

Say 'Yes' to Good Loans: Tax Return Analysis to Make Better Decisions...By the Numbers

Achieve Competence, Confidence and Consistency in Analyzing Tax Returns to:

- Spend less time getting to the right information; Reduce uncertainty and confusion; Gain confidence
- Understand the business and the borrower; Pull qualifying income for cashflow consideration
- Go beyond number-crunching and apply judgment to the loan decision
- Document the file to pass muster with loan committee and the regulators

We recommend teams of three or more for best results.

Level III limit of 5 Students total per class*.

	Level I: Library Pass	Level II: Virtual Classroom	Level III: Full Access
Four week course to cover all topics with 4-6 modules each week	✓	✓	✓
Twenty-one online, 30-minutes-or-less, interactive modules to take on your own schedule	✓	✓	✓
Downloadable handouts for each module to complete and keep for continued reference	✓	✓	✓
Access to courses to take, retake or search for something specific	3 months	6 months	12 months
Attend weekly live webinar with recap of each week's topics and the 'bonus lesson of the week'	X	✓	✓
Two 200+ page PDF manuals on Tax Return Analysis covering 1040, 1120, 1065 and 1120S Returns	X	✓	✓
Comprehensive Tax Return Case Studies at week two and four	X	✓	✓
Guidelines Checklist completely customizable to create your own 'cheat sheet' for your company	X	✓	✓
Excel-based Worksheet: Global cashflow w/ built-in 'help' boxes covers 1040 and business returns	X	✓	✓
Participation in Private Online Tax Return Analysis Community: Discussion and Q&A	X	✓	✓
Certificate of Completion based on meeting 100% of required criteria**	X	✓	✓
Personalized coaching: Instructor review & feedback on each of your Case Study Solutions	X	X	✓
Your Financial Institution's Team Mid-term Project: Customization of Guidelines Checklist	X	X	✓
Free updates to the PDF manuals (non-transferable) each year for the next three years	X	X	✓
Free registration to take the Level II series as a refresher (non-transferable) for up to three years	X	X	✓
Permanent Admission to the Private Online Tax Return Analysis Graduate Group***	X	X	✓



Register 1-3 >>>	\$495@	\$990@	\$1,485@
Register 4+ >>>	\$385@	\$770@	\$1,155@
Continuing Clients >>>	\$385@	\$770@	\$1,155@

*Due to the personal coaching and case study review, Linda only has room for five at Level III.

** In order to receive the certificate all participants must attain an 80% quiz score on every module and actively participate in Online Community; Full Access Level III participants must also complete team project on Guidelines Checklist and submit acceptable solutions on both case studies

*** This group includes all alumni of the Web-Based Class and continues discussion, access to Linda for specific questions, and first 'dibs' on Level III seats in upcoming courses for colleagues from their financial institution.

Ask us about:

- ◆ Customized solutions
- ◆ In-person training

Sign up for virtual in-house training at significant per-person savings