

2017 Corptax University Schedule



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2017 v7

For more information on any of our products or services, please visit corptax.com.

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Regional Learning Center Locations

Dallas, TX
 2701 Dallas Parkway
 Suite 400
 Plano, TX 75093
 Phone: 972-677-4200
 Fax: 972-677-4390

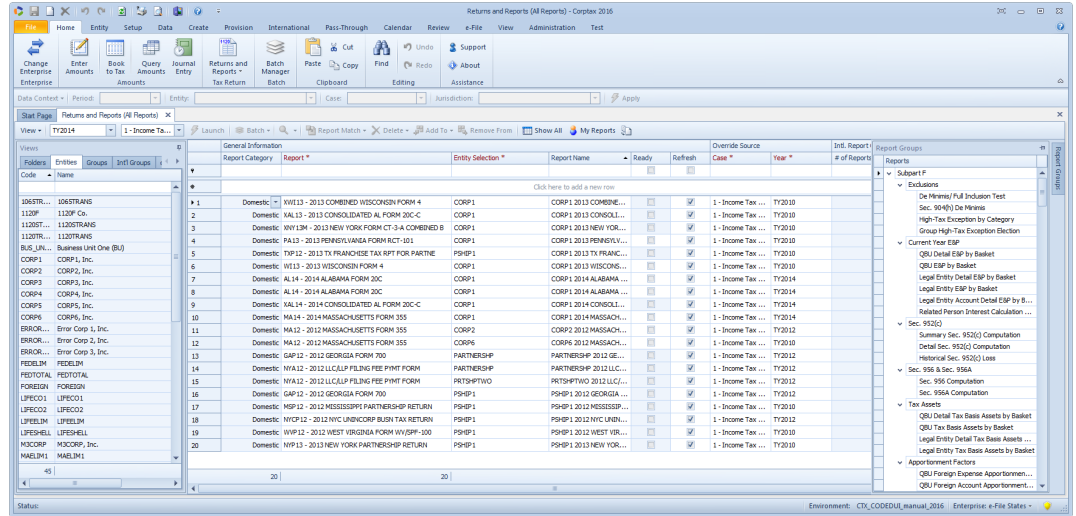
Chicago, IL
 2100 E. Lake Cook Road
 Suite 800
 Buffalo Grove, IL
 Phone: 847-236-8000
 Fax: 847-236-8011

Woodland Hills, CA
 21550 Oxnard Street
 Suite 700
 Woodland Hills, CA
 91367

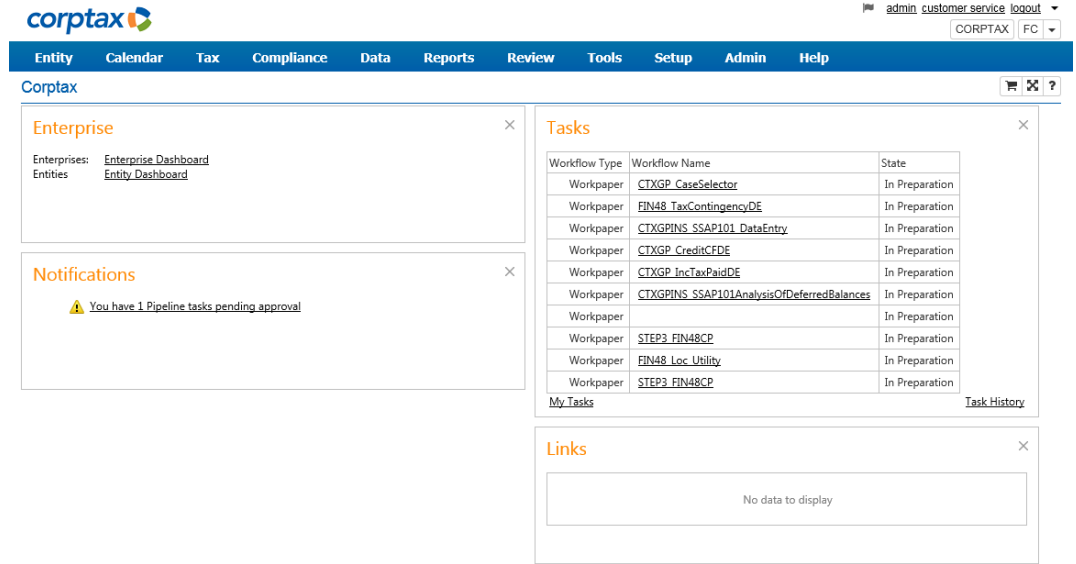
About Corptax

Corptax, Inc. has been the leading provider of corporate tax software and services for more than 30 years. Now, we are delivering technology that leads us toward a multi-year tax system, a single solution with common database, user experience, and administration to address all the needs of today's corporate tax department.

Our integrated tax compliance, provision, and planning applications deliver in-depth functionality, plus an intuitive interface that provides the ease-of-use and the look-and-feel of standard Microsoft® applications, so you can work in a manner to which you're already accustomed.



Intuitive Interface with Microsoft Look and Feel Reduces Learning Curve



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Corptax Web Interface

Product Training Information

Corptax, Inc. offers a wide selection of courses for both the new and advanced Corptax software user, most of which are eligible for CPE credit. All sessions are taught by experienced trainers and are designed to help address real-life issues through case studies and hands-on exercises.

We offer many convenient learning options to help address your learning needs, on your terms:

- [Online Training Events](#). In-depth, online product training
- [Corptax 24/7 Courses](#). Select online product training sessions are available on demand from our recording library
- [Classroom Events](#). Immerse yourself in instructor-led sessions. Visit our primary location in Dallas, TX or contact us to schedule a session at one of our other regional locations
- [Onsite Training](#). Corptax training brought to your office
- [Connect 2017](#). 4 days of all things Corptax
- [Corptax Certification](#). Credentials to recognize qualified users

CPE Information

Registration Information

A full listing of the event and course offerings is available by visiting the Training Center, which can be accessed by logging in to [Corptax Connect](#).

Please review the Training Details, including descriptions, price, and available CPE credits, for an event or course by browsing from the product listing or viewing the full calendar. Additionally, you can simply type in the name of the event or course as indicated in this document in the Search field. To register, you must complete the online registration form including the payment processing.

To register, follow this 5 step process:

1. Access the Training Details for the desired event or course and click the **Add to Cart*** action item or button. This will display your shopping cart.
2. You can search for additional courses by clicking **Continue Shopping**.
3. When you have added all your courses to your cart, click **Proceed to Checkout**. This displays the payment processing form.
4. Select your desired payment method and complete the necessary details.
5. Review your order and click **Place Order** to complete your registration.

*** Note:** Some courses require you to click **Request** rather than **Add to Cart**. If this occurs, select **Request** to display your Transcript. Then select **Register** to continue the registration process.

If there are no dates scheduled for an event you are interested in attending or if the scheduled dates do not meet your needs, please contact us at learn@corptax.com to discuss alternative scheduling options.

Cancellation Policy

Classroom cancellations up to three days prior to the scheduled Classroom event will result in a \$400 withdrawal fee per registrant. Cancellations within three days of any event and no-shows will be charged the full session fee. If Corptax cancels a classroom session that you are registered for, a cancellation email will be sent three weeks prior to the event.

Online event cancellations up to three days prior to the scheduled University Online event will result in a \$50 withdrawal fee per registrant. Cancellations within three days of any event and no-shows will be charged the full session fee. If Corptax cancels an online event that you are registered for, a cancellation email will be sent one week prior to the event.

Corptax, Inc. reserves the right to change the session fee and modify, reschedule, or cancel events at any time prior to the event start time.

To cancel either a Classroom or Online event, log in to [Corptax Connect](#), and click **Training**, then **Training Opportunities** to navigate to Training Center. Once in Training Center, click **Your Transcript** and locate the session you wish to cancel, then select **Withdraw** from the **Options** field.

Please note that all times shown on this schedule and on the Corptax website are Central Time (CT).

Corptax, Inc. reserves the right to change the course fee and modify, reschedule, or cancel courses at any time prior to the course start time.

Additional Information

For more information regarding course content, delivery methods, or CPE, to inquire about our refund/cancellation policy, or to log a complaint regarding a session, please contact Corptax University at learn@corptax.com.

For detailed instruction on logging in and using the Corptax Training Center, you can access the Training Center Guide, which is located in the Corptax Connect Knowledge Base and can be accessed by logging in to [Corptax Connect](#).

In accordance with the National Association of State Boards of Accountancy (NASBA) standards, course evaluations will be distributed at the end of the event.

Corptax, Inc. is registered with NASBA as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org.

NASBA National Registry of CPE Sponsors – Sponsor License Number 108611
Texas State Board of Public Accountancy – Sponsor Number 009498

In accordance with the standards of the National Registry of CPE Sponsors, CPE credits will be granted based on a 50-minute hour.

Corptax Certified Professional Program

Why Get Certified?

Demand for Corptax experts continues to grow. By getting certified, you identify yourself as one of those experts. Moreover, you've told us that we've given you a great deal of power: to customize, to integrate, and to complete your entire tax life cycle using the Corptax suite of products. Our goal is to help you take full advantage of that power.

By earning a Corptax certification, you can:

- Use the full potential of Corptax with best-in-class skills
- Grow your career by setting yourself apart from the crowd
- Join an exclusive community of Corptax Certified Professionals

3 Steps to Certification

Step 1: Pick Your Certification

Determine which certification is right for you by consulting the [Program Details](#) and certification datasheet. We offer four certifications covering a variety of Corptax products and areas of the tax life cycle.

Step 2: Get Ready

Are you ready for the exam now?

You may have on-the-job experience and be ready to take the exam today. If so, skip to step 3, Get Certified.

Do you want to take training to help you prepare?

You may elect to bolster your knowledge with additional preparations and training. We offer learning options ranging from certification preparatory training (see page 50) to an affordable Online Training subscription program (see page 10). In our training courses, you'll learn critical skills and gain an understanding of exam materials.

Step 3: Get Certified

Once your exam preparations are complete, you can register for the certification program(s) of your choice. Each certification examination includes a knowledge exam and a case study to certify mastery of skills.

Corptax Training Options

Online Events

Online Events provide detailed learning on specific subjects without having to leave your office.

Corptax 24/7 Courses

Corptax 24/7 Courses are on-demand learning available to you 24 hours a day/7 days a week.

Classroom Events

Attend comprehensive instructor-led sessions on a variety of topics at any of our three regional facilities.

Sessions are limited to a small number of participants to allow for individual instruction and knowledge-sharing.

Onsite

Experienced members of our training team will travel to your office and deliver a comprehensive training agenda designed to your specifications.

Online Training Subscription

For an affordable one-time fee, each participant receives unlimited access to our entire Online Training curriculum. That's over 50 different sessions for a total of over 100 hours in CPE-credit. In addition, Online Training Subscribers gain free access to Corptax 24/7 Courses. This includes select sessions available to each participant via our recording library 24 hours a day/7 days a week. See the complete listing of recorded sessions on the *Corptax 24/7 Course List* section on page 54.

Note: No CPE credits are available for recorded sessions.

Level	Price
Individual	\$995
Starter Package: Up to 5 users per package	\$2,495
Innovator Package: Up to 10 users per package	\$4,995
Visionary Package: Up to 20 users per package	\$9,995

Note: Access to the Online Training Subscription is issued on an individual basis. It is not transferable to other session attendees or other session types. Subscriptions are valid until your company's upcoming fiscal year-end. Check out our [expiration table](#) for more information on your expiration date.

For more information about online subscriptions, see Corptax.com.

BEPS and Global Reporting Track



Using Corptax for Our Base Erosion and Profit Shifting Reporting Series

Corptax BEPS CbC is a comprehensive solution designed to help multinational companies prepare for and meet finalized Country-by-Country (CbC) reporting requirements. Corptax single system automation leverages data already in the system such as amounts, entity information, and structures to simplify and streamline global compliance. In this session, you will walk through the entire process including reviewing the profile data, importing, data entry, reporting, and analysis.

