

Wisconsin School Catalog



2023 Basic Tax School (TY2022)

Wisconsin School Catalog

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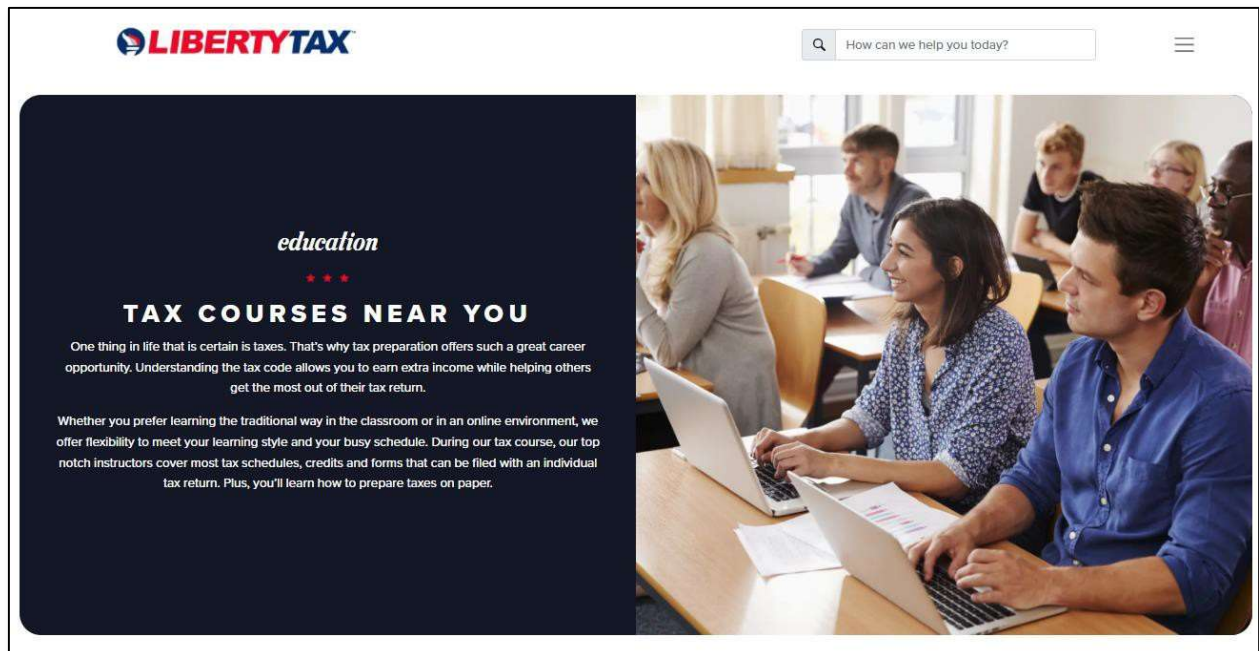
Wisconsin School Catalog

School Mission

TO OFFER TAX COURSES NEAR YOU.

One thing in life that is certain is taxes. That's why tax preparation offers such a great career opportunity. Understanding the tax code allows you to earn extra income while helping others get the most out of their tax return.

Whether you prefer learning the traditional way or in a virtual environment, we offer flexibility to meet your learning style and your busy schedule. During our tax course, our top-notch instructors cover most tax schedules, credits, and forms that can be filed with an individual tax return. Plus, you'll learn how to prepare taxes on paper.



The image is a screenshot of the Liberty Tax website. At the top left is the Liberty Tax logo. To its right is a search bar with the placeholder text "How can we help you today?". On the far right is a hamburger menu icon. Below the navigation is a large banner. The left side of the banner has a dark blue background with white text. The word "education" is written in a script font, followed by three red dots. Below that, the text "TAX COURSES NEAR YOU" is written in a bold, sans-serif font. Underneath, there are two paragraphs of smaller white text. The right side of the banner features a photograph of a diverse group of people sitting at desks in a classroom or office setting, working on laptops.

LIBERTY TAX

How can we help you today?

education

TAX COURSES NEAR YOU

One thing in life that is certain is taxes. That's why tax preparation offers such a great career opportunity. Understanding the tax code allows you to earn extra income while helping others get the most out of their tax return.

