

**Week 1**

<u>Day</u>	<u>Module</u>	<u>Delivery</u>	<u>Trainer</u>	<u>Start</u>	<u>End</u>
1	Computer & Phone Setup and Office Tour	In-person	Kelli/Mallory	0900	1000
	Housekeeping & Home Study Review	In-person	JasonW	1000	1200
	<i>Lunch Break</i>			1200	0100
	Website	In-person	JasonW	0100	0200
	HR Topics	In-person	EmilyM	0200	0230
	Ring Central & Loom	In-person	Alejandra	0230	0300
	Canopy	Self	Loom	0300	0400
	2	Rotations - Biz Dev	In-person	Amanda	0900
Rotations - Accounting Services		In-person	Michelle	0930	1000
Rotations - Payroll		In-person	Jolene	1000	1030
Rotations - TST (IDP, BB, CC)		In-person	Kelli/Tonya	1030	1100
Rotation - Operations/Rundowns/etc		Teams	Kimber	1100	1130
TLA Review		Teams	Terra	1130	1200
<i>Lunch Break</i>				1200	0100
etWidget		Teams	Terra	0100	0130
APlan Overview		Self	Loom	0130	0200
Calendly		Teams	Terra	0200	0230
Teams		Teams	Karlee	0230	0300
ShareFile		Self	Amanda	0300	0400
3		Tax Team Basics	Teams	Terra	0900
	Tax Prep Process Overview	Self	Loom	1000	1130
	1040 Review Checklist	Self	Loom	1130	1200
	<i>Lunch Break</i>			1200	0100
	Trial Balance & Other Templates	Teams	Terra	0100	0300
	SurePrep Annotations	Self	Loom	0300	0400
4	Fixed Asset	Teams	Terra	0900	1000
	SurePrep Binder Creation Basics	Teams	Kelli	1000	1100
	Intermediate Reviews	Teams	Terra	1100	1200
	<i>Lunch Break</i>			1200	0100
	UltraTax Setup & Basics	Teams	Terra	0100	0200
	Various Loom Videos	Self	Loom	0200	0400

**Week 2**

<u>Day</u>	<u>Module</u>	<u>Delivery</u>	<u>Trainer</u>	<u>Start</u>	<u>End</u>
5	Tax Planning Intro	Teams	Terra	0900	1000
	1120S Tax Return Shadowing	Teams	Terra	1000	1200
	<i>Lunch Break</i>			1200	0100
	1120S Tax Returns Training Clients	Self	Self	0100	0400
6	SurePrep Academy	Self	Website	0900	1000
	1065 Tax Return Shadowing	Teams	Terra	1000	1200
	<i>Lunch Break</i>			1200	0100
	1065 Tax Returns Training Clients	Self	Self	0100	0400
7	1040 Tax Return Shadowing	Teams	Terra	0900	1200
	<i>Lunch Break</i>			1200	0100
	1040 Tax Returns Training Clients	Self	Self	0100	0400
8	Tax Planning Advanced	Teams	Terra	0900	1200
	<i>Lunch Break</i>			1200	0100
	Tax Planning Training Clients	Self	Self	0100	0400