TAX TRAINING ACADEMY©

POWERED BY NADIA.CPA

S Corporation
Advanced Training

2026 PROGRAM OVERVIEW & COURSE GUIDE

Presented by Nadia Rodriguez, CPA, CTC

FOUNDER · TAX TRAINING ACADEMY

NADIA RODRIGUEZ
Founder, Tax Training Academy

LETTER FROM THE FOUNDER

A Note *from Nadia.*

Hi, I'm Nadia Rodriguez, CPA, CTC, and I'm so glad you're here. After nearly 20 years in the tax profession, I've found that what fuels me most is teaching. I've handled messy books, fixed S election mistakes, and helped clients navigate tax decisions they didn't even know they made. Through it all, I've learned that clarity, confidence, and community are what turn tax preparers into trusted advisors.

That's exactly why I created the S Corporation Advanced Training. This isn't just about forms and rules. It's about changing the way you approach your work. Whether you're new to business entity returns or ready to deepen your expertise, this 10-week course will take you from the fundamentals into advanced strategy with real-life examples and practical insights.

I designed this course to help you serve with purpose, lead with knowledge, and grow with confidence.

Let's get started. Your next level begins now.

IN THIS GUIDE

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THREE SECTIONS TO CARRY YOU FROM WEEK 1 TO YOUR CAPSTONE.

01 **10-WEEK CURRICULUM**
Your week-by-week learning plan

02 **CALENDAR**
Live session dates and times

03 **YOUR EXPERIENCE**
Three ways to learn

SECTION ONE

CURRICULUM

01

10-Week Curriculum

Ten weeks. Four phases.
One complete transformation.

INSIDE THIS SECTION YOU WILL FIND THE FULL WEEK-BY-WEEK ROAD MAP OF THE S CORPORATION ADVANCED TRAINING. EACH WEEK BUILDS ON THE LAST, MOVING YOU FROM FOUNDATIONS THROUGH ADVANCED STRATEGY, WITH LIVE SESSIONS, REAL EXAMPLES, AND SPACE TO APPLY WHAT YOU LEARN.

I	II	III	IV
FOUNDATIONS	**FORMATION**	**OPERATIONS**	**STRATEGY**
Weeks 1 – 2	*Weeks 3 – 4*	*Weeks 5 – 8*	*Weeks 9 – 10*

S CORPORATION ADVANCED TRAINING

WEEKS 1 & 2

The foundations every tax pro needs before the first S Corp return

WEEK 01 • MODULE 01 • 2 CE

Foundations of S Corporations

Where every successful S Corp practice begins.

S Corp Foundations

What an **S Corporation** is and how **pass-through taxation** works.

Entity Types Compared

How **sole props**, **SMLLCs**, **partnerships**, and **C Corps** stack up.

Tax Savings in Real Numbers

Quantify **SE tax savings** and the **Section 199A QBID** advantage.

WHAT YOU'LL WALK AWAY WITH

- Confidently explain what an **S Corp** is and why it matters
- Compare every **entity type** side by side with your clients
- Show real **dollar savings** with a clean **SE tax walkthrough**

WEEK 02 • MODULE 02 • 1 CE

Eligibility Rules and Shareholder Requirements

Screen every client before they screen themselves out.

Shareholder Eligibility

Who qualifies: **ITIN holders**, **trusts**, **estates**, and the **100-shareholder cap**.

The One Class of Stock Rule

Catch **voting-rights issues** and **unequal distributions** before they terminate S status.

Pre-Election Setup

Open the **balance sheet** and set **Section 351 basis** cleanly.

WHAT YOU'LL WALK AWAY WITH

- Screen any new client against every **eligibility rule** in minutes
- Catch **one class of stock** violations before the IRS does
- Prepare a clean **pre-election balance sheet** and **basis record**

S CORPORATION ADVANCED TRAINING

WEEKS 3 & 4

From election to filing, without a single missed step

WEEK 03 • MODULE 03 • 1 CE

Filing the S Election (Forms 2553 and 8832)

The paperwork that makes it all official.

Forms 8832 & 2553 Walkthrough

Complete **Forms 8832 and 2553** line by line with real cases.

Election Timing & Late Relief

Master **filing deadlines** and **late election relief** under **Rev. Proc. 2013-30**.

C Corp to S Corp Conversions

Handle **E&P**, **Built-In Gains tax**, and the **Sting tax** without surprises.

