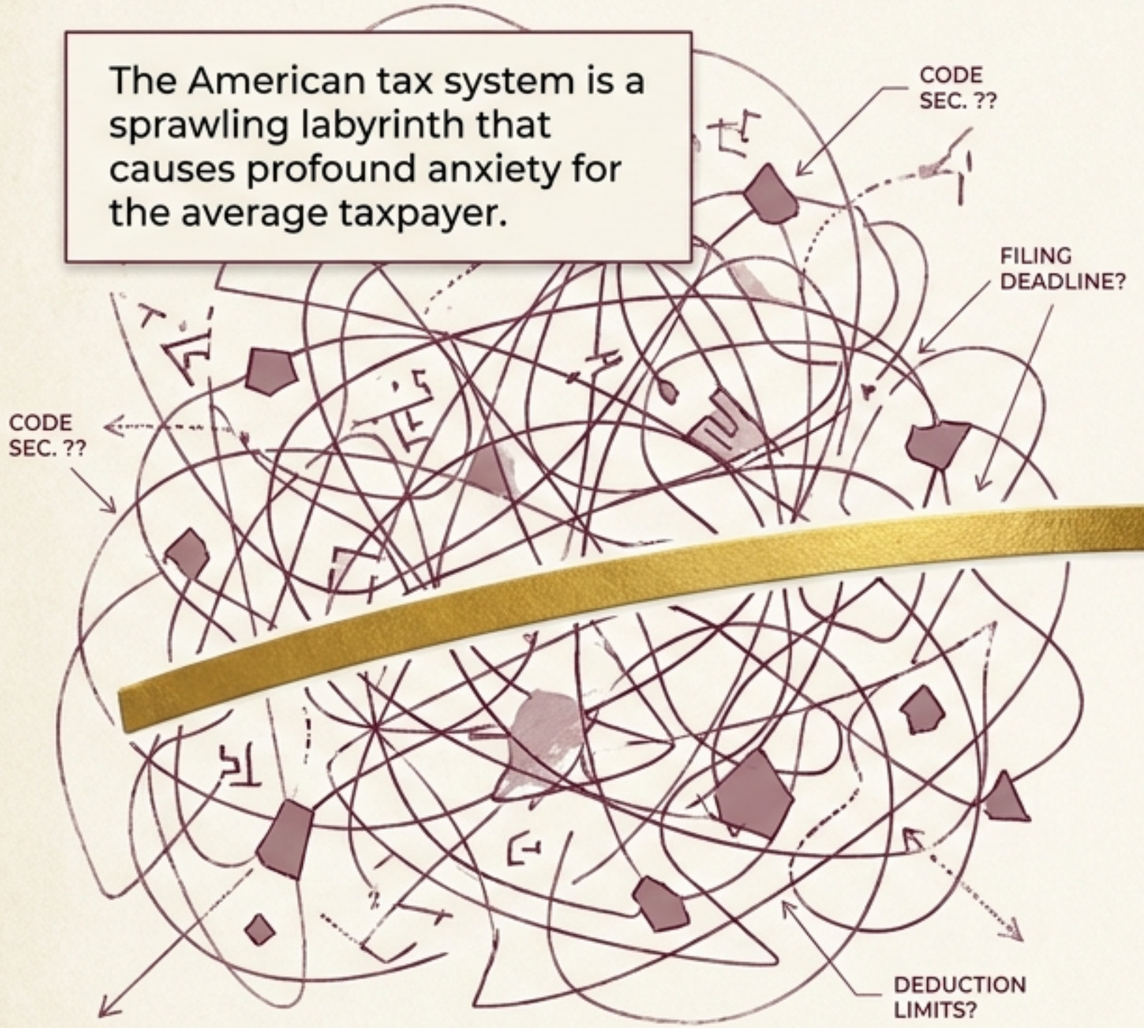


Welcome to Boot Camp

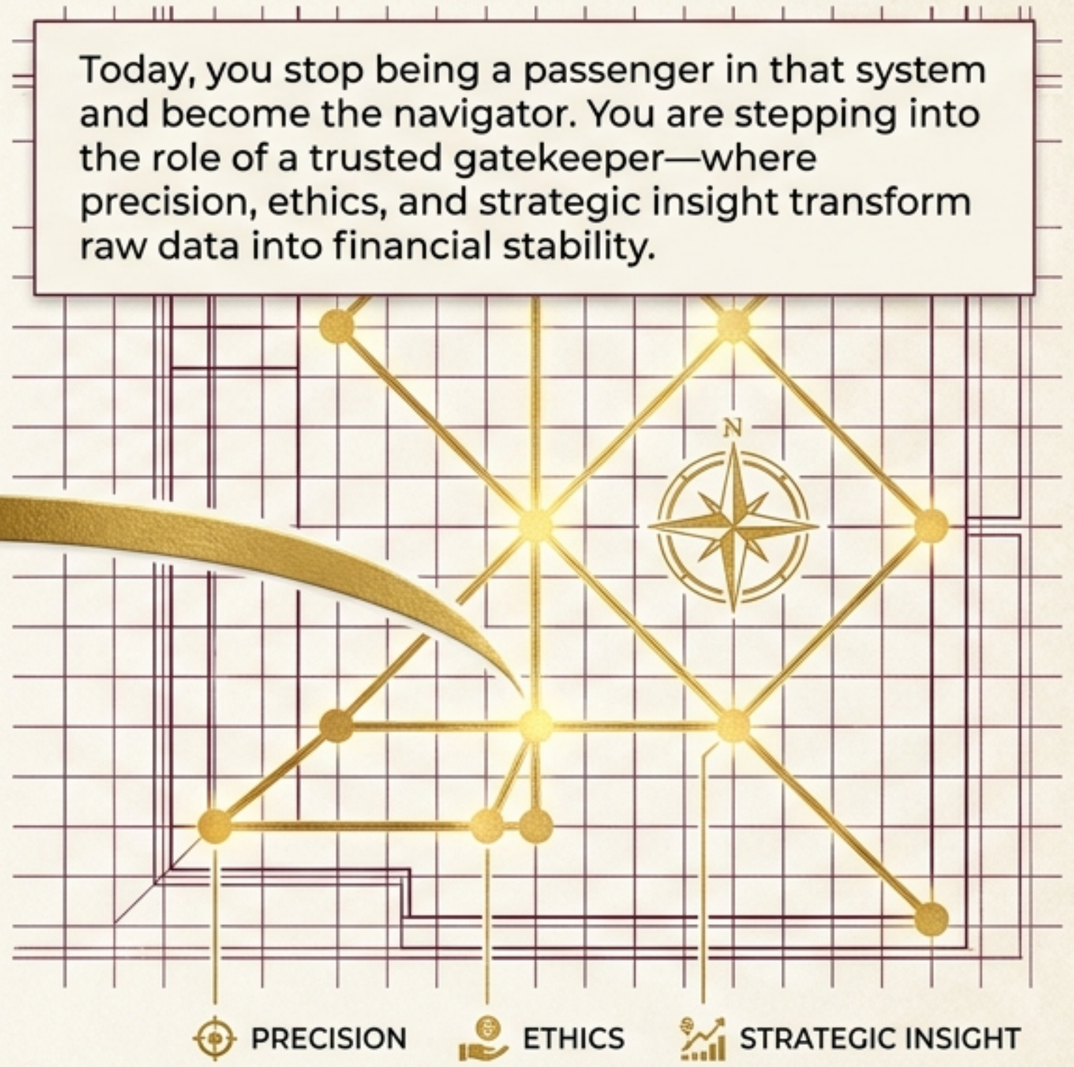
Tax Pro 360 | The **Original Tax Boot Camp** by Dr. Geno Bradley, Liz Biz Academy

The Transition: From Taxpayer to Trusted Advisor

The American tax system is a sprawling labyrinth that causes profound anxiety for the average taxpayer.



Today, you stop being a passenger in that system and become the navigator. You are stepping into the role of a trusted gatekeeper—where precision, ethics, and strategic insight transform raw data into financial stability.



