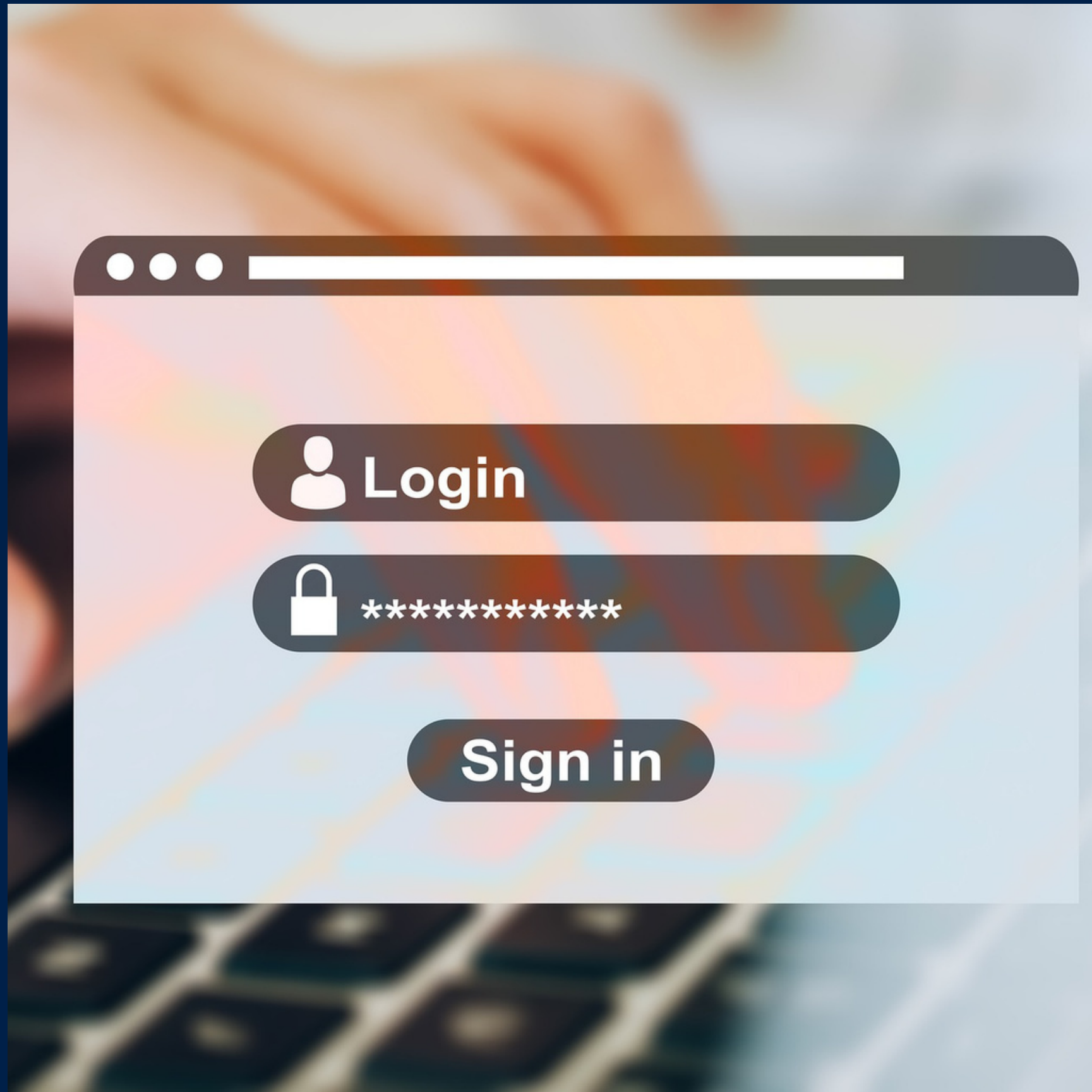


NTPPI Level 3

August | Virtual Live | On-Demand



*Pre-Session:
How to Use the CE Portal*



Logging In



Log-in to the NAEA Continuing Education Portal

www.pathlms.com/naea

NAEA Events Courses Product Bundles FAQ 2022 Tax Sum... Search... Sign In

NAEA National Association of Enrolled Agents **Continuing Education**

NAEA

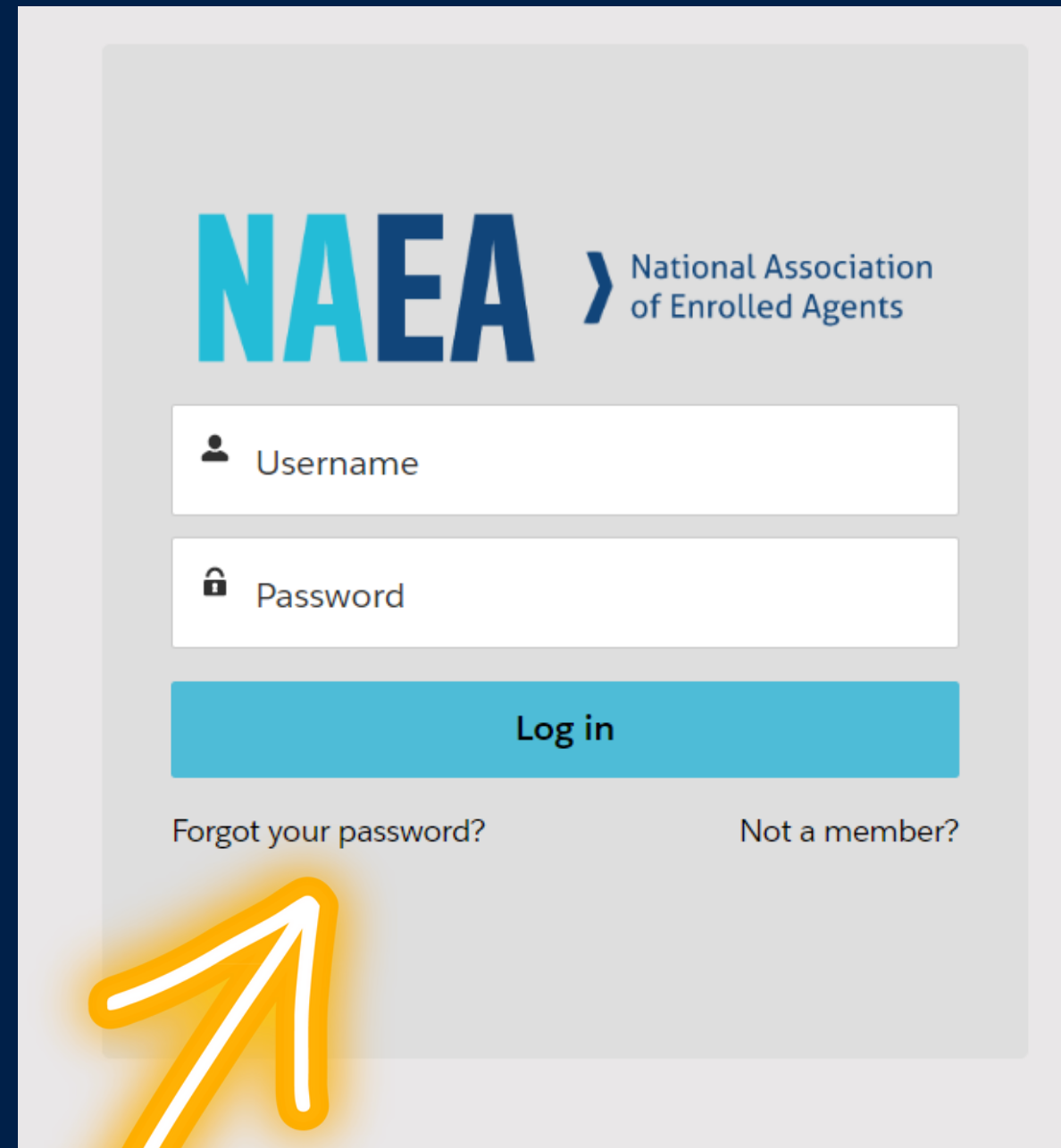
Welcome to the NAEA Continuing Education Portal

Our virtual offerings allow you to learn at your own pace on your own schedule without the cost of travel and travel-related expenses. You will earn valuable CE credits at your convenience. We offer a wide array of webinars, online study courses (both self-study and facilitated) and EA Journal education to meet you where you are. Our virtual offerings include timely content offered in a convenient format for the busiest tax professional.



Use your NAEA account credentials

If you forgot
your password
you can reset it
here.



The image shows a screenshot of the NAEA login page. At the top left is the NAEA logo, which consists of the letters 'NAEA' in a bold, blue, sans-serif font, followed by a right-pointing chevron and the text 'National Association of Enrolled Agents' in a smaller, grey font. Below the logo are two input fields: the first is labeled 'Username' with a person icon on the left, and the second is labeled 'Password' with a lock icon on the left. Below these fields is a blue button with the text 'Log in' in white. At the bottom of the form area, there are two links: 'Forgot your password?' on the left and 'Not a member?' on the right. A large, hand-drawn yellow arrow with a white outline points from the bottom left towards the 'Forgot your password?' link.