WHAT YOU'LL WALK AWAY WITH

- File **Form 2553** correctly the first time, every time
- Rescue a **late election** using the right IRS relief procedure
- Guide any **C-to-S conversion** without hidden tax traps

WEEK 04 • MODULE 04 • 1 CE

Pass-Through Income and Allocations

Turn raw numbers into a clean 1120-S.

Form 1120-S Deep Dive

Report **income**, **deductions**, and **credits** on every line correctly.

Separately Stated Items & K-1s

Allocate **Schedule K** and **K-1** items to every shareholder cleanly.

Schedule B & M-1 Reconciliation

Tie **book to tax** with **Schedule B** and **Schedule M-1**.

WHAT YOU'LL WALK AWAY WITH

- Prepare a complete **Form 1120-S** return with confidence
- Issue accurate **Schedule K-1s** for every shareholder
- Reconcile **book to tax** without guessing

WEEKS 5 & 6

The compensation and basis moves that separate pros from amateurs

WEEK 05
MODULE 05 • 1 CE

Reasonable Compensation

The salary conversation that pays for itself.

Reasonable Compensation Rules

Set salaries that pass the **IRS reasonable compensation test**.

Salary vs Distribution Trade-Off

Balance **W-2 comp**, **QBID**, and **distributions** for maximum savings.

Fringe Benefits & the 2% Rule

Handle **health insurance**, **HSAs**, and **fringe benefits** for **2% shareholders**.

WHAT YOU'LL WALK AWAY WITH

- Defend any **reasonable compensation** figure you set
- Optimize the **salary and distribution** mix for every client
- Report **2% shareholder fringe benefits** the correct way

WEEK 06
MODULE 06 • 2 CE

Stock and Debt Basis

The backbone of every S Corp return.

Stock & Debt Basis Essentials

Compute **stock basis**, **debt basis**, and yearly adjustments with precision.

Form 7203 & Ordering Rules

Walk **Form 7203**, **basis limitations**, and **distributions** with clean numbers.

Real Client Case Studies

Track multi-year basis through **gains**, **losses**, and **distribution cycles**.

WHAT YOU'LL WALK AWAY WITH

- Compute **stock and debt basis** for any S Corp shareholder
- Complete **Form 7203** correctly using proper **ordering rules**
- Explain basis limits clearly to any client who asks

WEEKS 7 & 8

Advanced rules that turn good returns into bulletproof ones

WEEK 07
MODULE 07 • 1 CE

Loss Limitations and Distributions

Where losses live, breathe, and get deducted.

The Four-Level Loss Limitation

Apply **basis**, **at-risk**, **PAL**, and **excess business loss** rules in order.

Material Participation & PAL Rules

Pass the **seven material participation tests** using **Form 8582**.

Distribution Ordering & Schedule M-2

Track **AAA**, **OAA**, and **E&P** distributions through **Schedule M-2**.

WHAT YOU'LL WALK AWAY WITH

- Apply every **loss limitation** in the correct sequence
- Pass the **material participation test** with confidence
- Order **distributions** to minimize surprise tax hits

WEEK 08
MODULE 08 • 1 CE

Individual Tax Filings (1040 Side)

The rules that reshape the modern S Corp return.

QBID & SSTB Mastery

Apply **Section 199A QBID**, **phase-outs**, and **SSTB rules** to every client.

PTET & SALT Workarounds

Navigate the **PTET election** and **SALT cap** strategies that save real money.

Depreciation After OBBBA

Apply **bonus depreciation** and **Section 179** on **Form 4562**.

WHAT YOU'LL WALK AWAY WITH

- Maximize the **QBID** for every eligible client
- Guide clients through the **PTET election** with confidence
- Apply post-**OBBBA** depreciation rules correctly

S CORPORATION ADVANCED TRAINING

WEEKS 9 & 10

How to close the loop, from termination to a clean final return.

WEEK 09
MODULE 09 • 1 CE

S Corporation Termination and Revocation

When the election ends, your guidance begins

Voluntary & Involuntary Termination

Revoke, **withdraw**, or **recover S status** with the right procedure.

Pro Rata Allocation & Short Year

Allocate income in a **short tax year** when status ends mid-year.

Post-Termination Strategy

Handle the **5-year re-election wait** and **LLC default rules**.

WHAT YOU'LL WALK AWAY WITH

- **Revoke** or **recover** S status with the right procedure
- Handle a **mid-year termination** and **short-year allocation**
- Advise clients on **re-election timing** and next steps

WEEK 10
MODULE 10 • 2 CE

Form 1120-S Walkthrough and Schedule L/M-1

Where preparation meets polish.