A Bridge Spanning Two Horizons



Building the Foundation

For the Newcomer

- Navigating entry requirements and legal credentials.
- Mastering the foundational Form 1040 and its core schedules.
- Translating abstract tax law into daily office practice.

Scaling the Architecture

For the Veteran

- Formalizing disjointed knowledge to eliminate audit triggers.
- Streamlining internal processes and implementing WISP security.
- Transitioning from a solo seasonal preparer to a year-round business owner.

The Dual Engine of Mastery

Theory turns into active execution







The Tax Pro 360 Handbook

GBC-Worldwide Portal

The Online Arsenal at GBC-Worldwide



Hands-On Software Training

Direct experience navigating professional tax software used across the industry.



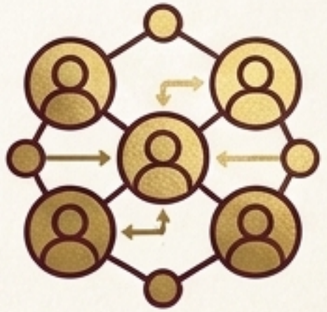
Interactive Practice Returns

Simulated environments to test your understanding against real-world client scenarios.



On-Demand Video Modules

Step-by-step video walkthroughs deconstructing complex forms, schedules, and compliance protocols.



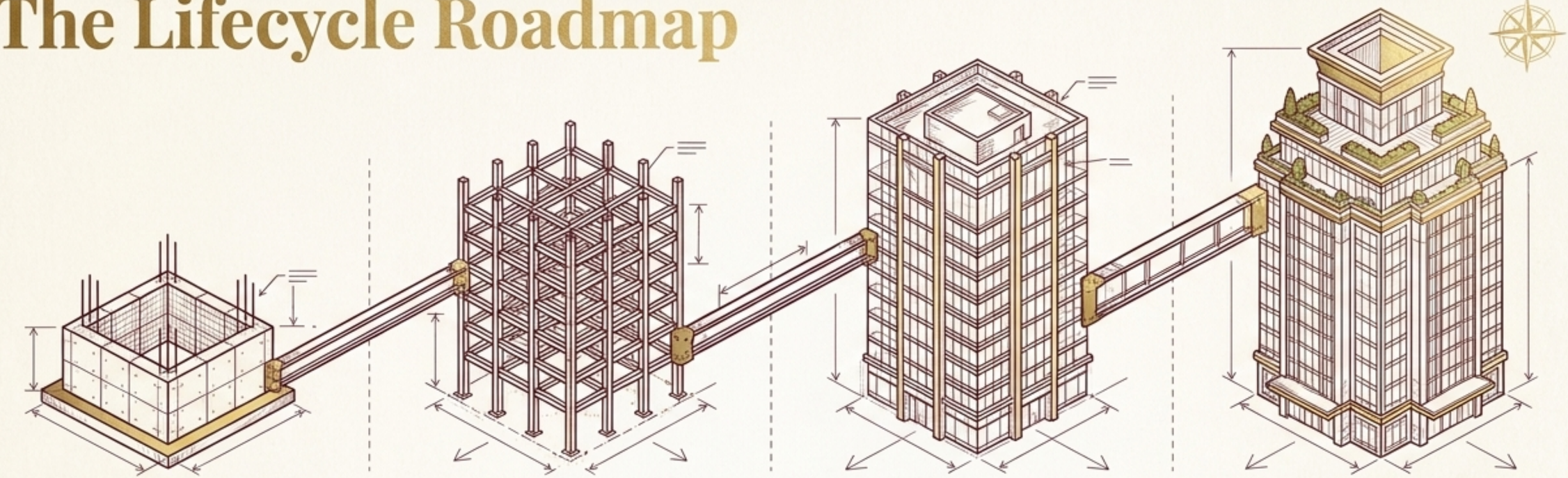
Community Mentorship

Direct guidance from Dr. Geno Bradley, the Liz Biz Academy team, and a network of experienced practitioners.