Delivery Method: Internet-Based
Subject Area: Specialized Knowledge and Applications
Course Level: Intermediate
Course Number: 6-7010

Prerequisite: None
Advanced Preparation: None
CPE: 6
Price: \$320
Duration: 1 day

Course Dates:

- February 14
- April 4
- July 11
- October 10

Individual Modules—Day 1

Course Number: 6-7011 & 6-7011R
10:00 a.m.–12:00 p.m. CT

Corptax Overview and Setup: In this session, you will review the profile data required for Country-by-Country reporting. You'll create new entities and classify related party revenue accounts as well as create user-defined workflows.

Course Number: 6-7012 & 6-7012R
1:00 p.m.–2:00 p.m. CT

Data Import: Learn how to import your trial balance data as a starting point for your Country-by-Country data. This session demonstrates the conversion and mapping of data for compliance and Country-by-Country reporting.

Course Number: 6-7013 & 6-7013R
2:30 p.m.–4:30 p.m. CT

Country-by-Country Data Collection and Reporting: Learn how Corptax converts trial balance data or data entry to Country-by-Country Table 1 reports. You will prepare Table 1 and Table 2 for a global group of companies as well as run analysis reports in Corptax Office.

Corptax Transfer Pricing Architect (TPA) Overview

Transfer Pricing Architect gives you the tools to conduct a transfer pricing study. We designed the session to assist in the process of documenting your company's existing transfer prices or engage in planning for future transactions.

Delivery Method: Internet-Based
Subject Area: Specialized Knowledge and Applications
Course Level: Intermediate
Course Number: 6-840

Prerequisite: None
Advanced Preparation: None
CPE: 2
Price: \$200
Duration: 2 hours

Course Dates:
Sessions are available on request.

To register for a course, follow the steps in the *Registration Information* section on page 7. If there are no dates scheduled for a session you are interested in or if the scheduled dates do not meet your needs, please contact us at learn@corptax.com to discuss alternative scheduling options.

Data Management Track



Corptax Amount Import

Learn how to improve efficiencies in your import process. This session presents a detailed explanation of the conversion and mapping tables, template files, processes, and duplicate amount options available when you import general ledger information into Corptax.

Delivery Method: Internet-Based
Subject Area: Specialized Knowledge and Applications
Course Level: Intermediate
Course Number: 6-200 & 6-200R

Prerequisite: None
Advanced Preparation: None
CPE: 2
Price: \$200
Duration: 2 hours

Course Dates:

- January 10
- February 1
- May 23
- September 20

Course Time:
10:00 a.m.–12:00 p.m. CT

Intermediate Corptax Data Import

Are you interested in taking your data import process to the next level? Join this intermediate data import session to become more efficient with the data import tools. You will gain insight on how to handle files with multiple columns and rows of data, create derived columns, and import adjustments.

Delivery Method: Internet-Based
Subject Area: Specialized Knowledge & Applications
Course Level: Intermediate
Course Number: 6-205

Prerequisite: None
Advanced Preparation: None
CPE: 2
Price: \$200
Duration: 2 hours

Course Dates:

- January 12
- February 6
- May 31
- September 26

Course Time:
10:00 a.m.–12:00 p.m. CT

Data Management Using Corptax Query Tools

Join this session for a look at the new Data Management module in Corptax Web. This session covers queries as well as copying and modifying data. In addition, this session demonstrates the new rules-based and advanced query functionality.

Delivery Method: Internet-Based
Subject Area: Specialized Knowledge & Applications
Course Level: Basic
Course Number: 6-5000

Prerequisite: None
Advanced Preparation: None
CPE: 2
Price: \$200
Duration: 2 hours

Course Dates:

- May 10
- September 27
- October 16

Course Time:
1:00 p.m.–3:00 p.m. CT

Setting Up Automated Adjustments Using Corptax Web (NEW)

Are you looking for a way to calculate and present adjustments consistently across your organization? Then you should consider how Corptax's automated adjustment workpapers will enhance your process. During this session you will set up and review workpapers for each of the model types that can be used to automate your adjustments. You will also see how easy it is to review automated adjustment workpapers for accuracy before and after posting.

Delivery Method: Internet-Based
Subject Area: Specialized Knowledge & Applications
Course Level: Basic
Course Number: 6-2910

Prerequisite: None
Advanced Preparation: None
CPE: 1.5
Price: \$150
Duration: 1.5 hours

Course Dates:

- April 6
- August 1
- December 8

Course Time:
10:00 a.m.–11:30 a.m. CT

To register for a course, follow the steps in the *Registration Information* section on page 7. If there are no dates scheduled for a session you are interested in or if the scheduled dates do not meet your needs, please contact us at learn@corptax.com to discuss alternative scheduling options.

Incorporating Corptax Automated Adjustments Into Your Processes (NEW)

Are you looking for a way to increase the efficiency of how adjustments are processed within your organization? Join this session to gain knowledge of the various methods that can be used to incorporate automated adjustment workpapers into your business processes. With this knowledge you will be able to design processes where adjustments are handled more efficiently and with less risk of error.

Delivery Method: Internet-Based
Subject Area: Specialized Knowledge & Applications
Course Level: Intermediate
Course Number: 6-2911

Prerequisite: None
Advanced Preparation: None
CPE: 1.5
Price: \$150
Duration: 1.5 hours

Course Dates:

- April 21
- August 24
- December 20

Course Time:

12:00 p.m.–1:30 p.m. CT

Corptax Web Reporting

Come see our new easier-to-read Corptax Web reports. Learn how to change report settings and configure columns as well as see new aggregation and comparison features.

Delivery Method: Internet-Based
Subject Area: Specialized Knowledge & Applications
Course Level: Intermediate
Course Number: 6-5600

Prerequisite: None
Advanced Preparation: None
CPE: 2
Price: \$200
Duration: 2 hours

Course Dates:

- April 27
- July 25
- November 13

Course Time:

12:00 p.m.–2:00 p.m. CT

Basic Corptax Office

Do you need to get acquainted with Corptax Office fundamentals? Then this session is for you! Corptax Office enables you to streamline data collection, improve analysis, and simplify management reporting all using your existing Excel worksheets. During this session you will learn to navigate through the Corptax Office interface and apply Corptax security to Excel spreadsheets. You will also see how easily you can submit information into Corptax and retrieve Corptax data into Excel spreadsheets.

Delivery Method: Internet-Based
Subject Area: Specialized Knowledge & Applications
Course Level: Basic
Course Number: 6-961 & 6-961R

Prerequisite: None
Advanced Preparation: None
CPE: 2
Price: \$200
Duration: 2 hours

Course Dates:

- Jan 5
- Feb 2
- Mar 2
- April 3
- May 5
- June 1
- July 5
- Aug 4
- Sept 1
- Oct 2

Course Time:

10:00 a.m.–12:00 p.m. CT

Intermediate Corptax Office

Are you ready to harness the power of Corptax Office? Then you won't want to miss this session. Get in-depth experience with the Corptax Office features that you can utilize to tackle your most challenging data collection and management reporting requirements. Gain the knowledge necessary to become proficient in using Corptax Office formulas and documentation. Gather insight on how advanced techniques, such as data manipulation, extraction, and options can be employed to improve analysis and enhance compliance.

Delivery Method: Internet-Based
Subject Area: Specialized Knowledge & Applications
Course Level: Intermediate
Course Number: 6-962

Prerequisite: None
Advanced Preparation: None
CPE: 2
Price: \$200
Duration: 2 hours

Course Dates:

- Jan 10
- Feb 9
- Mar 10
- April 13
- June 12
- July 12
- Aug 7
- Sept 11
- Oct 13

Course Time:

2:00 p.m.–4:00 p.m. CT

To register for a course, follow the steps in the *Registration Information* section on page 7. If there are no dates scheduled for a session you are interested in or if the scheduled dates do not meet your needs, please contact us at learn@corptax.com to discuss alternative scheduling options.

Using Corptax Office with Your Provision Data

Looking for a way to drive efficiency and reduce the risk of errors in your Provision processes? Join this session to gather the knowledge and skills necessary to expand the use of the Corptax Office product within your Provision processes.

Delivery Method: Internet-Based
Subject Area: Specialized Knowledge & Applications
Course Level: Intermediate
Course Number: 6-965

Prerequisite: None
Advanced Preparation: None
CPE: 2
Price: \$200
Duration: 2 hours

Course Dates:

- Jan 24
- Mar 8
- May 12
- July 17
- Oct 16
- Dec 7

Course Time: 10:00 p.m.–12:00 p.m. CT

Using Corptax Office with Your International Data

Join this session to discover ways to pull international data into Microsoft Excel using Corptax Office for reconciliation and reporting. You will use the Corptax functions to extract data, create a report using Corptax Office formulas.

Delivery Method: Internet-Based
Subject Area: Specialized Knowledge & Applications
Course Level: Intermediate
Course Number: 6-966

Prerequisite: None
Advanced Preparation: None
CPE: 2
Price: \$200
Duration: 2 hours

Course Dates:

- March 6
- July 26
- December 14

Course Time: 10:00 p.m.–12:00 p.m. CT

Setup Workflow Using Corptax

Corptax's Workflow Navigator allows you to organize a wide variety of tasks into a process flow that can be accessed via Corptax and on the web. It is the tool you need for streamlining your compliance, provision, or data collection process. Gain experience with creating workflows that incorporate tasks within Corptax, as well as linking to websites and spreadsheets that you use on a regular basis. You can also assign these tasks and see how they can be tracked from start to finish.

Delivery Method: Internet-Based
Subject Area: Specialized Knowledge & Applications
Course Level: Intermediate
Course Number: 6-215

Prerequisite: None
Advanced Preparation: None
CPE: 3.5
Price: \$300
Duration: 3 hours

Course Dates:

- March 9
- October 3

Course Time: 1:00 p.m.–4:00 p.m. CT

Corptax Data Collect - An Overview of Federal, State, City and International Workpapers and How to Use Them (NEW)

Are you looking for an efficient way to collect data for your International, U.S Federal, or State & City compliance needs? Join us in this session to discover what workpapers are available in the Corptax Data Collect products and how they can be used to standardize processes throughout the organization. You will see how easy it is to incorporate workpapers that provide a consistent method for collecting data across your organization.

Delivery Method: Internet-Based
Subject Area: Specialized Knowledge & Applications
Course Level: Basic
Course Number: 6-245

Prerequisite: None
Advanced Preparation: None
CPE: 2
Price: \$200
Duration: 2 hours

Course Dates:

- May 15
- October 6

Course Time: 10:00 a.m.–12:00 p.m. CT

To register for a course, follow the steps in the *Registration Information* section on page 7. If there are no dates scheduled for a session you are interested in or if the scheduled dates do not meet your needs, please contact us at learn@corptax.com to discuss alternative scheduling options.

Microsoft Excel Tips and Tricks

Could you be using Excel to improve your process flow and work smarter? This course offers a ton of great tips to help streamline your process for getting data both in and out of Corptax and analyzing that data more efficiently. During this session you will discover many great time-saving tricks for using existing Excel features to work more effectively with your Corptax data including Shortcut Commands, Excel Table features, and Fuzzy Lookups.

Delivery Method: Internet-Based

Subject Area: Specialized Knowledge & Applications

Course Level: Basic

Course Number: 6-963

Prerequisite: None

Advanced Preparation: None
CPE: 2

Price: \$200

Duration: 2 hours

Course Dates:

- Jan 23
- Feb 15
- Mar 13
- Apr 25
- May 23
- June 19
- July 26
- Aug 24
- Sept 19
- Oct 5

Course Time:

2:00 p.m.–4:00 p.m. CT

Corptax Database Connections (NEW)

This session gives you a first-hand look at how Corptax ODBC works. This application is the next biggest gateway to mining your own data from Corptax. Take a look at Corptax ODBC and then let your imagination run wild with process improvements.

Delivery Method: Internet-Based

Subject Area: Specialized Knowledge & Applications

Course Level: Intermediate

Course Number: 6-7600

Prerequisite: None

Advanced Preparation: None
CPE: 2

Price: \$200

Duration: 2 hours

Course Dates:

- May 11
- July 19
- Oct 2
- Dec 19

Course Time:

2:00 p.m.–4:00 p.m. CT

Leverage Corptax Data with Microsoft Excel Features (NEW)

Collection, manipulation, analytics and presentation of data within Excel is an everyday occurrence for the tax accountant. Would you like to be able to more effectively pull and clean your data in Excel or create interactive dashboards? Are you able to analyze your workbooks for potential problems or inconsistencies? In this session we'll discover advanced Excel features that would assist you with these tasks. Just some of the features to be covered are: Get & Transform (Power Query), Power View, and Inquire.

