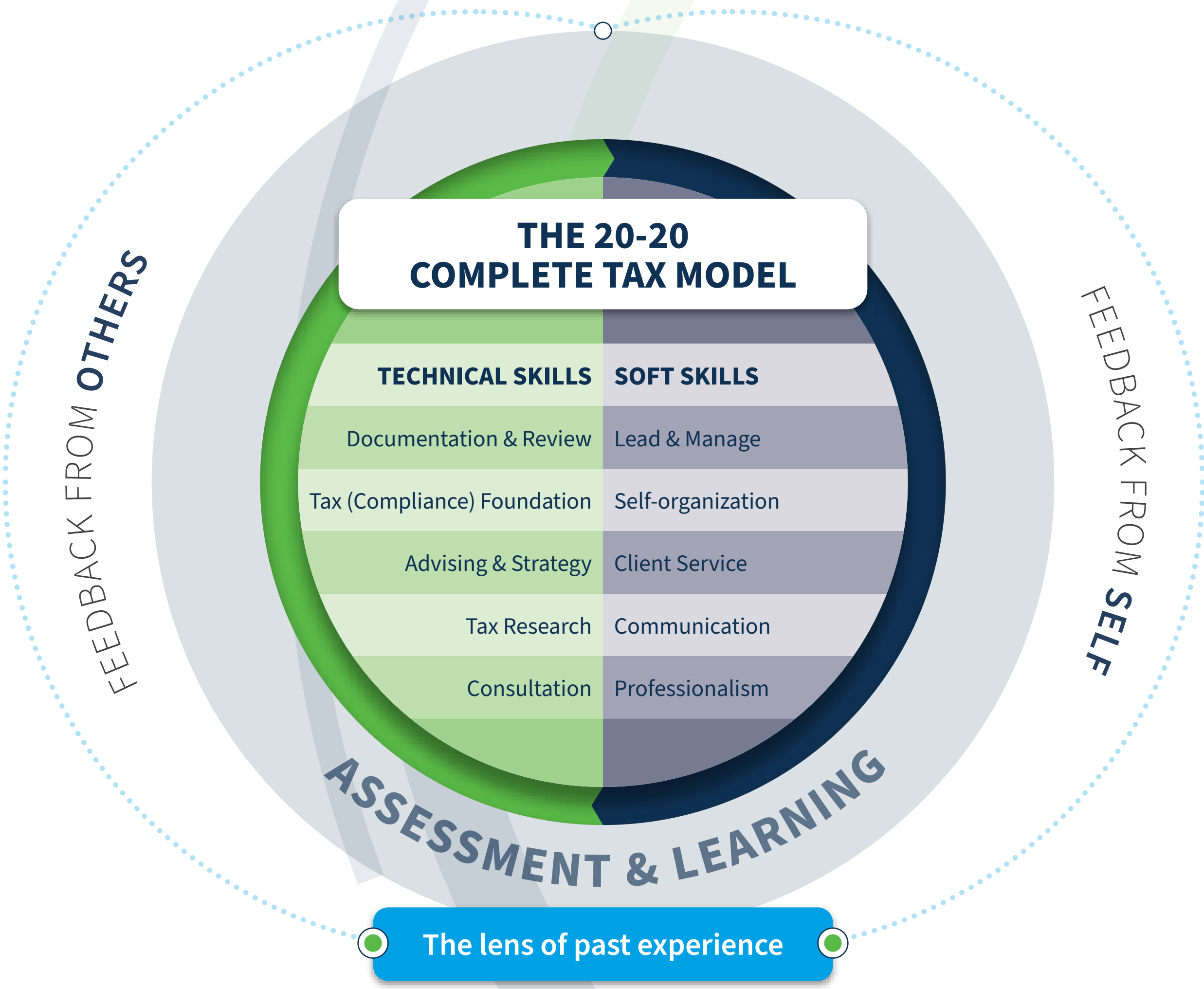
The 20-20 Complete Tax Model



20-20 Services provides a complete tax training curriculum to help develop your staff into well-rounded professionals who can take your firm to the next level. We have identified the key skill sets needed at various phases of a public accounting career and incorporated them into comprehensive training programs that offer both technical and soft-skills training. Our courses are tailored so that each module provides an opportunity to apply new skills right away. We use our experience in adult learning to design courses that share practical knowledge as well as engage and excite the participants. We encourage you to explore our unique offerings and ask us more about our training programs.

