# Advanced Income Tax Return Preparation and Filing Training Course

15 – 19 February 2027
Berlin

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**Ref:** 1145_184597 **Date:** 15 – 19 February 2027 **Location:** Berlin **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.