Delivery Method: Internet-Based

Subject Area: Specialized Knowledge & Applications

Course Level: Overview

Course Number: 6-8100

Prerequisite: None

Advanced Preparation: None
CPE: 2

Price: \$200

Duration: 2 hours

Course Dates:

- June 8
- July 14
- Aug 14
- Sept 21
- Oct 19
- Nov 17
- Dec 18

Course Time:

10:00 a.m.–12:00 p.m. CT

Using Microsoft Excel Pivot and Power Pivot Tables for Corptax Analytics (NEW)

Microsoft Excel Pivot Tables and Power Pivot are great analytical tools. In this instructor-lead session, you will discover the potential of pivot tables to summarize key data from one data source or multiple data sources. Whether the source of your data is from Corptax or not, Pivot Tables and Power Pivot allows you to slice and dice data in ways that are meaningful to you.

Delivery Method: Internet-Based

Subject Area: Specialized Knowledge & Applications

Course Level: Intermediate

Course Number: 6-8105

Prerequisite: None

Advanced Preparation: None
CPE: 2

Price: \$200

Duration: 2 hours

Course Dates:

- Mar 27
- Apr 24
- May 24
- June 22
- July 27
- Aug 16
- Sept 14
- Oct 12
- Nov 21
- Dec 11

Course Time:

2:00 p.m.–4:00 p.m. CT

To register for a course, follow the steps in the *Registration Information* section on page 7. If there are no dates scheduled for a session you are interested in or if the scheduled dates do not meet your needs, please contact us at learn@corptax.com to discuss alternative scheduling options.

Corptax Query Tools

If you've ever felt overwhelmed trying to sort through large amounts of data to find meaningful information, then you can't miss this session. You'll discover essential techniques to help you locate the data you need and take action. Learn how to use basic queries for data review, data entry, create summaries and generate reports. Find out how to modify, delete, copy and export amounts. This session also addresses International Compliance data queries.

Delivery Method:

Internet-Based

Subject Area: Specialized

Knowledge & Applications

Course Level: Basic

Course Number: 6-120R

Prerequisite: None

Advanced Preparation: None

CPE: None

Price: \$99

Duration: 1.5 hours

Course Dates:

This course is available as a 24/7 recorded session only.

To register for a course, follow the steps in the *Registration Information* section on page 7. If there are no dates scheduled for a session you are interested in or if the scheduled dates do not meet your needs, please contact us at learn@corptax.com to discuss alternative scheduling options.

Entity Management Track



Managing Entity Data Using Corptax Properties and Views

Do you have multiple systems or spreadsheets that you use to track information about your entities? Would you like to streamline the process of acquiring and managing this data into a central location? Join this session to learn how you can use Corptax Entity Management to create entity properties that support reporting requirements specific to your organization. In addition, learn how to create entity property groups and views that will result in more efficient processes for acquiring and managing your entity data.

Delivery Method: Internet-Based

Subject Area: Specialized Knowledge & Applications

Course Level: Basic

Course Number: 6-260

Prerequisite: None

Advanced Preparation: None

CPE: 2

Price: \$200

Duration: 2 hours

Course Dates:

- May 19
- August 15

Course Time:

10:00 a.m.–12:00 p.m. CT

Managing Entity Structures Using Corptax Ownership and Query Groups

Are you looking for a way to simplify the tracking of ownership and other data within your organization? If so, join us to learn how the Corptax Entity Management solution can be used to create and maintain this information across reporting periods. You will learn how to create and maintain ownership-driven entity groups that are automatically updated based on changes in the ownership structure. In addition, learn how to create query-based entity groups that are based on custom attributes unique to your reporting and analysis needs.

Delivery Method: Internet-Based

Subject Area: Specialized Knowledge & Applications

Course Level: Basic

Course Number: 6-261

Prerequisite: None

Advanced Preparation: None

CPE: 2

Price: \$200

Duration: 2 hours

Course Dates:

- May 25
- August 23

Course Time:

2:00 p.m.–4:00 p.m. CT

To register for a course, follow the steps in the *Registration Information* section on page 7. If there are no dates scheduled for a session you are interested in or if the scheduled dates do not meet your needs, please contact us at learn@corptax.com to discuss alternative scheduling options.

e-File Track



Corptax e-File Processing

Electronically filing your return can be as easy as 1, 2, 3! Whether you are filing a Form 1120 or 5471, Corptax has designed a process to guide you through the steps of setting up, preparing, and transmitting your returns. During this session you will become familiar with the Corptax-provided tools for creating MeFs, e-File packages, attaching supporting documents, and much more!

Delivery Method: Internet-Based
Subject Area: Specialized Knowledge & Applications
Course Level: Intermediate
Course Number: 6-814

Prerequisite: None
Advanced Preparation: None
CPE: 3
Price: \$250
Duration: 2.5 hours

Course Dates:

- Feb 15
- Mar 9
- Apr 5
- May 17
- June 2
- July 10
- Aug 10
- Sept 5

Course Time:
10:00 a.m.–12:30 p.m. CT

State e-File Using Corptax

This session highlights how Corptax e-File works with Corptax U.S. Compliance. You will learn how to handle the e-file process from creating the necessary MeF files to creating e-File packages for both the Federal proforma and state returns.

Delivery Method: Internet-Based
Subject Area: Specialized Knowledge & Applications
Course Level: Intermediate
Course Number: 6-815 & 6-815R

Prerequisite: None
Advanced Preparation: None
CPE: 2
Price: \$200
Duration: 2 hours

Course Dates:

- March 16
- July 12
- August 17
- October 10

Course Time:
1:30 p.m.–3:30 p.m. CT

Advanced Corptax e-File

Join this session to expand your knowledge of the various Corptax-provided tools and resources that will simplify your e-file experience. You will gain insight on how Corptax e-File helps you manage the common methods for processing special jurisdictional requirements, such as signature methods and payment information. Improve your ability to troubleshoot and resolve common e-file errors by utilizing tools such as the Knowledge Base and Raw Data Viewer.

Delivery Method: Internet-Based
Subject Area: Specialized Knowledge & Applications
Course Level: Advanced
Course Number: 6-817

Prerequisite: None
Advanced Preparation: None
CPE: 2
Price: \$200
Duration: 2 hours

Course Dates:

- Feb 16
- Mar 20
- Apr 10
- May 16
- June 6
- July 20
- Aug 18
- Sept 8

Course Time:
2:00 p.m.– 4:00 p.m. CT

Mixed Returns Using Corptax

The IRS has XML file mandates for Consolidated 1120 returns for Life and/or PC. If your company files an 1120L and/or an 1120PC, you may need to electronically file these mixed returns. This session will help you prepare mixed returns for electronic filing.

Topics include:

- Preparing a mixed return in Corptax
- Creating the entity structures for the subs
- Bringing the data into Corptax e-File

Delivery Method: Internet-Based
Subject Area: Specialized Knowledge & Applications
Course Level: Intermediate
Course Number: 6-820 & 6-820R

Prerequisite: None
Advanced Preparation: None
CPE: 3
Price: \$250
Duration: 2.5 hours

Course Dates:

- March 7
- August 10

Course Time:
2:00 p.m.–4:30 p.m. CT

To register for a course, follow the steps in the *Registration Information* section on page 7. If there are no dates scheduled for a session you are interested in or if the scheduled dates do not meet your needs, please contact us at learn@corptax.com to discuss alternative scheduling options.

Electronically Preparing Form 7004 in Corptax

If you're unable to assemble all of the necessary tax documentation in time to meet the federal tax deadline, you can apply for an extension. Form 7004 provides an automatic 6-month extension of time to file certain business income tax, information, and other returns. This session will detail the Form 7004 preparation process within Corptax.

Delivery Method: Internet-Based

Subject Area: Specialized Knowledge & Applications

Course Level: Basic

Course Number: 6-825 & 6-825R

Prerequisite: None

Advanced Preparation: None

CPE: 1.5

Price: \$100

Duration: 1.5 hours

Course Dates:

- February 22
- July 13

Course Time:

2:00 p.m.–3:30 p.m. CT

Corptax e-File for Foreign Bank Account Report (FBAR)

Are you looking for an efficient way to prepare and file the Form FinCEN Report 114, Foreign Bank and Financial Accounts Report (FBAR)? Then you will want to join this session to discover how you can utilize Corptax to fulfill the e-file requirements associated to this form. During the session you will review the current requirements for e-filing and use a case study to walk through the process of preparing and filing a consolidated FBAR form.

Delivery Method: Internet-Based

Subject Area: Specialized Knowledge & Applications

Course Level: Basic

Course Number: 6-827

Prerequisite: None

Advanced Preparation: None

CPE: 2

Price: \$200

Duration: 2 hours

Course Dates:

- February 6
- March 24
- April 20
- May 22
- June 13

Course Time:

2:00 p.m.– 4:00 p.m. CT

Corptax Partnership e-Filing

This session will explain how to use Corptax e-File along with Corptax U.S. Compliance to handle the various federal and state e-filing requirements for partnership filers.

Delivery Method: Internet-Based

Subject Area: Specialized Knowledge & Applications

Course Level: Intermediate

Course Number: 6-612

Prerequisite: None

Advanced Preparation: None

CPE: 2

Price: \$200

Duration: 2 hours

Course Dates:

- March 16
- May 18
- August 23

Course Time:

2:00 p.m.–4:00 p.m. CT

Corptax U.S. Compliance—Filing Federal Amended Returns

Corptax provides a streamlined process for filing your amended federal return. During this season you will walk through the steps necessary to prepare and e-file your amended federal return. In addition, you will review how Corptax can be used to analyze various settlement position scenarios.

Delivery Method: Internet-Based

Subject Area: Specialized Knowledge & Applications

Course Level: Intermediate

Course Number: 6-109 & 6-109R

Prerequisite: None

Advanced Preparation: None

CPE: 2

Price: \$200

Duration: 2 hours

Course Dates:

Sessions are available on request.

Corptax U.S. Compliance—Filing State Amended Returns

Join this session to see how you can use the data already in Corptax to streamline and automate the process of filing amended state returns.

Delivery Method: Internet-Based

Subject Area: Specialized Knowledge & Applications

Course Level: Intermediate

Course Number: 6-119 & 6-119R

Prerequisite: None

Advanced Preparation: None

CPE: 2

Price: \$200

Duration: 2 hours

Course Dates:

Sessions are available on request.

To register for a course, follow the steps in the *Registration Information* section on page 7. If there are no dates scheduled for a session you are interested in or if the scheduled dates do not meet your needs, please contact us at learn@corptax.com to discuss alternative scheduling options.

Indirect Tax Track



CORPSales—Basic

If you are a new CORPSales user, this course demonstrates the software's basic functionality for streamlining sales and use tax compliance. The course focuses on profile setup, amount import, data query, return setup, calculation options, tracing amounts, and return generation. Additionally, monthly procedures for return preparation and recommended monthly and annual maintenance requirements are also covered.

Delivery Method: Classroom
Subject Area: Specialized Knowledge & Applications
Course Level: Basic
Course Number: 3-900
Prerequisite: None
Advanced Preparation: None
CPE: 19.5
Price: \$995
Duration: 2.5 days

Course Dates for Dallas:

- January 31–February 2
- April 25–27
- September 26–28

Course Time:

- Day 1:
8:30 a.m.–4:30 p.m. CT
- Day 2:
8:30 a.m.–4:30 p.m. CT
- Day 3:
8:30 a.m.–12:00 p.m.
CT

CORPSales Process Training

As a CORPSales user, you will be provided with a general understanding of what you can expect to do each month to prepare returns. This session will walk you through the monthly process from how to update CORPSales for new rates and calculations to how to import current data and run returns. This session is ideal for users that need a refresher on the monthly process or new CORPSales users.

Delivery Method: Internet-Based
Subject Area: Specialized Knowledge & Applications
Course Level: Basic
Course Number: 6-980 & 6-980R
Prerequisite: None
Advanced Preparation: None
CPE: 2
Price: \$200
Duration: 2 hours

Course Dates:

- February 28
- June 5
- September 25

Course Time:

1:00 p.m.–3:00 p.m. CT

CORPSales—Advanced

Learn the functionality of CORPSales beyond basic compliance. In this course you learn how to improve productivity in your tax department by customizing the software for management reports as well as non-sales and use tax and industry-specific compliance reporting, using custom calculations, white paper reports, A/P upload files, and check requests. Interactive case studies, based on participants' experience and topics of interest, are used to provide you with hands-on opportunities. This course also includes a review of recommended monthly compliance process best practices.

