STATE BOARD OF TAX PRACTITIONERS
2007-2008 CORRESPONDENCE COURSE APPROVALS
June 1, 2007 – May 31, 2008
***List is Subject to change* - Last Updated: 1/29/08**
Courses listed in GRAY are pending / Sponsors listed in GRAY have not responded

COURSE SPONSOR	COURSE TITLES	HOURS
A+ Tax Educators April Bradford Barnes 1081 Camino Del Rio S213 San Diego, CA 92108 Phone: (619) 282-6502 Fax: (800) 856-3017 E-Mail: myaccountantsandiego@sbcglobal.net Website: www.aplustaxeducators.com	**Course Titles** Oregon Continuing Education for Federal Oregon Continuing Education for Federal	**Hours** 30 15
BISK EDUCATION, INC. Attn: Valerie Wendt 9417 Princess Palm Ave Tampa , FL 33619 Phone: 1-800-874-7877 Fax: 1-800-345-8273 E-mail: info@cpeasy.com Website: www.cpeasy.com	**TAXATION COURSES:** Advanced State & Local Taxation Aud Financial Planning Rprt–1 yr (AFPR, AFPRC) Aud Financial Planning Rprt–2 yr (AFPR, AFPRC) Audio Tax Report - 1 year (ATR, ATRC) Audio Tax Report - 2 year (ATR, ATRC) Circular 230 Update Closely-Held and Family Business Corporate Mergers & Acquisitions Corporate Organization & Operations Corp. Reorganization & Divisions CPE Network Tax and A&A (CNA, QNA) (4 per month-11 issues) CPE Network Tax (CNT, QNT) (2 per month-11 issues) Estate, Gift & Trust Tax Update Ethical Dilemmas of Tax Shelters Executive Compensation Experts' Forum for Nonprofit Organizations Family Limited Partnerships Under Attack Form 990: A Practical Guide Form 1040: A Practical Guide Form 1041: A Practical Guide Form 1120: A Practical Guide Form 1120S: A Practical Guide Form 1065: A Practical Guide Form 5500: A Practical Guide Incredible Shrinking Domain of Corp. Stock Individual & Business Planning–Split Dollar Ins Introduction to International Taxation IRC 199: Qualified Domestic Production IRS Practice & Procedure – Volume 1 IRS Practice & Procedure – Volume 2 Joint Ventures w/Tax Exempt Entities Marital Deduction Planning Mastering IRC 401(k) Plans Non-charitable Exempt Organizations Not for Profit Organizations: Tax Consideratns.	 12 Non-QAS, 18 CD/Online 12 Non-QAS (1 per month) 24 Non-QAS (1 per month) 12 Non-QAS (1 per month) 24 Non-QAS (1 per month) 1 14 Non-QAS, 21 CD/Online 4 Non-QAS, 6 CD/Online 6 Non-QAS, 9 CD/Online 6 Non-QAS, 9 CD/Online 44 Non-QAS 22 Non-QAS 1 3 4 Non-QAS, 6 CD/Online 1 4 4 Non-QAS, 6 CD/Online 16 Non-QAS, 24 CD/Online 4 Non-QAS, 6 CD/Online 14 Non-QAS, 21 CD/Online 14 Non-QAS, 21 CD/Online 8 Non-QAS / 12 CD/Online 4 Non-QAS, 6 CD/Online 2 1 4 Non-QAS, 6 CD/Online 4 CD/Online 1 1 2 3 3 Non-QAS, 4 CD/Online 4 Non-QAS, 6 CD/Online 8 Non-QAS, 12 QAS

