



# ACCOUNTING ★ ACADEMY ★

## 2018-19 SCHOOL CATALOG

(And Veterans' Information Bulletin)



### Accounting, Administrative Assistant, Tax Preparer Job Training Certificate Programs

Prospective students may request a copy of this catalog either in written form and/or electronically.

**Effective January 1, 2018 through December 31, 2019**



*“Some people dream of success...  
while others wake up and work at it.”*

#### **SAN DIEGO CAMPUS**

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## The Value of Career/Vocational Training

Many people feel their best option after high school is to go to a college or university and earn a bachelor's degree. While this isn't a bad plan, there may be a better option. A career training school offers many benefits that a four-year curriculum cannot...and it is often the more logical choice.

When someone graduates from college after four years, they get a degree and are ready to look for a job. The only problem is, they don't know where to start...their college courses did not give them the practical knowledge and skills employers look for in an applicant. They were never fully prepared for their chosen career.

How can a career training school help you get around this? There are many different ways that a career training school, or vocational college, will better prepare you for the real world.

- ▶ Practical Classes - Vocational schools offer a shorter program because they don't require you to take general education classes...the same ones you had in high school. The courses are highly focused and concentrate on a particular trade or skill-set.
- ▶ Career Programs - Career schools offer you classes where you actually learn how to perform a job instead of just giving you a general idea. They offer hands-on experience, the kind employers require. Courses offer real-world education, not theories and concepts.
- ▶ Time - Career colleges train you in a significantly shorter period of time so that you spend less time in the classroom and more time getting a job and earning a salary.
- ▶ Job Placement - Career training schools make sure you're prepared to get a job and keep that job. They give you the skills to step into your career immediately, with minimal on-the-job training.

Career training schools are geared toward making sure you succeed in a real-world environment. Their main goal is to get you trained and into a well-paying job. The programs are practical and insure that you have the knowledge and skills to succeed in your chosen field. If you're unsure about the time and cost commitment of a four-year college curriculum, consider a more practical alternative: consider a career training school.



*“Some people dream of success...  
while others wake up and work at it.”*

***Welcome to our The Accounting Academy Job Training Program catalog!***

***Like many people, you're probably wondering...***

- ▶ Why learn accounting, administrative assistant, tax preparation job skills?
- ▶ Don't I need a college degree to do this type of work?
- ▶ Are these careers I would like and be good at?



***Why learn accounting, admin assistant, tax preparation job skills?***

Accounting, clerical, and tax skills are the language of business, and no matter what your occupation, it is important to understand the fundamentals of finance and office work. However, the best reason to develop these skills is to make it your life's work. A career in these fields offer a strong potential for advancement, interesting work, job security and mobility, choice of industries and businesses, good working conditions, and...excellent monetary rewards over the long-term.

***Don't I need a college degree to get hired in these jobs?***

No, definitely not. There are numerous entry-level, accounting, admin assistant and tax jobs that don't require a college degree: accounting technician; accounts receivable/billing clerk; accounts payable clerk; payroll clerk; bookkeeper; accounting clerk; and auditing clerk. Or, you could start your own consulting service. In fact, a college curriculum is not really designed to teach students hands-on, real-world, practical vocational job skills.

***Are these careers I would like and be good at?***

Accounting, admin assistant, and tax preparation is not for everyone. It demands high standards and above-average abilities. You must be reasonably intelligent and be willing to think and use reason and rationality, and to act independently with integrity and honesty. In addition, the nature of the work requires strict attention to detail, an affinity for numbers, a high level of productivity, an ability to maintain confidentiality, and good technical and communication skills. You'll also need to know or be able to develop basic typing and computer skills in the areas of data entry, word processing and spreadsheet preparation.

*Visit the U.S. Department of Labor and the California Employment Development Department websites for additional comprehensive information about accounting, administrative assistant, and tax preparer jobs and their future occupational outlook.*



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## Job Training Programs - Overview and General Information

### COURSE CODE AA01 - ACCOUNTING AND BOOKKEEPING JOB TRAINING PROGRAM

This job-training program specializes in preparing adult students for entry and mid-level positions in bookkeeping and accounting as accounting clerks and bookkeepers trained for staff-level jobs in the areas of general accounting, bookkeeping, billing and collection, accounts payable, and payroll.

Students work hands-on with real-world accounting practice sets consisting of realistic-looking and colorful source documents: sales invoices, vendor bills, checks, receipts, employee time sheets, bank statements, etc. Over the course of the program, they complete five manual sets of books; a dozen QuickBooks practice sets, and ten Sage 50 (previously Peachtree) sets of books. In addition, they are taught no-look ten-key at a high level of proficiency.

