

**STATE BOARD OF TAX PRACTITIONERS
2008-2009 CORRESPONDENCE COURSE APPROVALS**

June 1, 2008 – May 31, 2009

**List is Subject to change* - Last Updated: 02/26/09*

Courses listed in GRAY are pending / Sponsors listed in GRAY have not responded

~~~Please refer to last page for important information re: changes & updates~~~

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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
AARDVACK TAX ON-LINE CONTINUING EDUCATION SERVICES Attn: Sean Kenefick PO Box 602031 San Diego, CA 92160-2031 Phone: (888) 294-1525 (619) 787-0040 Website: http://www.aardvarktax.com E-mail: seank@cmready.com	Course Titles Federal Tax Law Continuing Education Federal Tax Law Continuing Education	Hours 30 15
BISK EDUCATION, INC. Attn: Valerie Wendt 9417 Princess Palm Ave Tampa , FL 33619 Phone: 1-800-874-7877 ext. 4328 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) 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) Ethical Dilemmas of Tax Shelters Executive Compensation Form 990: A Practical Guide Form 1040: A Practical Guide Form 1120: A Practical Guide Form 1120S: A Practical Guide Form 1065: A Practical Guide Incredible Shrinking Domain of Corp. Stock IRC 199: Qualified Domestic Production	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) 6 Non-QAS, 9 CD/Online 6 Non-QAS, 9 CD/Online 44 Non-QAS 22 Non-QAS 3 4 Non-QAS, 6 CD/Online 4 Non-QAS, 6 CD/Online 16 Non-QAS, 24 CD/Online 14 Non-QAS, 21 CD/Online 14 Non-QAS, 21 CD/Online 8 Non-QAS / 12 CD/Online 2 4 CD/Online

<p>BISK EDUCATION, INC. (Cont.)</p>	<p>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. Not for Profit Org: Advanced Topics Overview of Federal Income Taxation Partnership Tax Issues Planning for Collectibles Real Estate: Acquisition & Operation Real Estate Taxation: Dispositions Tax Incentives for Paying/Saving for College Thinking Outside the Partnership Box Transfers to Controlled Corp.: IRC Sect. 351 Understanding Pension & Profit Sharing</p> <p>ACCOUNTING & AUDITING COURSES:</p> <p>Accounting for Income Taxes Accounting for Stock-Based Compensation Accounting Update Advanced Forensic Accounting Auditing Update Bisk GAAP Guide; Complete Bisk GAAP Guide; Advanced Topics Bisk GAAP Guide; The Balance Sheet Bisk GAAP Guide; Income Statement Construction Contractor: Real World Guide... Corporate Financial Management Corporate Financial Reporting Issues Forensic Accounting How 2 Generate, Project & Report Cash Flows Independence Requirements for CPA's Not for Profit Org: Accounting Considerations Not for Profit Org: Current Developments Sarbanes-Oxley: Benefiting from Compliance Sarbanes-Oxley: Beyond the 1st year SOX 404: Emerging Trends & Best Practices SOX 404: Relationship to COBIT</p> <p>ETHICS COURSES:</p> <p>Ethics in Tax Practice: Florida Ethics in Tax Practice: New York Ethics Standards for California CPA's Ethics Standards for Michigan CPA's Ethics Standards for Texas CPA's</p> <p>CONSULTING SERVICES COURSES:</p> <p>Board of Directors' Issues Divorce: Legal, Accounting & Tax Consider... Eldercare: Retirement & the Costs of Aging Hot Topics in Health Care Acctng & Auditing Introduction to Litigation Support Services Lost Profit Damage Calculation Real Estate:Real World Guide to Acctng & Aud</p>	<p>1 1 2 3 3 Non-QAS, 4 CD/Online 4 Non-QAS, 6 CD/Online 8 Non-QAS, 12 QAS 12 Non-QAS, 18 CD/Online 4 Non-QAS, 6 CD/Online 2 3 4 Non-QAS, 6 CD/Online 4 Non-QAS, 6 CD/Online 4 Non-QAS, 6 