

RSM McGladrey

AdvanceCPA Tax Curricula

As a tax professional, it is recommended that you obtain knowledge in all of the areas listed below. Noted at each level are electives to increase your training opportunities.

NEW TAX ASSOCIATES (less than six months of experience)

This curriculum is intended for new tax professionals entering their first busy season. It may also be appropriate for professionals who are moving from audit and accounting to tax. If you are enrolled in or have completed a Masters of Taxation program, you should not attend these classes.

Level 1 Core Curriculum

- Tax Level 1 – C Corporation Basics (26580-webcast)
- Tax Level 1 – S Corporation Basics (26581-webcast)
- Tax Level 1 – Partnership Basics (26582-webcast)
- Tax Level 1 – Property Transactions (26215-webcast)
- Tax Level 1 – Introduction to 1040 Preparation (26584-webcast) (uses ProSystem FX for Day 2)
- Tax Tools Orientation (26263-webcast)

Highly Recommended Courses for Tax Level 1 Participants

- Tax Level 1 – Introduction to Business Return Preparation (26273-webcast)
- Tax Professional Standards (26299-webcast)

Additional Courses of Interest for Tax Level 1 Participants

CaseWare Tax User Training (26284-webcast)

NEWLY HIRED EXPERIENCED ASSOCIATES

This curriculum is intended to introduce new experienced hires to M&P tools, policies and methodology.

Newly Hired Experienced Associates Core Curriculum

- Tax Tools Orientation (26263-webcast)

Highly Recommended Courses for Newly Hired Experienced Associates

- Tax Professional Standards (26299-webcast)

Additional Courses of Interest for Newly Hired Experienced Associates

CaseWare Tax User Training (26284-webcast)

RSM McGladrey AdvanceCPA Tax Curricula

LEVEL 2 ASSOCIATES (after one busy season)

If you are enrolled in or have completed a Masters of Taxation program, some of these classes may not be applicable.

Level 2 Core Curriculum

- Tax Level 2 – Partnership and LLC Taxation (26216-webcast)
- Tax Level 2 – S Corporation Taxation (26219-webcast)
- Tax Level 2 – C Corporation Taxation (26247-webcast)
- Tax Level 2 – Tax Research (26242-webcast)
- Private Foundations and Form 990-PF (26204-webcast)

Additional Courses of Interest for Tax Level 2 Participants

Management Development

Business Dining Etiquette (26612-webcast)

Tax

Intermediate Sanctions for Tax Exempt Organizations (26205-webcast)

Introduction to Taxpayer Penalties (26298-webcast)

Private Foundations and Form 990-PF (26204-webcast)

Tax Level 2 – Partnership and LLC Taxation (26216-webcast)

Tax Level 2 – S Corporation Taxation (26219-webcast)

Tax Level 2 – C Corporation Taxation (26247-webcast)

Tax Level 2 – Tax Research (26242-webcast)

Tax Professional Standards (26299-webcast)

Tax Tools Orientation (26263-webcast)

Unrelated Business Income (26282-webcast)

RSM McGladrey AdvanceCPA Tax Curricula

LEVEL 3 ASSOCIATES (completed Level 2 in the previous year or have two years of experience)

Level 3 Core Curriculum

- Accounting Methods and Periods-Day 1 (88101-webcast)
- Accounting Methods and Periods-Day 2 (88172-webcast)
- Introductory Accounting for Income Taxes - FAS 109 (26154-webcast)
- Intermediate Accounting for Income Taxes - FAS 109 (26155-webcast)
- Introduction to Taxpayer Penalties (26298-webcast)

Highly Recommended Courses for Tax Level 3 Participants

- Private Foundations and Form 990-PF (26204-webcast)

Additional Courses of Interest for Tax Level 3 Participants

Employee Benefits

Health Savings Accounts – HSAs (80319-webcast)

Ethics

Introduction to Independence Self-Study (48070-self-study)

Management Development

Business Dining Etiquette (26612-webcast)

Tax

Accounting Methods and Periods-Day 1 (88101-webcast)

Accounting Methods and Periods-Day 2 (88172-webcast)

Basics of Compensation (84109-webcast)

Deferred Compensation (84110-webcast)

Estate and Gift Tax Planning (85136-webcast)

Fiduciary Taxation (85142-webcast)

Intermediate Accounting for Income Taxes - FAS 109 (26155-webcast)

Intermediate Sanctions for Tax Exempt Organizations (26205-webcast)

Introduction to Taxpayer Penalties (26298-webcast)

Introductory Accounting for Income Taxes - FAS 109 (26154-webcast)