If you do not see the
reset password
email, email
education@naea.org
or call the office
202-822-6232



National Association
of Enrolled Agents

Continuing Education



NAEA

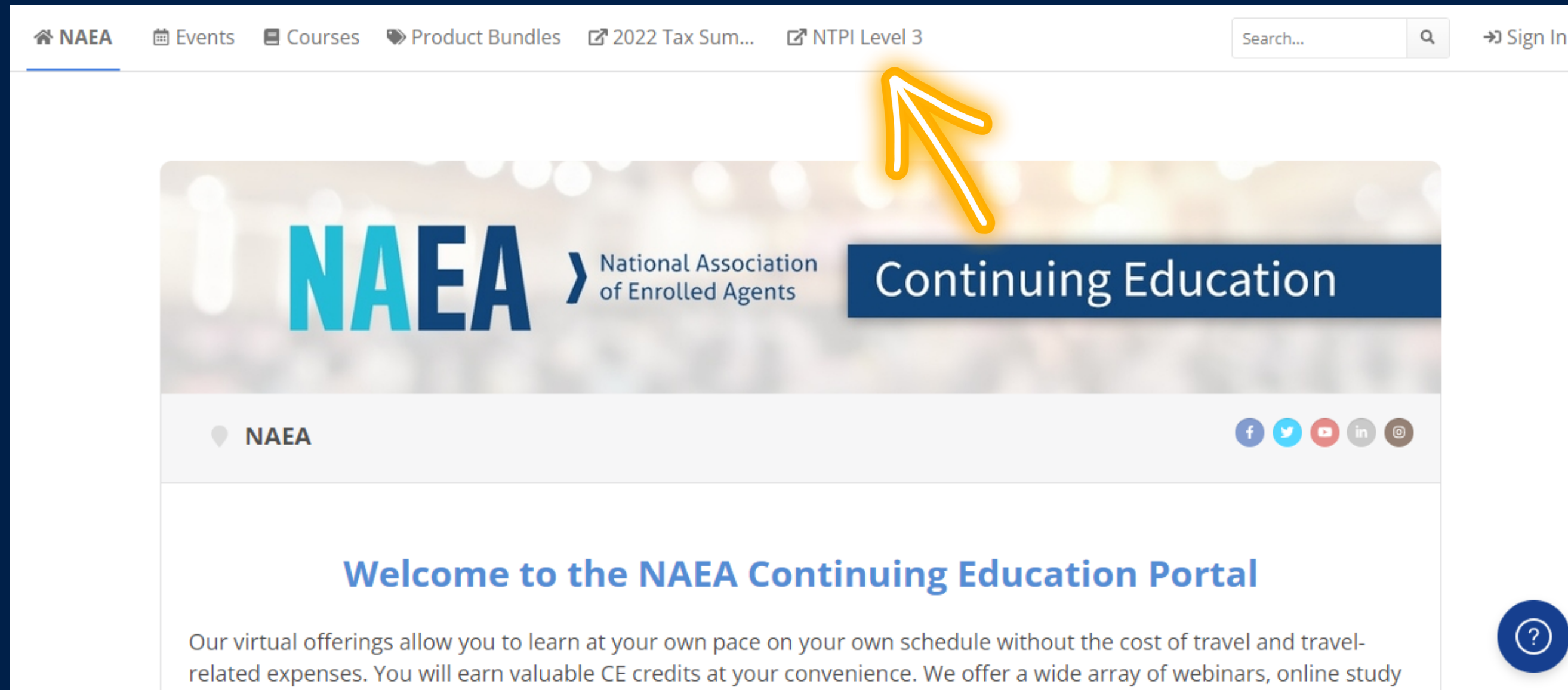


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**You
should
see your
first
name in
the top
right**

A Few Ways to Access the NTPI Level 3 Course



The screenshot shows the top navigation bar of the NAEA website. The navigation items are: [NAEA](#), [Events](#), [Courses](#), [Product Bundles](#), [2022 Tax Sum...](#), and [NTPI Level 3](#). A yellow arrow points to the 'NTPI Level 3' link. To the right of the navigation bar is a search box labeled 'Search...' and a 'Sign In' button. Below the navigation bar is a banner for 'Continuing Education' with the NAEA logo and the text 'National Association of Enrolled Agents'. Below the banner is a social media bar with icons for Facebook, Twitter, YouTube, LinkedIn, and Instagram. Below the social media bar is a heading 'Welcome to the NAEA Continuing Education Portal' and a paragraph of text: 'Our virtual offerings allow you to learn at your own pace on your own schedule without the cost of travel and travel-related expenses. You will earn valuable CE credits at your convenience. We offer a wide array of webinars, online study'.