Class Hours	Class Times	Class Days	Total Hours	Program Length	Cost
4.5 Hours Per Session	Morn: 8:30am-1pm Mid-Day: 1pm-5:30pm Evenings: 5pm-9:30pm	Mon-Thurs	450	6 Mos/25 Weeks	\$8,500

### COURSE CODE AA02 - ADMINISTRATIVE ASSISTANT JOB TRAINING PROGRAM

This program offers job training in basic and technical office skills, as well as a variety of general and specialized clerical duties required by every business. This includes, but not limited to typing, ten-key, computer hardware and software concepts, Microsoft Office suite, and good written, oral, telephone, and email communication skills. In addition, the program will teach students how to create and maintain organized files and records, learn good telephone habits, develop strong proofreading and editing skills for grammar and spelling, become competent in the use of basic business math, and acquire a basic knowledge of bookkeeping.

Class Hours	Class Times	Class Days	Total Hours	Program Length	Cost
4.5 Hours	Morn: 8:30am-1pm Mid-Day: 1pm-5:30pm Evenings: 5pm-9:30pm	Mon-Thurs	234	3 Mos/13 Weeks	\$4,950

### COURSE CODE AA03 - TAX PREPARER JOB TRAINING PROGRAM

Job training includes, but not limited to, interviewing clients, prepare or assist in preparing simple to intermediate income tax returns for individuals and/or small businesses, compute taxes owed or overpaid, using adding machines, computers, and software, follow tax form instructions and tax tables. Technology skills include, but not limited to, basic computerized tax preparer software, electronic mail software, database software, electronic mail software, and keyboarding and ten-key proficiency.

Class Hours	Class Times	Class Days	Total Hours	Program Length	Cost
4.5 Hours	Morn: 8:30am-1pm Mid-Day: 1pm-5:30pm Evenings: 5pm-9:30pm	Mon-Thurs	108	1.5 Mos/6 Weeks	\$2,250

## The Accounting Academy

Syllabus: Job Training Program Course Code AA01 - Accounting & Bookkeeping Page 1 of 2

