



www.TCLFinancialTaxServices.com • E-MAIL: clientservices@TCLFinancialTaxServices.com

4700 ROBINSON ROAD EXTENSION, SUITE 400 • POST OFFICE BOX 59051 • JACKSON, MS 39284
OFFICE: (601) 922-2TCL (2825) • FAX: (601) 922-2003

Future “Registered Tax Advisor”:

I would like to first thank you for your interest in wanting to attend my 2018 Income Tax Course, **“The Fundamentals of the Income Tax.”**

The classes will be held at the company’s main office at 4700 Robinson Road Extension, Suite 400 in Jackson, MS (located in the old Home Depot shopping center off Highway 18). Classes are every Tuesday and Thursday (some Wednesdays) evening from 6:00 p.m. to 9:00 p.m. beginning Tuesday, October 2, 2018 and will end on Thursday, December 13, 2018. See attachment for the detailed Income Tax Course Schedule.

Due to limited seating of approximately 30 students, registration is required to guarantee and reserve your seat in the class. Registration includes making a full or partial payment of the course fee. The total cost of the 2018 Income Tax Course ranges from \$149.99 to \$224.99 depending on the pricing option you select. See attachment for the detailed Pricing Options. **You can complete the payment process on our website or you can call or come by our main office.**

I am currently seeking individuals to employ on my Team at all four of our locations in the Canton and Jackson, MS area. Whether it is part-time or full-time, I am always seeking to hire ambitious and self-motivated individuals to join my Team. We also have a Business Partnership Opportunity available if you are interested in becoming a business owner of your own tax preparation company.

Trust me, no prior experience is required. I will begin the first day of class teaching the basics. The classes are challenging, but not hard. In addition to learning **“The Fundamentals of the Income Tax,”** you will also be trained on itemized deductions, business returns, farming income, rental property, and home office deductions. See attachment for the detailed Course Curriculum.

For the classes, you will need to bring a calculator and some pencils. No pens please...I promise you will need to erase!

While attending the class, you will totally understand why our slogan is:

“We Don’t Just Do Taxes...WE KNOW TAXES”

Upon completion of the course, I will also assist you in becoming registered with the Internal Revenue Service (IRS) and obtaining your own Preparer Tax Identification Number (PTIN).

Again, I thank you for your interest in wanting to attend my 2018 Income Tax Course, and I look forward to possibly meeting you on Tuesday, October 2, 2018 at 6:00 p.m.

If you have any questions, please feel free to contact me using either one of the methods below.

Sincerely,

Tim C. Lee

Tim C. Lee
CEO & Founder

timlee@TCLFinancialTaxServices.com

(601) 922-2TCL (2825)	Office
(601) 842-3226	Cellular
(601) 922-2003	Fax



“We Don’t Just Do Taxes...WE KNOW TAXES”

“THE FUNDAMENTALS OF THE INCOME TAX”

The Course Curriculum personally taught by CEO and Founder, Tim C. Lee.

FEDERAL INDIVIDUAL INCOME TAX RETURN FORMS

- Form 1040EZ
- Form 1040A
- Form 1040

WAGE AND TAX STATEMENT

- Form W-2
- Federal Income Tax Withheld
- Social Security Tax
- Medicare Tax
- After-Tax and Pre-Tax Deductions
- State Income Tax Withheld

INTEREST INCOME

- Form 1099-INT

DIVIDENDS INCOME

- Form 1099-DIV

SCHEDULE B

UNEMPLOYMENT COMPENSATION

- Form 1099-G

ROUNDING

- Rounding Up
- Rounding Down

THE TWO TYPES OF INCOME

- Earned Income
- Unearned Income

THE FIVE STANDARD DEDUCTION AMOUNTS

- Single
- Married Filing Separately
- Married Filing Jointly
- Qualifying Widower with Dependent Child
- Head of Household

Course Curriculum (continued)

THE TWO EXEMPTION AMOUNTS

- Personal Exemption
- Dependent Exemption

ALIMONY INCOME

GAMBLING INCOME

- Form W2-G

MISCELLANEOUS INCOME

- Form 1099-MISC

EDUCATOR EXPENSES DEDUCTION

ALIMONY PAID DEDUCTION

THE FIVE FILING STATUSES

- Single
- Married Filing Separately
- Married Filing Jointly
- Qualifying Widower with Dependent Child
- Head of Household

THE TWO TYPES OF EXEMPTIONS

- Personal Exemption
- Dependent Exemption

NONREFUNDABLE CREDITS

- Child and Dependent Care Expenses (Form 2441)
- Education Credits (Form 8863)
- Retirement Savings Contribution Credit (Form 8880)
- Child Tax Credit (Schedule 8812)

REFUNDABLE CREDITS

- Additional Child Tax Credit (Schedule 8812)
- Earned Income Credit (Schedule EIC and Form 8867)

