



TAX SCHOOL SYLLABUS

60-HOUR CTEC QUALIFYNG EDUCATION

Session 1: (Virtual) September 30, 2025 – November 24th, 2025, Monday & Wednesday 10am-12:30pm

Session 2: (In-Person) September 30, 2025 – November 24th, 2025, Monday & Wednesday 6pm-8:30pm

Course Objective

This course provides entry-level tax education to meet the CTEC 60-Hour requirements to become a California Tax Preparer which consists of Federal Income Tax instruction, California tax law instructions, and Ethics.

Prerequisites

No experience required; This course is designed for individuals who have little to no experience preparing taxes.

1. Must create CTEC account and get livescan. Livescan form provided by CTEC after account is created.
2. Must create student portal account: www.prendo365.com/learn (select Karyn Chapman as your instructor when you create your account).

Course Description

This course is designed to give you the knowledge needed to fulfill IRS and CTEC requirements and give you a basic understanding of tax law and practice to ensure you serve your clients with the highest quality. The study material has been organized to give line-by-line instructions for Form 1040, and how to complete the California return.

In this course, you will a) Develop an in-depth understanding of individual basic tax law; b) Explore the application and practice of tax preparation; c) Strengthen critical thinking in the context of tax law and due diligence.

This course focus on Small Business Taxes for Sole Proprietors; Students interested in learning how to prepare Corporation Tax Returns should enroll in the Business Entities Workshop.



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Course Material

- You will need notepaper or an electronic notebook, pencils, and a calculator. Optional: 1.5-2" binder for all your class materials and practice returns.
- Most coursework is completed online through your predo365 student account; this course requires Internet access. Computer use at the office is available if needed.
- This course includes the 2025 California 60 Hour Qualifying Education E-BOOK. Physical Textbooks can be purchased for \$169 if desired and can take up to 7 business days to arrive.

Grading Criteria

Most assignments, exams, and review questions are completed online through the student portal (www.Prendo365.com). Must pass each topic with a minimum score of 70%.

Homework: Each Chapter consists of reading an e-book or textbook, watching video, completing practice tax return, and completing the chapter quizzes.

Final Exam: The 3-Part Final consists of completing a Final Practice Tax Return and Completing Test on Federal and California State Tax Law. The Test may include a combination of multiple-choice, fill-ins, true/false, and is open book.

Certificates of Completion: Students will be issued certificates of Completion upon achieving a final grade of 70% or better on all assignments and exams, acknowledge CTEC policy, and upon completing the Course Survey. Students who don't complete the course during the course dates can finish as self-study. Instructor availability for tutoring or assistance is available during the duration of the course and up to **2 weeks** after the course ends.

Attendance: Students' success in this course depends on attending each class, participating, completing all assignments, and reading/studying. Each session will be recorded and made available to all students after each class. Students have the option of attending in person, or online via link. Link will be emailed with PowerPoint each week of class. Anyone unable to attend in person will be responsible for printed materials to complete assignments. Let the instructor know if you are unable to attend in person. **Students who miss more than three (3) classes will be dropped from the course.**

Course Fees & Refund Policy

Registration Fees are \$789 if registered during the Early-Bird special or \$975 after. **This course requires a minimum deposit of \$289.** Payment arrangements for the remaining balance are available, and all fees must be paid in full before the last 2 weeks of the class. Tax Practice Workshop is included for students who are qualified for the Super-Saver Special and must register for that course separately.

All sales are final. **Fees are Non-transferable and Non-refundable after the 1st week of class.** Refunds do not include the initial required deposit or cost for textbooks.



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Course Topics/Schedule

The following topics will be covered in this course:

Date	Module	Topic
Intro, Dependents, Filing Status, and Standard Deduction		
Week 1	Chapter 1	Ethics & Preparer Penalties
	Chapter 2	Compiling Taxpayers Information (Getting familiar with Form 1040 & 540)
	Chapter 3	Filing Status, Dependents, and Standard Deduction
Income		
Week 2	Chapter 4	Income (Taxable vs. Non-Taxable)
Tax Credits, Write-Offs, Deductions, and Other Taxes		
Week 3	Chapter 5	Adjustments to Income (Schedule 1 Tax Deductions)
	Chapter 6	Other Taxes (Schedule 2: Early-Withdrawal from Retirement, Self-Employment Taxes, etc.)
Week 4-5	Chapter 7	Payments and Tax Credits (Schedule 3: Earned Income Credit, Child Tax Credit, School Credits, Child Care Credit, Vehicle Credits, Home Energy Credits, etc.)
Week 5	Chapter 8	Itemized Deductions (Schedule A)
Business Income, Rental Property, Depreciation, and Capital Gains/Losses		
Week 6	Chapter 9	Schedule C (Business Income: Sole Proprietor & Independent Contractor Taxes)
Week 7	Chapter 10	Schedule E (Rental Income) & Capital Gains & Losses (Schedule D)
	Chapter 11	Schedule F (Farm Income) & Depreciation (Form 4562)
Other Tax Situations		
Week 8	Chapter 12	Extensions and Amendments (1040X / CA Sch X)
	Chapter 13	Electronic Filing
Complete 60-Hour Course		
Week 9	Final Due	Final Practice Return / California Law / Federal Law

This is a tentative schedule. Schedule is subject to change as needed.