



NCSEA SEE Prep Course Information - JULY 2021

<p><u>Are there prerequisites for this course?</u></p>	<p>Although no particular experience or educational requirements are required, persons taking the course should be able to answer income tax & accounting questions at the intermediate college course level. (See FAQ's # 5, 6, & 7 later) Please be aware that the course is intense.</p>									
<p><u>Cost / Payment</u></p>	<table border="1" style="width: 100%;"> <tr> <td style="background-color: yellow;">All Three Parts (11 weeks) – (Purchase all 3 parts, save \$300)</td> <td style="text-align: right;">\$ 1,370</td> </tr> <tr> <td style="background-color: yellow;">Part 1 only (4 weeks)</td> <td style="text-align: right;">\$ 550</td> </tr> <tr> <td style="background-color: yellow;">Part 3 only (2 weeks)</td> <td style="text-align: right;">\$ 330</td> </tr> <tr> <td style="background-color: yellow;">Part 2 only (5 weeks)</td> <td style="text-align: right;">\$ 790</td> </tr> </table>	All Three Parts (11 weeks) – (Purchase all 3 parts, save \$300)	\$ 1,370	Part 1 only (4 weeks)	\$ 550	Part 3 only (2 weeks)	\$ 330	Part 2 only (5 weeks)	\$ 790	<p>Note: The cost does not include fees for taking the Special Enrollment Examinations (SEE). Full payment required at time of registration. Payment can be made by check or credit card.</p>
All Three Parts (11 weeks) – (Purchase all 3 parts, save \$300)	\$ 1,370									
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<p><u>NCSEA Meeting Discounts</u></p>	<p>For Tax Professionals who intend to become Enrolled Agents (EAs), NCSEA SEE students are eligible for member discounts at any NCSEA event, but not at NAEA or other affiliate events. Once the student has passed the IRS Special Enrollment Examination (SEE) and has been granted EA status by the IRS, the student will be required to join NAEA/NCSEA as a full member to continue receiving member discounts.</p>									
<p><u>Registration Deadline</u></p>	<p><u>All registration deadlines are 2 weeks before classes begin</u></p> <p><u>Live Online Classes</u> Deadline is 2 weeks the any class forms</p> <p>Complete SEE Registration form. Scan and email completed registration forms to administrator@ncseaonline.org, or fax copy to Candace Cansler at Fax: 828-464-8300, or mail to: NCSEA-SEE Courses, PO Box 937, Conover NC 28613</p>									
<p><u>Class Size</u></p>	<p>Minimum class size - 6 Maximum class size – Generally 10 will be the maximum class size Once classes are full, individuals will be placed on a waiting list and contacted at least one week before the start of a class to confirm availability. Additional or different day/times may be available if enough people request it.</p>									



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<p><u>Course Dates</u></p>	<p>Live Online Classes - will begin the week of July 7th Classes - offered as afternoon 5 - 8:00pm Monday and Wednesday Sections will be taught in the following order: Part I, Part 3, and Part 2.</p> <p>*Please see FAQ's for why we teach the parts in this order.</p>
<p><u>Testing Appointments</u></p>	<p>For Live Online Classes – You may schedule your online classes to fit your schedule, please use breaks between your classes to take your exams.</p> <p>Register and schedule Part 1, 2, or 3 of your SEE exam at http://www.prometric.com/IRS/default.htm Note: A separate fee is assessed by Prometric for each part of the test.</p>
<p><u>Guarantees</u></p>	<p>Gleim is one of the leading providers of study and reference materials for the accounting industry. NCSEA purchases the Gleim Premium EA Review System for all students taking the SEE Prep course. Gleim guarantees students will pass the EA exam on the first sitting using the Gleim EA Review System. Students may be eligible for guarantees from Gleim.</p>
<p>-Access Until You Pass</p> 	<p>As long as you are preparing for and taking the EA exam parts for which you purchased the Gleim Premium EA Review System, Gleim will ensure that you have current Access Until You Pass®. Your electronic material will update automatically in the event of content changes or a new edition, and Gleim will ship you the new edition book* for only the cost of shipping. Please contact Gleim directly at 1-800-874-5346 to request a new addition if this guarantee applies to you.</p> <p>*New additions of the printed material are released each year in March.</p> <p>Continued Access will be provided on a per-part basis.</p> <p>Please note: Access to the NCSEA classroom instructor may be limited after the conclusion of the prescribed course schedule.</p>
<p>-Money Back</p>	<p>If you take and do not pass the EA exam part(s) within 12 months of purchasing the Gleim EA Review</p>



NCSEA SEE Prep Course Information - JULY 2021

Guarantee	<p>System, you may qualify for limited amount of the refund of the cost of the Gleim materials. To qualify for this, you must:</p> <ul style="list-style-type: none"> • <u>Complete 90% of EA Gleim Online before sitting for the corresponding part(s) of the exam. This requirement can be satisfied by completing either 90% of each Gleim Online instructional element for all study units or by completing 90% of the Gleim Online study units in their entirety.</u> • Complete 90% of each question type. This includes multiple-choice and true/false questions. • Sit for the purchased part(s) within 12 months of your purchase date. If you have to retake any part(s), you must retake the part(s) you did not pass within three months. • Submit your grade report within 48 hours of receiving your grade. <p>Please note: Access to the NCSEA classroom instructor may be limited after the conclusion of the prescribed course schedule.</p>
-Guarantee Procedure	<p>Requests for implementation of one of the Gleim guarantees above must be made in writing to the instructor. Documentation required will include, but is not limited to:</p> <ul style="list-style-type: none"> • Test Center (Prometric) appointment confirmation. • Receipts for exam fee payments. • Proof of current registration.
<u>Cancellation/Refund Policy</u>	<p>A full refund can only be granted if written request is received <i>before</i> materials are shipped. Please note that on your registration form that you are to initial your choice of receiving your materials as soon as they are available or once the class forms. If you choose to receive your materials before the class forms, you can receive a refund on the class portion but not for the Gleim materials which are yours to keep. The cost of the Gleim materials is at retail cost plus shipping.</p> <p>E-mail your refund request to Candace Cansler at administrator@ncseaonline.org.</p>
<u>Contact Us</u>	<p>Additional questions should be directed to Candace Cansler at administrator@ncseaonline.org. Address: P.O. Box 937, Conover, NC 28613</p>
<u>Forms</u>	<p>Go to www.NCSEAonline.org for the following forms</p> <ul style="list-style-type: none"> • NCSEA Course Information • NCSEA SEE Prep Registration form • 2021 Class Schedule



