

# FINANCE (ZFIN)

## ZFIN-1047 Introduction to Budgeting and Forecasting 0.8 CEUs

Effective budgeting is a vital part of financial management for any organization. The Introduction to Budgeting course explains the purpose of budgeting and illustrates the budgeting process from beginning to end. If you are new to budgeting or want to better understand the budget process and types of budgeting, this course is for you. Steps of the budgeting process, common types of budgets and widely used methods of budgeting will be illustrated. Students will gain hands-on experience building budgets with in-class budgeting exercises. This course is for professionals who are either new to budgeting or new to parts of the budgeting process.

Contact hours: 8

Not financial aid eligible.

## ZFIN-1048 Advanced Budgeting and Forecasting 0.8 CEUs

The Advanced Budgeting and Forecasting course illustrates several methods to improve budgeting and forecasting. These methods include sensitivity analysis, budget variance analysis, regression analysis, and many more. Effective budgeting and forecasting techniques will be explained and demonstrated. Students will gain hands-on experience through working on budgeting exercises in-class. This course is for professionals wanting to learn how to build better budgets and improve their budgeting and financial forecasting skills.

Contact hours: 8

Not financial aid eligible.

## ZFIN-1051 Chartered Tax Professional Certification (Online) 18 CEUs

The Chartered Tax Professional (CTP) designation is the undisputed professional credential for persons who advise clients on income tax situations. Students who complete this comprehensive program will be prepared to handle almost any individual or small business income tax situation. Participants must successfully complete a series of six 30-hour modules (with instructor support). All courses are offered online and can be completed any time, anywhere. Each module consists of 10 three-hour lessons and can be completed in five to 10 weeks (one or two lessons per week).

Contact hours: 180

Not financial aid eligible.

## ZFIN-1052 Professional Risk Manager (PRM) Exam Prep (Online) 7 CEUs

The self-guided ePRM Coach Complete course prepares learners to pass the four exams required for Professional Risk Manager (PRM) certification.

Contact hours: 70

Not financial aid eligible.

## ZFIN-1053 Financial Risk Manager (FRM) Exam Prep (Online) 6.1 CEUs

The eFRM Coach Complete course is a comprehensive online study guide for the Financial Risk Manager (FRM) exam. These online tutorials are based on the FRM exam structure and the latest learning outcome statements. They possess every formula, definition, concept and application for all subjects covered in the exam. While the interactive study modules foster benchmarking and self-assessment against other candidates, the mock exams are modeled on the same lines as the final exam.

Contact hours: 61

Not financial aid eligible.

## ZFIN-1054 Bookkeeping Administration Certification (Online) 28 CEUs

This online course provides an introduction to the concepts and uses of accounting in a business environment. The primary areas of study include analysis of business transactions; recording procedures and the use of ledgers and journals; accounting for sales and purchases; managing cash, payroll, accruals and deferrals; and preparation and analysis of basic financial statements. Learn to use QuickBooks Online Plus by completing two monthly accounting cycles. Payroll preparation and creating a new company will also be covered. While no prior QuickBooks knowledge is required, students taking this course should have some familiarity with the accounting cycle and how it relates to a business. While the reading requirements are light, the majority of this extensive, hands-on course consists of drill exercises and related practice activities and quizzes based on the knowledge gained from completing each chapter.

Contact hours: 280

Not financial aid eligible.

## ZFIN-1055 Payroll Level I: Fundamental Payroll Certification (FPC) 3 CEUs

This course teaches the fundamental payroll calculations and applications necessary for individuals who are new to the payroll industry, those who support the payroll industry and individuals preparing for the FPC or CPP certification examinations. Participants will gain the knowledge and skills required to maintain payroll compliance and prevent costly penalties. \*This course has both an in-person and webinar version. See right column for more details.

Contact hours: 30

Not financial aid eligible.

## ZFIN-1056 Payroll Level II: Certified Payroll Professional (CPP) 3.6 CEUs

This course provides students with an in-depth understanding of the advanced skills necessary for payroll managers and supervisors. This program is ideal for experienced payroll professionals seeking compliance training, professional development or CPP certification preparation. Please note: In order to sit for the CPP exam, you must have spent at least three of the last five years working in the payroll profession. \* This course has both an in-person and webinar version. See right column for more details.