Delivery Method: Classroom
Subject Area: Specialized Knowledge & Applications
Course Level: Advanced
Course Number: 3-910
Prerequisite: None
Advanced Preparation: None
CPE: 19.5
Price: \$995
Duration: 2.5 days

Course Dates for Dallas:

- July 25–27

Course Time:

- Day 1:
8:30 a.m.–4:30 p.m. CT
- Day 2:
8:30 a.m.–4:30 p.m. CT
- Day 3:
8:30 a.m.–12:00 p.m. CT

To register for a course, follow the steps in the *Registration Information* section on page 7. If there are no dates scheduled for a session you are interested in or if the scheduled dates do not meet your needs, please contact us at learn@corptax.com to discuss alternative scheduling options.

Insurance Track



Corptax Basic Insurance Series

This series will take attendees on a journey through the return preparation process from importing data through completing the return for both Life and PC scenarios.

Delivery Method: Internet-Based

Subject Area: Specialized Knowledge & Applications

Course Level: Basic

Course Number: 6-400

Prerequisite: None

Advanced Preparation: None

CPE: 11

Price: \$760

Duration: 2.5 days

Course Dates:

- April 26–28
- August 29–31

Individual Modules—Day 1

Course Number: 6-401
10:00 a.m.–11:30 a.m. CT

Overview: This session introduces you to the Corptax system and how its characteristics will help drive efficiency in your federal return process. You will become familiar with the basic navigational tools within Corptax and how context fields are used to organize data within the system, including insurance specific profiles, such as accident years.

Course Number: 6-402
1:00 p.m.–3:30 p.m. CT

Import: This session presents a detailed explanation of the conversion and mapping tables, and import process for both trial balance and National Association of Insurance Commissioners (NAIC) data.

Individual Modules—Day 2

Course Number: 6-403
10:00 a.m.–11:30 a.m. CT

Enter/Review Trial Balance: During this session you will explore how you can review trial balance data in Corptax. You will learn key concepts that control how Corptax stores this data within the system and get hands-on experience with how you can efficiently review your data for accuracy.

Course Number: 6-404
2:00 p.m.–4:00 p.m. CT

1120 PC: This session concentrates on steps necessary to prepare the Federal 1120 Property and Casualty return and its supporting schedules for your company. You will learn about the various workpapers available for posting adjustments and reviewing data.

Individual Modules—Day 3

Course Number: 6-405
10:00 a.m.–12:00 p.m. CT

1120 L: This session concentrates on steps necessary to prepare the Federal 1120 Life return and its supporting schedules for your company. You will learn about the various workpapers available for posting adjustments and reviewing data.

To register for a course, follow the steps in the *Registration Information* section on page 7. If there are no dates scheduled for a session you are interested in or if the scheduled dates do not meet your needs, please contact us at learn@corptax.com to discuss alternative scheduling options.

International Compliance Track



Corptax International Compliance

If your organization has international tax compliance obligations, you won't want to miss this introductory session. The course highlights how you can benefit from the enhanced functionality of Corptax International Compliance. Learn how to navigate the interface and carry out the return process from start to finish. Topics covered include detailed aspects of look-through, Subpart F, E&P, and §861 Allocations. Participants also learn how to set up foreign exchange rates, enter equity and ownership information, generate reports, process Forms 5471 and 1118, and much more.

Delivery Method: Classroom
Subject Area: Specialized Knowledge & Applications
Course Level: Basic
Course Number: 3-560

Prerequisite: None
Advanced Preparation: None
CPE: 23
Price: \$1,125
Duration: 3 days

Course Dates for Dallas:

- March 7–9
- June 20–22

Course Time:

- Day 1:
8:30 a.m.–4:30 p.m. CT
- Day 2:
8:30 a.m.–4:30 p.m. CT
- Day 3:
8:30 a.m.–4:30 p.m. CT

Corptax International Compliance—Form 5471 Basic Series

This series offers you a convenient way to obtain the information needed to understand, at a high level, how the international tax return process works in Corptax International Compliance. Attending all sessions within this program will provide you with an understanding of all inputs and outputs required to complete Forms 5471 and 8858.

Delivery Method: Internet-Based

Subject Area: Specialized Knowledge & Applications
Course Level: Basic
Course Number: 6-500

Prerequisite: None
Advanced Preparation: None
CPE: 8
Price: \$560
Duration: 2 days

Course Dates:

- Feb 21–22
- Mar 28–29
- May 3–4
- June 8–9
- July 18–19
- Sept 6–7
- Oct 17–18
- Dec 5–6

Individual Modules—Day 1

Course Number: 6-501 & 6-501R
10:00 a.m.–11:00 a.m. CT

International Return Preparation Overview: Learn how the overall international return preparation process works in Corptax International Compliance. Review dataflow for both Form 5471 and Form 1118 and learn what data is required to prepare both forms.

Course Number: 6-502 & 6-502R
2:00 p.m.–4:00 p.m. CT

International Setup Process: This session discusses the inputs required to complete Form 5471 including international specific profiles, adjustments, international amount mapping, and the basics of foreign exchange rates. You will also take a look at using international and domestic entities, entering historical data, and the foreign international calculation options required to complete Form 5471.

Individual Modules—Day 2

Course Number: 6-503 & 6-503R
10:00 a.m.–12:00 p.m. CT

Foreign Processing for CFC's, Foreign Branches, and Foreign Partnerships: Learn how to check trial balance data, post adjustments, refresh amounts in the foreign sourcing workpapers, source adjusted foreign amounts. Additional topics include foreign international tax payments, entering Subpart F inclusions, and processing foreign calculations. Finally, take a look at how to prepare and review foreign entity reports and how to post foreign data required for Form 5471 and Form 8858 preparation.

Course Number: 6-504 & 6-504R
2:00 p.m.–4:00 p.m. CT

Form 5471 Report/Return Preparation and Reconciliation: This session explains how and when you should use various return calculations. You will also review how to prepare Form 5471 and discuss strategies for handling special Form 5471 filing requirements.

To register for a course, follow the steps in the *Registration Information* section on page 7. If there are no dates scheduled for a session you are interested in or if the scheduled dates do not meet your needs, please contact us at learn@corptax.com to discuss alternative scheduling options.

Corptax International Compliance Setup

Does trying to maintain your entity data for international compliance leave you feeling tied up in knots? Let Corptax ease the pain with Entity Management. This session mixes best practices with tips and tricks to streamline the administration tasks from setting up new companies to annual maintenance. You will see how to set up key information related to international compliance and how changes to this information can be tracked over time. You will get first-hand experience on how to utilize this information in Visual Org to get a graphic depiction of your organization's ever-changing entity structures.

Delivery Method: Internet-Based

Subject Area: Specialized Knowledge & Applications

Course Level: Intermediate

Course Number: 6-550

Prerequisite: None

Advanced Preparation: None

CPE: 2

Price: \$200

Duration: 2 hours

Course Dates:

- January 17
- February 27
- May 9

Course Time:

2:00 p.m.–4:00 p.m. CT

Corptax International Reports—Foreign Reports

This session will cover reports supporting Foreign Processing, such as Current Year E&P by Basket and Historical E&P. We will explore the details of Subpart F calculations in the DeMinimus/ Full Inclusion, high tax exception report, and Section 956 computation reports. Learn which reports help reconcile schedules on a 5471 or a consolidated 5471 for a CFC with branches and much more.

Delivery Method: Internet-Based

Subject Area: Specialized Knowledge & Applications

Course Level: Intermediate

Course Number: 6-561

Prerequisite: None

Advanced Preparation: None

CPE: 2

Price: \$200

Duration: 2 hours

Course Dates:

- Feb 23
- Mar 30
- May 5
- June 12
- July 20
- Sept 11
- Oct 19
- Dec 7

Course Time:

2:00 p.m.–4:00 p.m. CT

Preparation of Form 1118 in Corptax International

Electronic filing has brought about changes in the way many complete returns. We designed this session to outline the Form 1118 preparation process in Corptax International to complete Form 1118. This session includes data flow for 1118 processing, income sourcing, and basic Sec. 861 expense allocation and apportionment.

Delivery Method: Internet-Based

Subject Area: Specialized Knowledge & Applications

Course Level: Basic

Course Number: 6-521

Prerequisite: None

Advanced Preparation: None

CPE: 2

Price: \$200

Duration: 2 hours

Course Dates:

- April 12
- June 15
- July 10
- August 2
- October 11

Course Time:

10:00 a.m.–12:00 p.m. CT

Corptax International Reports—1118 and Domestic Reports

This session will cover reports supporting domestic processing and Form 1118. Learn how to reconcile the various Form 1118 schedules using reports. We will look at the reports that detail the Sec. 861 expense allocations. Manage the FTC with reports such as FTC by Basket, Taxable Income by Basket, Detailed Sec. 904 (f)/(g) Adjustments by Basket, and much more.

Delivery Method: Internet-Based

Subject Area: Specialized Knowledge & Applications

Course Level: Intermediate

Course Number: 6-562

Prerequisite: None

Advanced Preparation: None

CPE: 2

Price: \$200

Duration: 2 hours

Course Dates:

- April 12
- June 15
- July 10
- August 2
- October 11

Course Time:

2:00 p.m.–4:00 p.m. CT

To register for a course, follow the steps in the *Registration Information* section on page 7. If there are no dates scheduled for a session you are interested in or if the scheduled dates do not meet your needs, please contact us at learn@corptax.com to discuss alternative scheduling options.

Advanced Form 8858 Using Corptax International

Are you looking for a way to optimize the handling of your “Check the Box” entities? Join this session to gain new insight on how to prepare your Form 8858 using Corptax. You will review the options for setting up your 8858 entities and populating exchange rates. You will identify methods for handling lower tier branches and multi-currency consolidations. Lastly, you will determine the appropriate calculations to use for including the DRE in its owners Form 5471, Form 1120, or Form 1118.

Delivery Method: Internet-Based
Subject Area: Specialized Knowledge & Applications
Course Level: Advanced
Course Number: 6-537

Prerequisite: None
Advanced Preparation: None
CPE: 2
Price: \$200
Duration: 2 hours

Course Dates:

- February 23
- May 5
- July 20

Course Time:
10:00 a.m.–12:00 p.m. CT

Expediting Corptax International Compliance

Want to add efficiencies to your international compliance processes? Looking for ideas to move from data entry analysis? Join this session to see how Corptax utilities such as automated adjustments, copy sourcing, queries, and much more can expedite the process.

Delivery Method: Internet-Based
Subject Area: Specialized Knowledge & Applications
Course Level: Advanced
Course Number: 6-530

Prerequisite: None
Advanced Preparation: None
CPE: 2
Price: \$200
Duration: 2 hours

Course Dates:

- January 11
- February 17

Course Time:
10:00 a.m.–12:00 p.m. CT

Check the Box Short Period Return Considerations for International Forms Preparation in Corptax U.S. Compliance and Corptax International

Check the Box elections can require multiple filings for the same entity. This session will discuss the form preparation considerations and setup requirements to preparing these multiple filings. We will cover preparation of the forms in both Corptax U.S. Compliance and Corptax International Compliance.

Delivery Method: Internet-Based
Subject Area: Specialized Knowledge & Applications
Course Level: Intermediate
Course Number: 6-525

Prerequisite: None
Advanced Preparation: None
CPE: 1.5
Price: \$150
Duration: 1.5 hours

Course Dates:

- April 10
- July 6
- September 8

Course Time:
10:00 a.m.–11:30 a.m. CT

Beyond Basics Corptax International Foreign & 1118 Processing

Once you have a basic understanding of how the international tax return preparation process is handled in Corptax International Compliance, this hands-on session allows you to dig deeper. We’ll examine a variety of topics, such as custom Section 861 apportionment methods, Sec. 199 Domestic Production Deduction, tax attributes such as NOL, OFL, ODL, and SLL, preparing AMT 1118, and more.