Level One

MODULE INFORMATION

Program Duration	**Variable**
Prerequisite	**None**
Level of Instruction	**Basic**
Delivery Method	**Group Internet** **Group Live** **Blended Learning**
CPE Credits Taxes – 23 Personal Development (PD) – 1	**24 Credits**
Advanced Preparation	**None**

LEARNING OBJECTIVES

- Identify the tax rules related to the common types of income, deductions, and credits found on the Form 1040.
- Discuss appropriate professional behavior, as well as various communication techniques, including the basics of oral and e-mail correspondence.
- Learn to prepare an individual tax return.
- Introduce business tax topics, such as Sch K, Sch M-1 and depreciation.
- Learn to prepare an S Corporation Tax Return or a C Corporation Tax Return.

LEVEL ONE SUMMARY

Level One is designed for individuals who are beginning their career. It provides practical training for each of the important areas a new tax preparer would encounter when preparing tax returns. The program also provides personal skills training related to professionalism and etiquette. This interactive program includes the preparation of an individual tax return, as well as an S Corporation tax return, using real life source documents.

MODULE SUMMARY

Individual Tax Return .... **12 Credits**
- Filing Status & Dependency
- Compensation
- Interest & Dividends
- Capital Gains & Losses
- Self-Employment
- Residential Rental Properties
- Adjustments to Income
- Standard & Itemized Deductions
- Individual Tax Credits
- Documentation

Prepare an Individual Tax Return .... **3 Credits**

Foundational Skills .... **1 Credit**
- Professionalism

Business Tax Topics .... **5 Credits**
- Introduction to Business Taxes
- Schedules K & M-1
- Depreciation

Prepare an S Corporation Tax Return .... **3 Credits**

Prepare a C Corporation Tax Return .... **(Optional Upon Request)**

The course material utilizes case studies pulled from current, real life tax scenarios.

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Level Two

LEVEL TWO SUMMARY

Level Two is designed for staff tax preparers. The program covers both individual and business tax subjects. It focuses on delivering a core understanding of the common tax topics that tax preparers encounter every day. The business tax section of the program covers the fundamental tax laws for each type of business entity, as well as other topics, such as book to tax reconciliation, basis, and depreciation. The program also provides skills training related to communication, obtaining and organizing information, and time management. This program includes extension case study exercises and tax court case review.

MODULE SUMMARY

Business Tax Topics .... **16 Credits**

- C Corporations
- S Corporations
- Introduction to LLCs and Partnerships
- Schedules K & M-1
- Basis Fundamentals – S Corporation
- Depreciation
- State Apportionments

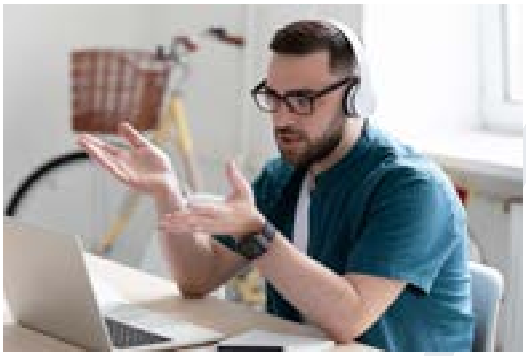
Individual Tax Topics .... **6 Credits**

- Adjustments to Income
- Selected Sch C & Rental Property Topics
- Alternative Minimum Taxes

Foundational Skills .... **2 Credits**

- Communication – Business Writing
- Self-Management & Organization

The course material utilizes case studies pulled from current, real life tax scenarios.



MODULE INFORMATION

Program Duration	**Variable**
Prerequisite	**1+ Years Professional Experience**
Level of Instruction	**Intermediate**
Delivery Method	**Group Internet** **Group Live** **Blended Learning**
CPE Credits Taxes – 22 Communications & Marketing – 1 Personal Development (PD) – 1	**24 Credits**
Advanced Preparation	**None**

LEARNING OBJECTIVES

- Identify the fundamental tax laws governing C Corporations, S Corporations, Limited Liability Companies, and Partnerships.
- Calculate permanent differences, timing differences, taxable income, separately stated items, and ordinary income.
- Review the tax principles of other business topics such as basis, depreciation, and state apportionments.
- Explain the tax treatment of selected individual income tax topics.
- Explore selected tax principles for rental property and self-employment income.
- Compute alternative minimum tax adjustments and preferences.
- Improve communication, business writing, and organizational skills.

