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Future Tax Advisor:

I would like to first thank you for your interest in wanting to attend my 2020 Income Tax Course, **“The Fundamentals of the Income Tax.”**

The classes will be held at the company’s main office at 4317 Robinson Road in Jackson, Mississippi (located between Piccadilly and Popeyes on Highway 18). Classes are every Tuesday and Thursday (some Wednesdays) evening from 6:00 p.m. to 9:00 p.m. beginning Tuesday, October 20, 2020 and will end on Thursday, December 17, 2020. See attachment for the detailed Income Tax Course Schedule.

Due to limited seating of approximately 15 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 2020 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 Byram, Canton and Jackson, Mississippi 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 management positions available and a Business Partnership Opportunity 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, unreimbursed employee business expenses, 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 obtaining your very own Preparer Tax Identification Number (PTIN) with the Internal Revenue Service (IRS).

Again, I thank you for your interest in wanting to attend my 2020 Income Tax Course, and I look forward to meeting you on Tuesday, October 20, 2020 at 6:00 p.m.

If you have any questions between now and the first day of class, please feel free to contact me using either one of the methods below.

Sincerely,

Tim C. Lee

Tim C. Lee

CEO & Founder

timclee@TCLFinancialTaxServices.com

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

“THE FUNDAMENTALS OF THE INCOME TAX”

**This Course and Curriculum is personally designed and taught by
CEO and Founder, Tim C. Lee**

FEDERAL INDIVIDUAL INCOME TAX RETURN FORMS

- Form 1040
- Form 1040-SR

FEDERAL INDIVIDUAL INCOME TAX RETURN SCHEDULES

- Schedule 1 (Additional Income and Adjustments to Income)
- Schedule 2 (Additional Taxes)
- Schedule 3 (Additional Credits and Payments)

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

TWO TYPES OF INCOME

- Earned Income
- Unearned Income

Course Curriculum (continued)

STANDARD DEDUCTION AMOUNTS

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

ALIMONY INCOME

GAMBLING INCOME

- Form W2-G

MISCELLANEOUS INCOME

- Form 1099-MISC

EDUCATOR EXPENSES DEDUCTION

ALIMONY PAID DEDUCTION

FILING STATUSES

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

DEPENDENTS

- Qualifying Child
- Qualifying Relative

NONREFUNDABLE CREDITS

- Child and Dependent Care Expenses (Form 2441)
- Education Credits (Form 8863)
- Retirement Savings Contribution Credit (Form 8880)
- Child Tax Credit
- Credit for Other Dependents (Other Dependents Credit)

REFUNDABLE CREDITS

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

CAPITAL GAINS AND LOSSES

- Form 1099-B
- Schedule D
- Form 8949

SOCIAL SECURITY BENEFITS

- Form SSA-1099

Course Curriculum (continued)

CANCELLATION OF DEBT INCOME

- Form 1099-C
- Form 982

MOVING EXPENSES

- Form 3903

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

- Form 1099-R
- Form 5329

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

STANDARD DEDUCTION AMOUNTS FOR DEPENDENTS OF ANOTHER

FILING REQUIREMENTS TESTS

STUDENT LOAN INTEREST DEDUCTION

- Form 1098-E

EDUCATION CREDITS AND TUITION AND FEES DEDUCTION

- Form 1098-T
- Form 8863
- American Opportunity Credit
- Lifetime Learning Credit
- Form 8917

MISSISSIPPI INDIVIDUAL INCOME TAX RETURN FORMS

- Form 80-105
- Form 80-205

MISSISSIPPI FILING STATUSES AND STANDARD DEDUCTION AMOUNTS

- Single
- Married – Filing Separate Returns
- Married – Combined or Joint Return
- Married – Spouse Died in Tax Year
- Head of Family

MISSISSIPPI EXEMPTION TYPES AND AMOUNTS

- Single
- Married – Filing Separate Returns
- Married – Combined or Joint Return
- Married – Spouse Died in Tax Year
- Head of Family
- Each Dependent
- Taxpayer and/or Spouse is Age 65 or Older
- Taxpayer and/or Spouse is Blind

MISSISSIPPI ADJUSTMENTS, CREDITS, DEDUCTIONS, AND INCOME

Course Curriculum (continued)

MISSISSIPPI SCHEDULE OF TAX COMPUTATION

STATES WITH NO INDIVIDUAL INCOME TAX

ITEMIZED DEDUCTIONS (Employees Only)

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

UNREIMBURSED EMPLOYEE BUSINESS EXPENSES (Employees Only)

- Form 2106

BUSINESS INCOME (Employees Only)

- Schedule C
- 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”

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 2020 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 2020 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 2020 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 2020 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.

Income Tax Course Schedule**OCTOBER 2020**

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

Income Tax Course Schedule (continued)

| NOVEMBER 2020 | | | | | | |
|----------------------|---------------|--|--|--|---------------|-----------------|
| Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday |
| 1 | 2 | 3 Income Tax Course 6 p.m. to 9 p.m. | 4 Income Tax Course 6 p.m. to 9 p.m. | 5 Income Tax Course 6 p.m. to 9 p.m. | 6 | 7 |
| 8 | 9 | 10 Income Tax Course 6 p.m. to 9 p.m. | 11 | 12 Income Tax Course 6 p.m. to 9 p.m. | 13 | 14 |
| 15 | 16 | 17 Income Tax Course 6 p.m. to 9 p.m. | 18 Income Tax Course 6 p.m. to 9 p.m. | 19 Income Tax Course 6 p.m. to 9 p.m. | 20 | 21 |
| 22 | 23 | 24 Income Tax Course 6 p.m. to 9 p.m. | 25 | 26 No Class | 27 | 28 |
| 29 | 30 | | | | | |

Income Tax Course Schedule (continued)

| DECEMBER 2020 | | | | | | |
|----------------------|---------------|---|---|--|---------------|-----------------|
| Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday |
| | | 1 Income Tax Course 6 p.m. to 9 p.m. | 2 Income Tax Course 6 p.m. to 9 p.m. | 3 Income Tax Course 6 p.m. to 9 p.m. | 4 | 5 |
| 6 | 7 | 8 Final Exam Review 6 p.m. to 9 p.m. | 9 Final Exam Review continued 6 p.m. to 9 p.m. | 10 Final Exam Review continued 6 p.m. to 9 p.m. | 11 | 12 |
| 13 | 14 | 15 Final Exam 6 p.m. to 10 p.m. | 16 Final Exam continued 6 p.m. to 10 p.m. | 17 Final Exam continued 6 p.m. to 10 p.m. | 18 | 19 |
| 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 27 | 28 | 29 | 30 | 31 | | |