

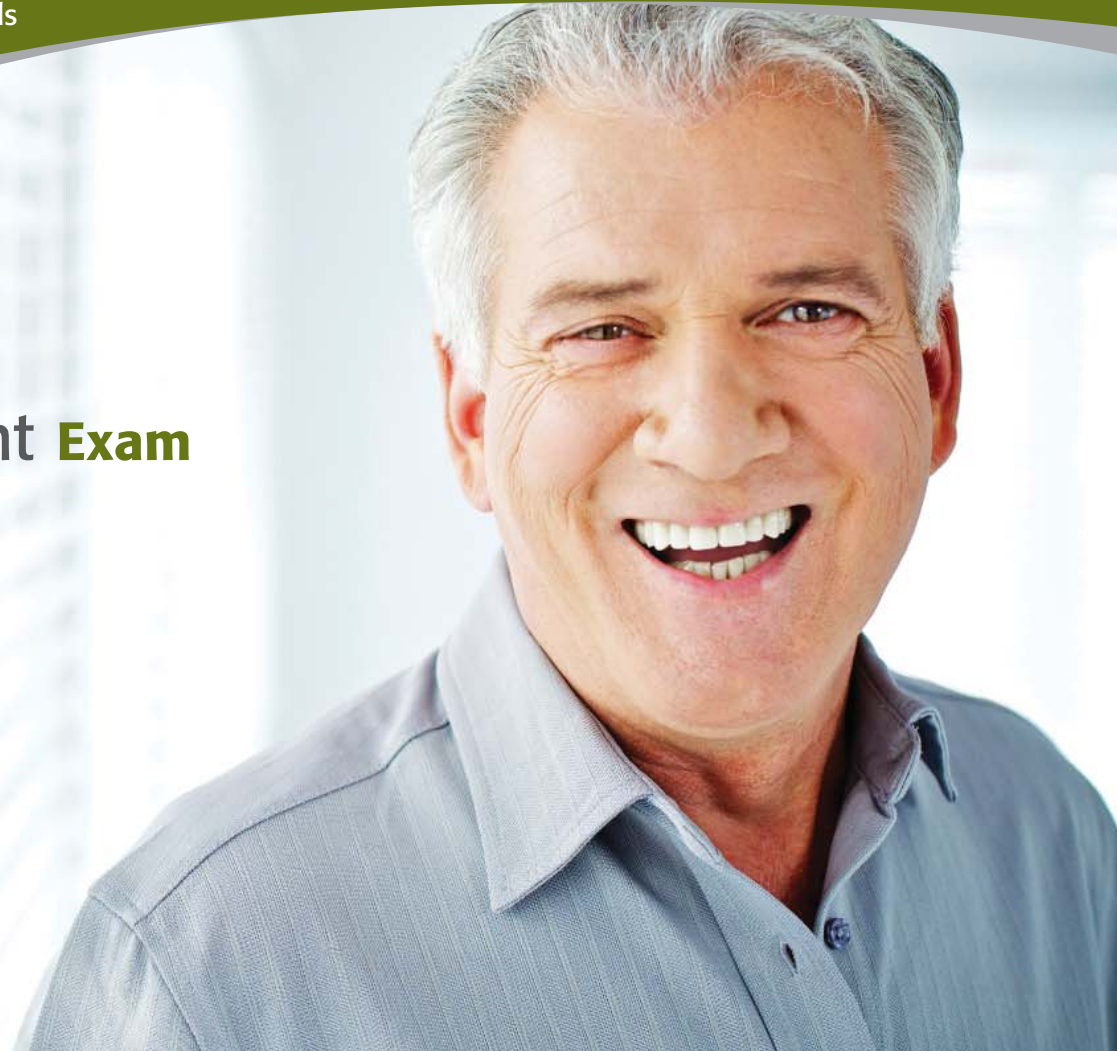


National Association
of Tax Professionals

Enrolled Agent **Exam** Review Courses

2011 could be **YOUR YEAR**
to become an Enrolled Agent.

We are with you every step of the way.