Whether you prefer learning the traditional way in the classroom or in an online environment, we offer flexibility to meet your learning style and your busy schedule. During our tax course, our top notch instructors cover most tax schedules, credits and forms that can be filed with an individual tax return. Plus, you'll learn how to prepare taxes on paper.

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Schedule, Facilities, and Equipment

Our in-seat program typically runs between October and December each year where local offices offer a work/study area (space for social distancing), chairs, and projectors for group presentations. The classes typically meet twice per week in the evenings from 6:00 PM to 9:00 PM and morning sessions between 10:00 AM and 1:00 pm on Monday and Thursday. Some instructors may allow students to go through the core program online and host study sessions so students can come together to work through classwork and homework scenarios together. Please search for [a location](#) close to you for any schedule variances. Offices are closed for the Thanksgiving holiday.

Local Office Contact Information

Entity: 3595 Entity Name: Gurmeet S Chawla Owner Name: Gurmeet Chawla Phone: (262) 957-6777
 Email: alivemindinc@gmail.com Address: 1336 S Cesar E Chavez Dr., Milwaukee, WI 53204

Inquiry and Student Management System							
Reports Upload Inquiries Forms Help Report Issues							Welcome, patricia.oid@libtax.
Home Locations Classes Inquiries Students							
Add New Class Office: 17533							
Class	Course	Status	Location	Start Date	End Date	Capacity	Available
BASIC TAX COURSE	Basic Tax Class - 10 Week	Upcoming	MLK / NORTH	09/05/2023	09/06/2023	20	20

Inquiry and Student Management System							
Reports Upload Inquiries Forms Help Report Issues							Welcome, patricia.oid@libtax.
Home Locations Classes Inquiries Students							
Add New Class Office: 12294							
Class	Course	Status	Location	Start Date	End Date	Capacity	Available
BASIC TAX COURSE	Basic Tax Class - 10 Week	Upcoming	MLK / NORTH	09/05/2023	09/06/2023	20	20

Entity: 5481 Entity Name: Transcend Financial Service LLC Owner Name: Tammy Bush Phone: (414) 405-0800
 Email: tammybush.libertytax27th@gmail.com Address: 3181 S 27th Street, Milwaukee, WI 53215

Inquiry and Student Management System							
Reports Upload Inquiries Forms Help Report Issues							Welcome, patricia.oid@libtax.
Home Locations Classes Inquiries Students							
Add New Class Office: 10656							
Class	Course	Status	Location	Start Date	End Date	Capacity	Available
basic tax course	Basic Tax Class - 10 Week	Upcoming	Liberty Tax Class	09/05/2023	09/06/2023	25	25
basic tax school	Basic Tax Class - 10 Week	Upcoming	Liberty Tax Class	09/05/2023	09/06/2023	10	10

Entity: 6036 Entity Name: A New Endeavor LLC Owner Name: Angie Curtis Phone: (414) 807-8849
 Email: angiecurtis@mylibertytax.com Address: 5307 S 108th Street, Hales Corner, WI 53130

Inquiry and Student Management System							
Reports Upload Inquiries Forms Help Report Issues							Welcome, patricia.oid@libtax.
Home Locations Classes Inquiries Students							
Add New Class Office: 16367							
Class	Course	Status	Location	Start Date	End Date	Capacity	Available
Weekday class morning	Basic Tax Class - 8 Week	Upcoming	Liberty Tax of Hales Corners	10/16/2023	12/14/2023	10	10
Weekday class nights	Basic Tax Class - 8 Week	Upcoming	Liberty Tax of Hales Corners	10/16/2023	12/14/2023	10	10
Saturday Class	Basic Tax Class - 8 Week	Upcoming	Liberty Tax of Hales Corners	10/21/2023	12/16/2023	10	10

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Entity 6261: Entity Name: Mehar Enterprise Owner Name: Gurmeet Chawla Phone: (262) 957-6777
 Email: gurmeetschawla@gmail.com Address: 1336 S Cesar E Chavez Dr. Milwaukee, WI 53204

Inquiry and Student Management System							
Reports Upload Inquiries Forms Help Report Issues							Welcome, patricia.oid@libtax
Home Locations Classes Inquiries Students							
Add New Class							
Office: 18213							
Class	Course	Status	Location	Start Date	End Date	Capacity	Available
BASIC INCOME TAX COURSE	Basic Tax Class - 10 Week	Upcoming	16th & Greenfield	09/05/2023	09/06/2023	20	20