CAPITAL GAINS AND LOSSES

- Form 1099-B
- Schedule D

SOCIAL SECURITY BENEFITS

- Form SSA-1099

CANCELLATION OF DEBT INCOME

- Form 1099-C
- Form 982

MOVING EXPENSES

- Form 3903

Course Curriculum (continued)

DISTRIBUTIONS FROM PENSIONS, ANNUITIES, RETIREMENT OR PROFIT-SHARING PLANS, IRAs, INSURANCE CONTRACTS, ETC. INCOME

- Form 1099-R
- Form 5329

STANDARD DEDUCTION FOR TAXPAYERS AGE 65 OR OLDER AND/OR BLIND

STANDARD DEDUCTION FOR DEPENDENTS OF ANOTHER

FILING REQUIREMENTS

STUDENT LOAN INTEREST DEDUCTION

- Form 1098-E

EDUCATION CREDITS

- Form 8863
- American Opportunity Credit
- Lifetime Learning Credit

TUITION AND FEES DEDUCTION

- Form 8917

STATE INDIVIDUAL INCOME TAX RETURNS

ITEMIZED DEDUCTIONS (Employees Only)

- Schedule A
- Form 8283
- Form 4684
- Form 2106
- Form 2106-EZ

BUSINESS INCOME (Employees Only)

- Schedule C
- Schedule C-EZ
- Schedule SE

FARMING INCOME (Employees Only)

- Schedule F
- Schedule SE

RENTAL PROPERTY INCOME (Employees Only)

- Schedule E

HOME OFFICE DEDUCTIONS (Employees Only)

- Form 8829

“We Don’t Just Do Taxes...WE KNOW TAXES”



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PRICING OPTIONS

Option #1 (One-Time Discounted Fee)

This pricing option is for the student that wants to pay the lowest overall price for the 2018 Income Tax Course. The student pays a one-time discounted fee of \$174.99 and they are paid in full for the entire course. This one-time discounted fee must be paid on or before the first day of class. The total fee paid for this pricing option is \$174.99 per student.

Option #2 (Payment Plan A)

This pricing option is for the student that can not pay the one-time discounted fee and wants to be placed on a payment plan for the 2018 Income Tax Course. The student pays a down payment of \$99.99 with the remaining balance of \$100 paid within 30 days after starting the course. The total fee paid for this pricing option is \$199.99 per student.

Option #3 (Payment Plan B)

This pricing option is for the student that can not pay the one-time discounted fee and wants to be placed on a payment plan for the 2018 Income Tax Course. The student pays a down payment of \$49.99 with the remaining balance of \$175 paid within 30 days after starting the course. The total fee paid for this pricing option is \$224.99 per student.

Option #4 (Buddy System)

This pricing option is for two or more students that are buddies and want to pay the lowest overall price for the 2018 Income Tax Course. The two or more students pay a one-time discounted fee of \$149.99 each and they are paid in full for the entire course. This one-time discounted fee must be paid on or before the first day of class and at the same time by the two or more students. The total fee paid for this pricing option is \$149.99 per student.

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Income Tax Course Schedule

OCTOBER 2018						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1	2 Income Tax Course 6 p.m. to 9 p.m.	3	4 Income Tax Course 6 p.m. to 9 p.m.	5	6
7	8	9 Income Tax Course 6 p.m. to 9 p.m.	10	11 Income Tax Course 6 p.m. to 9 p.m.	12	13
14	15	16 Income Tax Course 6 p.m. to 9 p.m.	17	18 Income Tax Course 6 p.m. to 9 p.m.	19	20
21	22	23 Income Tax Course 6 p.m. to 9 p.m.	24	25 Income Tax Course 6 p.m. to 9 p.m.	26	27
28	29	30 Income Tax Course 6 p.m. to 9 p.m.	31			

Income Tax Course Schedule (continued)

NOVEMBER 2018						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
				1 Income Tax Course 6 p.m. to 9 p.m.	2	3
4	5	6 Income Tax Course 6 p.m. to 9 p.m.	7	8 Income Tax Course 6 p.m. to 9 p.m.	9	10
11	12	13 Income Tax Course 6 p.m. to 9 p.m.	14 Income Tax Course 6 p.m. to 9 p.m.	15 Income Tax Course 6 p.m. to 9 p.m.	16	17
18	19	20 No Class	21	22 No Class	23	24
25	26	27 Income Tax Course 6 p.m. to 9 p.m.	28 Income Tax Course 6 p.m. to 9 p.m.	29 Income Tax Course 6 p.m. to 9 p.m.	30	

Income Tax Course Schedule (continued)

DECEMBER 2018						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
						1
2	3	4 Final Exam Review 6 p.m. to 9 p.m.	5 Final Exam Review continued 6 p.m. to 9 p.m.	6 Final Exam Review continued 6 p.m. to 9 p.m.	7	8
9	10	11 Final Exam 6 p.m. to 10 p.m.	12 Final Exam continued 6 p.m. to 10 p.m.	13 Final Exam continued 6 p.m. to 10 p.m.	14	15
16	17	18	19	20	21	22
23 30	24 31	25	26	27	28	29