



Tax Research Certificate Program™

Build a Solid Foundation for Your Tax Research

Gain the skills and confidence to expertly conduct federal and state tax research.



Checkpoint Learning® Tax Research Certificate Program



The Thomson Reuters Checkpoint Learning **Tax Research Certificate Program™** helps candidates develop foundational tax research knowledge while earning approximately 20 hours of Continuing Professional Education (CPE) credit. This program is designed for

CPAs or future CPAs, Tax Accountants, Senior Tax Accountants, Tax Managers, or anyone wanting to improve their tax research skills or become more efficient. Tax research proficiency is all too often underserved in formal education programs, leaving new accountants missing key skills required to perform effectively. From dependence on unreliable internet sources to lack of clarity on the import (and order) of law, case law, commentary, and treatises, many tax leaders find their staff unprepared to perform real-world tax research.

Professionals may register for a free 30-day trial subscription of Checkpoint at <https://checkpointlearning.thomsonreuters.com/GetCertificate/TRCP-Trial> to aid in course completion.

The certificate gained will reflect a thorough and transferable foundation in tax research. The courses include examples from Thomson Reuters Checkpoint, the profession's leading source for intelligent tax and accounting information.

Duration

The program can be completed in as little as one week or at your own speed for up to one year.

Tax Research Competency Certificate

Those who successfully complete the program will earn a Checkpoint Learning Tax Research Competency Certificate™. Certificate holders can add this accomplishment to their resume or LinkedIn profile.

CPE Credits

The Tax Research Certificate Program provides learners with an opportunity to earn 20 hours of Continuing Professional Education credit.

Who Benefits:

- **Firm and corporate executives who hire and manage tax staff members.** This certificate program provides consistent, quality direction to ensure new tax professionals are capable of effective and efficient tax research.
- **Individual tax professionals.** Adding a tax research certificate from Thomson Reuters to your resume and LinkedIn account will enhance your demonstrated skillset and professional profile.
- **New graduates.** The Tax Research Certificate program is a great bridge from your accounting degree to passing the CPA exam. While you are working and preparing for the exam, you can address this practical knowledge area and enhance your hireability as a staff accountant.

Tax Research Certificate Program

Online Courses

■ Tax Research: Tax Law and Treasury Interpretations.

This course provides an introduction to the area of tax research. It will acquaint you with the Internal Revenue Code and Treasury Department regulations as well as interpretations, rulings, and procedures issued by the Internal Revenue Service. It will teach you how to research tax issues and answer tax questions by consulting these tax materials (4 credit hours of CPE awarded after successful completion).

■ Tax Research: Court Interpretations and Citor.

The second course in our series on tax research further hones your tax research skills, discusses judicial interpretations and citations from various US courts, and introduces the citator research tools (7 credit hours of CPE awarded after successful completion).

■ Tax Research: Case Analysis.

This online course further develops the knowledge and tax research skills acquired in the previous two courses of this series. Each chapter has a taxpayer scenario that presents a few facts and requests an opinion or recommendation on the handling of a particular tax matter; the learner will realize the relationship of the law, interpretations, and cases to the taxpayer (4 credit hours of CPE awarded after successful completion).

■ Cracking the Code: Efficient and Thorough Tax Research Techniques.

In today's value-driven tax planning environment, tax accountants must research accurately, thoroughly and efficiently. This is especially difficult for researchers who have grown up using Google to answer every question, as keyword searching without a frame of reference (or knowledge of the right keywords) is often the least efficient and effective way to answer tax research questions. This video course will teach a systematic research methodology that tax researchers may use in order to identify and analyze tax issues efficiently, accurately, and thoroughly. Among other topics, it will teach students the hierarchy and different types of primary sources in tax law and discuss how to use secondary sources most effectively. Students will have opportunities to practice their skills on realistic research exercises, using RIA Checkpoint to answer research problems (2 credit hours of CPE awarded after successful completion).

■ Cracking the Code: Advanced Tax Research.

This video course builds on the basic skills taught in Cracking the Code: Efficient and Thorough Tax Research Techniques for participants to learn advanced research skills such as code section based research, state tax research, using explanations and annotations to find the most relevant authorities, and when and how to use keyword searches. Participants will also learn when and how to use legislative history in their tax research, and will practice their research skills with research examples (2 credit hours of CPE awarded after successful completion).

■ Checkpoint Functionality: Getting Started With the Basics.

The material covered in this video course gives you the groundwork needed to use Checkpoint for your research. Basic functionality is the same in all practice areas, so whether you are researching international, federal or state tax issues, accounting, pension, estate, or payroll, what you learn here will apply to all! This course shows you how to keyword search, efficiently navigate in the system, and how to set yourself up to receive newsletters by email so you can stay up-to-date on the latest happenings in your field (1 credit hour of CPE awarded after successful completion).

Final Exam

The program includes a comprehensive final exam to test comprehension. Note: each individual course also concludes with an exam for CPE credit.

With the Checkpoint Learning Tax Research Certificate Program, you're on solid ground.

Thomson Reuters®

Thomson Reuters is the world's leading source of news and information for professional markets. Our customers rely on us to deliver the intelligence, technology, and expertise they need to find trusted answers. The business has operated in more than 100 countries for more than 100 years. Thomson Reuters shares are listed on the Toronto and New York Stock Exchanges (symbol: TRI).

For more information, **visit tr.com**.

Thomson Reuters Checkpoint Learning®

Checkpoint Learning provides training and continuing professional education (CPE) solutions for tax, accounting and finance professionals and firms. From customized group training to more than 900 individual webinar, online self-study, and public seminar and conference events, Checkpoint Learning offers a full range of solutions to build learning plans for both individuals and teams. Our mission is to improve the productivity and profitability of accounting, tax and corporate finance professionals by rethinking traditional processes, leveraging cutting-edge technology, and providing the most accurate and insightful training available.

For more information, **visit cl.tr.com**.

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+1 800 231 1860

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