Delivery Method: Internet-Based
Subject Area: Specialized Knowledge & Applications
Course Level: Intermediate
Course Number: 6-535

Prerequisite: None
Advanced Preparation: None
CPE: 2
Price: \$200
Duration: 2 hours

Course Dates:

- June 12
- August 17
- December 15

Course Time:
10:00 a.m.–12:00 p.m. CT

To register for a course, follow the steps in the *Registration Information* section on page 7. If there are no dates scheduled for a session you are interested in or if the scheduled dates do not meet your needs, please contact us at learn@corptax.com to discuss alternative scheduling options.

Preparing Form 8865 Using Corptax International and Partnership Series

Use Corptax for your Foreign Partnership Compliance with this session in preparing Form 8865. Because of the flow-through aspect of partnership, additional setup considerations are needed to address items such as mixed domicile, tiering and integration into E&P. Join this session to see what setup is needed and how they can impact the partnership allocations and return preparation of your foreign partnership compliance.

Delivery Method: Internet-Based

Subject Area: Specialized Knowledge & Applications

Course Level: Intermediate

Course Number: 6-570

Prerequisite: None

Advanced Preparation: None

CPE: 4.5

Price: \$400

Duration: 1 day

Course Dates:

- February 28
- July 25
- December 12

Individual Modules—Day 1

Course Number: 6-571

10:00 a.m.–12 p.m. CT

Preparing Form 8865: This session looks at aspects of preparing Form 8865 such as creating and associating partners and entering special allocations. Learn to recognize the purpose of the various Form 8865 calc files. Discuss how you can work with functional currency trial balances to prepare the form and include in E&P. Partner's capital account analysis and K-1 statements will also be discussed.

Course Number: 6-572

2:00 p.m.–4 p.m. CT

Advanced 8865 Topics: Foreign Partnership compliance does not stop at preparing Form 8865. This session examines:

- Hybrid structures such as mixed domicile ownership structure and mixed currency tiering.
- When to populate the exchange rates (CFCCON accounts) and the entities for which to populate them.
- How to make partner allocations.
- How to handle a change in ownership.
- What functional currency to use for the partnership and the branches and how the choice of functional currency affects the international E&P.
- How to bring in tiering adjustments to the into Corptax International.
- How to include DREs in Form 8865 and how to include partnerships in Form 5471.

To register for a course, follow the steps in the *Registration Information* section on page 7. If there are no dates scheduled for a session you are interested in or if the scheduled dates do not meet your needs, please contact us at learn@corptax.com to discuss alternative scheduling options.

Preparing Form 8825 Using Corptax

The IRS requires Partnership and S-Corporations to report rental real estate income and expenses by property on Form 8825. The tax reporting for these activities has some unique traits to consider. This session will highlight how Corptax can help you streamline the preparation of Form 8825.

Delivery Method: Internet-Based

Subject Area: Specialized Knowledge & Applications

Course Level: Intermediate

Course Number: 6-615 & 6-615R

Prerequisite: None

Advanced Preparation: None

CPE: 2

Price: \$200

Duration: 2 hours

Course Date:

Sessions are available upon request.

International Planning Using Corptax International

Let the power of Corptax work for you when it comes to your International planning tasks. Obtain the skills needed to leverage the data in the system to forecast and plan your tax scenarios.

Delivery Method: Internet-Based

Subject Area: Specialized Knowledge & Applications

Course Level: Intermediate

Course Number: 6-660

Prerequisite: None

Advanced Preparation: None

CPE: 2

Price: \$200

Duration: 2 hours

Course Dates:

- November 14

Course Time:

1:00 p.m.–3:00 p.m. CT

Preparing the Form 5471 in Corptax (non Corptax International license)

Electronic filing has brought about changes in the way many complete returns. With the IRS requirement that all forms and attachments be included in one electronic file, we designed this session to outline the form preparation process in Corptax U.S. Compliance for users who are not using the Corptax International Compliance to complete Form 5471.

Delivery Method: Internet-Based

Subject Area: Specialized Knowledge & Applications

Course Level: Intermediate

Course Number: 6-511 & 6-511R

Prerequisite: None

Advanced Preparation: None

CPE: 1.5

Price: \$150

Duration: 1.5 hours

Course Dates:

Sessions are available on request.

Preparation of Form 5472 in Corptax

Electronic filing has brought about changes in the way many complete returns. We designed this session to outline the Form 5472 preparation process with e-filing considerations.

Delivery Method: Internet-Based

Subject Area: Specialized Knowledge & Applications

Course Level: Intermediate

Course Number: 6-512 & 6-512R

Prerequisite: None

Advanced Preparation: None

CPE: 1.0

Price: \$100

Duration: 1 hour

Course Dates:

Sessions are available on request.

To register for a course, follow the steps in the *Registration Information* section on page 7. If there are no dates scheduled for a session you are interested in or if the scheduled dates do not meet your needs, please contact us at learn@corptax.com to discuss alternative scheduling options.

Introduction to Corptax International Compliance

Make sure you're taking full advantage of the functionality offered in Corptax International. Join this session to get an overview of all the features and functionality available.

Delivery Method: Internet-Based
Subject Area: Specialized Knowledge & Applications
Course Level: Overview
Course Number: 6-515

Prerequisite: None
Advanced Preparation: None
CPE: 3
Price: \$200
Duration: 2.5 hours

Course Dates:
Sessions are available on request.

Preparation of Form 1118 in Corptax U.S. Compliance without Corptax International

Electronic filing has brought about changes in the way many complete returns. We designed this session to outline the Form 1118 preparation process in Corptax for users who are not using Corptax International to complete form 1118.

Delivery Method: Internet-Based
Subject Area: Specialized Knowledge & Applications
Course Level: Basic
Course Number: 6-520

Prerequisite: None
Advanced Preparation: None
CPE: 1
Price: \$100
Duration: 1 hour

Course Dates:
Sessions are available on request.

To register for a course, follow the steps in the *Registration Information* section on page 7. If there are no dates scheduled for a session you are interested in or if the scheduled dates do not meet your needs, please contact us at learn@corptax.com to discuss alternative scheduling options.

Other Sessions Track



Administration and Security in Corptax Web—Setup

A representative of Corptax will generally work closely with your IT department to perform the initial installation of the Corptax products. As a Corptax Administrator, you may or may not be heavily involved in this process. Either way, there are some key items that you need to understand about the system requirements and how users access Corptax products. Once the system is installed, you will be responsible for setting the policies and defining the options that control how information is displayed or what features are available to users. As processes are changed or new users added within your organization, you will be responsible for ensuring access is properly controlled. During this session we will cover where to locate settings and options within Corptax and other resources and tools that Corptax provides to ensure Corptax is properly set up.

Delivery Method: Internet-Based
Subject Area: Specialized Knowledge & Applications
Course Level: Intermediate
Course Number: 6-2900

Prerequisite: None
Advanced Preparation: None
CPE: 2
Price: \$200
Duration: 2 hours

Course Date:

- April 3
- July 27

Course Time:
2:00 p.m.–4:00 p.m. CT

Administration and Security - Maintenance and Troubleshooting (NEW)

Corptax Administrators serve a key role in ensuring systems are up to date and running efficiently throughout the year. They are also the "go to" person for questions regarding system and data. This session will provide insights on Corptax provided resources and tools that help you maintain the system and troubleshoot issues with your Corptax products.

Delivery Method: Internet-Based
Subject Area: Specialized Knowledge & Applications
Course Level: Intermediate
Course Number: 6-2901

Prerequisite: None
Advanced Preparation: None
CPE: 2
Price: \$200
Duration: 2 hours

Course Dates:

- April 20
- August 3

Course Time:
2:00 p.m.–4:00 p.m. CT

Using Corptax U.S. State Planner

Make sure you're taking full advantage of all Corptax U.S. Compliance has to offer. This session will cover how the software can assist you in tracking separate company, multistate, and multi-entity separate state analyses for estimated payments, as well as compiling information for what-if scenarios. You will learn the basic setup steps for state planner as well as data entry and options for modifications, annualized income, and more. To complete the process, you will integrate the calculations with Corptax Calendar and complete the estimated payment form.

Delivery Method: Internet-Based
Subject Area: Specialized Knowledge & Applications
Course Level: Intermediate
Course Number: 6-150 & 6-150R

Prerequisite: None
Advanced Preparation: None
CPE: 3.5
Price: \$300
Duration: 3 hours

Course Dates:

- April 11
- August 14
- November 28

Course Time:
1:00 p.m.–4:00 p.m. CT

Corptax Calendar

Corptax Calendar allows you to track all your organization's obligations for tax and non-tax purposes, including non-U.S. jurisdictions, Sales, VAT, and Unclaimed Property. In this session you will learn how to track multiple obligations, including tasks, due dates, payments, user-defined activities, and refunds.

Delivery Method: Internet-Based
Subject Area: Specialized Knowledge & Applications
Course Level: Basic
Course Number: 6-900

Prerequisite: None
Advanced Preparation: None
CPE: 3.5
Price: \$300
Duration: 3 hours

Course Dates:

- Feb 7
- Mar 1
- June 1
- July 13
- Sep 18
- Oct 16

Course Time:
1:00 p.m.–4:00 p.m. CT

To register for a course, follow the steps in the *Registration Information* section on page 7. If there are no dates scheduled for a session you are interested in or if the scheduled dates do not meet your needs, please contact us at learn@corptax.com to discuss alternative scheduling options.

Corptax Visual Org

Attend this session and see for yourself just how easy it is to create organizational charts using the data that is already in Corptax. Learn how Corptax Visual Org can be used to analyze tax planning strategies, graphically verify tax compliance calculations, and automate the process of creating organization chart attachments for e-filing Forms 5471 and 8858.

Delivery Method: Internet-Based

Subject Area: Specialized Knowledge & Applications

Course Level: Intermediate

Course Number: 6-830 & 6-830R

Prerequisite: None

Advanced Preparation: None

CPE: 1

Price: \$100

Duration: 1 hour

Course Dates:

- March 6
- October 4

Course Time:

2:00 p.m.–3:00 p.m. CT

To register for a course, follow the steps in the *Registration Information* section on page 7. If there are no dates scheduled for a session you are interested in or if the scheduled dates do not meet your needs, please contact us at learn@corptax.com to discuss alternative scheduling options.

Pass Through Track



Corptax Partnership—Advanced Series

The objective of this series is for you to understand the entire process necessary to complete a Form 1065 and the various state partnership returns using the Partnership—Advanced module of Corptax.

Delivery Method: Internet-Based

Subject Area: Specialized Knowledge & Applications

Course Level: Intermediate

Course Number: 6-600

Prerequisite: None

Advanced Preparation: None

CPE: 10

Price: \$720

Duration: 3 days

Course Dates:

- March 14–16
- April 18–20
- May 16–18
- August 21–23

Individual Modules—Day 1

Course Number: 6-601 & 6-601R
10:00 a.m.–11:30 a.m. CT

Setup: This session walks you through how to set up a partnership entity. You will become familiar with the partnership data required in the Entity Setup work area. Topics include adding and associating partners, return descriptive information, and single-member limited liability company and business unit rollups.

Course Number: 6-602 & 6-602R
1:00 p.m.–3:00 p.m. CT

Working with Trial Balance Data, Adjustments, and Allocations: The session will walk you through several methods for reviewing trial balance and apportionment data. In addition, you will learn how to post automatic and manual adjustments as well as state modifications.

Individual Modules—Day 2

Course Number: 6-603 & 6-603R
10:00 a.m.–12:00 p.m. CT

Reviewing Returns and Reports: This session focuses on working with forms and statements along with auditing amounts on a return and entering data from the return. The K-1 allocation process is also introduced along with K-1 supporting statements.

Course Number: 6-604 & 6-604R
2:00 p.m.–3:30 p.m. CT

Running Special Allocations: The Corptax Partnership module allows you to specially allocate partnership income at the K-1 line level, entity level, activity level, as well as the account and adjustment level. This module walks you through the special allocation process for state and federal returns. Additionally, we will introduce you to the K-1 import features available with the Advanced Partnership module and composite state returns.

