



NCSEA SEE Prep Course Information - JUNE 2018

Course Description



The North Carolina Society of Enrolled Agents (NCSEA) is pleased to offer the only study course taught by Enrolled Agents (EA) in North Carolina to prepare you for the IRS Special Enrollment Examination (SEE). Starting in 2018 classes will be available in Live Online classes as well as Live classrooms in selective locations. Instructors are knowledgeable NCSEA members who are EAs dedicated to helping participants pass the SEE. Students will receive live instruction, testing to ensure mastery over the materials, and continuous support and encouragement throughout the process.

Our Special Enrollment Examination (SEE) prep course is taught in 3 separate parts (Individuals; Businesses; and Representation, Practice, and Procedures) which correspond with the format of the exam required to become an Enrolled Agent.

The SEE prep course utilizes Gleim EA Review materials. Gleim is one of the leading providers of study and reference materials for the accounting industry. (For more information regarding Gleim study materials please go to Gleim.com/EAtax) **Gleim guarantees students will pass the EA exam on the first sitting using the Gleim EA Review System.** Go to "Guarantees" for more details.

Both Live and Live Online NCSEA SEE courses include:

- Live Instruction
- Review Books
- Audio and Audiovisual materials that can be downloaded on mobile devices
- Complete Gleim Online Access including:
 - Over 3,600 practice test questions with comprehensive answers
 - Timed Exam Rehearsals

Live Online Classes

- Online classes will be held somewhat continuously from July–November allowing students to schedule their parts to their schedule.
- The online classes are taught at an accelerated pace, 2 times per week for 2-2.5 hours per session.
- Sessions will be available for review for up to 2 weeks after the Part ends.
- System requirements:
 - Desk top or laptop. (Phones and tablets cannot access the online platform GleimTalk)
 - Google Chrome
 - A gaming headset with microphone (easily available for \$20 or less) is required unless you are using a laptop with built in microphone.
 - No camera is required

Live Classroom Instruction

- Classes will meet one day a week for 3 hours
- 18 classes over a 24 week timeframe for all parts.
- Scheduled 2-3 week breaks after each part to provide time for testing.
- Classes begin the week of June 5 for Part 1, July 31 for Part 3 and Sept. 11 for Part 2

Classes will not be held during holiday weeks or the week before the Oct 16th deadline .



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<p><u>Are there prerequisites for this course?</u></p>	<p>Although no particular experience or educational requirements are required, persons taking the course should be able to answer income tax & accounting questions at the intermediate college course level. (See FAQ's # 5, 6, & 7 later) Please be aware that the course is intense.</p>										
<p><u>Cost / Payment</u></p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;"></td> <td style="width: 50%;"></td> </tr> <tr> <td>All Three Parts (18 weeks) - (Purchase all 3 parts, save \$300)</td> <td style="text-align: center;">\$ 1,370</td> </tr> <tr> <td>Part 1 only (5 weeks)</td> <td style="text-align: center;">\$ 550</td> </tr> <tr> <td>Part 3 only (3 weeks)</td> <td style="text-align: center;">\$ 330</td> </tr> <tr> <td>Part 2 only (10 weeks)</td> <td style="text-align: center;">\$ 790</td> </tr> </table> <p>Note: The cost does not include fees for taking the SEE exams. Full payment required at time of registration. Payment can be made by check or credit card.</p>			All Three Parts (18 weeks) - (Purchase all 3 parts, save \$300)	\$ 1,370	Part 1 only (5 weeks)	\$ 550	Part 3 only (3 weeks)	\$ 330	Part 2 only (10 weeks)	\$ 790
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<p><u>NCSEA Associate Membership</u></p>	<p>For Tax Professionals who intend to become an Enrolled Agent (EA), the NC Society of Enrolled Agents offers an Associate membership. A courtesy 1 year Associate membership is now included with enrollment in any of our SEE Prep classes – whether Live or Live Online. Dues for Associate membership are normally \$50 annually. The status is available for a total of 3 years. Associates do not have voting rights and cannot hold elected office. Associates must follow the same CE requirements for members and must abide by the Society's Code of Ethics and Rules of Professional Conduct. Associate members are eligible for discounts at any NCSEA event but not at national events. Once EA status is obtained by passing the IRS Special Enrollment Examination (SEE), the next level of membership will be required to continue membership.</p>										
<p><u>Registration Deadline</u></p>	<p><u>All registration deadlines are 2 weeks before classes begin</u></p> <p><u>Live Online Classes</u> Deadline is 2 weeks the any class forms</p> <p><u>Live Classroom</u> Deadline: May 22, 2018 to register for all three parts or Part 1 only.</p> <p>Deadline for Part 2 only: August 28, 2018</p> <p>Deadline for Part 3 only: July 17, 2018</p> <p>Complete SEE Registration form. Scan and email completed registration forms to administrator@ncseaonline.org, or fax copy to Candace Cansler at Fax: 828-464-8300, or mail to: NCSEA-SEE Courses, PO Box 937, Conover NC 28613</p>										