NCSEA SEE Prep Course Information - JULY 2021

FAQs

1. Why should I become an EA? Becoming an EA shows you are reaching to the highest level in our profession. "Enrolled Agent status is the highest credential the IRS awards..... Enrolled agents, like attorneys and certified public accountants (CPAs), are **unrestricted** as to which taxpayers they can represent, what types of tax matters they can handle, and which IRS offices they can represent clients before." (www.IRS.gov 'Enrolled Agent Information') Becoming an EA will help you better serve your clients and potential clients.

2. What is the difference between the SEE and the AFTR course test offered for the Annual Filing Season Program? Participants in the Annual Filing Season Program must complete an Annual Federal Tax Refresher course followed by a knowledge-based comprehension test administered at the end of the course by the CE provider. Upon completing the AFTR course, passing the AFTR exam, and earning at least 18 hours of Continuing Education each year, the participant receives an AFSP-Record of Completion. Successful AFSP participants have limited representation rights for clients whose returns they prepared while holding AFSP Records of Completion.

The SEE (Special Enrollment Examination) is a 3 part intensive and extensive test. It is *not* an open book test. The 3 parts of the SEE cover Individual Income Tax, Ethics, Business, Estates, Trusts, and Representation. By passing the SEE, an individual demonstrates in-depth knowledge of tax matters. Upon passing all three parts of the SEE, candidates may apply for Enrolled Agent status. Enrolled Agents have unlimited representation rights, even for clients whose returns they did not prepare. Enrolled Agents are required to earn a minimum number of continuing education hours each year to maintain Enrolled Agent status.

AFSP participants who have passed Part I of the SEE within the past two calendar years are exempt from taking the AFTR course and exam, although they must still meet a minimum number of continuing education hours each year.

3. What if I don't pass the Special Enrollment Exam (SEE)? Gleim provides guarantees that you *will* pass all three parts of the SEE provided you do your part in studying and attending classes.

4. Tell me about the Gleim guarantee? Gleim offers continued access to their online materials until you pass. There are certain participation requirements in order to qualify for the guarantees, which are outlined in an earlier section. See "Guarantees" section.

5. Is the course difficult? Yes. *The course is very intensive.* For success, all students should have sufficient prior knowledge and/or experience in taxation (see FAQ # 7) and be prepared to put in sufficient time and effort before classes to get the most out of the course.



NCSEA SEE Prep Course Information - JULY 2021

FAQ's continued

- 6. How much time should I plan to spend on study and preparation for each class?** You should devote as much time each week as you need to review the study units to be discussed at the next class including online quizzes as well as IRS forms and publications. Most students find they *need* a minimum of ***at least 5 to 7 hours*** of preparation time ***each week before class*** to get the most out of each class to successfully pass each part of the SEE.
- 7. Your postcard said that it is strongly recommended that a person have at least an intermediate knowledge of individual & business taxation. What do you mean by 'Intermediate' knowledge? And do I need to know how to prepare a business tax return to take the class?** Having prepared business returns would certainly be advantageous but it is not a requirement for taking the class. We would define an intermediate knowledge of taxation as having at least a ***good working knowledge*** of:
- BASIS, DEPRECIATION, CAPITAL GAINS & LOSSES, CASH METHOD VS. ACCRUAL METHOD, SCHEDULE C, AMT**
- 8. Why are the classes taught in the order Part 1, 3, and 2?** Most students find Part 2 to be the most difficult part of the SEE. Taking it last allows you to successfully complete 2 of the 3 parts before focusing on the hardest part. It also allows you to take extra time, if needed, to prepare for Part 2 without falling behind on the other material.
- 9. Why should I take your class instead of taking other online prep classes?** All of our successful students agreed that attending the classes kept them focused and on a study schedule. They were less likely to procrastinate, get distracted or even give up. Interaction with a live teacher, whether online or in a physical classroom can provide clarification that may be absent in the self-study environment. Attending a class with live instruction gives you the opportunity to learn from your instructor and classmates with additional information, examples, and real-life experiences.
- 10. What if I have to miss a class? Can I make it up or is there another class I could attend?** You are more than welcome to attend another class at any of the locations where classes have formed. Online classes will have the opportunity to review the class missed since classes will be recorded.
- 11. When will I receive my Gleim material & online access?** The Gleim material is shipped and online access is made available to the student once the class is confirmed or if the student requests the Gleim program immediately. A class is generally confirmed when 5 or more students have registered for it. If you would like to receive your Gleim materials before the class is confirmed, please initial the appropriate line on your registration form. Once you receive your Gleim materials we cannot refund the money for Gleim but your cost for the Gleim materials is the standard retail cost plus shipping.