Individual Modules—Day 3

Course Number: 6-605 & 6-605R
10:00 a.m.–11:30 a.m. CT

Using Advanced Features: In this session, you will learn how to take advantage of the sophisticated ownership tracking and footnote capabilities of the Corptax Partnership module. You will discover how to enter ownership changes and create a variety of footnotes capable of pulling allocations from the return as well as user-defined categories. Tiering is also covered in this session.

Corptax S Corporation

Subchapter S Corporations are similar to partnership returns in that tax data needs to be segregated by owner/member/partner. However, there are some unique reporting needs for this type of corporation. Join this session to see how Corptax's integrated solution will help you simplify and automate your federal and state compliance processes.

Delivery Method: Internet-Based

Subject Area: Specialized Knowledge & Applications

Course Level: Intermediate

Course Number: 6-625 & 6-625R

Prerequisite: None

Advanced Preparation: None

CPE: 2

Price: \$200

Duration: 2 hours

Course Date:

Sessions are available on request.

To register for a course, follow the steps in the *Registration Information* section on page 7. If there are no dates scheduled for a session you are interested in or if the scheduled dates do not meet your needs, please contact us at learn@corptax.com to discuss alternative scheduling options.

Provision Track



Corptax Provision

This introductory course explores the first step in the provision-to-return cycle, provision reporting. You will practice the provision cycle first hand, starting with reviewing and practicing provision setup and data entry and continuing through reporting.

Delivery Method: Classroom
Subject Area: Specialized Knowledge & Applications
Course Level: Basic
Course Number: 3-700
Prerequisite: None
Advanced Preparation: None
CPE: 15.5
Price: \$995
Duration: 2 days

Course Dates for Dallas:

Sessions are available on request.

Corptax Accounting for Income Taxes

Join us for this hands-on look at the new Corptax Accounting for Income Taxes (AIT) module. In this session, you will produce an end-to-end provision including federal, national and local provision calculations. You will use a combination of entity management and apportionment rules to automate the state and local provision.

Delivery Method: Classroom
Subject Area: Specialized Knowledge & Applications
Course Level: Intermediate
Course Number: 3-1000
Prerequisite: None
Advanced Preparation: None
CPE: 15.5
Price: \$995
Duration: 2 days

Course Dates for Dallas:

- September 19–20
- October 11–12

Course Time:

- Day 1:
8:30 a.m.–4:30 p.m. CT
- Day 2:
8:30 a.m.–4:30 p.m. CT

To register for a course, follow the steps in the *Registration Information* section on page 7. If there are no dates scheduled for a session you are interested in or if the scheduled dates do not meet your needs, please contact us at learn@corptax.com to discuss alternative scheduling options.

Corptax Federal Provision Series

Corptax Provision solutions can accommodate complex computational provision requirements but are still flexible and easy-to-use. This series will guide you through the process from setting up the workpapers, entering and analyzing data, rolling data from period to period, and reviewing the available reports.

Delivery Method: Internet-Based

Subject Area: Specialized Knowledge & Applications

Course Level: Intermediate

Course Number: 6-750

Prerequisite: None

Advanced Preparation: None

CPE: 7

Price: \$480

Duration: 1.5 day

Course Dates:

- February 1–2
- March 15–16
- June 5–6
- September 6–7
- October 17–18

Individual Modules—Day 1

Course Number: 6-751 & 6-751R
10:00 a.m.–12:00 p.m. CT

Corptax Provision Setup: Beginning with a review of profiles and progressing to workpaper setup, this hands-on session will give you a solid understanding of the provision setup process. Topics addressed include workflow, adjustment classifications, cases, tax rates, and cumulative beginning balances.

Course Number: 6-752 & 6-752R
2:00 p.m.–4:00 p.m. CT

Using Corptax Provision: Corptax Provision is a powerful solution designed to help multinational corporations manage complex provision requirements. This session focuses on data entry and reporting for the Foreign and Domestic income tax provision process incorporating hands-on exercises throughout to further your understanding. Topics covered include current period data entry, tax attributes, batch processing, and reports.

Individual Modules—Day 2

Course Number: 6-753 & 6-753R
10:00 a.m.–11:00 a.m. CT

Provision Rollover: The rollover feature provided in Corptax Provision provides an efficient method of rolling data from one period to the next. During this session you will examine the processes for performing both annual and period-to-period rollovers of data.

Course Number: 6-754 & 6-754R
11:00 a.m.–12:00 p.m. CT

Interim Provision Reporting: Join us to discover how you can process your interim provision reporting using the Advanced Interim Reporting. During this session you will learn the basics for entering both your domestic and foreign data. In addition, you will see the new interim reports that are available.

Note: All provision sessions and certification exams use the Corptax Provision workpapers. Should you need training on the Corptax Advanced Global Provision workpapers, please contact Corptax University at learn@corptax.com to determine instructor availability and pricing.

To register for a course, follow the steps in the *Registration Information* section on page 7. If there are no dates scheduled for a session you are interested in or if the scheduled dates do not meet your needs, please contact us at learn@corptax.com to discuss alternative scheduling options.

Corptax State Provision Series

With the numerous states and reporting scenarios, navigating the State Provision process can be tricky. This series explores how Corptax State Provision can be used to calculate Current and Deferred State Income Tax Provision using a state-by-state calculation method and/or calculate a blended rate by entity.

Delivery Method: Internet-Based
Subject Area: Specialized Knowledge & Applications
Course Level: Intermediate
Course Number: 6-760

Prerequisite: None
Advanced Preparation: None
CPE: 4.5
Price: \$320
Duration: 1 day

Course Dates:

- February 3
- March 17
- June 7
- September 8
- October 19

Individual Modules—Day 1

Course Number: 6-761 & 6-761R
10:00 a.m.–12:00 p.m. CT

Blended Rate: Join this session to help you navigate through to a blended rate calculation. Using a case study, this session also walks you through setting up and analyzing your data as well as calculating a blended state rate.

Course Number: 6-762 & 6-762R
2:00 p.m.–4:00 p.m. CT

State by State: Join this session to help you navigate through to a state-by-state rate calculation. Using a case study, this session also walks you through defining key profiles and setting up workpapers as well as calculating a state-by-state rate.

Corptax Accounting for Income Taxes Series

Corptax Accounting for Income Taxes (AIT) was designed for speed, transparency and ease of use. This series will guide you through the provision process from set up, data entry and automation, through to the reports.

Delivery Method: Internet-Based
Subject Area: Specialized Knowledge & Applications
Course Level: Intermediate
Course Number: 6-1000

Prerequisite: None
Advanced Preparation: None
CPE: 9.5
Price: \$640
Duration: 2 days

Course Dates:

- August 8–9
- December 13–14

Individual Modules—Day 1

Course Number: 6-1001
10:00 a.m.–12:00 p.m. CT

Corptax Provision Setup: In this session, you will learn how to automate using entity management, jurisdiction profiles, and more. You'll set tax rates, classify accounts and adjustments, and establish apportionment rules that will determine the results of the provision reports. Discover how to use functional and translated amounts to calculate an imputed exchange rate.

Course Number: 6-1002
2:00 p.m.–4:00 p.m. CT

Data Import: Attend this session to learn how to import trail balance and other data required for the provision calculation. Discover how you can import to user defined charts of accounts, import tax attributes, entity attributes and more.

Individual Modules—Day 2

Course Number: 6-1003
10:00 a.m.–12:00 p.m. CT

Automated Adjustments: Using the same functionality available for compliance, you will create automated adjustments for the provision. In this session, you will learn how to set up and process your automated adjustments for Corptax Accounting for Income Taxes.

Course Number: 6-1004
2:00 p.m.–4:00 p.m. CT

Using Corptax Accounting for Income Taxes (AIT): In this session, you will learn the many ways to enter data including data collect and using the autofill feature. You will review the results and configure reports for different presentations. In addition, you will explore ways to extract data for analysis.

To register for a course, follow the steps in the *Registration Information* section on page 7. If there are no dates scheduled for a session you are interested in or if the scheduled dates do not meet your needs, please contact us at learn@corptax.com to discuss alternative scheduling options.

Corptax Tax Contingency

This session demonstrates how Corptax Tax Contingency (formerly known as Corptax FIN 48) addresses the recognition and measurement of all tax positions taken or expected to be taken.

During this session you will learn:

- How to navigate through Corptax Tax Contingency
- Data collection for tracking tax positions
- Data processing and workflow
- How to generate workpapers & reports for financial disclosure

Delivery Method: Internet-Based
Subject Area: Specialized Knowledge & Applications
Course Level: Basic
Course Number: 6-720

Prerequisite: None
Advanced Preparation: None
CPE: 1.5
Price: \$150
Duration: 1.5 hours

Course Dates:

- April 5
- May 24

Course Time:

2:00 p.m.–3:30 p.m. CT

Introduction to Corptax for Provision Only Users

This session is geared towards a new Corptax user who is starting out in the Provision module. You will learn some basic navigation and gain an understanding of the fundamental Corptax process flow. You will also see how data entry and reporting tools common to both the compliance and provision processes come together in the provision true-up.

Delivery Method: Internet-Based
Subject Area: Specialized Knowledge & Applications
Course Level: Overview
Course Number: 6-701

Prerequisite: None
Advanced Preparation: None
CPE: 2
Price: \$200
Duration: 2 hours

Course Date:

Sessions are available on request.

Advanced Foreign Provision

Do you want to know how Corptax handles APB23? In this hands-on session, you will discuss the various ways of applying tax rates in your provision calculation from creating user defined tax rates to using deferred scheduler to apply various tax rates by period. You will also walk through the outside basis workpapers and discover the integration with Corptax International calculations.

Delivery Method: Internet-Based
Subject Area: Specialized Knowledge & Applications
Course Level: Overview
Course Number: 6-770

Prerequisite: None
Advanced Preparation: None
CPE: 2
Price: \$200
Duration: 2 hours

Course Date:

Sessions are available on request.

To register for a course, follow the steps in the *Registration Information* section on page 7. If there are no dates scheduled for a session you are interested in or if the scheduled dates do not meet your needs, please contact us at learn@corptax.com to discuss alternative scheduling options.

U.S. Compliance Track



Corptax U.S. Compliance—Basic Federal & State

Learn the basics of federal and state returns using Corptax U.S. Compliance. This introductory course is the perfect opportunity to become more familiar with the user interface, navigation, and functionality. Through case study exercises, learn how to create and modify profiles, convert general ledger data, post adjusting entries, and create reports and returns. You'll also explore apportionment data entry options and the preparation of single, consolidated, and/or combined federal and state returns.

Delivery Method: Classroom
Subject Area: Specialized Knowledge & Applications
Course Level: Basic
Course Number: 3-600
Prerequisite: None
Advanced Preparation: None
CPE: 19.5
Price: \$1,125
Duration: 2.5 days

Course Dates for Dallas:

- February 14–16
- March 14–16
- April 18–20
- June 13–15
- July 11–13
- September 6–8
- December 12–14

Course Time:

Day 1:
8:30 a.m.–4:30 p.m. CT

Day 2:
8:30 a.m.–4:30 p.m. CT

Day 3:
8:30 a.m.–12:00 p.m. CT

Hands-on Corptax e-File Processing

Take advantage of this hands-on session to become familiar with the Corptax e-File process.

You will get insight on how to:

- Set up and organize your returns and locate key e-File requirements
- Identify and complete the steps necessary to generate MeFs and create a filing package regardless of whether you are filing a Form 1120 or 5471
- Walk through the steps to finalize and transmit your return to the IRS

Delivery Method: Classroom
Subject Area: Specialized Knowledge & Applications
Course Level: Intermediate
Course Number: 3-620
Prerequisite: None
Advanced Preparation: None
CPE: 3.5
Price: \$450
Duration: .5 day

Course Dates for Dallas:

- February 16
- April 20
- June 15
- September 8
- December 14

Course Time:

1:00 p.m.–4:30 p.m. CT

Introduction to Corptax U.S. Compliance

You've heard the buzz, but now it's time to get better acquainted with Corptax U.S. Compliance and its user interface. To ensure a smooth transition, we recommend you attend this product overview session. We'll explore new time-saving features and improved navigation as well as the ability to integrate with Excel and other Corptax products.

Delivery Method: Internet-Based
Subject Area: Specialized Knowledge & Applications
Course Level: Overview
Course Number: 6-115 & 6-115R
Prerequisite: None
Advanced Preparation: None
CPE: 2
Price: \$100
Duration: 2 hours

Course Dates:

Sessions are available on request.