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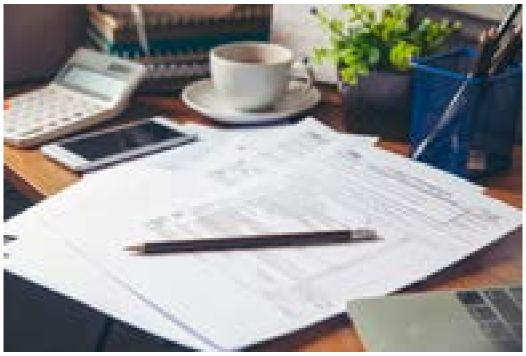
Level Three



MODULE INFORMATION

Program Duration	**Variable**
Prerequisite	**3+ Years Professional Experience**
Level of Instruction	**Intermediate**
Delivery Method	**Group Internet** **Group Live** **Blended Learning**
CPE Credits Taxes – 21 Communications & Marketing – 1 Personal Development (PD) – 2	**24 Credits**
Advanced Preparation	**None**

LEARNING OBJECTIVES

- Discuss the advantages and disadvantages of the various types of business entities in order to advise on business creation.
- Review the principles of selected core business income tax topics.
- Explain the tax treatment of selected individual income tax topics.
- Identify the basics of estate/trust taxation as well as gift tax law.
- Improve on tax return review techniques and learn to provide effective and constructive feedback.
- Manage information, clients, and projects more efficiently.

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LEVEL THREE SUMMARY

Level Three is designed for individuals that are beginning the transition from tax preparer to tax reviewer and advisor. The program covers individual and business tax themes, as well as an introduction to estate and trust tax law. This course is designed to challenge the participants core tax knowledge needed to become a tax reviewer. The program also provides skills training designed for those juggling the role of preparer and reviewer.

MODULE SUMMARY

Business Tax Topics .... **14 Credits**

- Advising on Business Creation
- Built in Gains
- Basis
- Deferred Taxes
- Passive Activities & At Risk Rules
- Section 461 All Events Test

Individual Tax Topics .... **4 Credits**

- Retirement Contributions & Distributions
- Equity Based Compensation

Estates, Trusts, & Gift Taxes .... **2 Credits**

- Intro to Estates, Trusts, & Gifts Taxes

Foundational Skills .... **4 Credits**

- Reviewing Tax Returns
- Providing Feedback
- Project Planning
- Time Management

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Level Four

MODULE INFORMATION

Program Duration	**Variable**
Prerequisite	**4+ Years Professional Experience**
Level of Instruction	**Intermediate**
Delivery Method	**Group Internet** **Group Live** **Blended Learning**
CPE Credits Taxes – 21 Personal Development (PD) – 3	**24 Credits**
Advanced Preparation	**None**

LEARNING OBJECTIVES

- Explore the core limited liability company and partnership tax issues.
- Explore other advanced business income tax topics such as state tax nexus, various tax elections, and business sales and exchanges.
- Review laws governing foreign taxes, cancellation of debt.
- Brainstorm tax planning strategies.
- Discuss estate and trust taxation, and multi-generational gifting strategies.
- Apply professional skills of supervision, networking, and work life balance.

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LEVEL FOUR SUMMARY

Level Four is designed to advance the skills and knowledge of participants. This program covers individual and business topics, such as foreign taxes, and state nexus. Significant portions of the course focus on LLC and Partnership taxes, business sales and exchanges, as well as estate, gift, and trust tax law. The program also provides professional skills training focused on managing, supervising, training, and delegating.

