

AZ TY23 AARP New Counselor Tax Training

****PLEASE CHARGE YOUR CHROMEBOOK BEFORE EACH CLASS****

This document contains links.

Contact: {Instructor Name & email}

Bring to class: <https://ta-nttc.tiny.us/NTTC-Workbook>, paper, highlighter, red pen, Qualifying Child or Relative Resource Tool (Quadfold)

Day 1 Read-Ahead/ Do-Ahead

1. Review Tom Andrews PPT here: [Tom Andrews PPT](#)
2. Review these lessons in [NTTC Pub 4491 Training Guide](#).
3. Review video: <https://ta-nttc.tiny.us/Wages-video>
4. Review video: <https://ta-nttc.tiny.us/Unemployment-video>

Lesson 3: Filing Basics
Lesson 8: Wages and Interest
Lesson 13: Unemployment
Lesson 17: IRA contributions and Student Loan adjustment
Lesson 25: Retirement Savings Credit or Savers Credit

Day 1

9:00 9:30 Welcome
9:30 10:30 Intake and Interview [Instructor led] [Intake & Interview PPT](#)
10:30 11:00 Quiz: Can we do Tax return? [Instructor led]

BREAK

SPOTLIGHT

11:15 12:00 Filing Status Basics [Instructor led] [Filing-Status-Basics-v-PPT](#)
Quiz: Filing Status [Instructor led]

LUNCH

12:45 3:15 [Single Working Taxpayer – Andrews](#) [Instructor led] [Andrews PPT](#)
Bogart for dependency [Instructor led]
Single Filing Status

BREAK

3:15 Explain Adams: need **Volunteers**

Homework:

1. TaxSlayer Practice Lab: enter Adams exercise page 147 & 148.
2. Enter Basic info for: Baker page 103, Chambers page 147 and 151, husband died May 2020; Davenport page 117
3. Review Michael Davenport PPT here: [Michael Davenport PPT](#)
4. Review the lessons for Day 2 in [NTTC Pub 4491 Training Guide](#)
5. Watch: Schedule A video here: [Sched-A-video](#)

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Day 2 Read-Ahead/ Do-Ahead

Review these lessons in [NTTC Pub 4491 Training Guide](#)

Review video: <https://ta-nttc.tiny.us/SSA-1099-video>

Review video: <https://ta-nttc.tiny.us/1099-R-Basic-Overview-video>

Davenport
Lesson 11: Pensions
Lesson 14: Social Security
Lesson 20: Itemized Deductions
Lesson 12: Rental income (Optional, rare)

Handout: Itemized Deductions Worksheet: [Itemized-Deductions-Worksheet](#)

9:00 9:30 Review Adams- Basic Income. **[Instructor led]**

9:30 10:00 All-in-one Filing Basics. **[Instructor led]**

BREAK

10:15 11:45 Senior Married couple - Davenport. **[Instructor led]**
Itemized Deductions (NOTE: skip supplemental lesson)
Bogart—Simplified Method **[Instructor led]**

LUNCH

SPOTLIGHT

12:30 1:30 Senior Married couple – finish Davenport **[Instructor led]**

1:30 2:30 Focused Exercise Chambers - Retirement Income (Class data entry)

SPOTLIGHT

Homework:

1. TaxSlayer Practice Lab: Enter Workbook Exercise: Elliott; LTC is for Mary; (skip education credit)
2. Quiz pg. 164 Retirement, pg. 165 Itemized Deductions—CORE only
3. Review the lessons for Day 3 in [NTTC Pub 4491 Training Guide](#)
4. Review Tiana Baker PPT: [Tiana Baker PPT](#)
5. Review Simplified Method video: <https://ta-nttc.tiny.us/1099-R-Pension-Exclusion-video>
6. Watch: Marketplace Insurance video: <https://ta-nttc.tiny.us/Marketplace-Insurance-video>

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Day 3 Read-Ahead/ Do-Ahead

Review these lessons in [NTTC Pub 4491 Training Guide](#)

