

AARP TAX-AIDE BASIC TRAINING
JANUARY 8-12 2018

Nancy

MONDAY	WELCOME/INTRODUCTIONS	BETTY THOMAS
	STANDARDS OF CONDUCT	BETTY THOMAS
	WHO MUST FILE, FILING STATUS, DEPENDENTS	DENNIS DRISCOLL
	LUNCH	
	INCOME	BETTY THOMAS
TUESDAY	ADJUSTMENTS TO INCOME	JULIA GRANT
	COMPREHENSIVE PROBLEM PART 1	BETTY THOMAS
	STANDARD DEDUCTION	DON WHEELER
	LUNCH	
	ITEMIZED DEDUCTIONS, EXEMPTIONS	DON WHEELER
	CALCULATING TAX	DON WHEELER
	COMPREHENSIVE PROBLEM PART 2	BETTY THOMAS
	NONREFUNDABLE CREDITS	
	FOREIGN TAX	JULIA GRANT
	CHILD/DEPENDENT CARE	DENNIS DRISCOLL
	CHILD TAX CREDIT	DENNIS DRISCOLL
WEDNESDAY	NONREFUNDABLE CREDITS CONTINUED	
	EDUCATION CREDIT	CONDA BOYD
	RETIREMENT CREDIT	HARRY ASKIN
	RESIDENTIAL ENERGY CREDIT	HARRY ASKIN
	OTHER CREDITS	HARRY ASKIN
	OTHER TAXES	HARRY ASKIN
	LUNCH	
	EARNED INCOME CREDIT	CONDA BOYD
	ACA	DON, DENNIS, BETTY
THURSDAY	STOCK SALES GAINS AND LOSSES/ SALE OF HOME	DENNIS CLOUGH
	LUNCH	
	STOCK SALES CONTINUED	DENNIS CLOUGH
	PAYMENTS, REFUNDABLE CREDITS/ FINISH RETURN	DON WHEELER

THURSDAY CONTINUED

INTAKE INTERVIEW QUALITY REVIEW
COMPREHENSIVE PROBLEM PART 3

DON WHEELER
BETTY THOMAS

FRIDAY MULTIFACTOR ADJUSTMENT
PORTAL, EXPENSES, REIMBURSEMENT
STATE OF OHIO

JOHN BASALLA
JOHN BASALLA
BETTY THOMAS

TESTS ARE DUE BY 3:00PM

INSTRUCTORS

HARRY ASKIN	440-835-0867
JOHN BASALLA	440-734-3979
CONDA BOYD	440-899-2987
DENNIS CLOUGH	440 871-3300 (OFFICE)
DENNIS DRISCOLL	440-734-0044
JULIA GRANT	440-333-3981
MARION GEDNEY	440-937-0242
BETTY THOMAS	440-835-1977
DON WHEELER	440-937-6792

HAVE A GREAT YEAR AND MANY HAPPY RETURNS