Find the NTPI
Level 3
bundle at the
top
navigation
bar

A Few Ways to Access the NTPI Level 3 Course

NAEA

Events Courses Product Bundles FAQ 2022 Tax Sum...

Search... ES Erin Sign Out

NAEA National Association of Enrolled Agents

Continuing Education

NAEA

Facebook Twitter YouTube LinkedIn Instagram

Welcome to the NAEA Continuing Education Portal

Our virtual offerings allow you to learn at your own pace on your own schedule without the cost of travel and travel-related expenses. You will earn valuable CE credits at your convenience. We offer a wide array of webinars, online study courses (both self-study and facilitated) and EA Journal education to meet you where you are. Our virtual offerings include timely content offered in a convenient format for the busiest tax professional.

Hit your
Name on
the top
right

A Few Ways to Access the NTPI Level 3 Course

The screenshot shows a user interface with a top navigation bar containing tabs: 'My Activity', 'Certificates', 'Purchases', and 'My Live Events'. The 'My Activity' tab is selected. Below this, there are sub-tabs for 'Purchased Content' and 'Courses'. A dropdown menu is set to 'Active'. A list of purchased content items is displayed, each with an icon, title, and expiration date:

- 2022 LEARN: Pittsburgh - Estates and Trusts Certificate Program** expires in 364 day(s)
- Cryptocurrency Certificate Program: On-Demand** expires in 350 day(s)
5 Presentations 2 Assessments 1 Certificate
- NAEA 2022 Tax Summit**
- 2022 NTPI Level 3 - LIVE** expires in 349 day(s)
14 Items
- Cryptocurrency Certificate Program - Live** expires in 349 day(s)

A yellow arrow points to the '2022 NTPI Level 3 - LIVE' item. A blue circular help icon is visible in the bottom right corner of the content area.

Find the
NTPI Level
3 bundle
among
your "My
Activity"
tab

A Few Ways to Access the NTPI Level 3 Course

[Please click here for Continuing Education Portal FAQs.](#)

My Activity

Purchased Content

Content

[View all >](#)



2022 LEARN: Pittsburgh - Estates and Trusts Certificate Program



Cryptocurrency Certificate Program: On-Demand

5 Presentations 2 Assessments 1 Certificate



NAEA 2022 Tax Summit



2022 NTPI Level 3 - LIVE

14 Items



Cryptocurrency Certificate Program - Live

1 Certificate

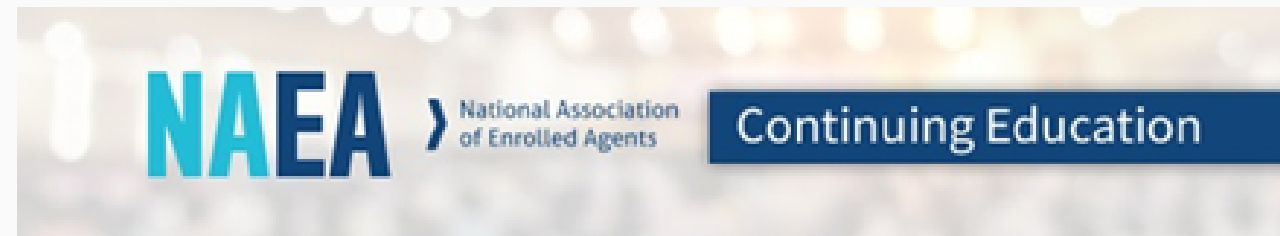


Scroll down
on the
home page,
and find
your "My
Activity"
tab



A Few Ways to Access the NTPI Level 3 Course

You will also
receive 3
reminder emails
for each webinar
with a "join"
button on each



Registration Reminder

Dear Erin,

This is a reminder that you are registered for the event below, which is scheduled to take place tomorrow.

Event: L3.01.22 Advanced Financial Analysis

Date: Monday, August 8, 2022

Time: 11:00 AM PDT / 12:00 PM MDT / 1:00 PM CDT / 2:00 PM EDT

[Add to Google Calendar](#)

[Add to iCal or Outlook](#)

System Check:

To ensure your computer is compatible for the live event, please perform a system check by clicking on the link <https://zoom.us/test> or by typing it into your internet browser. Please perform the system check on the same computer you will use for the live event.

