
- [California Course Packages](#)

### FEDERAL COURSES

#### [QuikStep 1040A Income Tax Course](#)

(6 Chapters, 3 Hours per Chapter)

*Only available in the Fall.*

This course covers how to correctly complete the 1040A Form, E-filing, and Bank Products. This is a great course for someone wanting to understand the very basic income tax returns. Companies wanting to generate extra revenue through tax preparation fees, check cashing fees, and selling products to customers using Refund Anticipation Loans will find this course ideal for training employees.

**Cost = \$199**

#### [Basic Income Tax Course](#)

(10 Chapters, 3 Hours per Chapter)

This Course will give you a solid start in tax preparation, enabling you to complete most standard individual tax returns and research tax issues. Ideal for RAL processors and short-form preparers.

**Cost = \$299**

#### [Intermediate Income Tax Course](#)

(10 chapters, 3 Hours per chapter)

This Course should be taken after completing the Basic Income Tax Class and will pick up where Basic left off and will enable you to prepare the more complicated tax returns that come later in the filing season such as Schedules C, D, E, Depreciation, etc.

**Cost = \$299**

### Comprehensive Income Tax Course

(20 Chapters, 3 Hours per Chapter)

*This Course encompasses the Basic Part I & Intermediate Part II courses.*

There are no entrance requirements.

This Course focuses on the majority of tax forms needed to complete tax returns for yourself and the general public. In the Course you should acquire the knowledge and skills necessary to complete federal income tax returns and research tax issues.

Because practice makes perfect the Course requires at least two tax returns prepared for most chapters.

**Cost = \$499**

### Advanced I Income Tax Course

(10 Chapters, 3 Hours per Chapter)

Students normally enroll in this Course after completing the 10-week Comprehensive Income Tax Class and working at least one season as a tax preparer. This Course will give you the confidence to take on more complex returns by reinforcing your existing tax knowledge and building on it.

**Cost = \$399 with book OR \$349 without book**

### Advanced II Income Tax Course

(10 Chapters, 3 Hours per Chapter)

Part II of the Advanced Course: If you are an enrolled agent, accountant, lawyer, financial planner, business owner, experienced tax preparer, or just interested in increasing your tax knowledge, the Advanced Course Level II will enable you to prepare more complex individual tax returns.

**Cost = \$399 with book OR \$349 without book**

### Small Business I Income Tax Course

(10 Chapters, 3 Hours per Chapter)

If you are comfortable with your knowledge of individual tax return preparation, the next step is Introduction to Small Business Income Tax Course.

This Course is designed as an introduction to some of the issues involved in the preparation of tax returns for various forms of business entities, which will give you the information necessary to handle partnerships and corporations.

**Cost = \$399 with book OR \$349 without book**

### [Small Business II Income Tax Course](#)

(10 Chapters, 3 Hours per Chapter)

If you are comfortable with your knowledge of individual tax return preparation, the next step is Small Business Level II Income Tax Course.

This Course is designed as an introduction to some of the issues involved in the preparation of tax returns for various forms of business entities, which will give you the information necessary to handle business returns with knowledge and confidence.

**Cost = \$399 with book OR \$349 without book**

### **CALIFORNIA QUALIFYING EDUCATION**

#### [California Comprehensive Income Tax Course \(CTEC Approved – Qualifying Education\)](#)

(20 Chapters, 3 Hours per Chapter)

This Course includes everything in the Comprehensive course plus a piece for California to meet the requirement for the state, which satisfies qualifying education and continuing education requirements for CTEC.

This California content includes: Differences Between Federal and California Tax Laws, Military Income, Resident Issues, Nonresident & Part-year Resident Issues, California State Disability Insurance (CASDI), Covenant Not to Compete, Community Property.

**Cost = \$549**

### **CALIFORNIA CONTINUING EDUCATION**

#### [California Small Business & Ethics Continuing Education Income Tax Course – \(CTEC Approved- Continuing Education\)](#)

(6 Chapters)

Prior tax preparation experience/knowledge is required. This course covers Small Business Tax Preparation for California Small Business Owners. This course also covers Federal and California State guidelines that govern the practices and behaviors of all tax professionals.

**Cost = \$79**

#### [Tax Guidelines for CA Small Businesses Continuing Education Income Tax Course – \(CTEC Approved- Continuing Education\)](#)

(6 Chapters)

This course will provide the tax knowledge needed to start a California business or to assist a client in starting a California business.