Entity: 8735 Entity Name: All That is Certain LLC Owner Name: Lisa Willi Phone: (920) 655-7903
 Email: lisawilli@libertytax.com Address: 832 S Oneida St Green Bay, WI 54304

Inquiry and Student Management System							
Reports Upload Inquiries Forms Help Report Issues							Welcome, patricia.oid@libtax
Home Locations Classes Inquiries Students							
Add New Class							
Office: 12081							
Class	Course	Status	Location	Start Date	End Date	Capacity	Available
Morning Mondays/Thursdays	Basic Tax Class - 10 Week	Upcoming	Liberty Tax Northland Office 2008	10/02/2023	12/14/2023	10	10
Saturday Morning	Basic Tax Class - 10 Week	Upcoming	Liberty Tax Northland Office 2008	10/07/2023	12/16/2023	10	10

Inquiry and Student Management System							
Reports Upload Inquiries Forms Help Report Issues							Welcome, patricia.oid@libtax
Home Locations Classes Inquiries Students							
Add New Class							
Office: 11657							
Class	Course	Status	Location	Start Date	End Date	Capacity	Available
Evening Mondays/Thursdays	Basic Tax Class - 10 Week	Upcoming	Liberty Tax Service	09/14/2023	12/21/2023	10	10
Morning Tuesdays/Friday	Basic Tax Class - 10 Week	Upcoming	Liberty Tax Service	10/02/2023	12/18/2023	10	10
Wednesday Classes	Basic Tax Class - 10 Week	Upcoming	Liberty Tax Service	10/04/2023	12/23/2023	10	10

Entity: 8885 Entity Name: 81012XX18 LLC Owner Name: Julie Strunz & Allen Bank Phone: (608) 201-0918
 Email: albank@charter.net; strunzj@charter.net Address: 3233 Thorton Drive, Janesville, WI 53548

Inquiry and Student Management System							
Reports Upload Inquiries Forms Help Report Issues							Welcome, patricia.oid@libtax
Home Locations Classes Inquiries Students							
Add New Class							
Office: 12132							
Class	Course	Status	Location	Start Date	End Date	Capacity	Available
Basic Tax Class	Basic Tax Class - 10 Week	Upcoming	Janesville Center	09/12/2023	11/14/2023	5	5

Self-Evaluation Process

Our online Student Survey allows students to provide anonymous feedback to both the corporate staff and the office where they participated. This survey is completed online after the final exam and shared with each office.

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Course Evaluation Survey

Your feedback helps us further develop our courses and gives us insight on your experience.

Part I – GENERAL DATA	
Course Name	Basic Tax Course
IRS & CTEC Course Number(s)	Qualifying Education
Optional: Student Name	
Course Date	
Approx. how many hours to complete the course	
Part II – INSTRUCTOR RATINGS	
	N/A Strongly Disagree Strongly Agree
If applicable: Online Instructor was effective and knowledgeable.	<input type="radio"/> N/A <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5
If applicable: In-seat Instructor was effective and knowledgeable.	<input type="radio"/> N/A <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5
Part III – GENERAL RATINGS	
	N/A Strongly Disagree Strongly Agree
Stated learning objectives were met.	<input type="radio"/> N/A <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5
Program materials were accurate, relevant and contributed to the achievement of learning objectives.	<input type="radio"/> N/A <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5
Time allotted to the learning activity was appropriate.	<input type="radio"/> N/A <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5
Text and/or Handout materials were satisfactory.	<input type="radio"/> N/A <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5
I gained skills or knowledge to do my job better.	<input type="radio"/> N/A <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5
I learned something I will share with others.	<input type="radio"/> N/A <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5
The session met my expectations for attending.	<input type="radio"/> N/A <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5
If applicable: The <i>In-seat</i> facilities were appropriate and conducive to learning.	<input type="radio"/> N/A <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5
If applicable: The <i>In-seat</i> Audio/Video materials were effective	<input type="radio"/> N/A <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5
If applicable: The <i>Online</i> Audio/Video materials were effective	<input type="radio"/> N/A <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5
Part IV – RECOMMENDATIONS	
What information did you find most valuable?	
What information did you find least valuable?	
Do you have any recommendations for ways to improve the content of the course?	