Accountable Plan Setup

Build a compliant plan for **vehicle**, **home office**, and **business expenses**.

Form 1120-S Top-to-Bottom

Walk the full **Form 1120-S** from start to signature-ready.

Schedule L Reconciliation

Tie **retained earnings**, **Schedule L**, and **Schedule M-1** cleanly.

WHAT YOU'LL WALK AWAY WITH

- Set up **accountable plans** that maximize deductions
- Prepare a complete, polished **Form 1120-S** from scratch
- Reconcile **Schedule L**, **M-1**, and **M-2** without guesswork

SECTION TWO

CALENDAR

02

Power Hour Live Session

Weekly live classroom.
Always recorded.

POWER HOUR LIVE SESSIONS ARE OUR WEEKLY LIVE CLASSROOMS WHERE WE REVIEW EACH MODULE TOGETHER, WORK THROUGH REAL EXAMPLES, AND CLOSE WITH OPEN Q&A. EVERY SESSION IS RECORDED AND SAVED IN THE POWER HOUR SPACE, SO YOU NEVER MISS A BEAT IF LIFE GETS IN THE WAY.

I	II	III	IV
OVERVIEW	**CONCEPTS**	**Q&A**	**REPLAY**
Module recap	*Updates & examples*	*Open questions*	*Always recorded*

Fall 2026
Power Hour Schedule

EVERY MONDAY
12 PM PST · 2 PM CST · 3 PM EST
90-minute live session

Each Power Hour covers the prior week's module topic. Other questions go to the S Corp Group Chat. All sessions are recorded and posted inside the member space for replay.

MON, SEPT 14	**New Member Onboarding** Welcome + Course Overview
MON, SEPT 21	**Power Hour 1 / Module 1** Foundations of S-Corporations
MON, SEPT 28	**Power Hour 2 / Module 2** Eligibility Rules and Shareholder Requirements
MON, OCT 5	**Power Hour 3 / Module 3** Filing the S Election (Forms 2553 and 8832)
• *TAX DEADLINE WEEK OFF*	
MON, OCT 19	**Power Hour 4 / Module 4** Pass-Through Income and Allocations
• *INTUIT CONNECT*	
MON, NOV 2	**Power Hour 5 / Module 5** Reasonable Compensation
MON, NOV 9	**Power Hour 6 / Module 6** Stock and Debt Basis
MON, NOV 16	**Power Hour 7 / Module 7** Loss Limitations and Distributions
• *THANKSGIVING WEEK OFF*	
MON, NOV 30	**Power Hour 8 / Module 8** Individual Tax Filings (1040 Side)
MON, DEC 7	**Power Hour 9 / Module 9** S Corporation Termination and Revocation
MON, DEC 14	**Power Hour 10 / Module 10** Form 1120-S Walkthrough and Schedule L/M-1

LIVE sessions hosted in the Nadia CPA Inner Circle member only space

SECTION THREE

EXPERIENCE

03 Your Experience

Three ways to learn.
Choose what fits you best.

INSIDE THIS SECTION YOU WILL EXPLORE THE THREE LEARNING EXPERIENCES AVAILABLE TO YOU. EACH TIER BUILDS ON THE LAST, OFFERING MORE ACCESS, MORE GUIDANCE, AND MORE ONE-ON-ONE TIME WITH NADIA. PICK THE PATH THAT MATCHES HOW YOU LEARN BEST.