Enrolled Agent **Exam Review Courses**

We were provided with great examples which were very helpful in explaining concepts. **I feel more prepared for the exam.**

– NATP New Jersey Member



Why Become An Enrolled Agent

Becoming an Enrolled Agent may be one of the greatest accomplishments a tax professional can experience. It is both challenging and rewarding. With a new designation comes not only an increase in your knowledge – a benefit to your clients, but also an opportunity to expand your practice and increase your earning potential – a benefit to you. The process of becoming an Enrolled Agent is not easy, but can be substantially more manageable by completing the NATP Enrolled Agent Exam Review Courses.

How To Become An Enrolled Agent

You can become an Enrolled Agent by demonstrating special competence in tax matters by passing a computer-based examination. You are required to:

- Apply to take the Special Enrollment Exam (SEE).
- Achieve passing scores on all parts of the SEE.
- Apply for enrollment.
- Pass a background check.

Course Objectives

Part I

- Identify the primary areas tested in Part I.
- Determine an individual's filing requirement.
- Identify the difference between a qualifying child and a qualifying relative.
- Identify items of reportable income and expenses for individual taxpayers.
- Report income from retirement plans and IRA distributions.
- Report the disposition of assets.
- Distinguish between refundable and nonrefundable tax credits.
- Identify the filing requirements for a deceased taxpayer.
- Explain the tax consequences of gifting cash or property.

Part II

- Comprehend the primary areas tested in Part II.
- Be knowledgeable in the tax theory for sole proprietors, partnerships, corporations, trusts and tax-exempt organizations.

- Analyze the question being asked and compare the facts of the question to the theory being applied and select the most appropriate answer to the question.
- Distinguish various requirements and limitations as applied to a wide variety of tax topics.
- Assimilate the theory to explain such requirements and limitations to tax clients in tax planning situations and in the completion of income tax returns.
- Evaluate the client's information to properly apply taxation principles to that client's situation.

Part III

- Identify the primary areas tested in Part III.
- Apply to become an Enrolled Agent (EA) and identify the requirements to maintain EA status.
- Avoid preparer penalties.
- Discuss the provisions of Circular 230.
- Complete the tax return filing process.

The Exam

The Special Enrollment Exam is made up of three parts:

Part I: Individual Issues: Income, Assets, Deductions, Credits, Individual Retirement Accounts (IRAs), Estate Tax and Gift Tax.

Part II: Business Issues: Entities, Partnerships, Corporations, S Corporations, Financial Information, Trust and Estate Income Tax, Exempt Organizations and Qualified Retirement Plans of an Employer or Self-Employed.

Part III: Representation, Practice and Procedures: Enrolled Agent, Circular 230, Power of Attorney, Legal Authorities and References, IRS Audit, Collection and Appeals, Filing Process and Records and Electronic Filing.

Course Level: Intermediate

These courses integrate theory, example and practice to give even the inexperienced professional an edge in passing the exam. The workshop is a refresher course for the purpose of fine-tuning your test preparation. We strongly recommend independent study prior to taking this course.

The **material covered during the course was great** and the instructor presented the materials very well; she has obviously done this for a while.

– NATP New Mexico Member

Live Education **Dates and Locations**

Cincinnati, OH • May 9-11

Holiday Inn & Suites Cincinnati-Eastgate
4501 Eastgate Boulevard
513.752.4400
\$95 single/double, when reserved by
4.24.11

Honolulu, HI • May 16-18

Pacific Beach Hotel
2490 Kalakaua Avenue
Ph: 808.922.1233
Room block not held

Concord, NC • May 16-18

Embassy Suites Charlotte-Concord
5400 John Q. Hammons Drive N.W.
704.455.8200
\$135 single/double, when reserved by
4.21.11
Hotel code: NTP

Liverpool, NY • May 23-25

Holiday Inn Syracuse/Liverpool
441 Electronics Parkway
315.457.1122
\$119 single/double, when reserved by
4.22.11

Atlanta, GA • June 6-8

Doubletree Atlanta Northwest Marietta
2055 S. Park Place
770.272.9441
\$119 single/double, when reserved by
5.5.11

West Palm Beach, FL • June 13-15

Crowne Plaza West Palm Beach
1601 Belvedere Road
West Palm Beach, FL 33406
Ph: 561.688.8625
\$99 single/double, when reserved by
5.20.11

South San Francisco, CA • June 13-15

Holiday Inn San Francisco Airport
275 S. Airport Boulevard
650.873.3550
\$109 single/double, when rooms
reserved by 5.23.11