Thank you for completing this survey.

Introducing our faculty members and qualifications.

Douglas C. Campbell, MBA CPA has worked with Liberty Tax from November 2019 through July 2023. He has been a Certified Public Accountant for over 30 years, specializing in Tax.

MBA from Michigan State University with an emphasis in Account (tax).

Before joining Liberty Tax, he was an adjunct professor teaching Accounting and Tax at Michigan State University and the University of Miami. He has also taught CPE seminars on issues of federal taxation for various state CPA associations and other entities for over 30 years.

Contact Information:

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500 Grapevine Highway, Suite 300 | Hurst, TX 76054
Direct: (800) 390-3863

Samantha Slapnik, Assistant Vice President of Training has worked for Liberty Tax since 2020, and a franchise since 2007. She currently owns and operates one highly successful tax office in South Carolina completing almost 10,000 returns each year.

Contact Information:

Samantha Slapnik
3713 Renee Drive
Myrtle Beach, SC 29579
Mobile: (843) 267-3590
Samantha.slapnik@libtax.com

Course Description

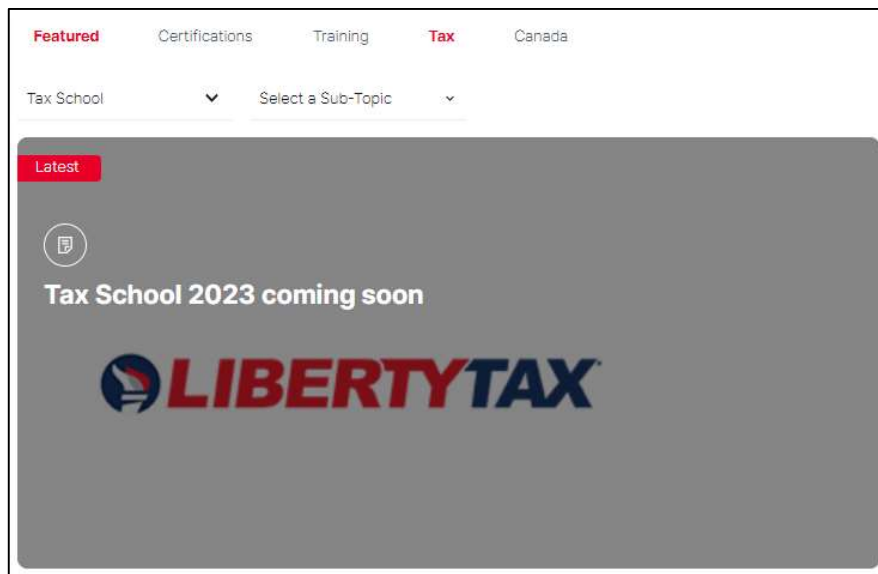
This basic tax school program is designed to provide new preparers with the knowledge to complete a federal personal tax return. No credit is given for prior coursework or work experience.

Students are guided through the Federal Chapters (approx. 50 hours video content). Completion of all content is required for a certificate of completion.

The course is progressive and builds on the content completed before. As chapters are completed online the next chapter becomes available. After moving forward, you can always review prior material.

After completing this course, students still need to register with the IRS PTIN registration system and pass any other state or local requirements. Completing this course does not guarantee you a job with liberty and is not a requirement of the IRS to prepare taxes.

To receive a certificate of completion, you need to pass the final exam with a 70% or higher. This exam is open-book and untimed but is limited to 5 attempts.



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Registration and Admission

Classes typically run October through December. For more information, reach out to your local office.

Every student who wants to prepare or assists in the preparation of a tax return for compensation must have his or her own PTIN issued by the IRS, therefore applicants must be at least 18 years of age. Should have a high school diploma or equivalency designation such as a GED.

Our tax school program is for students' knowledge and skills necessary to prepare basic tax returns for themselves and others, the IRS does not require a tax school certificate to prepare taxes. Completing the tax program does not guarantee students' employment. Additional training is required for employment as an Individual/Registered Tax Preparer for Liberty Tax.

