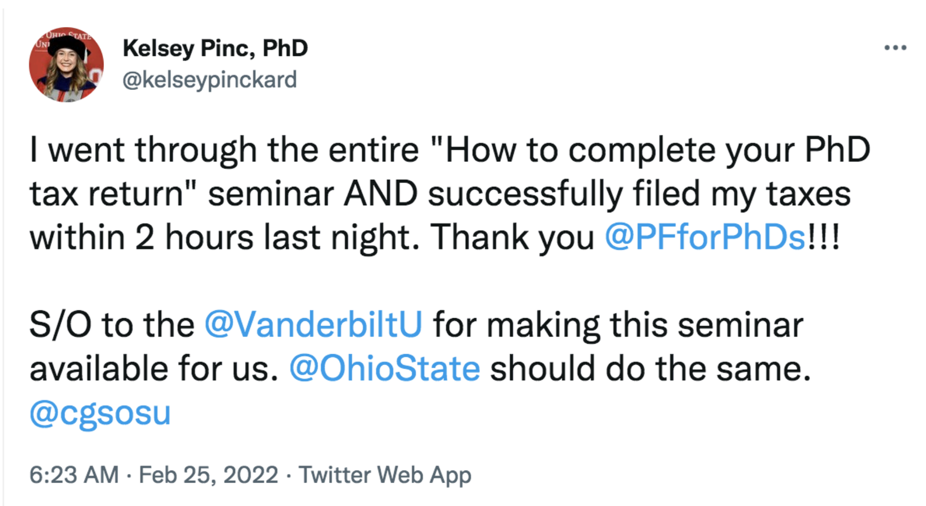
Annual Tax Return Workshop Bulk Clients FAQ

Thank you for considering purchasing *How to Complete Your Grad Student Tax Return (and Understand It, Too!)* on behalf of your graduate students!

It is an asynchronous workshop to be taken during tax season for 2021 (January to April 2022). You can read more about the workshop on [this sales page]() aimed at individuals.

This document contains answers to the frequently asked questions about this workshop. If you would like to discuss the workshop further or arrange for a purchase, please [schedule a call]() with or [email]() me.

Emily Roberts
[Personal Finance for PhDs]()



Who is it for?

The workshop is for people who:

- Are US citizens, permanent residents, or residents for tax purposes
- Are graduate students in 2021 (part-year included)
- Receive funding that pays a stipend and their education expenses (in part or in full)

What is the purpose?

The purpose of the workshop is to teach graduate students about the federal higher education tax benefits available to them, including how to tabulate, calculate, and report their funding and education expenses.

What is included?

The workshop comprises:

- 11 videos with transcripts totalling just under two hours, titled:
  - Introduction
  - Background
  - Tax Preparation Methods
  - Self-Assessment: Income
  - Higher Education Tax Benefits
  - Self-Assessment: Qualified Education Expenses
  - Applying Education Tax Benefits
  - Filling Out Forms
  - If You Were Under Age 24
  - If You Are Class of 2021 (Bachelor's)
  - Off-Target Effects
- 2 worksheets (PDF and Excel versions)
- Invitations to at least one live Q&A call per month throughout tax season (open to everyone in the workshop)—the recordings are added to workshop as well

Here is a quote from an anonymous previous workshop participant regarding this format:

"I appreciated the different segments and that the workshop was tailored to someone in my position with the questions I have. I didn't feel any of the material in the workshop itself was unclear and it was easy to pick up and work through the videos at my own pace. I also really appreciated [Emily's] availability—it was really nice to know that if I had any questions, I could just ask [her] directly!"

What is the cost?

The cost is $20 per person.

How do we pay for it?

I can register as a vendor/supplier with your institution and then invoice you for the number of registered participants to that date to be paid by check or direct deposit. Unless you prefer a different schedule, I will send you one invoice approximately one month after you open registration and one at the end of April.

Alternatively, for smaller purchases (~25 or fewer), if you prefer I can send you an invoice through an online payments platform, through which you can pay by credit card.

Can you automatically limit the number of sign-ups to the number we want to pay for?

