Tax Filing & Return Preparation for Individuals Training Course

Professional Development Training Course Outline

Category	Taxation and Revenue	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

Accurate tax filing and return preparation are essential for both compliance and personal financial management. Mistakes or omissions in filing can result in penalties, interest, and legal complications. Tax Filing & Return Preparation for Individuals Training Course provides a comprehensive understanding of individual income tax obligations, preparation processes, and filing requirements under prevailing laws and regulations. Participants will learn practical strategies to ensure timely and accurate submissions while optimizing eligible deductions and credits.

The course emphasizes real-world applications, guiding participants through step-by-step procedures for calculating taxable income, claiming exemptions, and completing returns. Case studies and practical exercises illustrate common challenges in individual tax filing, including reporting various income sources, handling deductions, and responding to notices or audits. Learners will gain confidence in preparing accurate returns, ensuring compliance, and reducing risk of errors.

Programme Curriculum

Tax Filing & Return Preparation for Individuals Training Course

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Course Objectives

1. Understand the fundamentals of individual income taxation.
2. Identify taxable and non-taxable income sources.
3. Apply standard and itemized deductions accurately.
4. Calculate taxable income and applicable tax liabilities.
5. Interpret exemptions, credits, and reliefs available to individuals.
6. Prepare accurate tax returns using current forms and guidance.
7. Identify common errors in individual tax filings and avoid them.
8. Manage filing deadlines and electronic submission procedures.
9. Handle amended returns and corrections effectively.
10. Respond to tax authority notices and inquiries.
11. Apply tax planning strategies for minimizing liabilities.
12. Integrate digital tools and software for return preparation.
13. Enhance understanding of individual tax compliance obligations.

Organizational Benefits

- Improved accuracy in individual tax return preparation.
- Reduced risk of penalties and audits for individuals.
- Enhanced efficiency through proper use of tax software and tools.
- Strengthened compliance with tax regulations and deadlines.
- Increased knowledge of deductions, exemptions, and credits.
- Improved client advisory capacity for tax consultants.
- Better recordkeeping and documentation practices.
- Minimized errors and improved financial reporting accuracy.
- Enhanced ability to manage complex income sources.
- Increased confidence in handling tax inquiries and corrections.

Target Audience

- Individual taxpayers
- Tax consultants and advisors
- Accountants and finance professionals
- Legal and compliance officers
- Payroll officers and HR managers
- Students of accounting and taxation
- Government revenue officers
- Financial planners and advisors

Course Duration: 5 days

Course Modules

Module 1: Introduction to Individual Taxation

- Overview of personal income tax principles
- Taxpayer obligations and compliance requirements
- Distinction between different sources of income
- Tax calculation framework for individuals
- Documentation and recordkeeping essentials
- Case Study: Common filing errors among salaried individuals

Module 2: Income Classification and Reporting

- Employment and business income
- Investment, rental, and capital gains income
- Non-taxable and exempt income sources
- Income reporting for multiple streams
- Tax implications of foreign income
- Case Study: Reporting multi-source income for a taxpayer

Module 3: Deductions, Credits, and Reliefs

- Standard vs. itemized deductions
- Personal exemptions and dependent allowances
- Tax credits for education, health, and retirement contributions
- Reliefs for special circumstances
- Interaction of deductions and credits in tax computation
- Case Study: Optimizing deductions for high-income earners

Module 4: Tax Computation and Return Preparation

- Calculating taxable income and tax liability
- Preparing and completing tax return forms
- Handling digital filing and electronic submission
- Verification of supporting documentation
- Managing amendments and corrections
- Case Study: Preparing returns for self-employed individuals

Module 5: Filing Requirements and Deadlines

- Understanding filing deadlines and extensions
- Online and offline filing procedures
- Handling late filings and penalties
- Filing joint vs. individual returns
- Recordkeeping for future reference and audits
- Case Study: Managing last-minute filings and penalties

Module 6: Responding to Tax Authority Queries

- Notices, audits, and inquiries
- Responding to discrepancies and corrections
- Documentation to support claims and deductions
- Dispute resolution procedures
- Maintaining compliance during reviews
- Case Study: Resolving audit issues for individual taxpayers

Module 7: Tax Planning for Individuals

- Strategies to minimize tax liabilities
- Retirement contributions, investment planning, and exemptions
- Timing of income and deductions for tax optimization
- Planning for capital gains and losses
- Integration with personal financial management
- Case Study: Tax planning for a salaried and investment-income individual

Module 8: Use of Technology in Tax Filing

- Tax software and e-filing platforms
- Automation of calculations and form generation
- Digital recordkeeping and secure submission
- Reducing errors through technology
- Best practices for secure and efficient filing
- Case Study: Implementing software solutions for individual tax returns

Training Methodology

- Interactive lectures and practical demonstrations
- Case study analysis and scenario-based exercises
- Hands-on exercises using tax computation tools
- Group discussions and problem-solving sessions
- Simulations of tax return preparation and filing
- Step-by-step exercises on handling audits and inquiries
- Access to updated forms, guidance, and reference materials
- Feedback and Q&A sessions with taxation experts

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call *+254769199797*

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.

f. Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Online	$1,000
23 Nov 2026	27 Nov 2026	Physical	$1,500
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$4,500
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$6,000

Ready to enroll or request a customized program? Book online or contact us:

Register Online Now

Email: info@fineskilltrainingcenter.com | Website: www.fineskilltrainingcenter.com