



# Wiley Tax Preparer: A Guide to Form 1040 (Wiley Registered Tax Return Preparer Exam Review)

*The Tax Institute at H&R Block*

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Whether you're already a tax preparer or you're looking to become one, you need a firm grasp of the tax concepts on which individual taxation is based. We created the Wiley Tax Preparer as a refresher for the experienced tax preparer, and as a readable guide for the less-experienced tax preparer.

This timely guide is an essential tax resource providing you with useful information on tax principles and filing requirements that a preparer must know to complete a 1040 series return and associated schedules. You'll refer to it time and again, for information about:

### Practices and Procedures

- Penalties to be assessed by the IRS against a preparer for disregard of the rules and regulations
- Furnishing a copy of a return to a taxpayer
- Safeguarding taxpayer information

### Treatment of Income and Assets

- Taxability of wages, salaries, tips, and other earnings
- Reporting requirements of Social Security benefits
- Determination of basis of assets

### Deductions and Credits

- Medical and dental expenses
- Types of interest and tax payments
- Child and dependent care credit

### Other Taxes

- Alternative Minimum Tax
- Self-Employment Tax

### Preliminary Work and Collection of Taxpayer Data

- Collecting a taxpayer's filing information and determining their status
- Determine filing requirements, including extensions and amended returns
- Personal exemptions and dependents

### Completion of the Filing Process

- Check return for completeness and accuracy
- Tax withholding, payment and refund options, and estimated tax payments
- Explaining and reviewing the tax return

## Ethics and Circular 230

- Preparer's due diligence for accuracy of representations made to clients and the IRS
- Sanctions that may be imposed under Circular 230
- Rules governing authority to practice before the IRS

If you're looking for a practical guide to the principles behind Form 1040, look no further. The Wiley Tax Preparer is the most accessible guide to understanding how complex tax laws affect individual taxpayers.

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