The Mindset Shift: Elevating Your Standard

The Data Entry Clerk	The Trusted Advisor
Takes client numbers at face value.	**Exercises rigorous due diligence and verifies source documents.**
Focuses solely on the highest possible refund.	**Focuses on total legal compliance and minimizing audit risk.**
Operates only during the seasonal tax rush.	**Provides strategic, year-round value to scale a profitable firm.**
Bends the rules to appease the client.	**Acts as an ethical gatekeeper protecting both the client and the firm.**

The Lifecycle Roadmap



Phase 1: The Foundation

Legal credentials (PTIN/EFIN) and strict data security protocols.

Phase 2: The Framework

Deconstructing the Form 1040, filing statuses, and the rigid rules of dependency.

Phase 3: Expanding Architecture

Mastering schedules, adjustments, credits, and advanced business entities (1065, 1120).

Phase 4: The Penthouse

Marketing, scaling, client acquisition, and establishing year-round advisory services.

Phase 1: Securing Your License to Operate



The PTIN (Individual)

Preparer Tax Identification Number

- Your personal, individual license to practice.
- Mandatory for anyone compensated for preparing federal returns.
- Your professional signature that links your work to your identity.



The EFIN (Firm)

Electronic Filing Identification Number

- The digital gateway for your business.
- Requires fingerprinting, background, and suitability checks.
- Authorizes your firm to securely transmit tax data directly to the IRS servers.

Phase 1: The Twin Fortresses of Your Practice

Digital Security (The WISP)

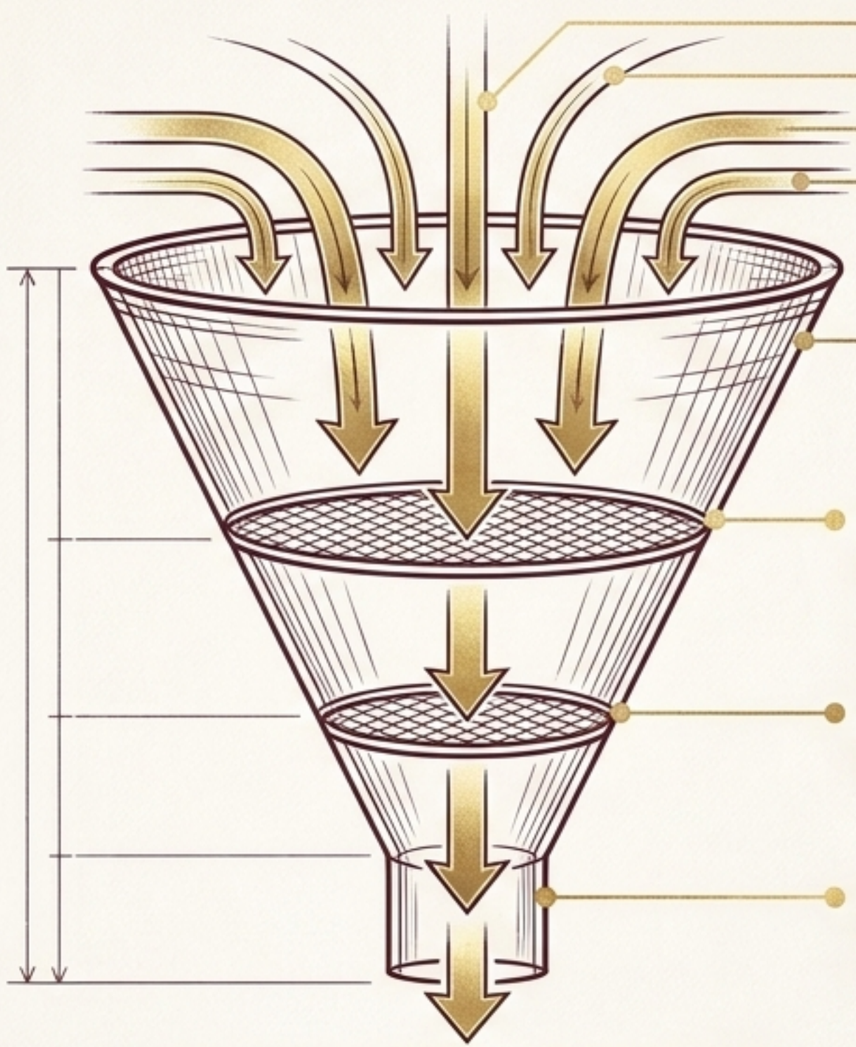
- Gramm-Leach-Bliley Act (GLBA) mandate to protect client data.
- Implementing Administrative, Physical, and Technical safeguards.
- Multi-factor authentication, encrypted portals, and incident response.