If your computer is compatible, you will receive a confirmation message on your screen and hear audio. Otherwise, please contact the Help Desk to resolve any issues.

Joining the Event:

[Join](#)

If not signed in, click the "Sign In" button and enter your login to join.





Bundle Page



Course Page

- Schedule
- Graduation form

2022 NTPI Level 3 - LIVE



The National Tax Practice Institute™ (NTPI®) is a three-level program developed to sharpen the skills of enrolled practitioners at all stages of their careers. With each level of this program, the core curriculum enables participants to expand their knowledge and skills, and gain the confidence needed to successfully guide their clients through the often-challenging maze of IRS codes, internal regulations, and agency structure.

Join NAEA virtually in the month of August for NTPI Level 3 – LIVE. NTPI Level 3 includes 24 CE focusing on Representation. Take the final step toward becoming an NTPI Fellow. Classes can be viewed live or on-demand. *Access to this course expires one year from purchase.*

Once you complete all courses within Level 3, fill out the below form to alert NAEA. **Must complete all courses by September 2nd to participate in the graduation.** Virtual graduation will be held on September 8th.

[2022 NTPI Graduation Form.](#)


Schedule


Date	Title	Speaker(s)
August 3rd 2-3pm ET	NTPI Class Preview: How to Access Everything you Need For A Successful Level 3 Experience!	NAEA Team Members
August 8th 2-4pm ET	L3.01.22 Advanced Financial Analysis (2 CE)	David Ramirez, EA
August 9th 2-4pm ET	L3.02.22 Trust Fund Recovery Penalty Process (2 CE)	Clarice Landreth, EA
August 10th 1-2pm ET	L3.03.22 Introduction to Criminal Tax (1 CE)	David Gannaway, EA
August 10th 3-4pm ET	L3.04.22 Bankruptcy and Taxes (1 CE)	Laura Strombom, EA
August 15th 2-4pm ET	L3.05.22 Lien Defenses (2 CE)	Clarice Landreth, EA
August 16th 2-4pm		




Course Page


- Each webinar has its own section


 **NTPI Class Preview: How to Access Everything You Need For A Successful Level 3 Experience**
Live Web Event: Wed, August 3, 2022 @ 2:00 PM EDT


 **2022 NTPI Level 3 - L3.01.22 Advanced Financial Analysis**
1 Certificate

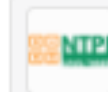
 **2022 NTPI Level 3 - L3.02.22 Trust Fund Recovery Penalty Process**
1 Certificate

 **2022 NTPI Level 3 - L3.03.22 Introduction to Criminal Tax**
1 Certificate


 **2022 NTPI Level 3 - L3.04.22 Bankruptcy and Taxes**
1 Certificate

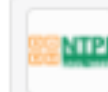
 **2022 NTPI Level 3 - L3.05.22 Lien Defenses**
1 Certificate


 **2022 NTPI Level 3 - L3.06.22 Spousal Relief**
1 Certificate


 **2022 NTPI Level 3 - L3.07.22 Business Entity Examination Issues**
1 Certificate

 **2022 NTPI Level 3 - L3.08.22 Tax Research and Resources**
1 Certificate

 **2022 NTPI Level 3 - L3.09.11 Advanced Appeals**
1 Certificate

 **2022 NTPI Level 3 - L3.10.22 Field Audit Case Study**
1 Certificate

 **2022 NTPI Level 3 - L3.11.22 Marketing**
1 Certificate

 **2022 NTPI Level 3 - L3.12.22 Ethics (Level 3)**
1 Certificate

 **2022 NTPI Level 3 - L3.13.22 Capstone Course**
1 Certificate

Single Webinar Page

- Overview
- Navigation
- Green registered ribbon
- Certificate
- Survey

Courses » 2022 NTPI Level 3 - L3.01.2...

2022 NTPI Level 3 - L3.01.22 Advanced Financial Analysis



Your Rating

★ NO RATINGS



Advanced Financial Analysis

IRS Program #: X9QQU-T00852-22-O/S

CTEC #: 6257-CE-0068

CE: 2 IRS credits and 2 CTEC credits

Speaker: David Ramirez, EA

Many times, it isn't about what the client filled out on the financial statement -- it is about what they did not put on the financial statement. This session will help the representatives avoid unnecessary surprises and will provide tools to complete a more in-depth financial analysis.