MODULE SUMMARY

Business Tax Topics .... **11 Credits**

- LLC and Partnership Tax Issues
  - Basis and At-Risk
  - Capital Accounts
  - Partner Distributions
  - Partner Contributions
- Various Tax Elections
- State Tax Nexus
- Equity vs Asset Sales & Exchanges

Individual Tax Topics .... **6 Credits**

- Foreign Taxes
- Tax Planning
- Cancellation of Debt

Estates & Trusts .... **4 Credits**

- Estate Tax Law
- Types of Trusts
- Gift Taxes

Foundational Skills .... **3 Credits**

- Supervising, Training, and Delegating
- Work Life Balance
- Meeting People & Networking

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20·20 TAX TRAINING

New Manager Program

MODULE INFORMATION

Program Duration	**Variable**
Prerequisite	**4+ Years Professional Experience**
Level of Instruction	**Intermediate**
Delivery Method	**Group Internet** **Group Live**
CPE Credits Communication – 2 Personal Development (PD) – 14	**16 Credits**
Advanced Preparation	**None**

LEARNING OBJECTIVES

- Describe and apply multiple strategies and techniques for improving management and leadership.
- Select and apply strategies to motivate team members.
- Increase effectiveness of interactions with clients and co-workers through consideration of conflict management and supervisory approaches.
- Describe strategies to plan and coordinate multiple overlapping projects and improve project efficiency and effectiveness.
- Prioritize task completion based on importance as well as urgency.
- Provide reinforcing, developing, or constructive feedback to team members using a proven feedback model.
- Describe strategic activities to grow a professional network, including key people within your firm, and existing and potential clients.

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NEW MANAGER SUMMARY

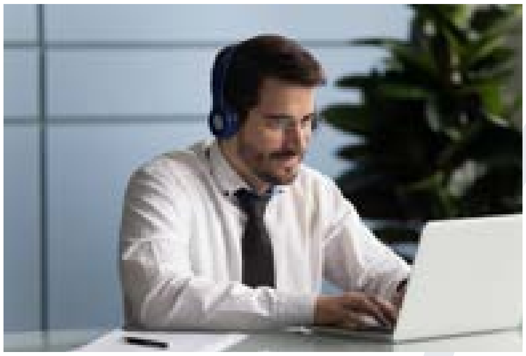
This course is designed to begin the development of management level skills. The ideal candidate to take this program is an experienced senior tax accountant.

This 16 CPE credit hour program is entirely devoted to the skills essential to becoming a supervisor or new manager and effective future leader in a public accounting firm. Participants will have an opportunity to practice vital leadership, communication and organization strategies.

MODULE SUMMARY

- Leadership & Management
- Supervising and Motivating
- Provide Written and Verbal Feedback
- Conflict Management
- Creative Problem Solving
- Project Management
- Time Management
- Business Development & Networking

20·20 TAX TRAINING



MODULE INFORMATION

Program Duration	**Variable**
Prerequisite	**2-5 Years Professional Experience**
Level of Instruction	**Intermediate**
Delivery Method	**Group Internet** **Group Live**
CPE Credits Taxes – 16	**16 Credits**
Advanced Preparation	**None**

LEARNING OBJECTIVES

- Build a foundation of knowledge by discussing the core Limited Liability and Partnership tax issues.
- Explore advanced tax concepts that are encountered when preparing Limited Liability and Partnership tax returns.

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BOOTCAMP: LLCs and Partnerships

This program is designed to immerse the participants in the many details of LLC and Partnership tax law. The material covers the range from big picture concepts to detailed specific nuances. The interactive approach includes lecture, and group activities, as well as comprehensive case studies.

THE TOPICS INCLUDE:

- Introduction to LLCs and Partnerships
- Basis and At-Risk
- Passive Activities & At Risk Rules
- Partner Distributions
- Partner Contributions
- Capital Accounts
- Payments to Partners
- Special Allocations and Substantial Economic Effect
- Sale of Partnership Interest
- IRC 754 Election Adjustment
- Comprehensive Case Studies

The course material utilizes case studies pulled from current, real life tax scenarios.

BOOTCAMP:
Estates, Gifts and Trusts

MODULE INFORMATION

Program Duration	**Variable**
Prerequisite	**4+ Years Professional Experience**
Level of Instruction	**Intermediate**
Delivery Method	**Group Internet** **Group Live**
CPE Credits Taxes – 16	**16 Credits**
Advanced Preparation	**None**

LEARNING OBJECTIVES

- Build an understanding of the steps and requirements when a client dies.
- Develop a foundation for the planning and information flow of asset transfers.
- Explore the use of trusts in the Estate and Probate planning arena and the income taxation issues that arise within.
- Review the tax principles of generation skipping transfers.
- Introduce the complex nature and intricate uses of grantor trusts.
- Explore the advanced tax issues encountered in asset transfers during life and at death.