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<p><u>Class Size</u></p>	<p>Minimum class size - 5 Maximum class size - Generally 10 will be the maximum class size Once classes are full, individuals will be placed on a waiting list and contacted at least one week before the start of a class to confirm availability. Additional or different day/times may be available if enough people request it.</p>
<p><u>Course Dates</u></p>	<p>Live Classroom - Part 1 week of June 4 Part 3 week of July 30 * Part 2 week of Sept. 10 * Line Online Classes - will begin the week of July 9 Classes - offered as afternoon (2-4 pm) and evening (6:30 - 8:30pm) classes Morning classes may be formed if enough interest. More information will be posted at a later date as to the days & times offered</p> <p>*Please see FAQ's for why we teach the parts in this order.</p>
<p><u>Live Classroom Locations</u></p>	<p>NCSEA has held Live classroom instruction <i>in or near</i> Asheville, Charlotte, Durham, Greensboro, High Point, Jacksonville, Raleigh, Salisbury and Winston Salem over the past 6 years. Some of these locations could not form classes every year due to a lack of students able to travel to those classes. Hence the need for Live Online classes. However, we realize that some would still prefer a live classroom setting and are committed to offer these Live classes if there are enough students to support the location. More information will be posted at a later date concerning Live classroom locations. In the meantime, you can register with your preference and NCSEA will try to meet your request.</p>
<p><u>Testing Appointments</u></p>	<p>For Live Online Classes – Since you may schedule your online classes to fit your schedule please use breaks between your classes to schedule your tests.</p> <p>For Live Classroom classes a 2-3 week break after each part (between Parts 1 & 3 and Parts 3 & 2) is set-aside for you to sit for the corresponding part of the SEE IRS EA exam.</p> <p>Register and schedule Part 1, 2, or 3 of your SEE exam at http://www.prometric.com/IRS/default.htm <u>Note: A separate fee is assessed by Prometric for each part of the test.</u></p>
<p><u>Guarantees</u></p>	<p>Gleim is one of the leading providers of study and reference materials for the accounting industry. NCSEA purchases the Gleim Premium EA Review System for all students taking the SEE Prep course. Gleim guarantees students will pass the EA exam on the first sitting using the Gleim EA Review System. Students may be eligible for guarantees from Gleim.</p>



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<p style="text-align: center;">-Access Until You Pass</p> 	<p>As long as you are preparing for and taking the EA exam parts for which you purchased the Gleim Premium EA Review System, Gleim will ensure that you have current Access Until You Pass®. Your electronic material will update automatically in the event of content changes or a new edition, and Gleim will ship you the new edition book* for only the cost of shipping. Please contact Gleim directly at 1-800-874-5346 to request a new addition if this guarantee applies to you.</p> <p>*New additions of the printed material are released each year in March.</p> <p>Continued Access will be provided on a per-part basis.</p> <p>Please note: Access to the NCSEA classroom instructor may be limited after the conclusion of the prescribed course schedule.</p>
<p style="text-align: center;">-Money Back Guarantee</p>	<p>If you take and do not pass the EA exam part(s) within 12 months of purchasing the Gleim EA Review System, you may qualify for limited amount of the refund of the cost of the Gleim materials . To qualify for this, you must:</p> <ul style="list-style-type: none"> • <u>Complete 90% of EA Gleim Online before sitting for the corresponding part(s) of the exam. This requirement can be satisfied by completing either 90% of each Gleim Online instructional element for all study units or by completing 90% of the Gleim Online study units in their entirety.</u> • Complete 90% of each question type. This includes multiple-choice and true/false questions. • Sit for the purchased part(s) within 12 months of your purchase date. If you have to retake any part(s), you must retake the part(s) you did not pass within three months. • Submit your grade report within 48 hours of receiving your grade. <p>Please note: Access to the NCSEA classroom instructor may be limited after the conclusion of the prescribed course schedule.</p>
<p style="text-align: center;">-Guarantee Procedure</p>	<p>Requests for implementation of one of the Gleim guarantees above must be made in writing to the instructor. Documentation required will include, but is not limited to:</p> <ul style="list-style-type: none"> • Test Center (Prometric) appointment confirmation. • Receipts for exam fee payments. • Proof of current registration.
<p><u>Cancellation/Refund Policy</u></p>	<p>A full refund can only be granted if written request is received <i>before</i> materials are shipped. Please note that on your registration form that you are to initial your choice of receiving your materials as soon as they are available or once the class forms. If you choose to receive your materials before the class forms you can receive a refund on the class portion but not for the Gleim materials which are yours to keep. The cost of the Gleim materials is at retail cost plus shipping.</p> <p>E-mail your refund request to Candace Cansler at administrator@ncseaonline.org.</p>