Contact hours: 36

Not financial aid eligible.

**ZFIN-1058 Comprehensive Tax Course with Career Package (Online)**  
**6 CEUs**

Get the skills needed to prepare tax returns for most Form 1040 individual, non-business taxpayers and small business taxpayers (self-employed/Schedule C) and learn how to research tax issues. This online course is CTEC and OBTP-approved.

*Contact hours: 60*

*Not financial aid eligible.*

**ZFIN-1060 Global Capital Markets (Online)**  
**10 CEUs**

Financial markets have evolved over the past few years, becoming robust and complex in nature. Success in this area requires specialized knowledge and skills around both the functioning of the markets and the financial instruments used. This online course offers participants a basic understanding of the various markets and instruments and provides detailed knowledge covering the qualitative and quantitative aspects of all markets.

*Contact hours: 100*

*Not financial aid eligible.*

**ZFIN-1061 Banking Management Operations (Online)**  
**10 CEUs**

This online course gives participants an in-depth understanding of various knowledge areas required of banking professionals. Learn about various banking products and operational aspects, as well as technology and regulatory requirements, and gain essential management and operational technology skills. Key knowledge areas: Banking essentials, Banking products, Foreign exchange management, Trade finance, Operational aspects, Banking technology, and Regulatory environment.

*Contact hours: 100*

*Not financial aid eligible.*

**ZFIN-1062 Financial Planning and Wealth Management (Online)**  
**10 CEUs**

Financial planning and wealth management are key skills needed for today's leaders. This online course presents key information to help participants understand the basic aspects of estate planning and various methods of property transfers, gifts and gift tax. Other topics include insurance concepts, mutual funds, retirement planning and the Gramm-Leach-Bliley Act, which requires institutions to disclose privacy policies and limits instances in which consumer information can be shared.

*Contact hours: 100*

*Not financial aid eligible.*

**ZFIN-1063 Comprehensive Tax Course with Business Package (Online)**  
**6 CEUs**

Develop the skills needed to prepare tax returns for most Form 1040 individual, non-business taxpayers and small business taxpayers (self-employed/Schedule C) and learn how to research tax issues. This CTEC and OBTP-approved online course includes a tax business start-up guide.

*Contact hours: 60*

*Not financial aid eligible.*

**ZFIN-1065 Fundamentals of Accounting (Online)**  
**14 CEUs**

This course will provide an introduction to the concepts and uses of accounting in a business environment. The primary areas of study in this course include analysis of business transactions, recording procedures and the use of ledgers and journals, accounting for sales and purchases, managing cash, payroll, accruals and deferrals, and preparation and analysis of basic financial statements. After completing this course, students will have a solid understanding of business and financial accounting, and its role in bookkeeping administration.

*Contact hours: 140*

*Not financial aid eligible.*

**ZFIN-1066 Investing in Stocks and Bonds (Online)**  
**2.4 CEUs**

This comprehensive course provides new investors with the skills and knowledge necessary to invest in stocks and bonds. Learn how the stock market works, the types of investments you can make, and where and how to begin. Activities, practice exams and assignments will help you master the foundational components of successful investing.

*Contact hours: 24*

*Not financial aid eligible.*

**ZFIN-1067 Intuit QuickBooks Online Plus (Online)**  
**10 CEUs**

In this course, you will learn how to use QuickBooks Online plus by completing two monthly accounting cycles. In the first lessons, accounting for selling service items will be covered. In later lessons, both service items and inventory items that are sold will be covered. The course will also cover the processes of preparing payroll and creating a new company. Prior to taking this course, you should be familiar with the accounting cycle and how it is related to a business. While no prior knowledge of QuickBooks Online is required, it is beneficial to have an understanding of accounting principles. The majority of this course will be conducted through drill exercises, and related practice activities and quizzes based on the knowledge you have gained through completing each chapter. Be prepared for a thorough and extensive hands-on experience throughout this QuickBooks course. Each chapter contains a number of drills that you must complete, as well as assigned practice activities and lesson quizzes. Students are eligible for a free 365 day copy of Intuit QuickBooks Online Plus from the Intuit Education Program in order to follow along with the course content. This course prepares students to take the Intuit QuickBooks Certified User Online certification exam.