Ethical Security (Circular 230)

- The Treasury Department's binding rules of professional professional conduct.
- Exercising rigorous due diligence as to accuracy.
- Managing conflicts of interest and avoiding Office of Professional Responsibility (OPR) sanctions.

Phase 2: The Framework of the 1040



- W-2s
- 1099s
- Schedule C Business Income
- Schedule D Gains
- Raw Data Intake
- Filter 1: Adjustments to Income (Above-the-line deductions yielding AGI)
- Filter 2: The Standard vs. Itemized (Schedule A) Deduction decision
- The Output: Application of Tax Rates minus Tax Credits

Final Tax Liability or Refund

The Gatekeeper of Dependency

The Dependent

Qualifying Child (QC)

- Meets Relationship and Age tests (Under 19 or 24 if student).
- Meets Residency test (>6 months).
- Child did not provide >50% of own support.



Unlocks: Child Tax Credit & Earned Income Tax Credit (EITC).

Qualifying Relative (QR)

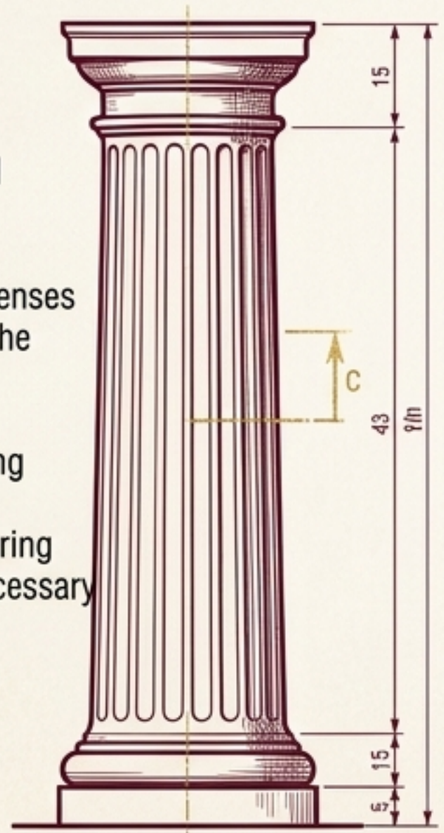
- Must not be a QC of anyone else.
- Meets Gross Income limit (<$5,050).
- Taxpayer provides >50% Total Support.



Unlocks: Credit for Other Dependents ($500).

Phase 3: Expanding the Architecture

The Sole Proprietor (Schedule C)

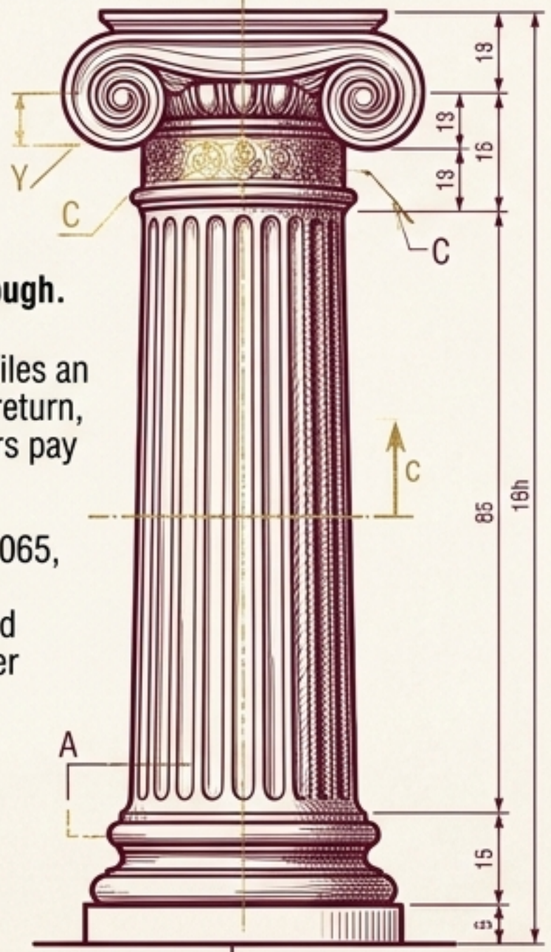


The Disregarded Entity.

