

**AARP Tax-Aide
National Tax Training Committee
Use of Power Point Slides in Training**

1. The PowerPoint slides are intended to assist the well-prepared instructor in the annual training of new and returning counselors. They are designed to help the instructor in presenting a major topic lesson from the student training guide and the preparation of Form 1040.
2. The slides are to be used in conjunction with the Student Guide (Pub 4491) and the Volunteer Resource Guide (Pub 4012) to address the majority of the tax law issues faced in our preparation of tax returns. In some cases, complex or rare instances may require additional information, such as that found in Pub 17 or publications provided in www.irs.gov.
3. Each slide presentation follows the modules in the student training guide (Pub 4491) using references to tabs and sections in Pub 4012.. When presenting a lesson the student can follow the information on the slide with the written text in Pub 4491 or to references in Pub 4012. Also certain slides may refer to TaxWise worksheets, schedules and forms where appropriate to explain tax questions and applications using the software.
4. Use of these primary training references should be accomplished in conjunction with an open copy of tax preparation software, currently TaxWise. We believe that the simultaneous teaching of tax law and its application in TaxWise is the best and most comprehensive application of the training materials.
5. Each instructor must use his or her most comfortable teaching techniques and some personal adaptation of the training slides may be desirable. Additionally, the variety of state tax law is too vast to be included in any national set of training material. State Training Specialists (TRSs) are encouraged to prepare local materials or adapt the NTTC PowerPoint slides to accommodate state specifics.
6. Lessons from the Student Guide (Pub 4491) should be assigned as reading prior to a given class session. The instructor should use the slides to guide classroom discussion, demonstrating software application with TaxWise and encouraging student note-taking in the Volunteer Resource Guide (Pub 4012). The Volunteer Resource Guide is an invaluable tool during the actual preparation of tax returns.
7. The Student Workbook (Pub 4491W) contains numerous scenarios, at different levels of difficulty, to illustrate different situations and application of tax law using the approved tax software. These exercises may be used as part of an in-class teaching experience or can be used for individual practice. Individual completion of a minimum of at least four problems from each of the Basic, Intermediate and Advanced sections and/or completion of the Intermediate or Advance comprehensive problem and their subsequent discussion in class is an

essential part of a complete training program and is highly recommended in the ultimate certification of a qualified counselor.

8. The PowerPoint slides, matched to the lesson order of the Student Guide (Pub 4491), which in turn following the order of the IRS Form 1040, will contain references to applicable tax law, display images of important input documents, reference the Volunteer Resource Guide (Pub 4012) and applicable forms in TaxWise. The time spent for each presentation may vary based on the complexity of the tax issue but plan to spend the appropriate time to achieve the best results. Suggested time for each module is provided on the agendas provided in the training guide.
9. The PowerPoint slides will NOT contain explicit, detailed elements of tax law. Such detail would duplicate information in the Student Guide and other IRS references. The “bullet item” format of the slides is intended to stimulate classroom discussion not replace it. It is suggested that the instructor refer to the appropriate sections in Pub 4491 or Pub 4012 or the Form 1040 while presenting a power point slide where further clarification or emphasis is needed.
10. Similarly, the slides will NOT contain screen shots of TaxWise software. We prefer that a copy of TaxWise be running concurrent with any classroom presentation; the instructor is encouraged to switch between a PowerPoint topic and the applicable TaxWise screen to reinforce the connection between a hard copy input document and the corresponding TaxWise screen form. This technique will also familiarize the counselor with the ease of navigation within the TaxWise software and the similarity between input documents and the software screens. It should be emphasized that data should be transferred exactly from any input documents to the corresponding TaxWise screen. If it appears on one, it must appear on the other.
11. References in the PowerPoint slides will be as specific as possible given the timeliness of publication and training dates. At a minimum, references to the Volunteer resource Guide (Pub 4012) will be at the Tab level, to Pub 17 at the Chapter level and to TaxWise at the 1040 line number or input screen level.