BISK EDUCATION, INC. (Cont.)	Not for Profit Org: Advanced Topics	12 Non-QAS, 18 CD/Online
	Overview of Federal Income Taxation	4 Non-QAS, 6 CD/Online
	Partnership Tax Issues	2
	Pass-Through Entities Update	1
	Planning for Collectibles	3
	Real Estate: Acquisition & Operation	4 Non-QAS, 6 CD/Online
	Real Estate Taxation: Dispositions	4 Non-QAS, 6 CD/Online
	S Corporations	7
	Servicing Your Closely-Held Business Clients	4 Non-QAS, 6 CD/Online
	Tax Experts' Forum, Vol. 1-12	1 hour each (Total of 12 hrs)
	Tax Incentives for Paying/Saving for College	4 Non-QAS, 6 CD/Online
	Tax Planning & Asset Protection Using VEBAs	6 Non-QAS, 9 CD/Online
	Thinking Outside the Partnership Box	1
	Transfers to Controlled Corp.: IRC Sect. 351	3
	Understanding Pension & Profit Sharing	4 Non-QAS, 6 CD/Online
	ACCOUNTING & AUDITING COURSES:	
	Accounting for Income Taxes	4
	Accounting for Business Combinations	4 Non-QAS, 6 CD/Online
	Accounting for Stock-Based Compensation	4 Non-QAS, 6 CD/Online
	Accounting Update	4 Non-QAS, 6 CD/Online
	Advanced Forensic Accounting	4 Non-QAS, 6 CD/Online
	Auditing Update	4 Non-QAS, 6 CD/Online
	Bisk GAAP Guide; Complete	20 Non-QAS, 30 CD/Online
	Bisk GAAP Guide; Advanced Topics	5 Non-QAS, 8 CD/Online
	Bisk GAAP Guide; The Balance Sheet	10 Non-QAS, 15 CD/Online
	Bisk GAAP Guide; Income Statement	5 Non-QAS, 8 CD/Online
	Board of Directors' Issues	4 Non-QAS, 6 CD/Online
	Construction Contractor: Real World Guide…	4 Non-QAS, 6 CD/Online
	Corporate Financial Management	4 Non-QAS, 6 CD/Online
	Corporate Financial Reporting Issues	4 Non-QAS, 6 CD/Online
	Financial Reporting & State Taxation	3 Non-QAS, 4 CD/Online
	Forensic Accounting	4
	How 2 Generate, Project & Report Cash Flows	4 Non-QAS, 6 CD/Online
	Independence Requirements for CPA's	4 Non-QAS, 6 CD/Online
	Not for Profit Org: Accounting Considerations	8 Non-QAS, 12 CD/Online
	Not for Profit Org: Current Developments	8 Non-QAS, 12 CD/Online
	Sarbanes-Oxley: Benefiting from Compliance	4 Non-QAS, 6 CD/Online
	Sarbanes-Oxley: Beyond the 1st year	2 CD/Online
	SOX 404: Emerging Trends & Best Practices	2 CD/Online
	SOX 404: Relationship to COBIT	2 CD/Online
	ETHICS COURSES:	
	Ethics in Tax Practice: Florida	4 CD/Online
	Ethics in Tax Practice: New York	4 CD/Online
	Ethics Standards for California CPA's	8 CD/Online
	Ethics Standards for Michigan CPA's	4 CD/Online
	Ethics Standards for Texas CPA's	4 CD/Online
	CONSULTING SERVICES COURSES:	
	Board of Directors' Issues	4 Non-QAS, 6 CD/Online
	Business Valuation	4 Non-QAS, 6 CD/Online
	Divorce: Legal, Accounting & Tax Consider…	4 Non-QAS, 6 CD/Online
	Eldercare: Retirement & the Costs of Aging	4 Non-QAS, 6 CD/Online
	Hot Topics in Health Care Acctng & Auditing	4 Non-QAS, 6 CD/Online
	Introduction to Litigation Support Services	4 Non-QAS, 6 CD/Online
	Lost Profit Damage Calculation	4 Non-QAS, 6 CD/Online
	Real Estate:Real World Guide to Acctng & Aud	4 Non-QAS, 6 CD/Online

BOAZ WEB GROUP LLC Tina Rainey 26351 Shady Oak Drive Monroe, Oregon 97456 Phone: (541) 607-6313 Fax: (541) 607-8195 E-mail: tina@lighthouseaccounting.com Website: www.boazcpe.com	**COURSE TITLES** **Asset Basis**	**HOURS** **3**
CALIFORNIA TAX INSTITUTE William J McKnight 5281 Laurel View Circle Yorba Linda , CA 92886 Phone: 1-800-995-1747 Fax: (714) 777-4267 E-mail: admin@caltaxinstitute.com Website: www.caltaxinstitute.com	**COURSE TITLES** **Individual Tax Fundamentals** **Preparation Course for EA Exam** **Corporations/Partnerships** **Estates, Fiduciary, Gift Taxes**	**HOURS** **30** **30** **15** **30**
CCH, Inc. Gwen Hefty & Mariela De La Torre 4025 W Peterson Ave Chicago IL 60646 Phone: 773-866-3949 Fax: 773-866-3084 E-mail: Mariela.delatorre@wolterskluwer.com Website: www.cch.learningcenter.com	**COURSE TITLES** 706/709 Prep & Plng Guide – 3 modules (06) 1040 Prep & Planning Guide (07)– 4 modules 1041 Preparation & Planning Guide (07) 1065 Preparation & Planning Guide (07) 1120 Prep & Plng Guide – 3 modules (07) 1120S Preparation & Planning Guide (07) 2005 Developments for Individuals – Nov 2005 2005 Dev. For Partnerships, LLCs & S Corps.. 2006 Developments for Individuals – Nov. 06 Basic Financial & Estate Plang Docs (05/05) Car, Trvl & Entrtmnt & Hme Off. Ded – 3 mods Corporate Income Tax Refresher – 2006 Ed. Depreciation Course – 2006 Edition Dvlpmnts in 06 for Prtnrshps & S Crps (09/06) Federal Tax Audio Advisor (CCH CPE Cred Serv) Health Care Options & Tax Rules that Affect… New Bankruptcy Act – July 2005 New Legislation & Changes Effective in 2006 New Tax Rules for 2005 – March 2005 Primary Resid. & Vac. Home as Pers. Tx. Sh… Roth 401(k)s Roth IRA's – January 2007 Sophisticated Charitable Giving Arr. for Indv… Tax Breaks for Energy Conservation – May 06 Tax Increase Prvntn & Recon Act – July 06 Tax Strategies for Sideline Businesses Top Accounting Issues for 2006 – (2 Modules) Top Accounting Issues for 2007 – (3 Modules) Top California Tax Issues 2006 – (2 Modules) Top Federal Tax Issues for 2006 – (3 Modules) Top Federal Tax Issues for 2007 – (3 Modules) Top Fin. & Est. Plng. Iss. for 2007 (2 Modules) Top Multi-state Tax Issues 2006 – (2 Modules) **On-line Courses:** 706 Prep & Planning 1: Tax Fundmntls (07/08) 706 Prep & Plang 2: Prop of Decedent (07/08)	**HOURS** 12 30 8 8 14 8 2 2 2 2 16 14 6 2 4 each (6 per year) = 24 2 2 2 2 4 4 2 4 2 2 4 8 15 12 8 21 16 8 3 5