CD/Online 1 3 4 Non-QAS, 6 CD/Online</p> <p>4 4 Non-QAS, 6 CD/Online 4 Non-QAS, 6 CD/Online 4 Non-QAS, 6 CD/Online 4 Non-QAS, 6 CD/Online 20 Non-QAS, 30 CD/Online 5 Non-QAS, 8 CD/Online 10 Non-QAS, 15 CD/Online 5 Non-QAS, 8 CD/Online 4 Non-QAS, 6 CD/Online 4 Non-QAS, 6 CD/Online 4 Non-QAS, 6 CD/Online 4 4 Non-QAS, 6 CD/Online 4 Non-QAS, 6 CD/Online 8 Non-QAS, 12 CD/Online 8 Non-QAS, 12 CD/Online 4 Non-QAS, 6 CD/Online 2 CD/Online 2 CD/Online 2 CD/Online</p> <p>4 CD/Online 4 CD/Online 8 CD/Online 4 CD/Online 4 CD/Online</p> <p>4 Non-QAS, 6 CD/Online 4 Non-QAS, 6 CD/Online 4 Non-QAS, 6 CD/Online 4 Non-QAS, 6 CD/Online 4 Non-QAS, 6 CD/Online 4 Non-QAS, 6 CD/Online 4 Non-QAS, 6 CD/Online</p>
<p>BOAZ WEB GROUP LLC Tina Rainey 26351 Shady Oak Drive Monroe, Oregon 97456</p> <p>Phone: (541) 607-6313</p>	<p>COURSE TITLES</p> <p>Asset Basis</p>	<p>HOURS</p> <p>3</p>

<p>Fax: (541) 607-8195</p> <p>E-mail: tina@lighthouseaccounting.com Website: www.boazcpe.com</p>		
<p>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</p>	<p>COURSE TITLES</p> <p>Individual Tax Fundamentals Preparation Course for EA Exam Corporations/Partnerships Estates, Fiduciary, Gift Taxes</p>	<p>HOURS</p> <p>30 30 15 30</p>
<p>CCH, Inc.</p> <p>Gwen Hefty & Mariela De La Torre 4025 W Peterson Ave Chicago IL 60646</p> <p>Phone: 773-866-3949</p> <p>Fax: 773-866-3084</p> <p>E-mail: Mariela.delatorre@wolterskluwer.com</p> <p>Website: www.cch.learningcenter.com</p>	<p>COURSE TITLES</p> <p>706/709 Prep & Plng Guide – 3 modules (06) 706/709 Prep & Plng Guide – 3 modules (07-08) 706/709 Prep & Plng Guide – 3 modules (08-09) 1040 Prep & Planning Guide (07)– 4 modules 1040 Prep & Planning Guide (08) – 4 modules 1040 Prep & Planning Guide (09) – 4 modules 1041 Preparation & Planning Guide (07) 1041 Preparation & Planning Guide (08) 1041 Preparation and Planning Guide (09) 1065 Preparation & Planning Guide (07 & 08) 1065 Preparation & Planning Guide (09) 1120 Prep & Plng Guide – 3 modules (07) 1120S Preparation & Planning Guide (07) 1120S Preparation & Planning Guide (09) Asset Protection & Risk Management (Jan 08) Car, Trvl & Entrtmnt & Hme Off. Ded – 3 mods Dvlpmnts in 07 for Individuals (11/07) Dvlpmnts in 07 for Ptrnrshps & S Crps (09/07) Federal Tax Audio Advisor (CCH CPE Cred Serv) Primary Resid. & Vac. Home as Pers. Tx. Sh... Roth 401(k)s Roth IRA's – January 2007 Sophisticated Charitable Giving Arr. for Indv... Tax Law Changes for 2008 (5/08) Tax Paths out of Economic Distress (July 08) Top Accounting Issues for 2007 – (3 Modules) Top Accounting Issues for 2008 – (3 Modules) Top Accounting Issues for 2009 – (3 Modules) Top Federal Tax Issues for 2007 – (3 Modules) Top Federal Tax Issues for 2008 – (3 Modules) Top Federal Tax Issues for 2009 – (3 Modules) Top Fin. & Est. Plng. Iss. for 2008 (2 Modules) Top Fin. & Est. Plng. Iss. for 2007 (2 Modules) Top Multi-state Tax Issues 2006 – (2 Modules) Top Multi-state Tax Issues 2007– (2 Modules) Top Multi-state Tax Issues 2008 – (2 Modules)</p> <p>On-line Courses:</p> <p>706 Prep & Planning 1: Tax Fundmntls (08) 706 Prep & Plng 2: Prop of Decedent (08) 706 Prep & Planning 3:Debts Decedent (08) 706 Prep & Planning 4:Creditt & Ded...(08) 706 Prep & Planning 5: Spec. Sits...(08) 709 Prep & Planning: Gift Tax Rtn (08) 1040 Preparation & Planning Part 1 (08) 1040 Preparation & Planning Part 2 (08)</p>	<p>HOURS</p> <p>12 17 17 30 30 30 8 8 16 8 8 14 8 8 8 2 16 4 4 4 2 4 4 4 4 19 18 18 21 19 19 18 16 8 13 14</p> <p>4 each (6 per year) = 24</p>