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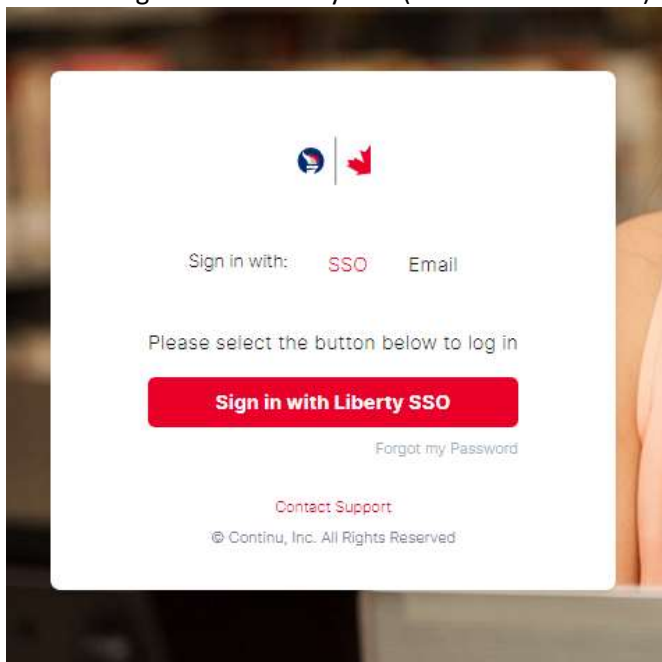
Grading and Progress

Student Instructions

1. Read each chapter of your textbook then log into the LMS and click on the corresponding chapter to access the additional video content. Here our CPA instructor provides additional explanations to assist with your understanding and completion of the classwork exercises.
2. Then return to your textbooks and workbook forms to complete the homework assignments.
3. If you are an in-seat student you complete the classwork as a group, and your local office will review the homework assignments with you.
4. All students complete the chapter review online, the online reviews provide instant feedback on why your answers are/are not correct, and while you are not required to pass each chapter review to move forward if your score is less than 70% you will want to review any areas where you struggled.
5. After completing the chapter review, all the homework and coursework solutions are available to be viewed and downloaded for your reference.
6. At the end of the course, students must complete a final exam. On the final exam, a passing score of 70% or above is required to receive a certificate of completion. This exam is open-book and untimed, but students are limited to 5 attempts.

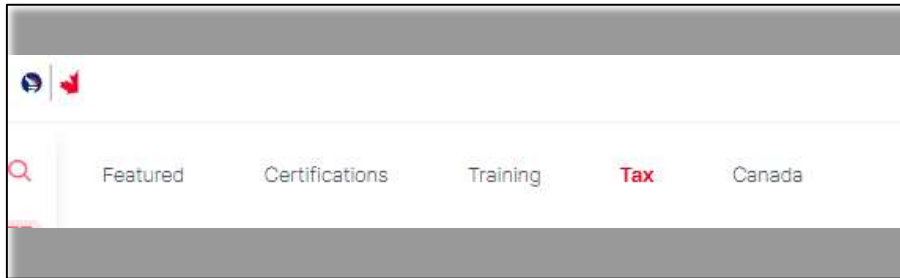
Online Access instructions

1. Navigate to eLearning tile the HUB
2. Sign in with Liberty SSO (firstname.lastname)

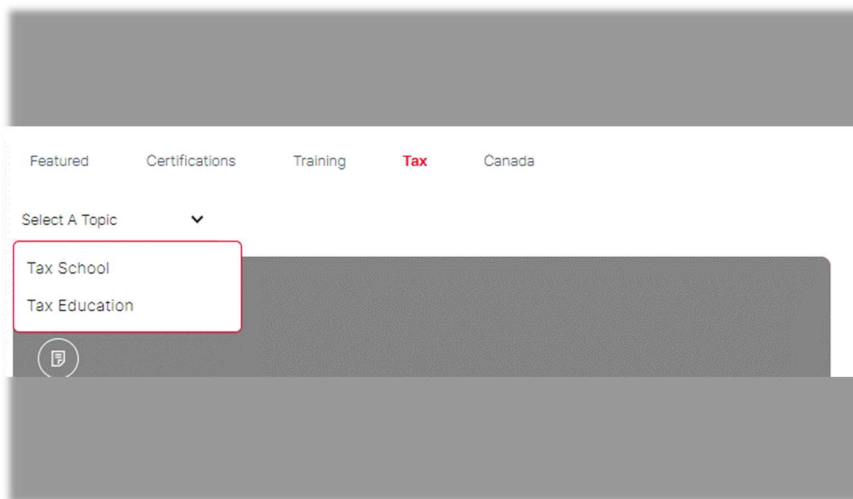


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3. Click on the header titled **Tax**