CCH, Inc. (Cont.)	706 Prep & Planning 3:Debts Decedent (07/08)	2
	706 Prep & Planning 4:Creditd & Ded…(07/08)	4
	706 Prep & Planning 5: Spec. Sits.…(07/08)	2
	709 Prep & Planning: Gift Tax Rtn (07/08)	3
	1040 Preparation & Planning Part 1 (07/08)	3
	1040 Preparation & Planning Part 2 (07/08)	4
	1040 Preparation & Planning Part 3 (07/08)	3
	1040 Preparation & Planning Part 4 (07)	4
	1040 Preparation & Planning Part 5 (07)	4
	1040 Preparation & Planning Part 6 (07)	5
	1040 Preparation & Planning Part 7 (07)	3
	1040 Preparation & Planning Part 8 (07)	4
	1040 Preparation & Planning Part 9 (07)	2
	1041 Preparation & Planning 1 (07/08)	7
	1041 Preparation & Planning 2 (07)	4
	1041 Preparation & Planning 3 (07/08)	2
	1041 Preparation & Planning 4 (07/08)	1
	1041 Preparation & Planning 5 (07/08)	2
	1065 Preparation & Planning 1 (07)	4
	1065 Preparation & Planning 2 (07)	3
	1065 Preparation & Planning 3 (07)	5
	1065 Preparation & Planning 4 (07)	4
	1120 Prep & Planning 1: Intr to F1120 (07/08)	2
	1120 Prep & Planning 2: Income (07/08)	3
	1120 Prep & Planning 3: Deductions (07)	5
	1120 Prep & Planning 4: Tx & Pymnts (07/08)	2
	1120 Prep & Planning 5: Estimated Taxes (07)	2
	1120S Preparation & Planning 1 (07)	5
	1120S Preparation & Planning 2 (07)	5
	1120S Preparation & Planning 3 (07)	3
	1120S Preparation & Planning 4 (07)	3
	Accumulated Earnings and Personal Hold..	3
	Alternative Minimum Tax for Individ. (2nd Ed)	2
	Alternative Minimum Tax: A Growing Problem	2
	Alternative Minimum Tax: Understanding…	2
	Alternative Tax Structures: Un-Incom Tax Reg	2
	Bankruptcy Abuse Act: Impact on Financial…	1
	Bankruptcy Act of 2005	2
	Boomer Planning	3
	Bus Succession Plan: The Debenture Solution	3
	CA Tax: Net Operating Losses & Net Op. Ls…	2
	Capital Gains, Div & Inc Bracks:ImpofRdTxRts	2
	Capital Gains, Divid. & Income Brackets... (2nd)	2
	Capitalizing Intangibles: New rules	3
	Cars: Expenses and Deductions (06/07/08)	6
	Charging Orders: Some of What Pract…	2
	Charitable Giving Tax Strategies (2nd Ed)	2
	Charitable Giving Tax Strategies (3rd Ed)	2
	Choice of Business Entity	3
	Circular 230: Staying Compliant	2
	Consolidated Returns: Determining Whether…	4
	Consolidated Returns: An overview	5
	Corporate Tax Part 1: Formation & Opera..	5
	Corporate Tax Part 2: Distributions	6
	Corporate Tax Part 3: Reorganizations	4
	Deduction for Foreign Dividends Repatri…	3
	Deferred Compensation Developments	3
	Depreciation course (2007 Edition)	6
	Dvlpmnts in 2007 4 Partnerships & S Corps	2
	Domestic Prod Activities Ded: Evolving Issues	2
	Educ. Tax Incentives: Opps & Strats (3rd Ed)	2
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	Family Limited Partnerships	3
	Financial & Estate Planning Documents	2
	Gifting as a Tax Strategy (2nd Edition)	2