**Cost = \$79**

**California Advanced I Income Tax Course (CTEC Approved- Continuing Education)**

(10 Chapters, 3 Hours per Chapter)

Prior tax preparation experience/knowledge is required. This course includes a piece on California Small Businesses to meet the requirement for the state, which satisfies qualifying education and continuing education requirements for CTEC.

**Cost = \$449 with book OR \$399 without book**

**California Introduction to Small Business I Income Tax Course – (CTEC Approved- Continuing Education)**

(10 Chapters, 3 Hours per Chapter)

Prior tax preparation experience/knowledge is required. This course includes a piece on California Small Businesses to meet the requirement for the state, which satisfies qualifying education and continuing education requirements for CTEC.

**Cost = \$449 with book OR \$399 without book**

**California Business Tax Liabilities and Issues for Employers – (CTEC Approved- Continuing Education)**

(4 – state hours)

This course covers the various types of business and payroll taxes for California.

**Cost = \$39**

**OREGON QUALIFYING EDUCATION**

**Oregon Comprehensive Income Tax Course (Oregon State Board of Tax Practitioners (OSBTP) Approved – Qualifying Education)**

(20 Chapters, 4 Hours per Chapter)

This Course includes everything in the Comprehensive course plus a piece for Oregon to meet the requirement for the state, which satisfies qualifying education and continuing education requirements for OSBTP.

This Oregon content includes: Differences between Federal and Oregon Tax Laws, Military Income, Resident Issues, Nonresident & Part-year Resident Issues, Covenant Not to Compete, Community Property.

**Cost = \$549**

## CHARTERED TAX PROFESSIONAL PROGRAMS

### Chartered Tax Professional Certificate Program

To get the CTP designation, you must successfully complete The Income Tax School series of six 30-hour Income Tax Courses (four additional courses beyond the 60-hour Comprehensive Tax Course). After completing this comprehensive certificate program, you will be well prepared to handle almost any individual and small business income tax situations you encounter.

**Cost = \$1,799**

### California Chartered Tax Professional Certificate Program

To get the CTP designation, you must successfully complete The Income Tax School series of six 30-hour Income Tax Courses (four additional courses beyond the 60-hour Comprehensive Tax Course). After completing this comprehensive certificate program, you will be well prepared to handle almost any individual and small business income tax situations you encounter. The California CTP program has California state material that meets the requirements for qualifying and continuing education with CTEC.

**Cost = \$1,899**

## CPE SEMINARS

### ***Amazing Savings on CPE Seminars!***

*All CPE Seminars cost \$39 and offer 3 hours of CPE credit.*

*Choose any 3 CPE Seminars for \$99...a Savings of \$18!*

*Choose any 5 CPE Seminars for \$149...a Savings of \$46!*

*You can't afford not to get your CPE here...*

### Amended Tax Returns for Individuals CPE Seminar

Explore amended returns. Covered topics will include common reasons for amendments, statute of limitation when claiming a refund, 1040X preparation, fees for amended returns, and state income tax return amendments.

### Clergy CPE Seminar

Study the various types of expenses related to clergy income and the forms necessary to deduct the expenses.

### Corporations – CPE Seminar

Learn about choosing to become a corporation, advantages and disadvantages of being a corporation, maintaining records, taxes paid by a corporation.

### Earned Income Credit CPE Seminar

Get the most up-to-date information on the Earned Income Tax Credit. Learn about requirements, qualifying children, and rules for foster children

### **Employee Business Expenses CPE Seminar**

Get the most up-to-date information on vehicle mileage allowance changes for employees. Discover tax saving tips for employees who have un-reimbursed business expenses.

### **Employment Taxes CPE Seminar**

Explore employment taxes and withholding issues for independent contractors and statutory employees. Review earned income tax credit. Form 941, Form 940, and tax deposits will be introduced.

### **Ethics Continuing Education CPE Seminar**

Learn the guidelines set by the Internal Revenue Service that governs the practices and behaviors of all tax professionals.

### **Net Operating Losses CPE Seminar**

Explore tax issues high income taxpayers face such as Alternative Minimum Tax, limitations on itemized deductions, IRA contributions, exemptions, deductible credits, and adjustments to income.

