

Reporting Unique Form 1040 Online Training Study Assignments



To get the most out of this course, please complete the following reading assignments before the scheduled live session.

Week

Text section
Day one
<ul style="list-style-type: none">• Introduction to the course
<ul style="list-style-type: none">• Sections covered
<ul style="list-style-type: none">• Foreign earned income exclusions
<ul style="list-style-type: none">• Incentive stock options (ISO), restricted stock units (RSU) and employee stock purchase plans (ESPP)
<ul style="list-style-type: none">• Installment sale reporting
Day two
<ul style="list-style-type: none">• Sections covered:
<ul style="list-style-type: none">• Sale of publicly traded partnerships (PTP)
<ul style="list-style-type: none">• Claim of right
<ul style="list-style-type: none">• Sale of a life estate
<ul style="list-style-type: none">• Like-kind exchanges
Case study
<ul style="list-style-type: none">• Prepare Form 2555
<ul style="list-style-type: none">• Calculating a claim of right adjustment for disability repayments
<ul style="list-style-type: none">• Prepare Form 6251 for an installment sale
<ul style="list-style-type: none">• Calculate and report the sale of a life estate interest
<ul style="list-style-type: none">• Prepare Form 8824 for a like-kind exchange