To register for a course, follow the steps in the *Registration Information* section on page 7. If there are no dates scheduled for a session you are interested in or if the scheduled dates do not meet your needs, please contact us at learn@corptax.com to discuss alternative scheduling options.

Corptax U.S. Compliance—Basic Federal Series

This virtual classroom series will allow you to actively engage in the learning program. You will recognize the foundational elements of Corptax's U.S. Compliance application and how they are employed to effectively drive the federal return process. You will use the features and functionality of the Corptax application to efficiently navigate through the federal return process.

Delivery Method: Internet-Based

Subject Area: Specialized Knowledge & Applications

Course Level: Basic

Course Number: 6-100

Prerequisite: None

Advanced Preparation: None

CPE: 12

Price: \$800

Duration: 2.5 days

Course Dates:

- Jan 17–19
- Feb 7–9
- Mar 21–23
- Apr 11–13
- May 2–4
- June 13–15
- July 5–7
- Aug 7–9
- Sept 12–14
- Oct 3–5
- Nov 14–16
- Dec 4–6

Individual Modules—Day 1

Course Number: 6-101 & 6-101R
10:00 a.m.–12:00 p.m. CT

Basic Navigation and Profiles: This session introduces you to the Corptax system and how it will help drive efficiency in your federal return process. You will become familiar with the basic navigational tools and how context fields are used to organize data within the system.

Course Number: 6-102 & 6-102R
2:00 p.m.–4:00 p.m. CT

Entering and Reviewing Trial Balance Data and Off-Trial Balance Data: During this session you will explore how you can enter both trial balance and off-trial balance data into Corptax. You will learn key concepts that control how Corptax stores this data within the system and get hands-on experience with how you can efficiently review your data for accuracy.

Individual Modules—Day 2

Course Number: 6-103 & 6-103R
10:00 a.m.–12:00 p.m. CT

Working with Automated Adjustments: One of the key benefits of Corptax's system is that it combines a common database with common administration, which provides opportunities for automating many of the steps within the federal return process. During this session you will learn how to automate the posting of both book and tax adjustments.

Course Number: 6-104 & 6-104R
2:00 p.m.–4:00 p.m. CT

Reviewing Reports and Preparing a Federal 1120 Return for a Separate Company: Once you have entered data, you are ready to begin the process of reviewing and preparing your Federal return. In this session you will get hands-on experience with generating system-provided trial balance reports that you can use in your review process, and you will become familiar with preparing the Federal 1120 return and its supporting schedules for a separate company.

Individual Modules—Day 3

Course Number: 6-105 & 6-105R
10:00 a.m.–12:00 p.m. CT

Preparing a Federal 1120 Return for a Consolidated Company: The final session concentrates on steps necessary to prepare the Consolidated Federal 1120 return and its supporting schedules for your company. You will get hands-on experience with setting the calculation options that drive how Corptax displays data on the return. Finally, you will learn about the various options that are available for printing returns and reports.

Corptax U.S. Compliance—Federal Considerations

This session takes an in-depth look at Federal Forms and Schedules that have unique processing requirements (such as Schedule M-3, Form 4797, etc). You will use various Corptax tools to drive data to the appropriate forms and schedules and to provide additional information as required by the IRS. You will also discover methods for analyzing data and enhancing your reporting.

Delivery Method: Internet-Based

Subject Area: Specialized Knowledge & Applications

Course Level: Intermediate

Course Number: 6-108

Prerequisite: None

Advanced Preparation: None

CPE: 3.5

Price: \$300

Duration: 3 hours

Course Dates:

- Jan 19
- Apr 13
- July 7
- Oct 5

Course Time:

1:00 p.m.–4:00 p.m. CT

To register for a course, follow the steps in the *Registration Information* section on page 7. If there are no dates scheduled for a session you are interested in or if the scheduled dates do not meet your needs, please contact us at learn@corptax.com to discuss alternative scheduling options.

Corptax U.S. Compliance—Basic State Series

This series guides you through the process of completing a state return using Corptax U.S. Compliance. Topics covered include an overview of the return process, entering and reviewing apportionment trial balance data, working with state modifications and reviewing the state return and its features.

Delivery Method: Internet-Based
Subject Area: Specialized Knowledge & Applications
Course Level: Basic
Course Number: 6-110

Prerequisite: None
Advanced Preparation: None
CPE: 6.5
Price: \$440
Duration: 1.5 days

Course Dates:

- Mar 7–8
- Apr 18–19
- May 8–9
- June 21–22
- July 11–12
- Aug 15–16
- Sept 18–19
- Oct 11–12
- Dec 12–13

Individual Modules—Day 1

Course Number: 6-111 & 6-111R
10:00 a.m.–11:30 a.m. CT

State Overview: In this overview of the state C Corporation return process, learn what entity information you need to review annually, how to use locations to distinguish data, and how to use accounts to keep state data separate from federal data. Finally, the instructor will discuss the overall process of producing a state return.

Course Number: 6-112 & 6-112R
1:00 p.m.–3:00 p.m. CT

State Data and Reports: Learn how to review and enter apportionment data and state modifications. You will also learn how to query apportionment data, enter apportionment data for multiple locations, enter common state modifications (i.e., state estimated payments, state taxes based on income, and interest on U.S. obligations), state-specific modifications, and how to enter federal and state bonus depreciation amounts.

Individual Modules—Day 2

Course Number: 6-114 & 6-114R
10:00 a.m.–12:00 p.m. CT

State C Corporation Return Preparation: Learn how to prepare a state C Corporation return. You will learn how to launch and review the forms and Corptax Return Instructions for the Florida Form F-1120. You will also learn how to review and apply tax return options. Lastly, the session covers how to audit a return and how to enter notes and text on a return.

Corptax U.S. Compliance—State Considerations

This session focuses on Corptax features and functions that are key to enhancing the efficiency of your state return preparation processes. You will identify the differences between preparing separate state returns and combined or consolidated state returns. You will explore behind the scenes of Corptax to gain a thorough understanding of how calculations work so that you can troubleshoot issues within returns. Finally, you will walk through the key steps that should be followed for preparing any state return.

Delivery Method: Internet-Based
Subject Area: Specialized Knowledge & Applications
Course Level: Intermediate
Course Number: 6-118

Prerequisite: None
Advanced Preparation: None
CPE: 3.5
Price: \$300
Duration: 3 hours

Course Dates:

- March 8
- May 9
- August 16
- October 12

Course Time:

1:00 p.m.–4:00 p.m. CT

To register for a course, follow the steps in the *Registration Information* section on page 7. If there are no dates scheduled for a session you are interested in or if the scheduled dates do not meet your needs, please contact us at learn@corptax.com to discuss alternative scheduling options.

Modifications of Corptax Calculations

This session is designed to assist you in understanding the basic steps in creating a custom calc and dataspec. We will look at determining which items to change when customizing a return or report by discussing the base calculation structure and the data specification structure as well as the relationship between the two. You will learn the purpose of the CONTANX, GLOBAL, and the state base calc. We will also look at printing reference materials to assist with customizing a report/return.

Delivery Method: Internet-Base
Subject Area: Specialized Knowledge & Applications
Course Level: Intermediate
Course Number: 6-140

Prerequisite: None
Advanced Preparation: None
CPE: 3
Price: \$250
Duration: 2.5 hours

Sessions are available on request.

Using Corptax to File a California Return

In this session, you will review the California e-file mandate and the differences between the California's Simple and Complex processing methods. In addition, you will get hands-on experience with completing and e-filing the returns using the complex process.

Delivery Method: Internet-Based
Subject Area: Specialized Knowledge & Applications
Course Level: Intermediate
Course Number: 6-165

Prerequisite: None
Advanced Preparation: None
CPE: 2
Price: \$200
Duration: 2 hours

Course Dates:

- April 17
- June 14
- August 1
- October 2

Course Time: 2:00 p.m.–4:00 p.m. CT

Using Corptax to File a New York Return (NEW)

New York City and New York State have made significant changes with the New York Tax Reform 2015. Consequently, the apportionment detailed out line items unlike any other state. Gathering specific data for these lines (both NY and Everywhere numbers) may take additional preparation time as its highly unlikely user's current apportionment is being recorded in this manner across all states. Attend this hands-on session which will highlight some of the changes and aid you in selecting the apportionment method which most efficiently reflects your desired presentation of New York information.

Delivery Method: Internet-Based
Subject Area: Specialized Knowledge & Applications
Course Level: Intermediate
Course Number: 6-175

Prerequisite: None
Advanced Preparation: None
CPE: 2
Price: \$200
Duration: 2 hours

Course Dates:

- June 22

Course Time: 2:00 p.m.–4:00 p.m. CT

Corptax Compliance—Canadian Returns

If your filing requirements extend into Canada, you won't want to miss this session. We'll show you how to easily integrate your Canadian federal corporate, partnership, and provincial income tax returns into your existing tax processes. We'll also explore the new country-specific and global accounts in our product that will help you meet your Canadian filing requirements.

Delivery Method: Internet-Based
Subject Area: Specialized Knowledge & Applications
Course Level: Basic
Course Number: 6-320

Prerequisite: None
Advanced Preparation: None
CPE: 2
Price: \$200
Duration: 2 hours

Course Dates:

- March 7
- May 9

Course Time: 10:00 p.m.–12:00 p.m. CT

To register for a course, follow the steps in the *Registration Information* section on page 7. If there are no dates scheduled for a session you are interested in or if the scheduled dates do not meet your needs, please contact us at learn@corptax.com to discuss alternative scheduling options.

Certification Preparation

Training is not required to become a Corptax Certified Professional. However, we offer Certification Preparation Training courses that may be helpful for those looking for additional preparation for the Certification Exam. Certification Exams will be held on the last day of the Preparation Course. The price of the Certification Preparation Course includes the fee for the corresponding exam.

Certification Preparation Training is scheduled at our Corptax University Centers or can be arranged at a mutually agreeable location. If held at alternate location, out-of-pocket costs, such as instructor travel and shipping (materials and learning laptops, if utilized) expenses will be billable in addition to the certification fees.

Note: For more details, download the full [Program Details](#).

To register for a session, follow the steps in the *Registration Information* section on page 7.

Corptax Certified Professional—U.S. Compliance

This session provides core training with respect to Federal and State Compliance. Attend this session to make sure your knowledge and skills are up to date and you're prepared to take the Certification Exam.

Areas covered in this certification program include:

- Basic Federal and State Compliance
- Electronic Filing of Federal and State Returns
- Federal and State Considerations
- Mixed Return Processing
- C Corporation and e-Filing Tips and Troubleshooting

Certification Exam will be held on the last day of the Prep Course. Prep Course price includes cost of Certification Exam.

Delivery Method: Classroom	Prerequisite: Two years of product experience recommended	Course Dates for Dallas:	Course Time:
Subject Area: Specialized Knowledge & Applications	Advanced Preparation: None	• March 20–24	Monday–Thursday: 9:00 a.m.–4:30 p.m. CT
Course Level: Intermediate	CPE: 28.5	• July 17–21	Friday: 7:30 a.m.–2:30 p.m. CT
Course Number: C-500	Price: \$1,495.00	• November 13–17	
	Duration: 5 days		

Corptax Certified Professional—International Compliance

This session provides core training with respect to International Compliance. Attend this session to make sure your knowledge and skills are up to date and you're prepared to take the Certification Exam.

Areas covered in this certification program include:

- Basic International Compliance
- Electronic Filing of Federal and International Returns
- Intermediate International Compliance Considerations
- International and e-Filing Tips and Troubleshooting
- Preparing Forms 5471, 1118, 8858, 5472, and 8865

Certification Exam will be held on the last day of the Prep Course. Prep Course price includes cost of Certification Exam.

Delivery Method: Classroom	Prerequisite: Two years of product experience recommended	Course Dates for Dallas:	Course Time:
Subject Area: Specialized Knowledge & Applications	Advanced Preparation: None	• April 3–7	Monday–Thursday: 9:00 a.m.–4:30 p.m. CT
Course Level: Intermediate	CPE: 28.5	• June 26–30	Friday: 7:30 a.m.–2:30 p.m. CT
Course Number: C-600	Price: \$1,495.00		
	Duration: 5 days		

Corptax Certified Professional—Pass Through Compliance

This session provides core training with respect to Partnership and S Corporation Federal and State Compliance. Attend this session to make sure your knowledge and skills are up to date and you're prepared to take the Certification Exam.

