

Introduction and Chapter 1					
<u>lîni</u>		Introduction Chapter Introduction, Expectations, History and Theory of Taxes.			
\bigcirc	Directions:	Inkling eBook: Inti	roduction Chapter		
* <u>*</u> :	Homework	for Introduction:	☐ Read Introduction Chapter in the Participant's Guide, if not already read.		
***	Homework Prep for Chapter 1:		☐ Read Chapter 1 in the Participant's Guide. ☐ Complete Chapter 1 Exercises in the Participant's Guide.		
	Chapter 1: Wages, Income, and Taxes				
\bigcirc	Directions: Inkling eB		k: Wages, Income, and Taxes		
* <u>*</u>	Homework	for Chapter 1:	☐ Complete Chapter 1 Case Study. ☐ Answer Chapter 1 Practice Questions in Block Academy. ☐ Optional: Complete Case Study A in the Optional Case Study Practice Chapter.		
>>>>	Homework	Prep for Chapter 2:	☐ Read Chapter 2 in the Participant's Guide. ☐ Complete Chapter 2 Exercises in the Participant's Guide.		



Chapters	napters 2 and 3				
	Chapter 2: Filin	g Requirements			
\bigcirc	Directions: Inkling eBook: File		ng Requirements		
\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\	Homework for Chapter 2: Homework Prep for Chapter 3:		☐ Complete Chapter 2 Case Study. ☐ Answer Chapter 2 Practice Questions in Block Academy. ☐ Optional: Complete Case Study B in the Optional Case Study Practice Chapter. ☐ Read Chapter 3 in the Participant's Guide. ☐ Complete Chapter 3 Exercises in the Participant's Guide.		
	Chapter 3: Qualifying Dependents and Support				
	Directions: Inkling eBook: Qu		alifying Dependents and Support		
\\ :	Homework	for Chapter 3:	☐ Complete Chapter 3 Case Study. ☐ Answer Chapter 3 Practice Questions in Block Academy. ☐ Optional: Complete Case Study C in the Optional Case Study Practice Chapter.		
****	Homework Prep for Chapter 4:		☐ Read Chapter 4 in the Participant's Guide. ☐ Complete Chapter 4 Exercises in the Participant's Guide.		



Chapter 4 and Test 1 Review				
Chapter 4: Dep	Chapter 4: Dependent-Related Filing Statuses			
Oirections:	Inkling eBook: De	pendent-Related Filing Statuses		
Homework for Chapter 4:		☐ Complete Chapter 4 Case Study. ☐ Answer Chapter 4 Practice Questions in Block Academy. ☐ Optional: Complete Case Study D in the Optional Case Study Practice Chapter.		
Test 1 Review Review of Chapter	Test 1 Review Review of Chapters 1 through 4.			
Directions:	Inkling eBook: Te	st 1 Review		
Homework	for Test 1 Review:	☐ Complete Test 1 Review in the Participant's Guide.		



Test 1 and Chapters 5 and 6					
	Test 1				
\hookrightarrow	Tests on content from Chapters 1 through Directions: Block Academy: To		Block Academy: To		
\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\		Homework	for Test 1:	☐ Complete Test 1 in Block Academy.	
***		Homework	Prep for Chapter 5:	☐ Read Chapter 5 in the Participant's Guide. ☐ Complete Chapter 5 Exercises in the Participant's Guide.	
<u>iri</u>	Chap	ter 5: Add	itional Income an	d Adjustments to Income	
\bigcirc	Direc	tions:	Inkling eBook: Add	ditional Income and Adjustments to Income	
×.		Homework for Chapter 5:		☐ Complete Chapter 5 Case Study. ☐ Answer Chapter 5 Practice Questions in Block Academy.	
**************************************		Homework Prep for Chapter 6:		☐ Read Chapter 6 in the Participant's Guide. ☐ Complete Chapter 6 Exercises in the Participant's Guide.	
Chapter 6: Credits					
\bigcirc	Oirections:		Inkling eBook: Cre	edits	
* <u>`</u>		Homework for Chapter 6:		☐ Complete Chapter 6 Case Study. ☐ Answer Chapter 6 Practice Questions in Block Academy.	
***	Homework Prep for Chapter 7:		Prep for Chapter 7:	☐ Read Chapter 7 in the Participant's Guide. ☐ Complete Chapter 7 Exercises in the Participant's Guide.	

Ethics and State Tax Fundamentals I will become available after *Test 1* is completed. The Ethics and State Tax Fundamentals I self-study modules may be completed at your convenience but must be completed before *Test 3* will become available.



Ethics				
	Ethics Chapter Due Diligence, Con	flicts of Interest, Con	fidentiality, Compliance, Tax Preparer Responsibilities.	
\bigcirc	Directions:	Inkling eBook: Ethics		
	Homework	for Ethics:	☐ Read Ethics in the Participant's Guide. ☐ Complete Ethics Exercises in the Participant's Guide. ☐ Answer Ethics Practice Questions in Block Academy.	

