

# T1 Professional Tax Preparation – Intermediate



Only from

**Knowledge Bureau®**  
Excellence in Financial Education

## OF SPECIAL INTEREST TO:

- Returning seasonal tax preparers
- Tax professionals for staff training
- Accountants and bookkeepers
- Financial advisory firms

- Refresh tax preparation skills after the off-season
- Broaden tax preparation expertise in more complex scenarios
- 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](http://www.knowledgebureau.com)
  2. Scan and email the completed registration form to our Registrar at [registrar@knowledgebureau.com](mailto: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**

## TI PROFESSIONAL TAX PREPARATION – INTERMEDIATE

Keeping up-to-date on what's new in tax and refreshing your skills after the off-season is an annual requirement for professional tax preparers. This course is especially designed for returning seasonal tax preparers to provide a thorough personal tax update and practical applications using true-to-life scenarios. Perfect for team training and an excellent opportunity for those working in financial services to embellish and broaden their knowledge.

### CONTENT DESCRIPTION & KEY CONCEPTS

The course will train your staff on the latest tax changes for the upcoming tax year as well as updating their skills to an intermediate level. Professional tax preparation and research software (student version) is included as one of the course components. Taken in conjunction with the January Personal Tax Bootcamp or taken on its own online, this course ensures that you are prepared for the coming tax preparation and planning season.

### CERTIFIED SKILLSETS YOU WILL LEARN

The student will be exposed to a broad range of personal income tax topics beyond the novice level by preparing returns for true-to-life case studies. The student will be able to competently prepare intermediate level personal tax returns including returns for part-year residents, pension income splitting, foreign and domestic investments, capital dispositions at death, and straightforward business returns.

This course includes a comprehensive reference manual, the Knowledge Journal, which covers what's new with Finance Canada and the CRA as well as detailed description of what's new and what's important to know for each line on the T1 tax return. For deeper reading and understanding of the concepts and links to the most recent tax and budget changes, students will have access to EverGreen Explanatory Notes.

### 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.

### TABLE OF CONTENTS

- 1 What's New at Finance and CRA?
- 2 Focus on Employees and Families
- 3 Optimizing Schedule 1 Tax Credits
- 4 Focus on Senior Employees
- 5 Investments and Income From Property
- 6 Capital Dispositions
- 7 Small Business Returns

Study Time: 30 hours

### STEP 1: STUDENT IDENTIFICATION

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

### STEP 2: TUITION FEES

- |   |                        |
|---|------------------------|
| <input type="checkbox"/> Single Course Tuition Fee        | <b>\$795</b>           |
| <input type="checkbox"/> Electronic Textbooks             | <b>No Extra Charge</b> |
| <input type="checkbox"/> Hard Copy Textbooks and Delivery | <b>\$ 75</b>           |

**OR**

- ☐ Choose Certified Skills Diploma or Designation Program and save up to 31% online at [www.knowledgebureau.com](http://www.knowledgebureau.com)

See [www.knowledgebureau.com](http://www.knowledgebureau.com) for tuition funding options and details on qualifying for tax credits.

### STEP 3: PAYMENT PLANS

- ☐ **Full Payment Plan** (Branch Office study groups save 10%):  
 Number of Courses: \_\_\_\_\_ A x fee from Step 2 = B below
- |                                     |            |
|-------------------------------------|------------|
| <b>TOTAL TUITION FEES:</b>          | \$ _____ B |
| Hard Copy and Delivery (see step 2) | \$ _____ C |
| <b>SUBTOTAL (B + C)</b>             | \$ _____ D |
| GST/HST (885004713RT001)            | \$ _____ E |
| <b>TOTAL DUE (D + E)</b>            | \$ _____ 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](http://www.knowledgebureau.com)  
**Email:** [registrar@knowledgebureau.com](mailto: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.