Learning Objectives:

- Describe how the IRS values various assets (i.e. retirement accounts, assets out of reach of taxpayer, and dissipated assets).
- Complete a bank statement analysis identifying potential issues (i.e. transfers from an unknown account, deposits larger than stated income, excessive cash withdrawals, etc.).
- Understand how state community property laws affect the financial analysis.
- Determine how a non-liable party changes the financial analysis.

Continuing Education

This course qualifies for IRS Continuing Education Hours. NAEA reports IRS CE on a monthly basis. If you have not received your CE Hours in your IRS PTIN Account by the end of the month, please contact ce@naea.org.

ce@naea.org. An NAEA education team member will review the request for refund. If the refund request is denied, Live Webinars, also offered On-Demand Webinars will not be refunded.

L3.01.22 Advanced Financial Analysis

Live Web Event: Mon, August 8, 2022 @ 2:00 PM EDT



Survey: L3.01.22 Advanced Financial Analysis

Survey: 2.0 CTEC 2.0 IRS CE Federal Tax Law 4 questions



Certificate: L3.01.22 Advanced Financial Analysis

Certificate: 0/2 Course items completed

Session Page

- Overview
- IRS program number
- Course description
- Learning objectives
- Speaker bio
- Add to calendar feature
- Resources tab

L3.01.22 Advanced Financial Analysis

Overview Resources

DESCRIPTION


Advanced Financial Analysis
IRS Program #: X9QQU-T00852-22-O/S
CE: 2 IRS credits
Speaker: David Ramirez, EA

Many times, it isn't about what the client filled out on the financial statement -- it is about what they did not put on the financial statement. This session will help the representatives avoid unnecessary surprises and will provide tools to complete a more in-depth financial analysis.

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CONTRIBUTORS



David Ramirez, EA, JD, MST, USTCP
David has been in practice in Honolulu, Hawaii since 2001. David is a former IRS agent, he has a BS in business administration, a Juris Doctor with a specialization in taxation, a masters in taxation, a masters level certificate in accountancy, and is a United States tax court practitioner. His practice focuses on IRS and state of Hawaii tax resolution.

August 8, 2022
Mon 2:00 PM EDT

Audio Options:
Use Your Computer

DURATION 2H 0M

[Add to Calendar](#)

[System Requirements](#)

[Cancel Registration](#)

Notice: A button to join will appear 30 minutes before the specified start time.

Support Contact
education@naea.org
(855) 880-NAEA (6232) press option 2

Receiving Your CE



Steps To Receive Your CE

Live Webinars

1

Watch the webinar and answer at least 3 poll questions per CE hour

2

Take the survey following the webinar

- Link will pop up once the zoom is closed
- All surveys can be found in the Continuing Education Portal

Steps To Receive Your CE

On Demand Webinars

1

Watch the full recording of the webinar

- Take the knowledge check
- Pass the assessment with a score of 70% or above.
 - There are 10 retakes.

2

Take the survey following the webinar

- Link will pop up once the zoom is closed
- All surveys can be found in the Continuing Education Portal

Steps To Receive Your CE

3

You can now download your certificate from the NAEA Continuing Education Portal. You will also be emailed your certificate.

4

NAEA will report all CE received at the for NTPI in September.

5

If you require CTEC CE to be reported, please email education@naea.org with your CTEC member number for this to be reported.