*Contact hours: 100*

*Not financial aid eligible.*

**ZFIN-1068 Advanced Income Tax Preparation Level I (Online)**  
**3 CEUs**

Students will study earned income tax credit (EIC or EITC), clergy income and investments. The course continues with a more in-depth study of employee business expenses, Schedules C and E, at-risk rules and passive activities. Upon completion, students will be able to assist individual taxpayers with more in-depth tax issues. Prior tax preparation experience/knowledge required. Students normally enroll in this course after completing the Comprehensive Income Tax course and working at least one season as a tax preparer. Get the confidence you need to take on more complex returns by reinforcing and building upon your existing tax knowledge. If you are an enrolled agent, accountant, lawyer, financial planner, business owner, experienced tax preparer or just interested in increasing your tax knowledge, the advanced course will enable you to prepare more complex individual tax returns. Benefits of becoming a tax professional Recession-resistant career Seasonal and flexible schedule Work for a firm or start your own business Emphasis on problem-solving and interpersonal skills Reduce your own tax liability Unlimited income potential

*Contact hours: 30*

*Not financial aid eligible.*

**ZFIN-1069 Advanced Income Tax Preparation Level II (Online)**  
**3 CEUs**

Study more specialized areas of taxation in this course, including amended returns, special needs and concerns for seniors, tax issues for high-income taxpayers, net operating losses, special issues for Schedule D, tax issues for divorced and separated taxpayers, tax planning, savings strategies, updates, guidance in responding to the IRS, state returns and nonresident alien returns. Prior tax preparation experience/knowledge required. Students normally enroll in this course after completing Advanced Income Tax Preparation Level I and working at least one season as a tax preparer. Gain the confidence to take on more complex returns by reinforcing and building upon your existing tax knowledge. If you are an enrolled agent, accountant, lawyer, financial planner, business owner, experienced tax preparer or just interested in increasing your tax knowledge, the advanced course will enable you to prepare more complex individual tax returns. Benefits of becoming a tax professional Recession-resistant career Seasonal and flexible schedule Work for a firm or start your own business Emphasis on problem-solving and interpersonal skills Reduce your own tax liability Unlimited income potential

*Contact hours: 30*

*Not financial aid eligible.*

**ZFIN-1070 Small Business Income Tax Course Level 1 (Online)**  
**3 CEUs**

Students explore how to start a business and choose a business entity. The course expands on business organization in areas such as recordkeeping, receipts, expenses and income. Topics for this course include sole proprietorships, partnerships, corporations, s-corporations, payroll taxes, retirement plans and dispositions. This course presents an introduction to small business returns. Upon successful completion of this course, students should be able to start preparing less-complex business returns. Prior tax preparation experience/knowledge is required. This course enhances the knowledge and experience of tax practitioners. Students normally enroll in this course after completing the Comprehensive Income Tax class and working at least one season as a tax preparer. This course will give you the confidence to take on more complex returns by reinforcing your existing tax knowledge and building on it. This course is also suitable for a veteran preparer who needs to refresh his/her skills. If you are an enrolled agent, accountant, lawyer, financial planner, business owner, experienced tax preparer, or just interested in increasing your tax knowledge, the advanced course will enable you to prepare more-complex individual tax returns. This course provides critical education and knowledge, making graduates more competent and successful than their competitors.