Areas covered in this certification program include:

- Using the Advanced Partnership Features to the Full Extent
- Federal and State Partnership Compliance
- Preparing Form 8825 for Advanced Partnership
- Electronic Filing of Partnership Federal and State Returns
- Advanced S Corporation Compliance
- Partnership e-Filing Tips and Troubleshooting

Certification Exam will be held on the last day of the Prep Course. Prep Course price includes cost of Certification Exam.

Delivery Method: Classroom	Prerequisite: Two years of product experience recommended	Course Dates for Dallas:	Course Time:
Subject Area: Specialized Knowledge & Applications	Advanced Preparation: None	<ul style="list-style-type: none">• February 28–March 3• August 1–4	Tuesday–Thursday: 9:00 a.m.–4:30 p.m. CT
Course Level: Intermediate	CPE: 21.5		Friday 7:30 a.m.–2:30 p.m. CT
Course Number: C-700	Price: \$995		
	Duration: 4 days		

Corptax Certified Professional—Provision

This session provides core training with respect to provision. Attend this session to make sure your knowledge and skills are up to date and you're prepared to take the Certification Exam.

Areas covered in this certification program include:

- Brief Overview of Full Corptax Product Line
- Completing the Tax Life Cycle Using Corptax
- Overview of Data Collection Methods
- Setting Up and Using Corptax Provision Products
 - Corptax Provision
 - Corptax State Provision
 - Corptax Tax Contingency
- Other Topics Including Interim Reporting and Rollover
- Provision Related Tips and Troubleshooting

Certification Exam will be held on the last day of the Prep Course. Prep Course price includes cost of Certification Exam.

Delivery Method: Classroom	Prerequisite: Two years of product experience recommended	Course Date for Dallas:	Course Time:
Subject Area: Specialized Knowledge & Applications	Advanced Preparation: None	<ul style="list-style-type: none">• May 1–5	Monday–Thursday: 9:00 a.m.–4:30 p.m. CT
Course Level: Intermediate	CPE: 28.5		Friday 7:30 a.m.–2:30 p.m. CT
Course Number: C-800	Price: \$1,495		
	Duration: 5 days		

Certification Exam Dates

To become a Corptax Certified Professional in any topic, you must successfully complete a knowledge exam and case study to ensure efficient and quality product usage. There are no prerequisites to sign up for a Certification Exam. Below is a listing of exam-only dates. To register for an exam or case study, select the Register button below.

Certification Fees

- 1st certification topic: \$595
- Subsequent certification topics: \$100

Retake Policy

- 1st exam retake: free
- Subsequent exam retakes: \$100

[REGISTER](#)

Before registering for retakes or additional certification topics, contact learn@corptax.com.

Annual Fees

Annual renewal fees are due February 28th
Per Certification Topic: \$99

Exam Type	Date	Start Time	End Time	Location
Knowledge	1.11.2017	9:30 AM	11:30 AM	Online
Case Study	1.11.2017	12:00 PM	4:30 PM	Online
Knowledge	1.14.2017	9:30 AM	11:30 AM	Online
Case Study	1.14.2017	12:00 PM	4:30 PM	Online
Knowledge	1.20.2017	9:30 AM	11:30 AM	Online
Case Study	1.20.2017	12:00 PM	4:30 PM	Online
Knowledge	1.28.2017	9:30 AM	11:30 AM	Online
Case Study	1.28.2017	12:00 PM	4:30 PM	Online
Knowledge	2.4.2017	9:30 AM	11:30 AM	Online
Case Study	2.4.2017	12:00 PM	4:30 PM	Online
Knowledge	2.8.2017	9:30 AM	11:30 AM	Online
Case Study	2.8.2017	12:00 PM	4:30 PM	Online
Knowledge	2.18.2017	9:30 AM	11:30 AM	Online
Case Study	2.18.2017	12:00 PM	4:30 PM	Online
Knowledge	2.23.2017	9:30 AM	11:30 AM	Online
Case Study	2.23.2017	12:00 PM	4:30 PM	Online
Knowledge	3.3.2017	9:30 AM	11:30 AM	Online
Case Study	3.3.2017	12:00 PM	4:30 PM	Online
Knowledge	3.11.2017	9:30 AM	11:30 AM	Online
Case Study	3.11.2017	12:00 PM	4:30 PM	Online
Knowledge	3.17.2017	9:30 AM	11:30 AM	Online
Case Study	3.17.2017	12:00 PM	4:30 PM	Online
Knowledge	3.31.2017	9:30 AM	11:30 AM	Online
Case Study	3.31.2017	12:00 PM	4:30 PM	Online
Knowledge	4.6.2017	9:30 AM	11:30 AM	Online
Case Study	4.6.2017	12:00 PM	4:30 PM	Online
Knowledge	4.22.2017	9:30 AM	11:30 AM	Online

Certification

Exam Type	Date	Start Time	End Time	Location
Case Study	4.22.2017	12:00 PM	4:30 PM	Online
Knowledge	5.2.2017	9:30 AM	11:30 AM	Online
Case Study	5.2.2017	12:00 PM	4:30 PM	Online
Knowledge	5.13.2017	9:30 AM	11:30 AM	Online
Case Study	5.13.2017	12:00 PM	4:30 PM	Online
Knowledge	5.25.2017	9:30 AM	11:30 AM	Online
Case Study	5.25.2017	12:00 PM	4:30 PM	Online
Knowledge	6.7.2017	9:30 AM	11:30 AM	Online
Case Study	6.7.2017	12:00 PM	4:30 PM	Online
Knowledge	6.24.2017	9:30 AM	11:30 AM	Online
Case Study	6.24.2017	12:00 PM	4:30 PM	Online
Knowledge	7.8.2017	9:30 AM	11:30 AM	Online
Case Study	7.8.2017	12:00 PM	4:30 PM	Online
Knowledge	7.21.2017	9:30 AM	11:30 AM	Online
Case Study	7.21.2017	12:00 PM	4:30 PM	Online
Knowledge	8.3.2017	9:30 AM	11:30 AM	Online
Case Study	8.3.2017	12:00 PM	4:30 PM	Online
Knowledge	8.19.2017	9:30 AM	11:30 AM	Online
Case Study	8.19.2017	12:00 PM	4:30 PM	Online
Knowledge	8.25.2017	9:30 AM	11:30 AM	Online
Case Study	8.25.2017	12:00 PM	4:30 PM	Online
Knowledge	9.5.2017	9:30 AM	11:30 AM	Online
Case Study	9.5.2017	12:00 PM	4:30 PM	Online
Knowledge	9.16.2017	9:30 AM	11:30 AM	Online
Case Study	9.16.2017	12:00 PM	4:30 PM	Online
Knowledge	10.7.2017	9:30 AM	11:30 AM	Online
Case Study	10.7.2017	12:00 PM	4:30 PM	Online
Knowledge	10.20.2017	9:30 AM	11:30 AM	Online
Case Study	10.20.2017	12:00 PM	4:30 PM	Online
Knowledge	12.8.2017	9:30 AM	11:30 AM	Online
Case Study	12.8.2017	12:00 PM	4:30 PM	Online
Knowledge	12.16.2017	9:30 AM	11:30 AM	Online
Case Study	12.16.2017	12:00 PM	4:30 PM	Online

Corptax 24/7 Course List

To register for a Corptax 24/7 course, follow the steps in the *Registration Information* section on page 7. Once you register, you will have access to the recording and the corresponding session documents for 30 days.

To access the training, log in to the Training Center, click **Your Transcript** on the right, click the session title, and scroll to the Curriculum section. Click **Launch** to view, print, or save the documents.

Note: No CPE credits are available with Corptax 24/7 courses.

Course Number	Corptax Title	Course Level
6-101R	Corptax U.S. Compliance Basic Federal Series—Module #1: Basic Navigation and Profiles	Basic
6-102R	Corptax U.S. Compliance Basic Federal Series—Module #2: Entering and Reviewing Trial Balance Data and Off Trial Balance Data	Basic
6-103R	Corptax U.S. Compliance Basic Federal Series—Module #3: Working with Automated Adjustments	Basic
6-104R	Corptax U.S. Compliance Basic Federal Series—Module #4: Reviewing Reports and Preparing a Federal 1120 Return for a Separate Company	Basic
6-105R	Corptax U.S. Compliance Basic Federal Series—Module #5: Preparing a Federal 1120 Return for a Consolidated Company	Basic
6-109R	Corptax U.S. Compliance—Filing Federal Amended Returns	Intermediate
6-111R	Corptax U.S. Compliance Basic State Series—Module #1: State Overview	Basic
6-112R	Corptax U.S. Compliance Basic State Series—Module #2: State Data and Reports	Basic
6-114R	Corptax U.S. Compliance Basic State Series—Module #3: State C Corporation Return Preparation	Basic
6-115R	Introduction to Corptax U.S. Compliance	Overview
6-119R	Corptax U.S. Compliance—Filing State Amended Returns	Intermediate
6-120R	Corptax Query Tools	Basic
6-150R	Using Corptax U.S. State Planner	Intermediate
6-200R	Corptax Amount Import	Intermediate
6-501R	Corptax International Compliance: Form 5471 Basic Series—Module #1: International Return Preparation Overview	Basic
6-502R	Corptax International Compliance: Form 5471 Basic Series—Module #2: International Setup Process	Basic
6-503R	Corptax International Compliance: Form 5471 Basic Series—Module #3: Foreign Processing for CFCs, Foreign Branches, and Foreign Partnerships	Basic
6-504R	Corptax International Compliance: Form 5471 Basic Series—Module #4: Form 5471 Report/Return Preparation and Reconciliation	Basic
6-511R	Preparing the Form 5471 in Corptax (non Corptax International license)	Intermediate
6-512R	Preparation of Form 5472 in Corptax	Intermediate
6-601R	Corptax Partnership—Advanced Series—Module #1: Setup	Intermediate
6-602R	Corptax Partnership—Advanced Series—Module #2: Working with Trial Balance Data, Adjustments, and Allocations	Intermediate
6-603R	Corptax Partnership—Advanced Series—Module #3: Reviewing Returns and Reports	Intermediate
6-604R	Corptax Partnership—Advanced Series—Module #4: Running Special Allocations	Intermediate
6-605R	Corptax Partnership—Advanced Series—Module #5: Using Advanced Features	Intermediate

Course Number	Corptax Title	Course Level
6-610R	Corptax Partnership E-Filing & EDI Processing	Intermediate
6-615R	Preparing Form 8825 Using Corptax	Intermediate
6-625R	Corptax S Corporation	Intermediate
6-751R	Corptax Federal Provision Series—Module #1: Corptax Provision Setup	Intermediate
6-752R	Corptax Federal Provision Series—Module #2: Using Corptax Provision	Intermediate
6-753R	Corptax Federal Provision Series—Module #3: Provision Rollover	Intermediate
6-754R	Corptax Federal Provision Series—Module #4: Interim Provision Reporting	Intermediate
6-761R	Corptax State Provision Series—Module #1: Corptax State Provision—Blended Rate	Intermediate
6-762R	Corptax State Provision Series—Module #2: Corptax State Provision—State by State	Intermediate
6-811R	Electronic Filing Using Corptax	Intermediate
6-813R	Electronic Filing International Returns Using Corptax	Intermediate
6-815R	State e-Filing Using Corptax	Intermediate
6-820R	Mixed Returns Using Corptax	Intermediate
6-825R	Electronically Filing Form 7004 in Corptax	Basic
6-830R	Corptax Visual Org	Intermediate
6-980R	CORPSales Process Training	Basic
6-961R	Basic Corptax Office	Basic
6-967R	Microsoft Excel Power Pivot Tables	Intermediate
6-7011R	Using Corptax for Our Base Erosion and Profit Shifting Reporting Series—Module #1: Corptax Overview and Setup	Intermediate
6-7012R	Using Corptax for Our Base Erosion and Profit Shifting Reporting Series—Module #2: Data Import	Intermediate
6-7013R	Using Corptax for Our Base Erosion and Profit Shifting Reporting Series—Module #3: Country-by-Country Data Collection and Reporting	Intermediate