Income and expenses flow directly to the owner's 1040.

Focus: Separating personal from business; mastering ordinary and necessary expenses.

Partnerships (Form 1065)

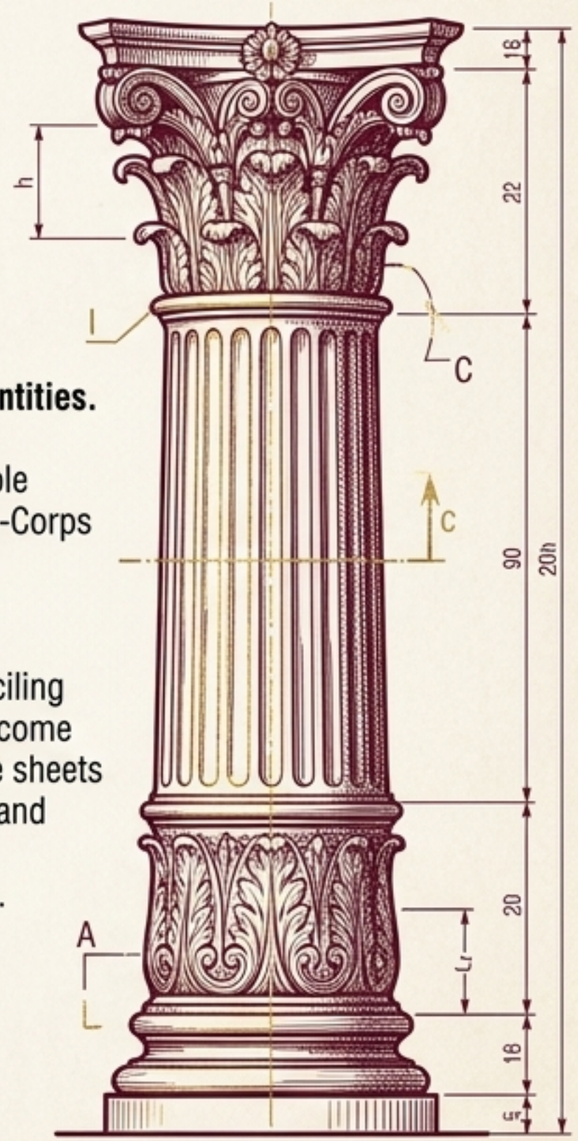


The Pass-Through.

The business files an informational return, but the partners pay the tax.

Focus: Form 1065, Schedule K-1 allocations, and tracking partner basis.

Corporations (Form 1120 / 1120-S)