*Contact hours: 30*

*Not financial aid eligible.*

**ZFIN-1071 Small Business Income Tax Course Level 2 (Online)**  
**3 CEUs**

Students will study more in-depth areas of business taxation in this course. This course includes a study of the balance sheet, a more in-depth study of partnerships and partnership issues, corporation issues, a more complex study of s-corporations, fringe benefits, business tax credits, amended business returns, farm income, tax practitioner regulations and penalties, taxes and tax research. Upon completion of this course, students will be able to complete the most complex of business returns. Prior tax knowledge and experience are required for this course. Prior tax preparation experience/knowledge is required. This course enhances the knowledge and experience of tax practitioners. Students normally enroll in this course after completing the Comprehensive Income Tax class and working at least one season as a tax preparer. This course will give you the confidence to take on more complex returns by reinforcing your existing tax knowledge and building on it. This course is also suitable for a veteran preparer who needs to refresh his/her skills. If you are an enrolled agent, accountant, lawyer, financial planner, business owner, experienced tax preparer or just interested in increasing your tax knowledge, the advanced course will enable you to prepare more complex individual tax returns. This course provides the critical education and knowledge which make the graduates more competent and successful than their competitors.

*Contact hours: 30*

*Not financial aid eligible.*

**ZFIN-1072 Tax Law Updates Seminar (Online)**  
**0.3 CEUs**

With this seminar you will gain an understanding of new and changed tax laws. Three Hours CE credit.

*Contact hours: 3*

*Not financial aid eligible.*

**ZFIN-1073 Professional Tax Preparer Certification (DL) (Online)**  
**10 CEUs**

Become a tax preparation specialist equipped to prepare federal income tax filings for individuals and businesses. Learn current tax guidelines and get an overview of the documents, statements and other necessary materials for filing.

*Contact hours: 100*

*Not financial aid eligible.*

**ZFIN-1074 Personalized Financial Coaching**  
**0.2 CEUs**

Having difficulty determining your profit with your projected revenue and expenses? Wish you had someone from the outside who could answer your financial questions? Talk through your financial scenarios with a financial expert in this individual coaching session. Once registered, your contact information will be sent to our financial coach. They will contact you to schedule two individual sessions based on your schedule and location.

*Contact hours: 2*

*Not financial aid eligible.*

**ZFIN-1075 Payroll Study Group**  
**4.8 CEUs**

Looking for a study group for all things payroll? Look no further! This course prepares students to sit for the Fundamental Payroll Certification (FPC) or Certified Payroll Professional (CPP) exam. Class will meet at regular intervals to discuss payroll-related topics, such as the laws and regulations that govern wages, tax withholdings and related deductions. Whether you're new to the profession or just looking to take a deeper dive into the "why" of your current role and responsibilities, you will benefit from this course.

*Contact hours: 48*

*Not financial aid eligible.*

**ZFIN-1080 Enrolled Agent Intensive Exam Prep Boot Camp**  
**19 CEUs**

Enrolled agents are licensed by the federal government and have demonstrated special competence in tax matters and professional ethics. They can practice before the IRS anywhere in the United States. At least one to two seasons of tax preparation experience and a basic understanding of tax accounting and accrual accounting is recommended before taking this class. This innovative blended-learning program allows students to participate in-person and/or via WebEx. The course prepares participants to pass the IRS Special Enrollment Exams (SEE). Class sessions are structured based on the Gleim System for Success and require (at minimum) 15-20 hours of studying per week outside of class. The SEE is a three-part exam administered by Prometric on behalf of the IRS. Participants must successfully pass all three parts to receive IRS-EA certification. We strongly suggest that participants register for part one of the SEE (Individuals) to obtain their PTIN through the IRS before enrolling in this course.

*Contact hours: 190*

*Not financial aid eligible.*

**ZFIN-1081 Budgeting Certificate (Cohort)**  
**1.6 CEUs**

This certificate program uses real-world scenarios presented by an industry expert to help participants practice and implement budgeting techniques. It is ideal for employees who are new to budgeting or who want to review budgeting and financial forecasting principles. These interactive courses teach the fundamentals of budgeting, forecasting and financial analysis. Participants will use and practice several financial analysis tools, formulas and methods for accurately forecasting financial data. They will also complete a course project to utilize their newly acquired or enhanced budgeting and forecasting skills. Participants are encouraged to bring copies of their organization's budgets to class.

*Contact hours: 16*

*Not financial aid eligible.*