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This program is designed to provide the participants with an in-depth understanding of the multiple levels of taxation encountered in the area of Estates, Gifts & Trusts. The material covers a range of topics from basic planning to detailed requirements of the asset transfer process.

The interactive approach includes lecture and group activities, as well as comprehensive case studies.

THE TOPICS INCLUDE:

- Death of a Taxpayer
- Estate Taxes
- Gift Taxes
- Generation Skipping Transfer Tax
- Fiduciary Taxes
- Trust Agreements
- Types of Trusts
- Special Trusts
- Grantor Trusts
- Planning
- Comprehensive Case Studies

The course material utilizes case studies pulled from current, real life tax scenarios.

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Experienced Manager Program

EXPERIENCED MANAGER PROGRAM (EMP) SUMMARY

The EMP is designed for individuals who have 2+ years of experience in the manager role in client service. This 2.5 day program will explore the skills necessary for seasoned managers to develop into future leaders of the organization. The EMP provides a deep dive on the topics relating to leading teams, crucial conversations, business development, and a heavy emphasis on business presentation skills. Participants will have an opportunity to explore and build upon their strengths, and to identify strategies to work through challenges.

MODULE SUMMARY

Introduction, Goal Setting and Review......................................(PD 1.5)

- Identify challenges facing experienced managers
- List goals for implementing strategies discussed in the program
- Review concepts discussed in the program and set action plans

Successful Communication.. (COM 3.5)

- Analyze three components of successful communication; intentional communication, active listening skills and the role of non-verbal communication
- Analyze differences between electronic and in-person communications and how to become more effective at both
- Practice opportunities to implement the components of successful communication

Team Development and Feedback ....(PD 3)

- Analyze internal and external motivational factors and explore the impact of a team leader on the motivation of individual team members
- Describe best practices to conduct effective development conversations
- Examine strategies to better develop engagement team members
- List elements of the feedback model
- Review concept of feed-forward

Building an Intentional Network ....(PD 2)

- Delve into steps to take to begin conversations that lead to winning new business
- Explore network building strategies with key people at your firm and external contacts

Managing Energy & Stress ....(PD 2)

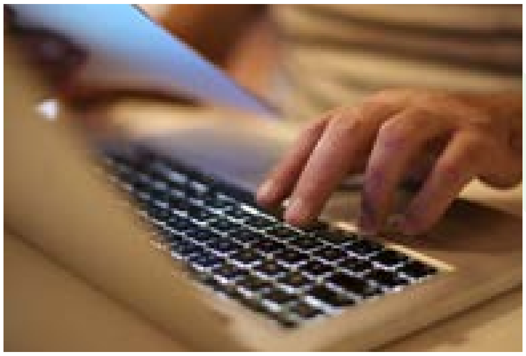
- Identifying impacts on your own energy as well as energy of your team members
- Brainstorm strategies for managing mindset, energy and activities to improve performance and satisfaction
- Support team members through stressful times

Business Presentation Skills... (COM 6)

- List essential skills for exceptional virtual presenters
- Identify best-practices for setting up your virtual presentation studio
- List common tools for creating engagement and collaboration in your virtual presentations
- Practice delivering business presentations in a variety of settings

Building Trust ....(PD 2)

- List dimensions of diversity in self and others
- Define concpets related to diversity and inclusion as relevant to the workplace
- Review strategies to build trust within your teams



MODULE INFORMATION

Prerequisite	**1+ Yrs. Management Experience**
Level of Instruction	**Intermediate**
Delivery Method	**Group Internet** **Group Live**
CPE Credits Communication & Marketing (COM) – 9.5 Personal Development (PD) – 10.5	**20 Credits**

Advanced Preparation
Bring a presentation for delivery during the program

LEARNING OBJECTIVES

- Describe strategic activities to grow a professional network, including key people within your firm, and existingand potential clients.
- List and apply best practices for making successful presentations in a business setting.
- Analyze and practice best approaches to tackle difficult conversations with clients and team members.
- Demonstrate leadership skills by identifying and recognizing biases, building trust within your team, listing strategies to motivate the individuals on your engagement teams, and prioritizing the professional development of staff.

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