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<p><u>Contact Us</u></p>	<p>Additional questions should be directed to Candace Cansler at administrator@ncseaonline.org or call 828-464-8300. Address: P.O. Box 937, Conover, NC 28613</p>
<p><u>Forms</u></p>	<p>Go to www.NCSEAonline.org for the following forms or click below for the links: Link: NCSEA SEE Prep Registration form</p>
<p><u>FAQs</u></p>	<ol style="list-style-type: none"> 1. Why should I become an EA? Becoming an EA shows you are reaching to the highest level in our profession. "Enrolled Agent status is the highest credential the IRS awards..... Enrolled agents, like attorneys and certified public accountants (CPAs), are unrestricted as to which taxpayers they can represent, what types of tax matters they can handle, and which IRS offices they can represent clients before." (www.IRS.gov 'Enrolled Agent Information') Becoming an EA will help you better serve your clients and potential clients. 2. What is the difference between the SEE and the RTRP test that used to be offered? The RTRP (Registered Tax Return Preparer) test has currently been suspended due to the decision in the Loving vs. IRS court case. The RTRP test was a minimal competency open book test. The SEE (Special Enrollment Examination) is a 3 part intensive and extensive test. It is <i>not</i> an open book test. The 3 parts of the SEE cover Individual Income Tax, Ethics, Business, Estates, Trusts, and Representation. By passing the SEE, an individual demonstrates their in-depth knowledge of tax matters. 3. What if I don't pass the Special Enrollment Exam (SEE)? Gleim provides guarantees that you <i>will</i> pass all three parts of the SEE provided you do your part in studying and attending classes. 4. Tell me about the Gleim guarantee? Gleim offers continued access to their online materials until you pass. There are certain participation requirements in order to qualify for the guarantees, which are outlined in an earlier section. See "Guarantees" section. 5. Is the course difficult? Yes. <i>The course is very intensive.</i> For success, all students should have sufficient prior knowledge and/or experience in taxation (see FAQ # 7) and be prepared to put in sufficient time and effort before classes to get the most out of the course. 6. How much time should I plan to spend on study and preparation for each class? You should devote as much time each week as you need to review the study units to be discussed at the next class including online quizzes as well as IRS forms and publications. Most students find they <i>need</i> a minimum of <i>at least 5 to 7 hours</i> of preparation time <i>each week</i> before class to get the most out of each class to successfully pass each part of the SEE. 7. Your postcard said that it is strongly recommended that a person have at least an intermediate knowledge of individual & business taxation. What do you mean by



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FAQs, cont.

'intermediate' knowledge? And do I need to know how to prepare a business tax return to take the class? Having prepared business returns would certainly be advantageous but it is not a requirement for taking the class. We would define an intermediate knowledge of taxation as having at least a ***good working knowledge*** of:

BASIS, DEPRECIATION, CAPITAL GAINS & LOSSES, CASH METHOD VS. ACCRUAL METHOD, SCHEDULE C, AMT

- 8. Why are the classes taught in the order Part 1, 3, and 2?** Most students find Part 2 to be the most difficult part of the SEE. Taking it last allows you to successfully complete 2 of the 3 parts before focusing on the hardest part. It also allows you to take extra time, if needed, to prepare for Part 2 without falling behind on the other material.
- 9. Why should I take your class instead of taking other online prep classes?** All of our successful students agreed that attending the classes kept them focused and on a study schedule. They were less likely to procrastinate, get distracted or even give up. Interaction with a live teacher, whether online or in a physical classroom can provide clarification that may be absent in the self-study environment. Attending a class with live instruction gives you the opportunity to learn from your instructor and classmates with additional information, examples, and real-life experiences.
- 10. What if I have to miss a class? Can I make it up or is there another class I could attend?** You are more than welcome to attend another class at any of the locations where classes have formed. Online classes will have the opportunity to review the class missed since classes will be recorded.
- 11. When will I receive my Gleim material & online access?** The Gleim material is shipped and online access is made available to the student once the class is confirmed or if the student requests the Gleim program immediately. A class is generally confirmed when 5 or more students have registered for it. If you would like to receive your Gleim materials before the class is confirmed, please initial the appropriate line on your registration form. Once you receive your Gleim materials we cannot refund the money for Gleim but your cost for the Gleim materials is the standard retail cost plus shipping.