4. Choose **Tax School** from the **Select A Topic** dropdown



5. Click on the chapter you'd like to review for 2023 Tax School (TY 2022).

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Student Records

Students' first and last names are recorded and kept in a permanent record. No Student NPI (Non-Public Information) is collected or stored. If the student completes the program the student transcript is kept by the local office. The transcript includes the student's name, completed courses, and final score. Access to student records is only available to an office manager or above. Students can print copies of their transcripts on-demand directly from the LMS site or request a copy from the office where they completed the program.

Academic Probation, Dismissal, and Readmittance

This is a non-certified course where you elect to participate. Liberty has no academic probation or dismissal policy for academic reasons. We do not remove your student access to materials or remove you from the course unless it is a mutual decision by you and your instructor. If you request to be removed from the program within 60 days of registration, a full refund can be granted if the textbooks are returned in good condition.

Student Conduct

For our in-office students, you are expected to conduct yourself in a positive and friendly way and show a positive attitude towards other students, and our instructors. Certain conduct is not tolerated. Examples include, but are not limited to profanity, spitting, discriminatory conduct, hostile and/or any negative behavior that would be harmful to yourself or others, disrespect instructor or other students, or defacing location property. Based on the severity of the infraction, a single violation of the conduct policy can result in termination from the course. The severity of the infraction is determined by the instructor or program director. [Example: A student may curse once softly when they stub their toe. This infraction would not be considered severe enough for the student to be terminated. However, a student being disrespectful and cursing at others will be terminated.]

If a student is terminated from the in-seat course due to conduct, he/she would not be readmitted to the local school. Students may follow a complaint policy stated below if they feel they have been aggrieved. A follow-up letter of explanation is sent to the student with a copy of the letter being kept in his/her file.

Leave of Absence, Attendance, Tardiness

As each location for in-seat classes is different, we do not have a formal leave, attendance, or tardiness policy.

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Student Complaints

Students can call their local Liberty office if taking the course in-seat. If a student is unable to resolve the issue by contacting the local office, they can call or email the corporate office. The corporate phone number is 800-790-3863 and the email is onlinetaxschoolrequests.com.

If the student contacts the corporate office, we work with you and the local office to remediate the issue when possible.

Additionally, as part of the complaint process, if mediation through the corporate office fails, students can contact the State of Wisconsin Educational Approval Program (EAP) at 4822 Madison Yards Way, Madison, WI 53705. Email is dspseap@wisconsin.gov or phone (608) 266-1996.

Tuition and Fees

There may be a small fee for books and materials, depending on the market. Find and contact your local office for more information. Availability is based on classroom capacities per office.

Cancellation and Refund Policy

In-seat class refunds are issued by the individual office. The refund is issued within 30 days of receipt and acceptance of books. The refund is mailed to the address on record.

The student is notified by email if the refund cannot be processed and why.

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Tax School Course Curriculum

Each Chapter in our Basic Federal Tax School course includes video(s), reading assignments, classwork exercises, homework, and a chapter review.

Volume I

Chapter 1: Filing Information

- Chapter 1 Text: 25 pages
- Chapter 1 Video
- Chapter 1 Classwork
- Chapter 1 Homework: 8 questions & 1 exercise
- Chapter 1 Chapter Review

Chapter 2: Dependents

- Chapter 2 Text: 28 pages
- Chapter 2 Video
- Chapter 2 Classwork
- Chapter 2 Homework: 11 questions & 1 exercise
- Chapter 2 Chapter Review

Chapter 3: Filing Status

- Chapter 3 Text: 19 pages
- Chapter 3 Video
- Chapter 3 Classwork
- Chapter 3 Homework: 8 questions & 1 exercise
- Chapter 3 Chapter Review

Chapter 4: Wages, Tips, Salaries, Tips, Other Income, and Withheld Taxes

- Chapter 4 Text: 32 pages
- Chapter 4 Video
- Chapter 4 Classwork
- Chapter 4 Homework: 5 questions & 2 exercises
- Chapter 4 Chapter Review

