Advanced Income Tax Return Preparation and Filing Training Course

13 – 17 June 2027
Bali

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Training Center

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Ref: 1145_184575 **Date:** 13 – 17 June 2027 **Location:** Bali **Fees:** 5700 Euro

Overview

Advanced Income Tax Return Preparation and Filing Training Course is a one-week course for tax managers, accountants, finance professionals and compliance teams who leave with an Income Tax Return Preparation and Review File. Participants convert accounting records into taxable-income reconciliations, supporting schedules, filing data and review evidence. The course addresses errors caused by disconnected calculations, documentation and approvals through a controlled return workflow. Agile Leaders Training Center develops income tax return preparation and filing capability.

Who Should Attend

- Teams responsible for preparing corporate income tax returns
- Reviewers responsible for tax reconciliations and filing controls
- Finance functions responsible for source records and supporting schedules
- Compliance teams responsible for submission evidence and amendments
- Internal assurance teams responsible for tax-file readiness

The course assumes participants already prepare financial statements and apply income tax rules, and it leaves out introductory bookkeeping and personal tax returns.

Departments and Industries

The course supports departments and industries that prepare, review and evidence corporate income tax filings.

- Tax, finance, controllership and shared services
- Compliance, internal audit and legal operations
- Manufacturing, energy and infrastructure organizations
- Banking, insurance and investment organizations
- Technology, retail and professional services organizations

Learning Objectives

By the end of this course, participants will be able to:

- Analyze source records for return completeness
- Build an accounting-to-tax reconciliation
- Evaluate taxable-income adjustments and evidence
- Apply reviewer controls to return schedules
- Diagnose filing errors and amendment needs
- Build an audit-ready return file

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Course Agenda

Day 1: Filing Scope and Data Readiness

- Taxpayer and Reporting-Period Data Checklist
- Return Requirement and Responsibility Matrix
- Trial-Balance Source Mapping Template
- Financial-Statement Tie-Out Procedure
- Return Preparation Control Calendar

Day 2: Taxable Income Reconciliation

- Accounting-to-Tax Reconciliation Model
- Income Classification Review Schedule
- Deductible Expense Evidence Test
- Permanent and Timing Adjustment Register
- Taxable-Income Computation Workpaper

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Day 3: Supporting Schedules and Disclosures

- Fixed-Asset and Depreciation Tax Schedule
- Related-Party Transaction Disclosure Matrix
- Transfer-Pricing Form Applicability Checklist
- Carryforward Balance Reconciliation
- Supporting Document Index and Cross-Reference

Day 4: Review, Submission and Amendment Controls

- Pre-Filing Validation Checklist
- Maker-Checker Review Control
- Electronic Submission Evidence Pack
- Filing Exception and Error Log
- Return Amendment Decision Record

Day 5: Income Tax Return Filing Practice

- Exercise: Validate a Return Data Pack
- Exercise: Prepare a Taxable-Income Reconciliation
- Exercise: Review Supporting Tax Schedules
- Exercise: Resolve Filing Exceptions and Amendments
- Capstone Exercise: Income Tax Return Preparation and Review File

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Practical Exercises

The course uses suggested activities to convert financial records into a controlled filing file.

- Suggested activity: reconcile a manufacturing trial balance to return classifications
- Suggested activity: assess deductible-expense evidence for a services organization
- Suggested activity: review related-party schedules and filing attachments
- Suggested activity: present return exceptions and amendment decisions to a tax review team

FAQs

Who suits income tax return preparation and filing training?

Tax, accounting, finance, compliance and assurance teams suit the training. Participants should already prepare financial statements and apply income tax rules.

How does income tax return filing training differ from a general tax course?

Income tax return filing training focuses on reconciliation, schedules, review controls, submission evidence and amendments. A general tax course covers broader legal principles and transaction treatments.

How is an accounting-to-tax reconciliation prepared?

An accounting-to-tax reconciliation starts with reported results, classifies permanent and timing adjustments, links each adjustment to evidence and traces the resulting taxable income into the return.

What belongs in an audit-ready income tax return file?

An audit-ready income tax return file contains source records, reconciliations, adjustment support, schedules, disclosures, review evidence, submission confirmation, correspondence and controlled amendment records.

How are income tax return filing errors controlled?

Filing errors are controlled through source-data tie-outs, validation checks, maker-checker review, exception logs, version control, submission evidence and documented amendment decisions.

Conclusion

Participants take back an Income Tax Return Preparation and Review File containing reconciliations, schedules, controls, evidence and exception records. The file changes disconnected calculations into a traceable filing workflow. It helps tax and finance teams prepare, review, submit and amend returns with consistent documentation.