State Tax Fundamentals I				
	State Tax Fundamentals I Domicile, residency, state filing requirements, the state taxable income calculation, federal-state conformity, and common state tax benefits.			
\bigcirc	Directions:	Block Academy: St	tate Tax Fundamentals I	
	Homework Fundamen	t for State Tax tals I:	☐ Read State Tax Fundamentals I in Block Academy.	
	Homework Prep:		Depending on when you elect to finish State Tax Fundamentals I: ☐ Read the next chapter in the Participant's Guide. ☐ Complete the next chapter's Exercises in the Participant's Guide. Guide.	

Ethics and State Tax Fundamentals I will become available after *Test 1* is completed. The Ethics and State Tax Fundamentals I self-study modules may be completed at your convenience but must be completed before *Test 3* will become available.



Chapter	Chapter 7, Test 2 Review, Test 2, and Chapter 8				
	Chapter 7: EIC and ACTC				
\bigcirc	Directions:	Inkling eBook: EIC	and ACTC		
\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\	Homework	for Chapter 7:	☐ Complete Chapter 7 Case Study. ☐ Answer Chapter 7 Practice Questions in Block Academy. ☐ Optional: Complete Case Study E in the Optional Case Study Practice Chapter.		
	Test 2 Review Review of Chapter	s 5 through 7.			
\bigcirc	Directions:	Inkling eBook: Tes	et 2 Review		
·	Homework	for Test 2 Review:	☐ Complete Test 2 Review in the Participant's Guide.		
<u>lini</u>	Test 2 Tests on content f	rom Chapters 5 throu	ugh 7.		
\bigcirc	Directions:	Block Academy: To	est 2		
.	Homework	for Test 2:	☐ Complete Test 2 in Block Academy.		
****	Homework	Prep for Chapter 8:	☐ Read Chapter 8 in the Participant's Guide. ☐ Complete Chapter 8 Exercises in the Participant's Guide.		
	Chapter 8: Education Provisions				
\bigcirc	Directions:	Inkling eBook: Edu	ucation Provisions		
* <u>*</u>	Homework	for Chapter 8:	☐ Complete Chapter 8 Case Study. ☐ Answer Chapter 8 Practice Questions in Block Academy. ☐ Optional: Complete Case Study F in the Optional Case Study Practice Chapter.		
****	Homework Prep for Chapter 9:		☐ Read Chapter 9 in the Participant's Guide. ☐ Complete Chapter 9 Exercises in the Participant's Guide.		

Ethics and State Tax Fundamentals I may be completed at any time, but must be completed before *Test 3* will become available.



Chapters 9 and 10 and Test 3 Review					
\bigcirc	Direc	ctions:	Inkling eBook: Re	kling eBook: Retirement	
ě	Homework for Chapter 9 Homework Prep for Chapter 10:		for Chapter 9:	☐ Complete Chapter 9 Case Study. ☐ Answer Chapter 9 Practice Questions in Block Academy. ☐ Optional: Complete Case Study G in the Optional Case Study Practice Chapter.	
>>>>			Prep for Chapter	☐ Read Chapter 10 in the Participant's Guide. ☐ Complete Chapter 10 Exercises in the Participant's Guide.	
	Chap	oter 10: Ite	mized Deduction	s	
\bigcirc	Directions:		Inkling eBook: Ite	emized Deductions	
*:	Homework for Chapter 10:		for Chapter 10:	☐ Complete Chapter 10 Case Study. ☐ Answer Chapter 10 Practice Questions in Block Academy.	
>>>>		Homework Review:	Prep for Test 3	☐ Complete Test 3 Review in the Participant's Guide.	
Test 3 Review Review of Chapters 8 through 10, plus Ethics.					
Directions:		Inkling eBook: Te	st 3 Review		
Homework for <i>Test</i>		for Test 3 Review:	□ Complete Ethics in the Participant's Guide (if not done prior). □ Complete Ethics Practice Questions in Block Academy (if not done prior). □ Complete State Tax Fundamentals I in Block Academy (if not done prior). □ Complete Test 3 Review in the Participant's Guide		

Ethics and State Tax Fundamentals I may be completed at any time, but must be completed before *Test 3* will become available.



Almost Finished with the Course Test 3 Tests on content from Chapters 8 through 10, Ethics, and State Tax Fundamentals I. Directions: Block Academy: Test 3 Homework for Test 3: Complete Test 3 in Block Academy. Complete the Course Evaluation in Block Academy.

Note: If you cannot open *Test 3*, verify that all of the Practice Question modules in Block Academy have been completed, including Ethics, and that the State Tax Fundamentals I module has been completed. *Test 3* will not become available to you until all tasks in your curriculum have been completed and show a checkmark by them.