Woburn, MA • June 20-22

Holiday Inn Select Boston Woburn
15 Middlesex Canal Park
781.935.8760
\$119 single/double, when reserved by
5.19.11

Monroeville, PA • June 27-29

Doubletree Monroeville Convention
Center
101 Mall Boulevard
412.373.7300
\$109 single/double, when reserved by
6.5.11

Overland Park, KS • July 11-13

Holiday Inn Hotel & Suites Overland Park West

8787 Reeder Road

913.888.8440

\$89 single/double, when reserved by 6.12.11

Kenner, LA • July 11-13

Hilton New Orleans Airport

901 Airline Drive

504.469.5000

\$119 single/double, when reserved by 6.27.11

Las Vegas, NV • July 18-20

Harrah's

3475 Las Vegas Boulevard S.

800.214.9110

\$45-\$65 single/double, when reserved by 6.17.11

Concord, NH • July 25-27

Concord Holiday Inn

172 N. Main Street

603.224.9534

\$99 single/double, when reserved by 7.3.11

Lisle, IL • August 1-3

Hilton Lisle

3003 Corporate West Drive

630.505.0900

\$119 single/double, when reserved by 7.10.11

Towson, MD • August 8-10

Sheraton Baltimore North

903 Dulaney Valley Road

410.321.7400

\$119 single/double, when reserved by 7.9.11

Arlington, TX • August 29-31

Crowne Plaza Suites Arlington

700 Avenue H E.

817.394.5000

\$99 single/double, when reserved by 7.31.11

Nashville, TN • September 12-14

Holiday Inn Opryland Airport

2200 Elm Hill Pike

615.883.9770

\$89 single/double, when reserved by 8.12.11

New York, NY • September 19-21

Holiday Inn Midtown

440 W. 57th Street

212.581.8100

Room block not held

Denver, CO • September 19-21

Red Lion Denver Central

4040 Quebec Street

303.321.6666

\$89 single/double, when reserved by 8.19.11

Bloomington, MN • November 7-9

Embassy Suites Bloomington

2800 American Boulevard W.

952.884.4811

\$129 single/double, when reserved by 10.16.11

Hotel Code: EAX

EA Exam Courses Schedule

Part I

8 Credits*

Day 1: 8:00 a.m. – 5:00 p.m.

Part II

12 Credits*

Day 2: 8:00 a.m. – 5:00 p.m.

Day 3: 8:00 a.m. – noon

Part III

4 Credits*

Day 3: 1:00 p.m. – 5:00 p.m.

**CPE credits available for NASBA and CTEC.*

Fees

| | Member | Member Associate* | Nonmember** |
|--------------------|--------|-------------------|-------------|
| Part I | \$205 | \$224 | \$242 |
| Part II | \$310 | \$329 | \$347 |
| Part III | \$105 | \$124 | \$142 |
| Part I, II and III | \$572 | \$635 | \$698 |

**A Member Associate is a nonmember who works in an office with an NATP member. NATP member name will be required when registering.*

*** Become a member of NATP and pay the lowest fee.*

Listed are the Priority Registration rates. Any registrations received less than 10 days prior to the session date will be charged an additional \$35. Fees include required textbooks and refreshments.

Prerequisite

Unless otherwise stated, there are no prerequisites or advance preparation required to take courses.

Cancellation/refund/complaint policy

For more information regarding refund, complaint and/or program cancellation policies, please contact our Member Services Department at 800.558.3402, ext. 3 or visit our website at natptax.com.

CTEC CPE Information

Information can be found at www.natptax.com/EventsAndEducation/liveworkshops/eareview/Pages/CPEInformation.aspx

The National Association of Tax Professionals (NATP) is registered with the National Association of State Boards of Accountancy (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 addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN, 37219-2417. Web site: www.nasba.org

Delivery Method: Group-Live

The Facilitated Online EA Exam Review Courses allow you to manage your studying while benefitting from expert facilitator assistance. Facilitators are there to pose questions to get you thinking critically about the material and to help answer any questions that you or others may have on the material. Of course, one of the best aspects of this learning method is that the entire group of students can share input and opinions. And, class sizes are limited so you can get the most out of your learning experience. You can use any computer with access to the Internet to participate; however, a broadband/high speed Internet connection is required.

