

Introduction to Personal Tax Preparation

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Knowledge Bureau[®]
Excellence in Financial Education

OF SPECIAL INTEREST TO:

- Those new to tax preparation
- Tax professionals for staff training
- Accountants and bookkeepers
- Financial advisory firms

- Prepare tax returns utilizing the best approach for the family as a whole
- Understand the mechanics and theory behind tax return preparation
- Achieve consistently accurate results, including up-to-date tax law changes

Study On Your Terms and Time in Our World-Class Virtual Campus

- Individualized study plans, instructor support
- 24/7 access to online lessons, quizzes
- Valuable e-journals, software, calculators
- Testing, accreditation and certification
- Easy pay plan customized to fit your budget
- Risk-free enrolment

How to Enrol in Your Self-Study Course Today

1. Enrol online at www.knowledgebureau.com
2. Scan and email the completed registration form to our Registrar at registrar@knowledgebureau.com
3. Call our Registrar toll-free at 1-866-953-4769
4. Fax your registration form to 1-204-953-4762

Free educational consultation available

INTRODUCTION TO PERSONAL TAX PREPARATION

This course is designed for prospective tax preparers who have no experience with preparing tax returns for others. The course starts with an introduction to income tax in Canada: who is taxed and what is subject to income tax. By the end of the first chapter students will be able to prepare a simple tax return for a no-income credit filer. Subsequent chapters will teach you how to prepare returns for singles, families, students; retirees and investors. Along the way, you'll learn about the most common deductions and credits available to Canadian taxpayers.

CONTENT DESCRIPTION & KEY CONCEPTS

This introductory course provides the student with a solid foundation and understanding of personal taxation in Canada for low and middle income taxpayers including single employees, students, young families, retirees and investors. The successful graduate will have the skills to prepare basic tax returns professionally with a high degree of confidence.

Students may use their own tax preparation software to complete the course. For those without tax preparation software, student versions of Intuit's ProFile Premier, Dr Tax's DT Max software and TaxCycle are provided with the course. Case Studies preparing 2016 returns will be done using income tax preparation software while scenarios involving 2017 returns will be completed using the Income Tax Estimator from the Knowledge Bureau Toolkit.

CERTIFIED SKILLSETS YOU WILL LEARN

The student will be exposed to a broad range of personal income tax topics in common scenarios, each featuring short answer and true-to-life case studies which include the details behind reporting income and claiming deductions and tax credits using tax software. The student will be able to prepare basic personal tax returns.

COURSE COMPONENTS

MULTI MEDIA INTRODUCTION – Your virtual instructor overviews key concepts in each chapter.

KNOWLEDGE JOURNAL TEXTBOOK – A full course manual containing detailed study materials, chapter by chapter.

EVERGREEN EXPLANATORY NOTES – A comprehensive reference library.

PRACTICE MANAGEMENT THESIS – Your formal case study online: a great review before your final exam.

TESTING – Chapters end with multiple-choice quizzes and true-to-life cases. A comprehensive final exam is written at the end of your studies.

ACCREDITATION – Earn 30 CE/CPD credits per course.

STEP 1: STUDENT IDENTIFICATION

Name	Returning Student ID #
<hr/>	
Company	
<hr/>	
Address	
<hr/>	
City	Province
<hr/>	
Postal Code	Email
<hr/>	
Phone with Area Code	Fax
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Referred By	Current Designations/Licensing

STEP 2: TUITION FEES

- Single Course Tuition Fee** **\$795**
- Electronic Textbooks** **No Extra Charge**
- Hard Copy Textbooks and Delivery** **\$ 95**

OR

- Choose Certified Skills Diploma or Designation Program and save**

See www.knowledgebureau.com for tuition funding options and details on qualifying for tax credits.

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- 1 Introduction to Canadian Tax
- 2 Tax Preparation for Single Employees
- 3 Tax Preparation for Employees with Variations
- 4 Tax Preparation for Families - Married with Children
- 5 Tax Preparation for Families - Marital Change
- 6 Tax Preparation for Students
- 7 Tax Preparation for Retirees
- 8 Tax Preparation for Investors – Non-Registered Accounts
- 9 Tax Preparation for Investors - Capital Property
- 10 Basic Tax Planning

Study Time: 30 hours

STEP 3: PAYMENT PLANS

- Full Payment Plan** (Branch Office study groups save 10%):
Number of Courses: _____ A x fee from Step 2 = B below
- | | |
|-------------------------------------|------------|
| TOTAL TUITION FEES: | \$ _____ B |
| Hard Copy and Delivery (see step 2) | \$ _____ C |
| SUBTOTAL (B + C) | \$ _____ D |
| GST/HST (885004713RT001) | \$ _____ E |
| TOTAL DUE (D + E) | \$ _____ F |
- EZ-Pay Instalment Plan:** Call 1-866-953-4769 for details.

STEP 4: PAYMENT METHODS

- CREDIT CARD:** Visa MC Amex Expiry Date ___ / ___
- Card Number _____
- Name on Card _____
- Signature _____

STEP 5: REGISTRATION OPTIONS

Phone: 1-866-953-4769 **Fax:** 1-204-953-4762

Online: www.knowledgebureau.com

Email: registrar@knowledgebureau.com

- Unless box is checked, I provide consent for you to store my contact information and inform me of my progress and future educational opportunities.