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	Health Savings Accounts (2nd Edition)	3
	Home Office Exps & Deductions (06/07/08)	5
	Invest. Srats. After the Tax Increase Prev & R..	2
	Invest. Strats. Jobs Growth & Tx Rel. Rec. A…	2
	IRS Audit Process	3
	IRS Enforcement Programs	3
	IRS Tax Enforcement: Crackdown Abuse	2
	Itemized Deductions: What is/is not Deductible	3
	KESS 2004 Tax Legislation: Insights & Strats	6
	KESS Financial & Estate Planning: Building…	4
	KESS Financial & Estate Plng for Bus & Prof…	4
	KESS Financial & Estate Plng for Personal Sit.	4
	KESS Financial & Estate Plng: Gen Princip I	8
	KESS Financial & Estate Plng: Gen Princip II	6
	Like-Kind Exchanges	3
	Military Tax Breaks	2
	New Tax Breaks from Congress: Energy…	3
	New Tax Legislation & Previous Sched…	2
	New Tax Rules for 2005	2
	Nonqualified Deferred Compensation	2
	Partnership, LLCs & S Corps: Tax Dev…(06)	2
	Partnership Sales & Distribs: Making sense I	3
	Partnership Sales & Distribs: Making sense II	3
	Partnership Taxation Fundamentals (2nd Ed)	6
	Personal Residence as a Tax Shelter	2
	Postmortem Planning: What Executors Must…	2
	Primary Residence & Vacation Home as a…	2
	Recent Tax Developments (Jan-Feb 2007)	2
	Recent Tax Developments (Jul-Aug 2006)	2
	Recent Tax Developments (Nov-Dec 2006)	2
	Recent Tax Developments (Sep-Oct 2006)	2
	Recent Tax Developments (Mar-Apr 06)	2
	Recent Tax Developments (May-June 06)	2
	Recent Tax Developments (Mar-Apr 07)	2
	Recent Tax Developments (May-June 07)	1
	Recent Tax Developments (July-August 07)	1
	Recent Tax Developments (Sept.-Oct. 07)	2
	Retirement Planning: Maximizing After Tax Inc	2
	Retirement Plans and Traditional IRAs: Roll…	2
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	S Corps: Formation & Liquidation (2nd Edition)	5
	Sales & Use Taxability of Information Services	2
	Sales & Use Tax: Undrstng & Meas Sales Tax	2
	Sales & Use Tax: Undrstng & Meas Use Tax	2
	Sarbanes-Oxley Aftermath	2
	Section 179: Maximizing Small Bus Deduction	2
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	Tax Accounting Periods (2nd Ed.)	2
	Tax Accounting Inventories (2nd Ed.)	2
	Tax Breaks for Energy Conservation: In & Bus	2
	Tax Cons in Starting & Terminating a Bus (2nd)	2
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	Tax Credits: Business (3rd Ed.)	4
	Tax Credits: Personal (2nd Ed.)	4
	Tax Developments in 2006 for Individuals	2
	Tax-Exempt Organizations:Special Tax Rules..	2
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	Tax News & Headlines in 06: TIPRA, Pns Leg	3

	Tax Shelters & Scams	3
	Tax Strategies for Sideline Businesses	2
	Travel & Entertainment:Exps & Dedctns(06/07)	6
	Travel & Entertainment:Exps & Dedctns(07/08)	6
	Uniform Definition of a Child	1
	Vacation Homes and REITS	2
Client Whys, Inc. Lee Reams P.O. Box 6768 Malibu, California 90264 Phone: (818)-338-8700 Fax: (818) 743-0551 E-mail: lee.reams@clientwhys.com Website: www.clientwhyscpe.com	**COURSE TITLES** **Correspondence & On-line:**	**HOURS**
	40 Overlooked Tax Strategies & Benefits	**3**
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	Alternative Minimum Tax	**3**
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	Avoiding/Mitigating the Effects of the AMT	**3**
	Baby Boomer Profile & Common Mistakes	**1**
	Better Late Than Jail Bait	**1**
	Business Use of a Home	**2**
	Business Vehicle Expenses	**2**
	Casualty Losses	**2**
	Charitable Trusts	**1**
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	Claim of Right	**1**
	Community Property	**2**
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	Concepts of Estate Planning for the Baby...	**1**
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	Earned Income Credit	**1**
	Education Credits	**2**
	Education Planning	**1**
	Effect of Domicile on Estate Planning	**1**
	End of the Estate	**1**
	Ethics, Conflicts, Disclaimers & Engage…	**2**
	Farm Income Averaging	**1**
	Filing Status	**1**
	Foreign Earned Income Exclusion	**1**
	Foreign Travel	**1**
	Gambling Losses	**1**
	Gifting Issues in Estate Planning	**2**
	Health Savings Accounts	**2**
	Higher Education Interest	**1**
	Home Energy Credits	**2**
	Household Employees	**1**
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	Innocent Spouse Rules	**3**
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	Insurance & Estate Planning	**2**
	Investment Interest	**1**
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	Krusemarks Tax Returns Made Easy	**16**
	Krusemarks Tax Retrns Made Easy OR edition	**30**
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Drake Software Christine Reynolds 235 E. Palmer Street Franklin, NC 28734 Phone: (828) 349-5924 Fax: (828) 349-5713 E-mail: christine.reynolds@drakesoftware.com	**COURSE TITLES** **Drake Software Basic Tax Course** **Drake Software Evaluation Guide** **Drake Software Intrmd. Tax Course**	**HOURS** **4** **6** **3**
ERLAND FINANCIAL EDUCATION SERVICES Peggy Erland 25831 S Morgan Road Estacada , OR 97023 Phone/Fax: 503-630-7425 **OR** 888-617-8008 E-mail: erlandeducation@aol.com Website: www.erlandeducation.com	**COURSE TITLES** **Advanced Markets** **Annuities** **Asset Allocation** **Individ. Retire. & Medicare Sav. Accts.** **Insuring Long-term Care** **Introduction to Gift & Estate Tax** **The Living Trust and Other Probate…** **Mutual Funds & Individual Securities** **Personal Insurance Markets** **Principles of Life Insurance** **Retirement Plans for the Sml Business**	**HOURS** **15** **30** **12** **15** **15** **6** **5** **8** **30** **12** **3**