Private Foundations and Form 990-PF (26204-webcast)

Qualified Retirement Plans (88112-webcast)

Tax Professional Standards (26299-webcast)

Tax Tools Orientation (26263-webcast)

Unrelated Business Income (26282-webcast)

RSM McGladrey AdvanceCPA Tax Curricula

LEVEL 4/5 SENIOR ASSOCIATES/SUPERVISORS (completed Level 3 in the previous year or have at least three years of experience and are nearing promotion to manager)

Level 4/5 Core Curriculum

- Estate and Gift Tax Planning (85136-webcast)
- Fiduciary Taxation (85142-webcast)
- Qualified Retirement Plans (88112-webcast)
- Advanced Accounting for Income Taxes - FAS 109 (26156-webcast)
- Accounting for Uncertain Tax Positions - FIN 48 (26157-webcast)

Highly Recommended Courses for Tax Level 4/5 Participants

- Giving Performance Feedback (26144-webcast)

Additional Courses of Interest for Tax Level 4/5 Participants

Employee Benefits

Health Savings Accounts – HSAs (80319-webcast)

Management Development

Business Dining Etiquette (26612-webcast)

Giving Performance Feedback (26144-webcast)

Tax

Accounting Methods and Periods-Day 1 (88101-webcast)

Accounting Methods and Periods-Day 2 (88172-webcast)

Accounting for Uncertain Tax Positions - FIN 48 (26157-webcast)

Advanced Accounting for Income Taxes - FAS 109 (26156-webcast)

Basics of Compensation (84109-webcast)

Deferred Compensation (84110-webcast)

Estate and Gift Tax Planning (85136-webcast)

Fiduciary Taxation (85142-webcast)

Intermediate Accounting for Income Taxes - FAS 109 (26155-webcast)

Intermediate Sanctions for Tax Exempt Organizations (26205-webcast)

Introduction to Taxpayer Penalties (26298-webcast)

Introductory Accounting for Income Taxes - FAS 109 (26154-webcast)

Private Foundations and Form 990-PF (26204-webcast)

Qualified Retirement Plans (88112-webcast)

Tax Entity Selection (26261-webcast)

Tax Professional Standards (26299-webcast)

Tax Tools Orientation (26263-webcast)

Unrelated Business Income (26282-webcast)

RSM McGladrey AdvanceCPA Tax Curricula

MANAGERS

Tax Manager Core Curriculum

- Effective Goal Setting (26143-webcast)
- Giving Performance Feedback (26144-webcast)
- Coaching to Develop Others (26145-webcast)

Additional Courses of Interest for Tax Managers

Employee Benefits

Health Savings Accounts – HSAs (80319-webcast)

Ethics

Independence Update 2009 (48029-webcast-contains McGladrey specific content)

Management Development

Business Dining Etiquette (26612-webcast)
Coaching to Develop Others (26145-webcast)
Effective Goal Setting (26143-webcast)
Giving Performance Feedback (26144-webcast)

Tax

Accounting for Uncertain Tax Positions - FIN 48 (26157-webcast)
Advanced Accounting for Income Taxes - FAS 109 (26156-webcast)
Basics of Compensation (84109-webcast)
Deferred Compensation (84110-webcast)
Intermediate Accounting for Income Taxes - FAS 109 (26155-webcast)
Introductory Accounting for Income Taxes - FAS 109 (26154-webcast)
Qualified Retirement Plans (88112-webcast)
Tax Entity Selection (26261-webcast)
Tax Professional Standards (26299-webcast)
Tax Tools Orientation (26263-webcast)

RSM McGladrey AdvanceCPA Tax Curricula

SENIOR MANAGERS AND PARTNERS

Senior Manager and Partner Core Curriculum

- Coaching to Develop Others (26145-webcast)
- Tax Professional Standards (26299-webcast)

Additional Courses of Interest for Senior Managers and Partners

Employee Benefits

Health Savings Accounts – HSAs (80319-webcast)

Ethics

Independence Update 2009 (48029-webcast-contains McGladrey specific content)

Management Development

Business Dining Etiquette (26612-webcast)
Coaching to Develop Others (26145-webcast)
Effective Goal Setting (26143-webcast)
Giving Performance Feedback (26144-webcast)

Tax

Accounting for Uncertain Tax Positions - FIN 48 (26157-webcast)
Advanced Accounting for Income Taxes - FAS 109 (26156-webcast)
Basics of Compensation (84109-webcast)
Deferred Compensation (84110-webcast)
Qualified Retirement Plans (88112-webcast)
Tax Professional Standards (26299-webcast)
Tax Tools Orientation (26263-webcast)