Accessing Certificates

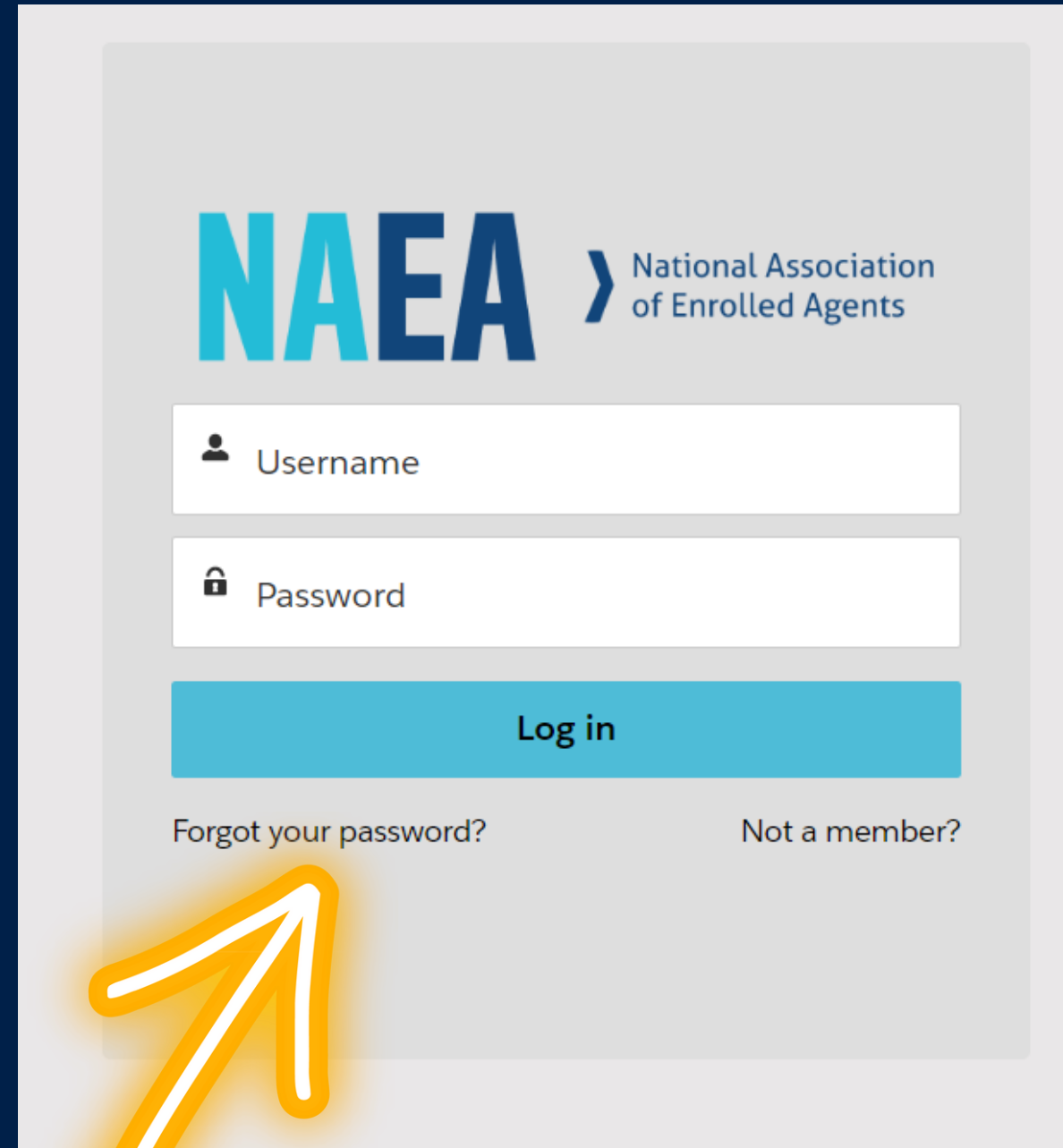


Log-in to the NAEA Continuing Education Portal

www.pathlms.com/naea

The screenshot shows a web browser window displaying the NAEA Continuing Education Portal. The browser's address bar shows the URL pathlms.com/naea. The browser's bookmark bar includes links for Login | Salesforce, NAEA LmS, Sign In - Zoom, Log In - Asana, Login - Dropbox, NAEA, CE Info, Basic Tax Info, Microsoft Office Ho..., Settings, voya 401k, Profile Completion, and Other bookmarks. The website's navigation menu includes links for NAEA, Events, Courses, Product Bundles, FAQ, and 2022 Tax Sum... A search bar and a Sign In button are also visible. The main content area features a large banner with the NAEA logo (National Association of Enrolled Agents) and the text "Continuing Education". Below the banner, there is a location pin for NAEA and social media icons for Facebook, Twitter, YouTube, LinkedIn, and Instagram. The main heading reads "Welcome to the NAEA Continuing Education Portal", followed by a paragraph: "Our virtual offerings allow you to learn at your own pace on your own schedule without the cost of travel and travel-related expenses. You will earn valuable CE credits at your convenience. We offer a wide array of webinars, online study

Use your NAEA account credentials



The image shows a login form for NAEA (National Association of Enrolled Agents). At the top left is the NAEA logo, consisting of the letters 'NAEA' in a bold, blue, sans-serif font, followed by a right-pointing chevron and the text 'National Association of Enrolled Agents' in a smaller, grey font. Below the logo are two input fields: the first is labeled 'Username' with a person icon, and the second is labeled 'Password' with a lock icon. A blue 'Log in' button is positioned below these fields. At the bottom of the form, there are two links: 'Forgot your password?' on the left and 'Not a member?' on the right. A large, hand-drawn yellow arrow with a white outline points from the bottom left towards the 'Forgot your password?' link.

If you forgot your password you can reset it here.