This course requires you to read the material and to communicate with the class online. However, more time spent will enhance the learning process. We suggest that you plan at least an hour a day into your schedule to receive the full benefits from these courses.

Registration for all facilitated online courses must be completed at natptax.com.

Additional electronic study guides and an electronic Q & A of more than **500 sample test questions** included and available June 1.

Facilitated Online EA Exam Review Course Dates

Part I

April 25 – May 15
 July 11 – 31
 Sept. 26 – Oct. 16

Part II

May 23 – June 12
 Aug. 8 – 28
 Oct. 24 – Nov. 13

Part III

June 20 – 26
 Sept. 12 – 18
 Nov. 28 – Dec. 4

No CPE credits available for facilitated online courses.

Fees

| | Member | Nonmember |
|----------|--------|-----------|
| Part I | \$252 | \$384 |
| Part II | \$252 | \$384 |
| Part III | \$84 | \$128 |

I learned more in three days than I have in the last five years about taxes.

– NATP Florida Member

Textbooks

Available through the NATP Tax Store at www.natptax.com/taxstore.

Pass the EA Exam the first time! Preparation for the Enrolled Agent exam is the objective of these textbooks. Key items are covered, followed by questions and answers.

Part I

Individual Issues: Income, Assets, Deductions, Credits, Individual Retirement Accounts (IRAs), Estate Tax and Gift Tax.

Part II

Business Issues: Entities, Partnerships, Corporations, S Corporations, Financial Information, Trust and Estate Income Tax, Exempt Organizations and Qualified Retirement Plans of an Employer or Self-Employed.

Part III

Representation, Practice and Procedures: Enrolled Agent, Circular 230, Power of Attorney, Legal Authorities and References, IRS Audit, Collection and Appeals, Filing Process and Records and Electronic Filing.

| | Item # | Member | Nonmember |
|-------------|--------|--------|-----------|
| Part I | #3103 | \$65 | \$75 |
| Part II | #3104 | \$65 | \$75 |
| Part III | #3105 | \$55 | \$65 |
| All 3 Books | #3106 | \$170 | \$200 |

Textbooks included with registration of Live Education.

Registration Form Please submit a separate form for each person attending.

Name: _____
Full name, including middle initial, and designations, if applicable.

E-Mail Address Required: _____

Company Name: _____

Primary Mailing Address: _____

City: _____ State: _____ Zip: _____

Member ID#: _____
 PTIN#: _____
 CFP#: _____
 CTEC#: _____
 CPA#: _____
 EA#: _____

if applicable ▼

Primary Phone: _____ Check here if the above address should be your main mailing address with NATP.

Listed are the Priority Registration rates. Any registrations received less than 10 days prior to the session date will be charged an additional \$35.

| Check | | Member | Member Associate* | Non Member** | Course Code | Location State | Fees |
|--------------------------|---|--------|-------------------|--------------|-------------|----------------|------|
| <input type="checkbox"/> | EA Exam Review Course – Part I | \$205 | \$224 | \$242 | | | |
| <input type="checkbox"/> | EA Exam Review Course – Part II | \$310 | \$329 | \$347 | | | |
| <input type="checkbox"/> | EA Exam Review Course – Part III | \$105 | \$124 | \$142 | | | |
| <input type="checkbox"/> | All Three Days and Parts (same location only) | \$572 | \$635 | \$698 | | | |

Total: _____

If registering as a member associate, please provide member name. _____

Additional fees apply for those paying at the door. Payment must accompany registration. Fees include refreshments. Registration confirmation will be sent via e-mail. Did you remember to check which day(s) you will be attending?

Facilitated Online: Registration for facilitated online courses can be completed online at natptax.com or by calling 800.558.3402, ext. 3.

Textbooks: To place your textbook order, visit the NATP Tax Store at natptax.com. Textbooks are included with Live EA registration.

Payment Method: Check Credit Card

Name as it appears on card: _____

Card #: _____ Exp. Date: _____

Signature: _____

* A member associate is a nonmember who works in an office with an NATP member. • **Become a member of NATP and pay the lowest fee.
 NATP reserves the right to charge your credit card for late fees, errors, or omissions made when submitting this form.
 For general workshop information, including our cancellation and refund policy, visit www.natptax.com.



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National Association
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PO Box 8002
Appleton, WI 54912-8002



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