GLEIM PUBLICATIONS , INC. Martha Willis PO Box 12848 – Univ. Station Gainesville , FL 32604 Phone: 1-800-874-5346 Fax: (352) 375-6940 E-mail: martha@gleim.com Website: www.gleim.com	**On-Line Courses (2006):** Property Trans – Bas/Cap Gns & Losses Property Transactions - Installment Sales Tax-Corporate-Distribs., Liquids. & Re. Tax-Corporate-S Corp Form & Operation Tax-Corporate-Tax Computations Tax-Corporate-Taxable Income Tax: Credits, Alternative Min. Tax, FICA Tax: Estates,Trusts,Wealth Trns & Ex Orgs Tax-Individual-Above the Line Deductions Tax-Individual-Acctng Meths, Flng Stats… Tax-Individual-Business Expenses/Losses Tax-Individual-Exclusions from Gross Inc Tax-Individual-Gross Income Tax-Individual-Itemized Deductions Tax-Partnerships-Formation & Operation Tax: Payroll Tax: Procedures	**HOURS** 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 3 4
GOLDEN CITY PRO STD Thomas Yip 2550 W Main St Ste #105 Alhambra , CA 91801 Phone: 626-457-8836 Fax: 626-457-8852 E-mail: order@goldtax.com Website: www.goldtax.com	**COURSE TITLES** **Federal Individual Income Tax: Selected Topics** **Partnerships & Corporations - Including: S Corporations**	**HOURS** **30** **30**
JENNINGS ADVISORY GROUP Kathy Wright 830 Eastern Blvd Clarksville, IN 47129 Phone: (812) 282-7666 Fax: (866) 223-2696 E-mail: kathyw@taxspeaker.com Website: www.taxspeaker.com	**COURSE TITLES** 1040 In Depth 2007 1040 Update 2007 1120/1120S/1065 In Depth 2007 Clergy Tax Now Depreciation 2007 Estates & Trusts 2007 Ethics for Enrolled Agents Now Federal Tax Update 2007 Form 1040 Forms 1040-6252 Form 1040 Schedules A-SE Like Kind Exchanges Partnerships & LLC's Pensions Plans & IRA's S & C Corporations Tax Strategies 4 Small Bus. Owners	**HOURS** 24 8 16 2 4 8 2 8 4 4 2 6 4 6 8
L&M PRODUCTION DESIGN GROUP, INC. "Tax Talk Today" Jennifer Sterling 5510 Cherokee Av, Ste 200 Alexandria , VA 22312 Phone 703-642-6505 Fax: 703-642-6005 E-mail: billing@taxtalktoday.tv Website: www.taxtalktoday.tv	**Course Titles** 1. Compliance Update 2. Electronic IRS–E-file, EFTPS, E-services 3. Exempt Organizations – emerging issues 4. Getting Ready for Filing Season 2007 5. Getting Ready for Filing Season 2008 6. Office of Professional Responsibility 7. Payroll Update – worker classification 8. Simplifying Tip Reporting 9. Taxpayer Advocate Serv & Sys Advocacy 10. When you & the IRS don't agree…	**HOURS** **1 hour each course**: VHS & On-Line ***Please note:*** All courses are archived until the end of the month **one** year after its original viewing date.

National Society of Tax Professionals (NSTP) Paul LaMonaca 10818 NE Coxley Dr Ste A Vancouver, WA 98662 Phone: (360) 695-8309 Fax: (360) 695-7115 E-mail: taxes@nstp.org Website: www.nstp.org	COURSE TITLE **2007 Federal Tax Update & Review Course**	HOURS **8**
PACIFIC NORTHWEST TAX SERVICE SanDee Tharp 13405 NW Cornell Road Portland, OR 97229 Phone: (503) 646-5600 Fax: (503) 350-0265 E-mail:smtharp2@comcast.net Website: www.pnwtax.com	**COURSE TITLE** **Basis of Assets** **Ethics for Enrolled Agents** **Form 4797 & Sale of Assets** **Introduction to S-Corps & LLC's** **Rental Income Passive Activities** **Understanding AMT** **LTC Exam Prep Series** **Adjustments to Income** **Depreciation Made Easy** **Federal Credits** **Filing Status & Dependents** **Itemized Deductions** **Passive Activity Loss Limitatns** **Pensions & Social Security** **Sale of Assets & Capital Gains** **Self-Employment Income** **Welcome to Oregon** **80 Hour Basic Course** ***(through correspondence)***	**HOURS** **4** **3** **4** **8** **4** **3** **48** **4** **4** **8** **4** **6** **4** **4** **4** **4** **8** **80**
PROFESSIONAL EDUCATION SERVICES, LP (PES) Kathy Yates 8303 Sierra College Blvd Building #146 Roseville , CA 95661 Phone: 1-800-990-2731 916-791-3675 Fax: 916-791-4099 E-mail: kyates@pescpe.xohost.com Website: www.pescpe.com	**COURSE TITLES** Alternative Minimum Tax Car,Travel, Entertain & Home Off Ded… Choice of Entity Corporate and Partnership Inc Taxation Death and Taxes #5640 Divorce and Taxes #5610 Estate and Trust Income Taxation Ethics & Professional Responsibility EAs Ethics & the Tax Professional Hiring Independent Contractors Inc Taxes for Churches, Religious Org… Individual Income Tax Individual Retirement Arrangements Like-Kind Exchanges and Other Sales Limited Liability Companies Medical and Health Savings Plans Preparing Form 990 Real Estate Tax Issues #5630 Residential Rental Property Roth IRA's Small Business Taxation	**HOURS** 6 10 16 12 6 12 12 2 2 16 12 24 8 8 10 4 16 2 10 4 16