Accessing from your account page

Erin Shumate

My Activity

Certificates

Purchases

My Live Events

All-time

2019-05-06

2022-07-16

Load Transcript

TOTAL CREDITS AWARDED

PDF

Credit Type

Total

IRS CE Federal Tax Law

3.0

Name

Course > Section

Award Date

Credits

Certificate

Certificate: L3.03.21 - Trust Fund
Recovery Penalty - (3 CE)

2021 Winter Education Academy >
Thursday, December 2nd

12/1/21 12:00
AM EDT

IRS CE Federal
Tax Law: 3.0

View Certificate

- Hit your name in the top right of any page
- Hit certificates

Accessing from the course page



Check that your name is the same as the one on your PTIN account

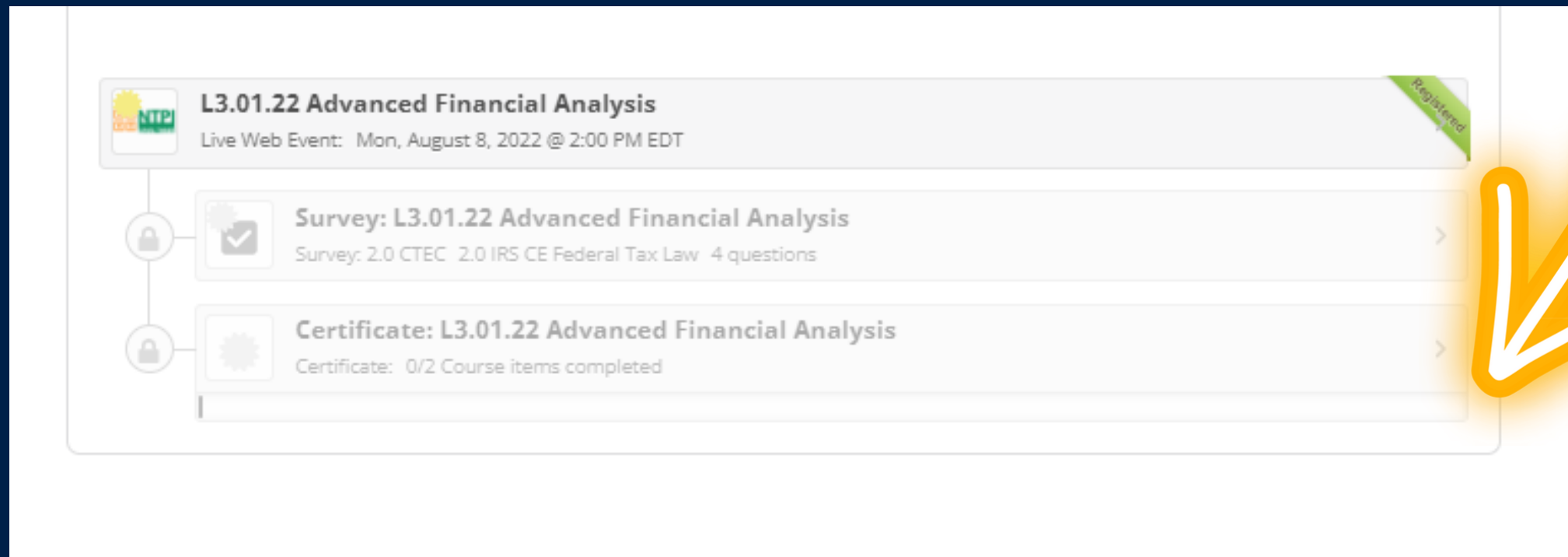
Check your PTIN to make sure it is on the certificate

You can print and download from here

Each certificate will be emailed once completed

Accessing from the course page

Once you are marked attended, your certificate appears here



The screenshot displays a course page with the following items:


- L3.01.22 Advanced Financial Analysis**
Live Web Event: Mon, August 8, 2022 @ 2:00 PM EDT
- Survey: L3.01.22 Advanced Financial Analysis**
Survey: 2.0 CTEC 2.0 IRS CE Federal Tax Law 4 questions
- Certificate: L3.01.22 Advanced Financial Analysis**
Certificate: 0/2 Course items completed

A large yellow arrow points to the certificate item, indicating that the certificate is displayed once the user is marked as attended.

Accessing from the course page

Courses » NAEA 2022 Tax Summit » Sunday - July 24th, 2022 » Certificate: Transforming Y...

Certificate: Transforming Your Pricing - Everything You Need to Know 1/1



Print Certificate

Check that your name is the same as the one on your PTIN account

Check your PTIN to make sure it is on the certificate

You can print from here

Questions!

**Email education@naea.org or call
202-822-6232**