



Tax Staff Essentials

Ensure staff competencies at all levels.

In the ever-changing and complex world of tax, does your staff have the necessary knowledge and skills to deliver quality work to your clients? Are you spending billable hours sourcing learning content or developing in-house programs? AICPA Tax Staff Essentials offers a comprehensive training curriculum for tax professionals at every stage of their career.

Based on a profession-wide competency model that AICPA developed and validated with industry experts, the Tax Staff Essentials program is arranged in four progressive levels — from new staff through tax manager/director. The program uses advanced technologies and instructional methods to effectively transfer knowledge and prepare staff for on-the-job performance.

Choose from a variety of delivery methods:

- On-site programs may be purchased for 10+ participants; use an AICPA instructor or furnish your own
- On-demand programs allow individuals to learn at their own pace, time and location
- AICPA Tax Boot Camp provides an opportunity to learn in a classroom setting at several U.S. locations
- Webcasts are offered on multiple dates and times throughout the year
- Combine the above formats to create a program that is just right for your firm

Our learning consultants can help you assess competencies and create a customized learning proposal to meet your staff's unique training needs.

Develop your firm's talent.

Call 800.634.6780, option 1,
or email aicpalearning@aicpa.org.

Four progressive levels

1 New staff

Covers the core skills required to begin working on tax engagements.

- Tax Research I
- Working Paper Documentation
- Individual Tax Fundamentals
- S Corporation Fundamentals
- Capitalized Costs and Depreciation
- Effective Business Communication
- Tax Fundamentals of LLCs and Partnerships

2 Experienced staff

Builds upon foundational tax knowledge and prepares staff for a variety of more complex firm engagements.

- Tax Research II
- Choice of and Formation of Entity
- Multistate Taxation
- Taxation of Corporations
- Tax Accounting for Inventories
- Accounting Methods and Periods
- Taxation of Property Transactions
- Intermediate Individual Taxation

3 Tax senior/ supervisor

Equips staff with the knowledge to advise the firm's high-net-worth clients on tax considerations.

- Form 990: Mastering Its Unique Characteristics
- Real Estate Taxation
- Income Tax Accounting
- Advanced Tax Planning S Corporations
- Estate and Trust Primer
- Introduction to Business Acquisitions

4 Tax manager/ director

Covers the advanced technical training required to handle tax controversy issues, offer additional services and increase service fees.

- IRS Audits
- Advanced Income Tax Accounting
- Advanced Taxation Partnerships and LLCs
- Tax Planning for Small Businesses
- International Taxation
- Individual Tax Planning

For more information on AICPA's premium learning for your staff:

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