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	Taxation of Retirement Plng Prod…#5635	4
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	Today's Cafeteria Plans	10
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	Comp Guide 2 Tx Plng Strategies 4 College (CMFA)	**8**
	Everything u Need -Retirement Plan Distrib. (CRPD)	**10**
	Complete Guide to Depreciation,…(DASP)	**8**
	Avoid Getting Burned in Divorce: Tax Traps (DTTP)	**8**
	Advncd Est. Planning & Valuation Issues… (EPVI)	**10**
	Estate & Bus Sucsn Planning Using Life Ins (ESLI)	**10**
	Complete Guide 2 Administration of Trusts…(GATE)	**10**
	Fed Estate & Gift Tax Rtns - Frms 706/709… (GIFT)	**16**
	Gld Mn of Grt Tax Strats 4 the Real Est Inv (GOLD)	**12**
	Inc Tax, Est Tax & Fin Plng Ideas of 2003 (IEFP)	**12**
	Guide to Undrstndg the Key Issues…S Corps (IPSC)	**8**
	Int Tax Issues 4 Small & Med-Sized Bus… (ITCO)	**8**
	Ind Tx Guide 2 Fringe Benefits & Sel Payroll (ITGF)	**8**
	Int Tx Issues 4 Individuals: Going Overseas & (ITIO)	**10**
	LLC & Partnership Tax Rtn. Prep Workshop (LLPW)	**8**
	Tax Workshop on the New Manufacturers'…(MANU)	**8**
	Mastering the Fundamentals of Estate Plng (MFEP)	**10**
	Neg & Tx Aspects of Buying & Selling a Bus (NTAB)	**12**
	Preparing Corp Tax Rtrns 4 New Staff &… (PCTR)	**10**
	Preparing Individ Tax Rtrns 4 New Staff &… (PITR)	**8**
	Comp Guide 2 Preping Limited Liability Co (PLPS)	**16**
	Pst-Mortem Est Plng: Frms 706/1041/1040 (PMEP)	**12**
	Critical Tax Planning Strategies & Issues…(PRVH)	**8**
	Design & Administration new Roth 401(k)…(RTSC)	**12**
	Small Business Retirement Plan Review…(SBRP)	**12**
	S Corps: A Comprehensive Analysis (SCCA)	**8**
	Solid Critical Issues for the Estate Planner (SCEP)	**16**
	Guide to Tax Research: Doing it Smarter…(SGTR)	**8**
	Surgent McCoy Income Tax School (SITS)	**16**
	Social Security & Other Retirement Benefits: (SSRB)	**8**
	Surgent McCoy Adv Individ Inc. Tx Rtrn Iss. (STRI)	**12**
	Adv Strats & Tactics of Wealth Accumulation(STRP)	**10**
	Surgent McCoy 2003 Top Ten Tax Topics (STTT)	**8**
	The Complete Trust Workshop (TCTW)	**20**
	1040 Tax Season Survival Guide (TSSG)	**8**
	Toolbox for the prep of tax compliance…(TTCR)	**10**
	Self-Study Web Casts & On-line Courses:	
	Calc Tax Basis 4 a Subchapter S Corp (CTSS)	**2**
	Employ & Retire Tx Iss 4 Mems of an LLC (ERTI)	**2**
	Formation Issues of an S Corporation (FISC)	**2**
	Tax Issues in Formation of the LLC (FLLC)	**2**
	Gen Oper & Acctng Methods of an S Corp (GOAM)	**2**

SURGENT MCCOY, INC. (Cont.)	How to Settle an Estate – An Overview (HSEO) Individual AMT: Planning Issues & Pitfalls (IAMT) Introduction to the Limited Liability Company (ILLC) Intro 2 S Corporations – Eligibility & Elections (ISEE) Intro 2 the Inc Taxation of Trusts and Estates (ITTE) Using Life Insurance Trusts & Estate Plng (LITP) Liquidation & Termination Issues for LLCs (LTIL) Und the Role of Executors and Trustees (RETU) Tax Issues and Planning Using Roth IRA's (ROTH) Sv 4 Col w/ Coverdell Educ Accts & 529s (SCUS) Splitting Inc w/ Family Mems 2 Reduce Txs (SIFM) Statutory Fringe Benefits from A to Z (STFB) Tax Aspects of Distributions from an IRA (TADI) Tax Aspects of Health Benefits 4 Employers (TAHC) Tx Aspts of Purchase/Sale of Princ Resid (TASR) Tax Benefits for College Education (TBCE) Und the Tax Aspects of Profit Sharing Plans (TPSP) Tax-Deferred Exchanges (TXDE) Understanding Traditional IRA's (UNRI) Undrstndg the Tax Aspects of SIMPLE IRA's (UTAS)	2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2
TAX EDUCATORS James L. Crawford 31869 Herman Road Coburg , OR 97408 Phone: (541) 915-4915 Toll Free: 1-866-755-2853 Fax: 1-866-755-2853 E-mail: tax-ed@tax-educators.com Website: http://tax-educators.com	**COURSE TITLES** **Alternative Minimum Tax** **Basics** **Basis of Assets & Like Kind Exchange** **C Corporations** **Depreciation** **Divorce** **Farm Income & Expenses** **Going Into Business** **Income Generally** **Information Returns** **Installment Sales** **IRAs** **Itemized/Standard Deductions** **LLC & LLP** **Non-Payroll Taxes** **Oregon** **Partnerships** **Passive Activities** **Payroll Taxes** **S Corporations** **Sole Proprietor**	**HOURS** **3** **9** **3** **6** **7** **4** **9** **4** **12** **6** **4** **15** **12** **3** **5** **16** **6** **5** **9** **8** **13**
TAX MATERIALS, INC. Joe Meyer 15105 Minnetonka Ind. Rd.#221 Minnetonka, MN 55345 Phone: (952) 746-5276 x207 Fax: (952) 746-5278 E-mail: joe@thetaxbook.com Website: www.thetaxbook.com	**COURSE TITLES** **The Tax Book Deluxe Edition Self-Study CPE** **The Tax Book 1040 Edition Self-Study CPE**	**HOURS** **12** **8**
TAX TALK TODAY – See: L&M Productions		
THE TAX PLANNING INSTITUTE, LLC Damon L. Mayer 2367 State Street Ste #30 Salem , Oregon 97301 Phone: (503) 585-1393 Fax: (503) 585-1859	**COURSE TITLES** **2004/2005 Tax Updates** **Alternative Minimum Tax** **Asset Basis** **Business Expense Taxation** **Capital Asset Transactions** **EA Ethics & Prof Responsibilities** **Education Tax Benefits & Credits** **Estate & Gift Tax Overview & Plng** **Form 1041 - Estate Inc Tax Rtrn** **Forms of Business**	**HOURS** **3** **2** **2** **4** **4** **2** **4** **12** **6** **4**

