

Tax Return Preparer/QR Training

Module	Washington	Simon	Rico	Walker
Day 1 - Module 01: Introduction				
Day 1 - Module 02: Intake (removed from curriculum; separate course)				
Day 1 - Module 03: Basics of the American Income Tax System				
Day 1, Tab A - Module 04: Filing Basics				
Day 1, Tab B - Module 05: Filing Status				
Day 1, Tab C - Module 06: Dependents	(1)	(1)	(1)	(1)
Day 1, Tab D - Module 07: Income Overview				
Day 1, Tab D - Module 08: Income - Wages, Interest etc.	(2)	(2)	(2)	
Day 1, Tab D - Module 09: Income - Business		(3)		

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Day 1, Tab D - Module 10: Income - Capital Gain or Loss		(4)		
Module XX: Next Steps				
Day 2, Tab D - Module 11: Income - Retirement Income		(5)	(3)	
Day 2, Tab D - Module 12: Income - Social Security	(3)			(2)
Day 2, Tab D - Module 13: Income - Unemployment Compensation			(4)	
Day 2, Tab D - Module 14: Other Income	(4)			
Day 2, Tab E - Module 15: Adjustments	(5)	(6)		
Day 2, Tab F - Module 16: Standard vs. Itemized Deductions				
Day 2, Tab G - Module 17: Credit Basics				
Day 2, Tab G - Module 18: Child & Dependent Care Credit			(5)	
Day 2, Tab G - Module 19: Retirement Savers Credit				
Day 2, Tab G - Module 20: Child Tax Credit				
Day 2, Tab G - Module 21: Credit for Other Dependents				
Day 2, Tab H - Module 22: Other Taxes		(7)		
Module XX: Next Steps				

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Module	Washington	Simon	Rico	Walker
Day 3, Tab I - Module 23: Earned Income Tax Credit				
Day 3, Tab J - Module 24: Education Credits	(6)	(8)		
Day 3, Tab K - Module 25: Completing the Return, Part 1 - E-file Section	(7)			
Module XX: Next Steps				
Day 4, Tab K - Module 26: Completing the Return, Part 2 - Final Checks				
Day 4, Tab K - Module 27: Quality Review				
Day 4 - Module 28: High Risk/High Reward Topics				
Day 4 - Module XX: Next Steps				