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	Charging Orders: Some of What Pract...	2
	Charitable Giving Tax Strategies (3 rd Ed)	2
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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 2008 Federal Tax Update & Review Course	HOURS 8
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	Basics	9
	Basis of Assets & Like Kind Exchange	3
	C Corporations	6
	Depreciation	7
	Divorce	4
	Farm Income & Expenses	9
	Going Into Business	4
	Income Generally	12
	Information Returns	6
	Installment Sales	4
	IRAs	15
	Itemized/Standard Deductions	12
	LLC & LLP	3
	Non-Payroll Taxes	5
Phone: (541) 915-4915 Toll Free: 1-866-755-2853 Fax: 1-866-755-2853 E-mail: tax-ed@tax-educators.com Web: http://tax-educators.com		

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Universal Accounting Center Roger Knecht 5288 South Commerce Dr STE. B100 Salt Lake City, Utah 84107 Phone: (801) 265-3777 Fax: (801) 265-3798 E-mail: rknecht@universalaccounting.com Website: www.universalaccountingcenter.com	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 Module 5 – Getting Comft. w/Bus. Basics Module 6 – Profitable Business Returns	HOURS 88 PENDING 13 PENDING 13 PENDING 13 PENDING 13 PENDING 18 PENDING 18 PENDING

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Michael Monson 243 Pegasus Drive Bozeman , MT 59718	Mega Tax CD-Rom Library - all 61 Tax Courses	550
Phone: 406-556-0115 Phone: 1-800-822-4194 Fax: 406-556-0210	On-Line Tax Library - all 61 Tax Courses	550
Web site: www.westerncpe.com	Individual Taxation Courses:	
E-mail: michael@westerncpe.com	1040 In-Depth 2006/2007	24
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WISE GUIDES, INC. Kathleen J. Rosenberg 2796 Greenspire Lane Akron, OH 44333-2755 Phone: 1-330-475-0407 Fax: 1-330-475-0409 E-mail: krosenberg@wiseguides.com Web site: www.wiseguides.com	COURSE TITLES 1040 Tax Course 403b Plan Basics Alimony Alternative Minimum Tax Individual Armed Forces Taxation Basis of Assets Becoming an S Corporation Business Use of Home California Income Tax Charitable Contributions Corporation Deductions Corporation, Estates & Gift Tax Corporation Income Corporation Tax & Credits Depreciation Calculations Direct Sellers Disaster Losses Earned Income Credit Electronic Filing Employee Business Expense Estate Tax (Form 1041) Estate Tax Return (Form 706) Examinations, Appeals & Claims Filing Status and Exemptions Filing the 1120s Final Return for the Decedent Foreign Tax Credit Fringe Benefits Health & Medical Savings Accounts Individual Retirement Arrangements Investment Interest Expense Investment Interest Income Listed Property Medical Expenses Miscellaneous Expense Mortgage Interest Moving Expense Mutual Fund Distributions Net Operating Losses Passive Activity – Individual Pensions & Annuities Roth IRAs Rules for Children & Dependents Sale of Personal Residence Schedule D Section 179 Depreciation Self-Employment Retirement Plan Small Business Stock Special Corporate Issues Tax Benefits for Higher Education Vacation Home	HOURS 8 2 2 3 5 3 4 3 4 4 2 6 2 2 8 4 2 2 4 4 2 2 4 4 6 3 3 4 4 4 2 2 2 2 2 3 2 6 4 3 4 4 2 4 2 4 2 2 3 2 4 3 4 2 4 2 2 3 2

CHANGES & UPDATES PAGE

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

Changes to Oregon Administrative Rules (OARs) since last renewal cycle

OAR 800-015-0015 - Continuing Education: Audit, Required Documentation and Sanctions