E-mail: dmayercfp@yahoo.com Website: www.thetaxplanninginstitute.com **THE TAX PLANNING INSTITUTE, LLC (Cont.)**	**Foundations of Estate Planning** **Fringe Benefits** **Mutual Fund Distributions** **Partnerships** **Rental Real Estate** **Retirement Plan Taxation** **S-Corporations–From Open 2 Close** **Sale of a Farming Business…** **Starting a Business-Step by Step…** **Stock Options *Simplified*** **Tax-Exempt 501(c)(3) Basics** **Tax Research Basics** **Taxation of Investment Products** **The Financial Planning Process** **Tracking Business Entity Basis** ***Back to Basics Courses:*** **Filing Info, Exmptns & Stndrd Ded** **Income Types & Taxation** **Oregon Income Tax**	**5** **3** **3** **6** **4** **8** **5** **2** **3** **4** **2** **3** **3** **3** **3** **3** **5** **5**
TEC INSTITUTE OF OREGON, LLC Teresa Hector 905 W. 8th Street Medford, Oregon 97501 Phone: (541) 774-4201 Fax: (541) 774-4202 E-mail: tjhector@juno.com Web: www.tecinstitute.com	**COURSE TITLES** ***Basic Income Tax Course Units:*** **Get Started** **Income** **Itemized Deductions** **Retirement** **Capital Assets** **Business Issues** **Tax & Penalty Issues** **Credits** **Oregon Law**	 **HOURS** **10** **9** **12** **5** **6** **12** **3** **11** **10**
THOMAS TAX SEMINARS Susan Merz 1523 Amanda Place Santa Rosa , CA 95403 Phone: (800) 638-3783 Fax: (800) 638-3783 E-mail: info@thomastaxseminars.com Website: www.thomastaxseminars.com	**COURSE TITLES** **Basis of Assets – An Overview** **Casualties, Disasters & Thefts** **Ethics & Tax Prof Responsibilities** **Tax Treatment of a Qualifying Child** **Tax Treatment of Corporations** **Tax Treatment of Employee Inc & Exp** **Tax Trtmnt of Estates, Gifts & Trusts** **Tax Treatment of Investment Interest** **Tax Treatment of Partnerships** **Tax Trtmnt of Passive Act/Rntl Inc.** **Tax Treatment of Retirement Plans** **Tax Treatment of S Corporations**	**HOURS** **5** **2** **2** **3** **4** **2** **3** **2** **3** **2** **2** **3**
Universal Accounting Center Roger Knecht 5250 South Commerce Dr Murray, Utah 84107 Phone: (801) 265-3777	**COURSE TITLE** **The Professional Tax Preparer Program** **Module 1 – Your Bread and Butter Returns** **Module 2 – Sheltering Your Income** **Module 3 – Income Adjustment Strategies** **Module 4 – Becoming the 1040 Expert**	**HOURS** **88** **13** **13** **13** **13**