I

SELF-STUDY

On-demand access

Self-paced learning with community Q&A

II

CORE

Live + recorded

Weekly Power Hours and 12-month access

III

VIP

1:1 with Nadia

Coaching calls and tax-season support

Option I

Self-Study

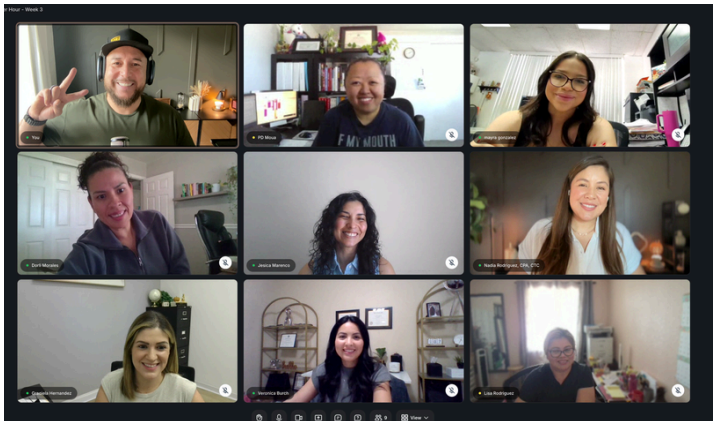
Learn on your own pace

- On-demand access to the entire course
- Access to Tools and Resources
- Access to hands-on Practice Lab
- Learn on your own schedule
- Quizzes to test your knowledge
- Earn CE Credits
- Access to Discussion Hall group chat
- Community-driven Q&A support
- Lifetime access to the entire course

Option II

Core

Self-Study+live training.



- **Everything in Self-Study**
- Weekly 1.5-hour Power Hours
- Live Case Study Meetups
- Group learning with guided structure
- **10% Discount on TTA Courses**
  Save on future trainings as you continue learning

Both options include access to the Nadia CPA Inner Circle member space.

Option III

The CORE + VIP Experience

Core PLUS personal access to Nadia.

THE VIP EXPERIENCE IS DESIGNED FOR THE MEMBERS WHO WANT DIRECT GUIDANCE, PRIORITY SUPPORT, AND LONG-TERM ACCESS TO EVERYTHING NADIA TEACHES. YOU GET EVERYTHING IN CORE **PLUS** A CONCIERGE-STYLE EXPERIENCE BUILT AROUND YOUR PRACTICE.

- **Four 1:1 Coaching Calls with Nadia**
  45 to 60 minute strategy sessions
- **Tax Season Support: Office Hours**
  Live drop-in hours during peak filing season
- **Tax Season Support: Private VIP Chat**
  Direct line for urgent questions
- **Priority access during peak filing**
  Get answered first when it matters most
- **Free future S Corporation Advanced Training**
  Attend every future Power Hour
- **PRO Inner Circle locked at $75/month**
  Your rate for life, never raised
- **15% Discount on TTA Courses**
  Save on future trainings as you continue learning

SECTION THREE

MEMBER STORIES

What Members Are Saying

> *I've been taking S-Corp classes since 2023, and this one has been the best experience so far. In the past I didn't feel prepared for complex clients, but now I finally feel confident and ready.*

Jesica Marenco
Tax Expert

> *This course outshone other classes by giving me a complete grasp of the S Corp return from start to finish. Nadia offers ongoing support, always ready to help and eager for our success.*

Dorli R. Morales
Tax Expert

> *The first session alone was incredible. The material is very easy to follow, and Nadia has created such a comfortable classroom where everyone feels welcome to ask questions.*

PD Moua
Practice Consultant

ENROLLMENT

FALL 2026

Three tiers. One mission.

Enrollment Options

S Corporation Advanced Training Pricing

WHAT'S INCLUDED	SELF-STUDY $2,497	CORE $3,997	BEST VALUE CORE + VIP $7,497
Essentials			
S Corporation Advanced Training Modules	✓	✓	✓
Discussion Hall (Group Chat)	✓	✓	✓
CE Credits	✓	✓	✓
Workbook, Study Companion, Practice Lab	✓	✓	✓
Lifetime access to modules	✓	✓	✓
Live Learning & Strategy			
LIVE Power Hour Sessions	—	✓	✓
BONUS: The Pricing Blueprint	—	✓	✓
VIP Exclusives	—	—	
4 x 1:1 Coaching Calls with Nadia	—	—	✓
PRO Inner Circle Membership rate locked at $75/mo for life	—	—	✓
Tax Season Support (Office Hours + VIP Chat)	—	—	✓
Access to Future Power Hour Sessions	—	—	✓
Discount on Future MasterClasses	—	10%	15%
		3 payments of $1,332.34	*4 payments of $1,874.25*

Secure your spot today. Seats are limited for the VIP tier.

Fall 2026 Pricing

13 hours of CE credit

S CORPORATION ADVANCED TRAINING

Your next step

Join the 2026 cohort

The S Corporation Advanced Training is open for enrollment. Build the
confidence, the systems, and the client skills to deliver S Corp work that pays for itself.

SCAN THE QR CODE TO ENROLL AND START LEARNING TODAY

or visit: courses.taxtrainingacademy.com/store

Next cohort starts September 14th

Seats are limited.

10 WEEK	LIVE + REPLAY	THREE TIERS
Cohort	*Every Week*	*One Mission*