- (1) The Board will audit a select percentage of licensee records determined by the Board to verify compliance with continuing education requirements.
- (2) Licensees notified of selection for audit of continuing education attestation shall submit to the Board, within 30 days from the date of issuance of the notification, satisfactory evidence of participation in required continuing education in accordance with OAR 800-015-0010.
- (3) Documentation of a certificate of completion of attendance at a program, seminar or course provided by a sponsor must include:
 - (a) Name of student;
 - (b) Name of sponsoring institution/association or organization;
 - (c) Location of program;
 - (d) Title of program and description of content;
 - (e) Name of instructor or presenter;
 - (f) Date(s) of attendance;
 - (g) Number of classroom hours of instruction;
- (4) For documentation of completion of a college/university course, a Licensee must submit a copy of an official transcript, diploma, certificate, statement or affidavit.
- (5) If documentation of continuing education is invalid or incomplete, the licensee must correct the deficiency within 30 days from the date of notice. Failure to correct the deficiency within the prescribed time shall constitute grounds for disciplinary action.
- (6) Misrepresentation of continuing education, or failing to meet continuing education requirements or documentation may result in disciplinary action, which may include but is not limited to assessment of a civil penalty and suspension or revocation of the license.

OAR 800-015-0010 (1, 2 & 3): Continuing Education

- (1) Except for renewal of an initial license, a Licensed Tax Consultant or Licensed Tax Preparer renewing a license shall submit evidence of attending OR by self-attestation on the renewal must complete at least 30 hours of acceptable continuing education since the last renewal date.
- (2) If by self-attestation, each licensee shall report compliance with the continuing education requirements on the license renewal document. Licensees shall be subject to the provisions of OAR 800-015-0015 pertaining to the periodic audit of continuing education.
- (3) If by self-attestation, proof of participation in required continuing education is the responsibility of the licensee. To ensure that proof of attainment of required continuing education is available for audit or investigation by the Board, licensees shall maintain a record of attendance for at least two years following each continuing education cycle and renewal of the tax practitioner license.

Web address to access OARs for reference: http://arcweb.sos.state.or.us/rules/OARS_800/OAR_800/800_015.html

If audited, remember that COPIES of continuing education certificates must be submitted. (Please retain your original certificates for your records).

Renewal cycle information:

For renewal of your license in 2008 (Preparer) & 2009 (Consultant) - Continuing Education Hours shall be accrued within the following date ranges:

Preparer – Sept. 1, 2007 thru renewal date (Your license expires 9/30/08 and you will no longer be able to provide services until you have renewed your license. A reactivation fee of \$35 will be assessed after October 15, 2008)

Consultant – May 1, 2008 thru renewal date (Your license expires 5/31/09 and you will no longer be able to provide services until you have renewed your license. A reactivation fee of \$35 will be assessed after June 15, 2009)