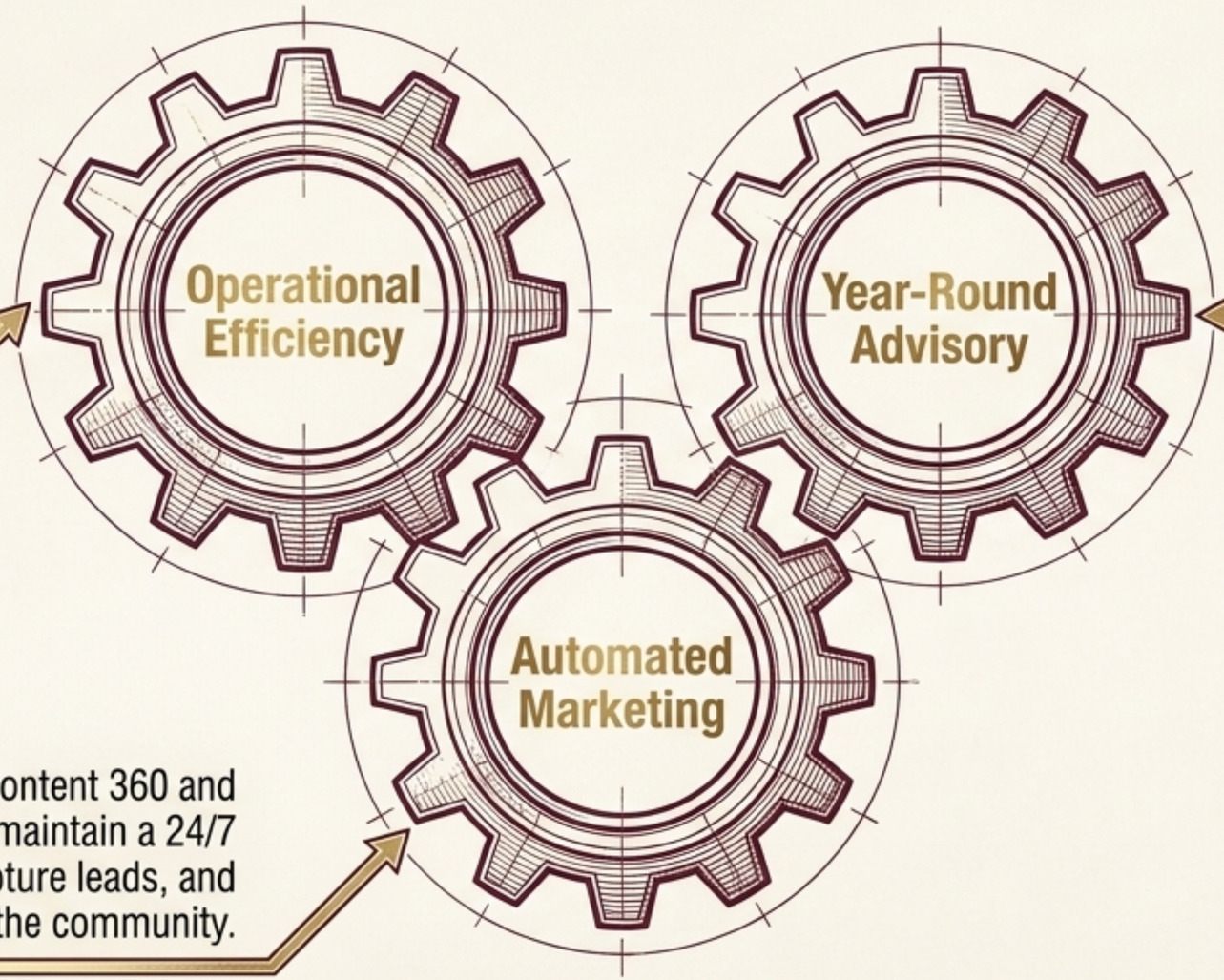
The Distinct Entities.

C-Corps (double taxation) vs. S-Corps (pass-through election).

Focus: Reconciling book-to-tax income (M-1), balance sheets (Schedule L), and reasonable compensation.

Phase 4: Scaling the Practice (The Penthouse)

Utilizing the Tax Pro 360 Dashboard to centralize intake, track returns, and maintain pristine compliance records.



Moving beyond the seasonal rush by offering tiered pricing structures, tax planning, and strategic business consulting.

Leveraging Tax Pro Content 360 and Go High Level CRM to maintain a 24/7 digital storefront, capture leads, and educate the community.

“Your signature is your professional guarantee. You are not a data entry clerk; you are an investigator and a gatekeeper.”

- **Reasonable Inquiry:** Never accept illogical claims at face value.
- **Impeccable Documentation:** Retain the proof, the intake forms, and the chronological notes.
- **Professional Courage:** Protect your client and your license by refusing to compromise on the law.

Welcome to the Profession. Let's Begin.



To the aspiring tax professionals who serve their communities with integrity, diligence, and a commitment to excellence:
Your foundation is being built now.

Your Launch Protocol:

1. Log in to your portal at GBC-Worldwide.com.
2. Schedule your 1-on-1 strategic consultation at GenoBradley.com.
3. Access the software, execute your pilot practice returns, and start building your legacy.