



JPL DREAM ACADEMY

Tax Preparation Course Guide

From Complete Beginner to Career-Ready Tax Professional

If you are new to taxation and have little or no background in the field, this guide is for you. The JPL Tax Preparation Course walks you step by step through everything needed to understand and prepare real tax returns — no prior experience required.

1 What Is Taxation?

Taxation is how governments collect money from individuals and businesses to fund public services. In simple terms, taxes are **mandatory payments required by law**. For many people, taxation feels confusing because of the forms, rules, and calculations involved. This course removes that confusion.

Income Tax	Paid on money earned by individuals or businesses — the main focus of this course.
Payroll Tax	Connected to wages and employment, including Social Security and Medicare taxes.
Self-Employment Tax	For people who work for themselves, paid in addition to income tax.
Capital Gains Tax	May apply when assets like stocks or property are sold at a profit.
Business Tax	Separate responsibilities depending on business structure and activities.

2 Who This Course Is For

- Complete beginners with no prior tax knowledge
- People looking for seasonal or year-round income opportunities
- Entrepreneurs who want to start a tax preparation business
- Insurance, finance, or service professionals expanding their skill set



- Anyone who wants practical, structured tax knowledge they can apply immediately

No Experience Needed

You do not need prior experience in accounting or taxation to begin. This course is built for beginners and teaches from the ground up in clear, simple language.

3 What You Will Learn

- Understand the structure of the U.S. tax system
- Identify common tax forms and what they are used for
- Determine filing requirements and correct filing status
- Calculate adjusted gross income and taxable income
- Apply deductions and tax credits accurately
- Prepare individual tax returns using Form 1040
- Handle self-employment income, rental income, and more
- Apply ethical and compliance standards in professional tax work

4 Course Structure – 4 Modules

MODULE 1

Foundations of Tax Preparation

- Introduction to the U.S. tax system
- Filing requirements and statuses
- Understanding dependents
- W-2 income and basic income reporting

Outcome: Understand the core structure of a basic individual tax return



MODULE 2

Credits, Adjustments & Tax Benefits

- Adjusted Gross Income (AGI) and taxable income
- Common adjustments to income
- Child Tax Credit and Earned Income Tax Credit (EITC)
- Education and retirement-related benefits

Outcome: Identify opportunities to reduce tax liability legally and accurately

MODULE 3

Intermediate & Advanced Tax Preparation

- Standard vs itemized deductions
- Capital gains and losses
- E-filing basics and amended returns
- Correcting returns and complex client scenarios

Outcome: Develop confidence working through returns beyond the most basic filing situations

MODULE 4

Professional Practice & Specialized Topics

- Self-employment income and Schedule C
- Rental income and deductions
- IRS due diligence requirements and ethics
- Preparing to work with real clients

Outcome: Understand how tax preparation works in real professional settings

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Career Opportunities

Tax Preparer

Prepare federal and state returns for individuals and small businesses.

Seasonal Tax Professional

Earn strong income during peak filing season (January–April).



Freelance Tax Consultant

Work independently with your own growing client base.

Tax Business Owner

Launch your own tax preparation service and build a business.

6 Frequently Asked Questions

Q: Do I need prior experience?

A: No. This course is built for complete beginners.

Q: Do I need an accounting degree?

A: No. We teach taxation in a practical, understandable way.

Q: Is this theoretical or practical?

A: Both – you learn concepts and prepare real tax returns.

Q: Will I receive a certificate?

A: Yes. A Certificate of Completion is issued upon finishing the course.

Ready to Start Your Tax Career?

Tax preparation is a marketable skill with real income potential. At JPL Dream Academy, we teach from the ground up – setting you on a path to a new professional direction.

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