Unfortunately, my software does not have this feature. The best I can do is monitor the sign-ups frequently and manually close registration when I see that you are nearing or have reached your desired limit. The registration page can go to a waitlist instead.

How will participants sign up?

I will create a unique registration link for your graduate students that leads to a unique version of the workshop. I will bill you for the number of people who were added to your version of the workshop.

How do participants access it?

I host the workshop files on my website, PFforPhDs.community. After a participant registers, they will receive their auto-generated login information. When they log in through PFforPhDs.community/account/login, they will see a link for the workshop.

Can we subsidize the cost of the workshop for our grad students instead of paying for it in full?

Yes, you can choose what fraction of the $20 per person cost you will subsidize and what fraction will be the student’s contribution. I will still create a unique registration page and workshop copy. The student will be charged up front the price you choose, and I will bill you later on for your portion based on the number of completed registrations.

Can we host a live event instead?

I believe that this pre-recorded and asynchronous version of the tax workshop is superior to a fully live version (which I presented for many years prior to creating the workshop) because:

- The video content is 100% scripted and therefore as complete, precise, and concise as possible—and I provide the script/transcript so the content can be read instead of watched.
- The videos can be paused, replayed, or skipped as needed. This is particularly useful as it sometimes takes time to gather documents, look up fine print, and make calculations; a live event doesn't allow sufficient time for this.
- A participant can access the workshop at the time that they feel motivated to complete it, whether January or April or in between.
- The periodic live Q&A calls retain a live event's advantage of being able to ask questions of me, and I've observed that the questions are usually better because the participants have had time to reflect on the material.

While I won't present this material live during this tax season, you can create a live event for your students who prefer a group event. You can stream the videos sequentially in a group setting (in person or remote). I just ask that you make sure that everyone in attendance has joined the workshop through your registration page.

This event could even precede a live Q&A call with me (see next).

Can we schedule a private Q&A call with Emily?

Yes! I offer a private live Q&A call as a volume bonus if 200+ people from your institution register. Alternatively, even without meeting that registration threshold, I can provide a private call for an additional $500 charge.

Can you send us any data on how the workshop is being used?

I have the workshop pages linked to Google Analytics. In addition to the number of completed registrations, I can tell you the number of unique visitors and average amount of time spent on your unique pages.

Do you offer a version for non-residents?

I have seriously considered providing a version of this workshop for non-residents. I appreciate there is an intense need for this type of product.

After starting to research non-resident taxes in 2021, I got in touch with the team at Sprintax. They sell tax preparation software for non-residents (federal and state) to universities and individuals. Last year, they hosted numerous free tax education webinars for non-residents that were publicly available, not just for their clients.

Basically, they already do everything that I would want to do for non-residents for free, plus they offer software. They are much better positioned than I am to offer these services to non-residents, so this year I'm recommending them instead of selling a non-resident version of this workshop.

Do you have any advertising materials that we can use?

Yes! If you need anything further than what I've included below, please ask.

Title: How to Complete Your Grad Student Tax Return (and Understand It, Too!)

Description: Are you intimidated by the prospect of preparing your grad student tax return? Are you confused by the tax forms you received from your institution or funding agency – or the forms you didn't? This workshop breaks down how to calculate your taxable income from your salary, stipend, fellowship, grant, and/or scholarships; minimize your tax liability using education tax benefits; and report your income, qualified education expenses, and estimated tax paid on your tax return. It also touches on the special tax situations that may apply to students under age 24. The workshop is for US citizens, permanent residents, and residents for tax purposes, and comprises pre-recorded videos, worksheets, and live Q&A calls.

Bio (pic attached): Dr. Emily Roberts is a personal finance educator specializing in early-career PhDs. Through her business, Personal Finance for PhDs, she equips graduate students, postdocs, and PhDs with Real Jobs to make the most of their money. She gives seminars at universities and for associations, interviews PhDs on her podcast, and creates courses and workshops on taxes, investing, and more. Emily holds a PhD in biomedical engineering from Duke University and lives in southern CA with her husband and two children.

Workshop Title Image

Emily Roberts Image