

Weekly Calendar

(subject to change)

The submission deadline for assignments, exams and quizzes is always the date due at 11:59 PM (MST). No late work will be accepted. *** You must submit all of your course assignments in Blackboard by the assigned dates and time. Blackboard should be utilized effectively in order to receive full credit for all class assignments.

The submission deadline for discussion boards is always original post due on open date 11:59 PM (MST) and 2 responses posted at least 1 days after original post 11:59 PM (MST).

Week	TOPIC	Chapters/Readings	Assignments Due	Notes
Week 1 8/24 – 8/30	Class Orientation Introduction to Taxation	Review Syllabus Instructor Introduction Student Introduction	1. Syllabus Quiz (8/27) 2. Discussion Board: Introduce Yourself (8/27)	
	An Introduction to Tax	Chapter 1		
Week 2 8/31 – 9/6	An Introduction to Tax	Chapter 1	1. Chapter 1 Quiz (8/31) 2. Assignment CH 1 (8/31)	
	Tax Compliance, the IRS, and Tax Authorities	Chapter 2		
Week 3 9/7 – 9/13	Labor Day RIA/Checkpoint Research	Chapter 2 Training on RIA Checkpoint Library	1. Chapter 2 Quiz (9/8) 2. Assignment CH 2 (9/8)	Assign Research Memo and Client Letter
	RIA/CCH Research	Training on RIA Checkpoint Library	3. CPE Certificate RIA(9/14)	Census Day (9/9)
Week 4 9/14 – 9/20	Individual Income Tax Overview	Chapter 4 Tax Forms Review	1. Chapter 4 Quiz (9/18) 2. Assignment CH 4 (9/18)	
		Chapter 4	3. Research Memo & Client Letter (9/18)	Research Memo & Client Letter Due
Week 5 9/21 – 9/27	Exam I	Chapters 1, 2, & 4	1. Exam - CH 1, 2 & 4 (9/21)	
	Gross Income and Exclusions	Chapter 5		
Week 6 9/28 – 10/4	Gross Income and Exclusions	Chapter 5	1. Quiz Chapter 5 (9/28) 2. Assignment CH 5 (9/28)	Assign Tax Return 1
	Individual Deductions	Chapter 6		
Week 7 10/5 – 10/11	Individual Deductions	Chapter 6	1. Quiz Chapter 6 (10/5) 2. Assignment CH 6 (10/5)	

		Chapter 6		
Week 8 10/12 – 10/18	Investments	Chapter 7	1. Quiz Chapter 7 (10/12) 2. Assignment CH 7 (10/12) 3. Tax Return 1 (10/14)	<i>Tax Return 1 Due</i>
		Chapter 7		
Week 9 10/19 – 10/25	Exam 2	Chapters 5, 6, & 7	1. Exam Chapters 5, 6 & 7 (10/19)	
	Individual Income Tax Computation and Tax Credits	Chapter 8		
Week 10 10/26 – 11/1	Individual Income Tax Computation and Tax Credits	Chapter 8	1. Quiz Chapter 8 (10/27) 2. Assignment CH 8 (10/27)	Assign Tax Return 2
		Chapter 8		Deadline to drop with a “W” (10/30)
Week 11 11/2 – 11/8	Business Income, Deductions & Accounting Methods	Chapter 9	1. Quiz Chapter 9 (11/4) 2. Assignment CH 9 (11/4)	
		Chapter 9		
Week 12 11/9 – 11/15		Chapter 9	1. Tax Return 2 (11/9)	<i>Tax Return 2 Due</i>
	Exam 3	Chapters 8 & 9	2. Exam Chapters 8 & 9 (11/11)	Assign Tax Return 3
Week 13 11/16 – 11/22	Property Acquisition and Cost Recovery	Chapter 10	1. Quiz Chapter 10 (11/18) 2. Assignment CH 10 (11/18)	
		Chapter 10		
Week 14 11/23 – 11/29	Property Dispositions	Chapter 11	1. Tax Return 3 Due (11/24)	<i>Tax Return 3 Due</i>
		Chapter 11		
	Thanksgiving Holiday TH - F			
Week 15 11/30 – 12/6	Property Dispositions	Chapter 11	1. Quiz Chapter 11 (11/30) 2. Assignment CH 11 (11/30) 3. Discussion – Ethics (12/1)	<i>Tax Return 3 Due</i>
	Exam 4	Chapters 10 & 11	4. Exam Chapters 10 & 11 (12/2)	
Week 16 12/7 – 12/13	Finals Week			