Chapter 5: Interest, Dividends, Capital Gains

- Chapter 5 Text: 29 pages
- Chapter 5 Video
- Chapter 5 Classwork
- Chapter 5 Homework: 2 exercises
- Chapter 5 Chapter Review

Chapter 6: Retirement Benefits and IRAs

- Chapter 6 Text: 47 pages
- Chapter 6 Video
- Chapter 6 Classwork
- Chapter 6 Homework: 7 questions & 3 exercises

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- Chapter 6 Chapter Review

Chapter 7: Standard Deduction, Itemized Deductions, and Income Tax

- Chapter 7 Text: 54 pages
- Chapter 7 Video
- Chapter 7 Classwork
- Chapter 7 Homework: 16 questions & 3 exercises
- Chapter 7 Chapter Review

Chapter 8: Earned Income Credit

- Chapter 8 Text: 28 pages
- Chapter 8 Video
- Chapter 8 Classwork
- Chapter 8 Homework: 5 questions & 1 exercise
- Chapter 8 Chapter Review

Chapter 9: Child Tax Credit (CTC), Additional Child Tax Credit (ACTC), and Other Dependents Credit (ODC)

- Chapter 9 Text: 40 pages
- Chapter 9 Video
- Chapter 9 Classwork
- Chapter 9 Homework: 10 questions & 2 exercises
- Chapter 9 Chapter Review

Chapter 10: Higher Education Credits and Expenses

- Chapter 10 Text: 44 Pages
- Chapter 10 Video
- Chapter 10 Classwork
- Chapter 10 Homework: 2 exercises
- Chapter 10 Chapter Review

Chapter 11: Other Credits and Due Diligence

- Chapter 11 Text: 32 pages
- Chapter 11 Video
- Chapter 11 Classwork
- Chapter 11 Homework: 1 exercise
- Chapter 11 Chapter Review

Volume 2

Chapter 12: Depreciation

- Chapter 12 Text: 50 Pages
- Chapter 12 Video
- Chapter 12 Classwork
- Chapter 12 Homework: 6 questions & 1 exercise
- Chapter 12 Chapter Review

Chapter 13: Profit or Loss from Business

- Chapter 13 Text: 40 pages

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- Chapter 13 Video
- Chapter 13 Classwork
- Chapter 13 Homework: 2 exercises
- Chapter 13 Chapter Review

Chapter 14: Property Transactions (Schedule D, Form 8948, and Form 4797)

- Chapter 14 Text: 45 pages
- Chapter 14 Video
- Chapter 14 Classwork
- Chapter 14 Homework: 7 questions & 3 exercises
- Chapter 14 Chapter Review

Chapter 15: Rental Real Estate, Royalties, K-1's

- Chapter 15 Text: 33 pages
- Chapter 15 Video
- Chapter 15 Classwork
- Chapter 15 Homework: 4 exercises
- Chapter 15 Chapter Review

Chapter 16: Schedules 1, 2 and 3

- Chapter 16 Text: 59 pages
- Chapter 16 Video
- Chapter 16 Classwork
- Chapter 16 Homework: 1 exercise
- Chapter 16 Chapter Review

Chapter 17: Business Travel, Meals, and Qualified Business Income Deduction (QBID)

- Chapter 17 Text: 33 pages
- Chapter 17 Video
- Chapter 17 Classwork
- Chapter 17 Homework: 2 exercises
- Chapter 17 Chapter Review

Chapter 18: Payments, Penalties, Installment Agreement, and Injured Spouse

- Chapter 18 Text: 53 pages
- Chapter 18 Video
- Chapter 18 Classwork
- Chapter 18 Homework: 2 exercises
- Chapter 18 Chapter Review

Chapter 19: Estimated Tax, Extensions, and Amended Returns

- Chapter 19 Text: 35 pages
- Chapter 19 Video
- Chapter 19 Classwork
- Chapter 19 Homework: 4 exercises
- Chapter 19 Chapter Review

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Chapter 20: Practice, Procedure, and Professional Responsibility

- Chapter 20 Text: 19 pages
- Chapter 20 Video
- Final Exam

Workbook

Contains all forms necessary to complete homework for each chapter.