Baker
Lesson 4: Head of Household
Lesson 6: Dependents: Qualifying Child Standard Deduction and Tax Computation
Lesson 15: Other Income: alimony, gambling winnings and cancellation of debt
Lesson 19: Standard Deduction
Lesson 21: Credit for Child and Dependent Care
Lesson 24: Child Tax Credit
Lesson 26: Marketplace Insurance
Lesson 29: Earned Income Credit (EIC or EITC)

9:00 9:30 Review Elliott exercise

9:30 10:15 Quiz: Retirement Income. **[Instructor led]**
Review Itemized Deductions and Quizzes. **[Instructor led]**

BREAK

SPOTLIGHT

10:30 12:00 Single Working Parent - Baker. [Instructor led]/interview.
Bogart – for dependency – **[Instructor led]**
Marketplace Insurance

LUNCH

12:45 1:45 Finish Single Working Parent – Baker. **[Instructor led]**

1:45 2:15 Check Your Work. **[Instructor led] video:** <https://ta-nttc.tiny.us/Tips-Accurate-video>

Homework:

Handout: Arizona Checklist for Day 4:

1. Quiz pg. 164 Retirement, pg. 165 Itemized Deductions—CORE only
2. Review the lessons for Day 4 in [NTTC Pub 4491 Training Guide](#)
3. Watch Schedule D Brokerage video: [Schedule D Brokerage Statements video](#)
4. Watch Tax Law Highlights 2022 video: [Tax-Law-Highlights-2022-video](#)
5. Review Tax Law and Scope Changes 2022: [Tax-Law and Scope changes](#)
6. Watch Baker and Kaczenski 2-year comparison videos here: [Baker-video](#), [Kaczenski-video](#)
7. Arizona Supplemental Intake:

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Day 4 Read-Ahead/ Do-Ahead

Review these lessons in [NTTC Pub 4491 Training Guide](#)

Important Changes for 2023
Lesson 8: Dividends
Lesson 10: Income Capital Gain or Loss

SPOTLIGHT

9:00 9:30 Tax Law Highlights 2023 [Tax-Law Highlights TY23](#)
9:30 10:15 Self Review Workbook Exercise TY23 vs TY22 (class review Form 1040, no data entry)
10:15 10:30 Break

SPOTLIGHT Tax-Law and Scope changes TY23
10:30 11:30 Brokerage Statements/ Capital Gains **[Instructor led]**
Brokerage Statements Quiz
11:30 12:00 Taxpayer roundtable discussion

LUNCH BREAK

12:45 1:45 Arizona – Supplemental Intake Form, TSO Manual Entries **[Instructor led]**
1:45 2:00 Break
2:00 2:30 Arizona – Advanced Topics **[Instructor led]**
2:30 4:00 Arizona Tax Credits, Knowledge Check

Homework:

1. Review Day 5 lessons: [NTTC Pub 4491 Training Guide](#)
2. Enter Basic information for: Caldwell, page 110, and enter: W2, 1099-DIV and 1099-R.
3. TaxSlayer Practice Lab: Enter Davis page 147 and 153.
4. Review—[Sch-C-Guidelines](#)
5. Review Sch C Worksheet: [Sch-C-Worksheet](#)
6. Review Caldwell: [Caldwell PPT](#)

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Day 5 Read-Ahead/ Do-Ahead

Review these lessons in [NTTC Pub 4491 Training Guide](#)

Lesson 4: Filing Status MFJ and MFS
Lesson 6: Dependents Qualifying Relative
Lesson 11: IRA section only
Lesson 17: Educator Expenses
Lesson 22: Education Benefits
Lesson 23: Foreign Tax Credit
Lesson 24: Credit for other dependents

Handout—Tip Sheet Education Credits

9:00 9:30 Review Davis **[Instructor led]**
9:30 11:00 Education Credits **[Instructor led]**
Link & Learn Education Credits Workout

LUNCH BREAK

SPOTLIGHT

12:30 2:30 Young Married Couple Caldwell. **[Instructor led]**
Caldwell: Business Income. **[Instructor led]**.

SPOTLIGHT

2:30 3:00 Taxslayer Practice Lab: Self-employment exercise (Class)
3:00 Check Your Work. **[Instructor led]**

Suggestion:

Taxslayer Practice Lab: for self-employment: Baldwin page 147 and page 150.

Review Exercises for Certification (Advanced): Paper [Workbook](#):

{TBD}