

## 2024 Online SEE Prep Class Schedule

Monday and Wednesday

5-8 pm

### Session 1: PART 1 – INDIVIDUALS

| <u>Date</u> | <u>Class #</u> | <u>Unit of Study</u> | <u>Topic</u>                                             |
|-------------|----------------|----------------------|----------------------------------------------------------|
| 4-Sep       | 1              | 0                    | Introductions                                            |
|             |                | 1                    | Filing Requirements                                      |
|             |                |                      |                                                          |
| 9-Sep       | 2              | 2                    | Gross Income I                                           |
|             |                | 3                    | Gross Income II: Interest Securities and Decedent        |
|             |                |                      |                                                          |
| 11-Sep      | 3              | 4                    | Business Deductions                                      |
|             |                | 5                    | Above-the-Line Deductions & Losses                       |
|             |                |                      |                                                          |
| 18-Sep      | 4              | 6                    | Itemized Deductions                                      |
|             |                | 7                    | Qualified Business Income Deduction, AMT and other Taxes |
|             |                |                      |                                                          |
| 23-Sep      | 5              | 8                    | Tax Credits and Payments                                 |
|             |                | 9                    | Property Transactions: Basis and Dispositions            |
|             |                |                      |                                                          |
| 25-Sep      | 6              | 10                   | Related Parties, Business Property and Installment Sales |
|             |                | 11                   | Non-recognition Property Transactions                    |
|             |                |                      |                                                          |
| 30-Sep      | 7              | 12                   | Individual Retirement Accounts                           |
|             |                | 13                   | Gift Tax                                                 |
|             |                |                      |                                                          |
| 2-Oct       | 8              | 14                   | Estate Tax                                               |

NOTE: Exam Prep & Testing - Oct 3rd - Oct 20th

### Session 2: PART 3 – REPRESENTATION, PRACTICES, AND PROCEDURES

| <u>Date</u> | <u>Class #</u> | <u>Unit of Study</u> | <u>Topic</u>                                   |
|-------------|----------------|----------------------|------------------------------------------------|
|             |                |                      |                                                |
| 21-Oct      | 1              | 1                    | Practice Before The IRS                        |
|             |                | 2                    | Tax Preparers and Penalties                    |
|             |                |                      |                                                |
| 23-Oct      | 2              | 3                    | Representation                                 |
|             |                | 4                    | Examination of Returns and the Appeals Process |
|             |                |                      |                                                |
| 28-Oct      | 3              | 5                    | The Collection Process                         |
|             |                | 6                    | Tax Authority                                  |
|             |                |                      |                                                |
| 30-Oct      | 4              | 7                    | Recordkeeping and Electronic Filing (1 hour)   |

NOTE: Exam Prep - Oct 31st - Nov 12th

### Session 3: PART 2 – BUSINESSES

| <u>Date</u> | <u>Class #</u> | <u>Unit of Study</u> | <u>Topic</u>                                   |
|-------------|----------------|----------------------|------------------------------------------------|
|             |                |                      |                                                |
| 13-Nov      | 1              | 1                    | Entity Types, Methods, and Periods             |
|             |                | 2                    | Income and Farms                               |
|             |                |                      |                                                |
| 18-Nov      | 2              | 3                    | Rental Property and Loss Limitations           |
|             |                | 4                    | Business Expenses                              |
|             |                |                      |                                                |
| 20-Nov      | 3              | 5                    | Other Deductions                               |
|             |                | 6                    | Basis and Property Transactions                |
|             |                |                      |                                                |
| 25-Nov      | 4              | 7                    | Depreciation                                   |
|             |                | 8                    | Credits, Losses, and Additional Taxes          |
|             |                |                      |                                                |
| 27-Nov      | 5              | 9                    | Contributions to a Partnership                 |
|             |                | 10                   | Partnership Operations                         |
|             |                |                      |                                                |
| 2-Dec       | 6              | 11                   | Disposition of a Partner's Interest            |
|             |                | 12                   | Corporations                                   |
|             |                |                      |                                                |
| 4-Dec       | 7              | 13                   | Corporate Formation                            |
|             |                | 14                   | Corporate Income, Losses and Deductions        |
|             |                |                      |                                                |
| 9-Dec       | 8              | 15                   | Corporate Distributions                        |
|             |                | 16                   | Corporate Liquidations & Redemptions           |
|             |                |                      |                                                |
| 11-Dec      | 9              | 17                   | S Corporations                                 |
|             |                | 18                   | Decedent, Estate, and Trust Income Tax Returns |
|             |                |                      |                                                |
| 16-Dec      | 10             | 19                   | Retirement Plans for Small Businesses          |
|             |                | 20                   | Exempt Organizations                           |

NOTE: Exam Prep & Testing - Dec 17th - Dec 31st