### **Non-resident Alien Returns – Form 1040NR – CPE Seminar**

Learn the difference between a non-resident alien and a resident alien. Discover when to use Form 1040NR and when Form 1040 is use is more appropriate. Explore tax treaties with other countries, filing requirements, credits, deductions and exemptions.

### **Partnerships – CPE Seminar**

Learn about developing a partnership, advantages and disadvantages of becoming one, maintaining records and how partners pay taxes on their share of income.

### **Part-year and Non-resident State Tax Preparation Principles CPE Seminar**

Review the various issues for filing part-year and non-resident tax returns. Discover how your client may be affected by credits, adjustments, subtraction, additions, exemptions and deductions. Gain an awareness for common issues shared among many states and items that may be state specific.

### **Rental Property CPE Seminar**

Learn what constitutes rental property, what expenses are deductible, and how to handle sales of rental property.

### **Responding to the IRS CPE Seminar**

Given the choice most taxpayers would rather not deal directly with the IRS. This is where you step in with the knowledge you will gain to assist your taxpayer. Learn how to handle IRS letters which request information or explanations. Gain knowledge in handling audit issues and complex collection issues. Learn about offers-in compromise.

### **Retirement Plans CPE Seminar**

Learn the different types of retirement income, and the tax treatment of distributions received.

### **Schedule C / Sole Proprietorships CPE Seminar**

Learn about developing a sole proprietorship, advantages and disadvantages of being one, maintaining records, inventory and costs of goods sold.

### **Schedule D – Special Issues CPE Seminar**

Learn how to assist your client with wash sales, puts and calls, employee stock options, like-kind exchanges, the sale of a personal residence, sale of personal residence, the sale of business property and capital loss carryovers.

### **S-Corporations – CPE Seminar**

Learn the differences in choosing to become an S-Corporation instead of a corporation, advantages and disadvantages of making the S-election, maintaining records, how to make an S-election and how shareholders report and pay taxes on their share of income from the S-Corporation.

### **Special Needs and Concerns for Seniors CPE Seminar**

Concentrate on issues that affect senior citizens such as required minimum distributions from IRAs, taxable social security and estimated tax payments. Review medical deductions for seniors such as assisted living, long term care insurance premiums and when these expenses are allowed. Estate planning and tax-free investments will also be covered.

### **Tax Issues for Divorced or Separated Taxpayers CPE Seminar**

Concentrate on tax issues surrounding a separated or divorced taxpayer such as exemptions for children, itemized deductions, credits, filing status, community property issues, alimony, and child support. You will also learn how to handle asset transfers, qualified domestic relations orders (QDRO) and adjustments to income.

### **Tax Issues for High Income Taxpayers CPE Seminar**

Explore tax issues high income taxpayers face such as Alternative Minimum Tax, limitations on itemized deductions, IRA contributions, exemptions, deductible credits, and adjustments to income.

### **Tax Planning Tips and Strategies CPE Seminar**

Learn how to help your client save valuable tax dollars by offering tax planning tips and strategies. Discover how a contribution to an IRA may lower your client's tax liability. Help you client determine if he is utilizing the deductions and credits to which he entitled.

## FEDERAL COURSE PACKAGES

### [Comprehensive & Advanced I Income Tax Course Package](#)

- **Comprehensive Income Tax Course**  
(20 Chapters, 3 Hours per Chapter)  
*This Course encompasses the Basic Part I & Intermediate Part II courses.* There are no entrance requirements. This Course focuses on the majority of tax forms needed to complete tax returns for yourself and the general public. In the Course you should acquire the knowledge and skills necessary to complete federal income tax returns and research tax issues. Because "Practice makes perfect", the Course requires at least two tax returns prepared for most chapters.
- **Advanced I Income Tax Course**  
(10 Chapters, 3 Hours per Chapter)  
Students normally enroll in this Course after completing the 10-week Comprehensive Income Tax Class and working at least one season as a tax preparer. This Course will give you the confidence to take on more complex returns by reinforcing your existing tax knowledge and building on it.  
**Cost for Package = \$699**