Fax: (801) 265-3798 E-mail: rknecht@universalaccounting.com Website: www.universalaccountingcenter.com **Universal Accounting Center (Cont.)**	**Module 5 – Getting Comft. w/Bus. Basics** **Module 6 – Profitable Business Returns**	**18** **18**
WESTERN CPE	**COURSE TITLES (Password required)**	**HOURS**
Michael Monson 243 Pegasus Drive Bozeman , MT 59718 Phone: 406-556-0115 Phone: 1-800-822-4194 Fax: 406-556-0210 Web site: www.westerncpe.com E-mail: michael@westerncpe.com	**Mega Tax CD-Rom Library - all 61 Tax Courses** **On-Line Tax Library - all 61 Tax Courses** **Individual Taxation Courses:** 1040 In-Depth 2006/2007 2006/2007 Federal Tax Update 2006/2007 Federal Tax Update DVD 2006/2007 Federal Tax Update SV A Guide to Tax Resolution: Solving… Asset Protection Strategies Automobile Tax Rules Basic Guide to Partnership Taxation Basic Marital Tax Matters Basics of Fringe Benefits Business Travel, Meal & Entr Deducts C Corporation Tax Law From A to Z Choice of Entity Choice of Entity for Life's Milestones Choice of Entity In-depth Choosing the Right Retirement Plan Complete Guide to Depreciation, A... Concepts & Mechanics of Exchanges Corporate Tax Planning Critical Legal & Tax Issues for Acctnts Complete Guide to Estate & Gift Tax Depreciation & Amortization Divorce Transfers and Settlements Education Tax Bnfts: Credits & Ded. Employee Compensation & Benefits Estate & Fncl. Plng. 4 Baby Boomers Estate & Fncl Plng 4 the Older Client Estate Planning - Quick & Easy Estate Planning: Understanding Gif… Estate Planning After Tax Reform Estate Tax Planning for the Elderly Family Tax Planning Farm & Ranch Tax 2006 Fast Track Retirement Planning Form 1040 Fringe Benefits	**550** **550** 24 24 16 21 12 24 2 2 2 3 2 3 24 8 24 2 20 16 16 40 40 3 2 2 2 12 8 24 8 6 1 24 12 24 1 16

WESTERN CPE (Cont.)	Getting Most Out of Installment Sale	2
	Hot Topics in Estate Planning	4
	Ins and Outs of LLC's	4
	Intro to Financial Tax Planning	16
	IRS Form 990 Tax Prep for Nonprofits	12
	Itemized Deductions	1
	Legal Analysis for Tax Issues	2
	Like-Kind Exchanges	4
	Making the Best of Bad Situations	16
	Medical Expenses & Small Business	1
	Operating an S Corporation	5
	Partnership Taxation	24
	Passive Loss and At-Risk Rules	2
	Property Disp: Spec Rates & Provs	2
	Reducing Business Health Care Costs	4
	Regs on Retirement Plan Distributions	2
	Sale of Principle Residence:The $MFJ	2
	Schedule C from A to Z	8
	Small Business Retirement Plans	4
	Small Business Taxation	24
	Special Real Estate Tax Problems	16
	Strategies for Asset Protection	5
	Tax Analysis of Invsts on the Internet	2
	Tax Issues for Members of the Clergy	1
	Tax Issues Related to Bankruptcy	2
	Taxpayer's Guide to Interest and Debt	2
	The Acronyms of Estate Planning	4
	The Basic Trust Course	4
	The Complete Guide to 1031 Exchngs	8
	The Purch & Oper of Passive Activity	2
	Travel & Entertainment	24
	Understanding Estate Documents	4
WISE GUIDES, INC. Andrew Rosenberg 2796 Greenspire Lane Fairlawn, OH 44333 Phone: 1-330-475-0407 Fax: 1-330-475-0409 E-mail: andyr@wiseguides.com Web site: www.wiseguides.com	**COURSE TITLES**	**HOURS**
	1040 Tax Course	8
	403b Plan Basics	2
	Alimony	2
	Alternative Minimum Tax Individual	3
	Armed Forces Taxation	5
	Basis of Assets	3
	Becoming an S Corporation	4
	Business Use of Home	3
	California Income Tax	4
	Charitable Contributions	4
	Corporation Deductions	2
	Corporation, Estates & Gift Tax	6
	Corporation Income	2
	Corporation Tax & Credits	2
	Depreciation Calculations	8
	Direct Sellers	4
	Disaster Losses	2
	Earned Income Credit	2
	Electronic Filing	4
	Employee Business Expense	2
	Estate Tax (Form 1041)	4
	Estate Tax Return (Form 706)	6
	Examinations, Appeals & Claims	3
	Filing Status and Exemptions	3
	Filing the 1120s	4

WISE GUIDES, INC. (Cont.)	Final Return for the Decedent	4
	Foreign Tax Credit	4
	Fringe Benefits	4
	Health & Medical Savings Accounts	3
	Individual Retirement Arrangements	4
	Investment Interest Expense	3
	Investment Interest Income	4
	Listed Property	2
	Medical Expenses	2
	Miscellaneous Expense	2
	Mortgage Interest	2
	Moving Expense	2
	Mutual Fund Distributions	3
	Net Operating Losses	2
	Passive Activity – Individual	6
	Pensions & Annuities	4
	Roth IRAs	3
	Rules for Children & Dependents	4
	Sale of Personal Residence	3
	Schedule D	4
	Section 179 Depreciation	2
	Self-Employment Retirement Plan	4
	Small Business Stock	2
	Sole Proprietors & Partnerships	8
	Special Corporate Issues	2
	Tax Benefits for Higher Education	3
	Vacation Home	2

NOTE: Correspondence courses must be approved by the Board and on an active approval list at the time of license renewal in order to be accepted by the Tax Board for continuing education hours.

Remember that COPIES of continuing education certificates must be turned in with renewal applications. **(Please retain original certificates for your records).**

For renewal of your license in 2007 (Preparer) & 2008 (Consultant) - Continuing Education Hours shall be accrued within the following date ranges:

Preparer – Sept. 1, 2006 thru renewal date (Your license expires 9/30/07 and you will no longer be able to provide services until you have renewed your license. A reactivation fee of $25 will be assessed after October 15, 2007)

Consultant – May 1, 2007 thru renewal date (Your license expires 5/31/08 and you will no longer be able to provide services until you have renewed your license. A reactivation fee of $25 will be assessed after June 15, 2008)