

# Intro to Individual Tax Preparation



To get the most out of this course, please complete the following reading assignments before the scheduled live session.

## Day one

- Filing requirements
- Form 1040 and due dates
- Review questions
- Form 1040, heading and dependents
- Review questions
- Form 1040, income lines 1 – 7
- Review questions

## Day two

- Schedule 1 (Form 1040):
  - Part I: Additional income
  - Part II: Adjustments to income
- Review questions

## Day three

- Standard deductions, itemized deductions, QBID and other deductions
- Review questions
- Tax, Schedule 2, Part I, and nonrefundable credits
- Review questions

## Day four

- Other taxes, payments, and refundable credits
- Refund, tax due, third party designee
- Review questions
- Case Studies