### [Comprehensive and Small Business I Income Tax Course Package](#)

- **Comprehensive Income Tax Course**  
(20 Chapters, 3 Hours per Chapter)  
*This Course encompasses the Basic Part I & Intermediate Part II courses.* There are no entrance requirements. This Course focuses on the majority of tax forms needed to complete tax returns for yourself and the general public. In the Course you should acquire the knowledge and skills necessary to complete federal income tax returns and research tax issues. Because "Practice makes perfect", the Course requires at least two tax returns prepared for most chapters.
- **Introduction to Small Business I Income Tax Course**  
(10 Chapters, 3 Hours per Chapter)  
If you are comfortable with your knowledge of individual tax return preparation, the next step is Introduction to Small Business Income Tax Course. This Course is designed as an introduction to some of the issues involved in the preparation of tax returns for various forms of business entities, which will give you the information necessary to handle partnerships and corporations.  
**Cost for Package = \$699**



## Advanced I & II Income Tax Course Package

- **Advanced I Income Tax Course**  
(10 Chapters, 3 Hours per Chapter)  
Students normally enroll in this Course after completing the 10-week Comprehensive Income Tax Class and working at least one season as a tax preparer. This Course will give you the confidence to take on more complex returns by reinforcing your existing tax knowledge and building on it.
- **Advanced II Income Tax Course**  
(10 Chapters, 3 Hours per Chapter)  
Part II of the Advanced Course: If you are an enrolled agent, accountant, lawyer, financial planner, business owner, experienced tax preparer, or just interested in increasing your tax knowledge, the Advanced Course Level II will enable you to prepare more complex individual tax returns.  
**Cost for Package = \$650**

## Small Business I & II Income Tax Course Package

- **Small Business I Income Tax Course**  
(10 Chapters, 3 Hours per Chapter)  
If you are comfortable with your knowledge of individual tax return preparation, the next step is Introduction to Small Business Income Tax Course. This Course is designed as an introduction to some of the issues involved in the preparation of tax returns for various forms of business entities, which will give you the information necessary to handle partnerships and corporations.
- **Small Business II Income Tax Course**  
(10 Chapters, 3 Hours per Chapter)  
If you are comfortable with your knowledge of individual tax return preparation, the next step is Small Business Level II Income Tax Course. This Course is designed as an introduction to some of the issues involved in the preparation of tax returns for various forms of business entities, which will give you the information necessary to handle business returns with knowledge and confidence.  
**Cost for Package = \$650**

## CALIFORNIA COURSE PACKAGES

### [California Comprehensive and Advanced I Income Tax Course Package \(CTEC Approved – Qualifying and Continuing Education\)](#)

- **California Comprehensive Income Tax Course**  
(CTEC Approved – Qualifying Education)  
(20 Chapters, 3 Hours per Chapter) This Course includes everything in the Comprehensive course plus a piece for California to meet the requirement for the state, which satisfies qualifying education and continuing education requirements for CTEC. This California content includes: Differences between Federal and California Tax Laws, Military Income, Resident Issues, Nonresident & Part-year Resident Issues, California State Disability Insurance (CASDI), Covenant Not to Compete, Community Property.
- **California Advanced I Income Tax Course**  
(CTEC Approved- Continuing Education)  
(10 Chapters, 3 Hours per Chapter) Students normally enroll in this Course after completing the 10-week Comprehensive Income Tax Class and working at least one season as a tax preparer. This Course will give you the confidence to take on more complex returns by reinforcing your existing tax knowledge and building on it.  
**Cost for Package = \$779**

### [California Comprehensive and Small Business I Income Tax Course Package \(CTEC Approved – Qualifying and Continuing Education\)](#)

- **California Comprehensive Income Tax Course**  
(CTEC Approved – Qualifying Education)  
(20 Chapters, 3 Hours per Chapter) This Course includes everything in the Comprehensive course plus a piece for California to meet the requirement for the state, which satisfies qualifying education and continuing education requirements for CTEC. This California content includes: Differences Between Federal and California Tax Laws, Military Income, Resident Issues, Nonresident & Part-year Resident Issues, California State Disability Insurance (CASDI), Covenant Not to Compete, Community Property.
- **California Introduction to Small Business I Income Tax Course**  
(CTEC Approved- Continuing Education)  
(10 Chapters, 3 Hours per Chapter) Prior tax preparation experience/knowledge is required. This course includes a piece on California Small Businesses to meet the requirement for the state, which satisfies qualifying education and continuing education requirements for CTEC.  
**Cost for Package = \$779**