<b>WEEK 01</b>		<b>WEEK 03</b>		<b>WEEK 06</b>	
<b>ORIENTATION/10-KEY/MATH</b>		<b>BASIC ACCOUNTING INFORMATION AND THE BOOKS OF ACCOUNT</b>		<b>INVENTORY, PREPAID EXPENSES, FIXED ASSETS, ACCOUNTS PAYABLE</b>	
Student Orientation		Accounting Rules and Concepts		Accounting for Inventory	
School Disclosures	0.5	Lecture	1.0	Lecture	1.0
Student Rights	0.5	True/False Quiz	1.0	True/False Quiz	1.0
Career Goals	0.5	The Accounting Process		Three Practice Sets	3.0
The World of Accounting	0.5	Lecture	1.0	Markups and Margins	
World of Accounting Lecture	0.5	True/False Quiz	1.0	Lecture	1.0
True/False Quiz	0.5	Accounting for Time, Calendar, Dates		Four Practice Sets	3.0
Multiple Choice Quiz	0.5	Lecture	1.0	Accounting for Prepaid Expenses	
Tools of the Trade	0.5	True/False & Multiple Choice Quiz	1.0	Lecture	1.0
Ten-Key by Touch	0.5	Days of the Month Exercise	1.0	True/False Quiz	1.0
Ten-Key Lecture	0.5	The World of Accounts		One Practice Set - Two Parts	2.0
Ten-Key Study Guide	0.5	Lecture	1.0	Accounting for Fixed Assets	
Ten-Key Worksheets	0.5	True/False Quiz	1.0	Lecture	1.0
Mastering the Calculator	0.5	The Chart of Accounts		True/False & Multiple Choice Quiz	1.0
Calculator Lecture	0.5	Lecture	1.0	Depreciation Practice Set	3.0
Calculator Study Guide	0.5	True/False Quiz	1.0	Total Week 6	18.0
Review of Calculator Instructions	0.5	The Six Journals		<b>WEEK 07</b>	
Sales Tax Keys - Exercise	0.5	Lecture	1.0	<b>SECOND TWO MANUAL ACCOUNTING AND BOOKKEEPING PRACTICE SETS</b>	
Sale/Cost/Margin Keys - Exercise	0.5	True/False & Multiple Choice Quiz	1.0	Furniture Store	9.0
Percentage Keys - Exercise	0.5	The General Ledger		Retail/Wholesale Bakery	9.0
Basic Math Review	0.5	Lecture	1.0	Total Week 7	18.0
Basic Math Lecture	0.5	True/False & Multiple Choice Quiz	1.0	<b>WEEK 08</b>	
Basic Math Quizzes 1 - 3	0.5	The Five General Ledger Account Types		<b>COMPLETE PRACTICE SETS, AP, ACCRUED EXPENSES, ACCOUNTING FOR ERRORS</b>	
Mastering Mental Math	0.5	Lecture	1.0	Complete Bakery Practice Set	9.0
Mental Math Video (1-4)	0.5	General Ledger Account	1.0	Accounts Payable	
Mental Math Exercises	0.5	Classification Exercise	1.0	Lecture	1.0
Mental Math Review Lecture	0.5	Total Week 3	18.0	True/False & Multiple Choice Quiz	2.0
Mental Math Exercises	0.5	<b>WEEK 04</b>		Accrued Expenses	
Understanding Negative Numbers	0.5	<b>FINANCIAL STATEMENTS, ACCOUNTING FOR CASH, ACCOUNTS RECEIVABLE</b>		Lecture	1.0
Lecture	0.5	Financial Statements		True/False & Multiple Choice Quiz	1.0
True/False Quiz	0.5	Lecture	1.0	Accounting for Errors	
Negative Numbers Exercise	0.5	True/False Quiz	1.0	Lecture	1.0
Simple and Compound Interest	0.5	Financial Statement Ratio Analysis		True/False & Multiple Choice Quiz	1.0
Lecture	0.5	Lecture	1.0	Accounting for Errors Exercises	2.0
True/False Quiz	0.5	True/False Quiz	1.0	Total Week 8	18.0
Simple Interest Exercise	0.5	Two Practice Sets	2.0	<b>WEEK 09</b>	
Compound Interest Exercise	0.5	Accounting for Cash		<b>PAYROLL AND SALES AND USE TAX</b>	
Total Week 1	18.0	Lecture	1.0	Payroll	
<b>WEEK 02</b>		True/False & Multiple Choice Quiz	1.0	Lecture - Overview	1.5
<b>THE ACCOUNTING EQUATION AND DEBITS AND CREDITS</b>		Accounting for Cash Practice Sets		True/False Quiz	1.0
The Accounting Equation		Two-Month Bank Reconciliation	2.0	Lecture - Mastering Payroll	1.5
Lecture	0.5	Daily Cash Report	2.0	Seven Payroll Quizzes & Practice Set	4.0
Accounting Equation: 3 Prac Sets	1.0	Twelve-Month Cash Flow Forecast	2.0	Law Firm Payroll Practice Set	3.0
The Accounting Equation & Debits & Credits		Accounting for Accounts Receivable		Sales & Use Tax	
Lecture	0.5	Lecture	1.0	Lecture - Overview	1.0
Introduction to Debits & Credits		True/False & Multiple Choice Quiz	1.0	True/False Quiz	1.0
Lecture	0.5	Accounts Receivable Practice Sets (3)	2.0	Instructor Led Sales & Use Tax Return	1.5
True/False Quiz	0.5	Total Week 4	18.0	Student Sales & Use Tax Practice Return	3.5
Entering Debits & Credits into General Accounts	1.0	<b>WEEK 05</b>		Total Week 9	18.0
T Accounts: A Debit & Credit Memory Tool		<b>FIRST TWO MANUAL PRACTICE SETS</b>		<b>WEEK 10</b>	
Lecture	1.0	<b>Landscaping Company</b>		<b>FINAL TWO MANUAL ACCOUNTING AND BOOKKEEPING PRACTICE SETS</b>	
T Account Practice Set	1.0	Set up company General Ledger	1.5	Architectural Firm	9.0
Transactions Using Debits & Credits and the 5 General Ledger accounts		Record Transactions into Journals	1.5	Retail Garden Center	9.0
Student Debit & Credit Exercises		Post from Journals to General Ledger	1.5	Total Week 10	18.0
Instructor-Led First Beginning Worksheet	1.0	Reconcile Bank Account	1.5	<b>WEEK 11</b>	
Student: Second Beginning Worksheet	1.0	Prepare Trial Balance & Financials	1.5	<b>CREDIT AND COLLECTION, MID-TERM GENERAL JOURNAL ENTRY EXAM</b>	
Student: Two Intermediate Worksheets	1.0	Perform Financial Ratio Analysis	1.5	Credit and Collection	
Student: Two Advanced Worksheets	1.0	<b>Law Firm</b>		Credit Lecture & Collection Lecture	3.5
Student Debit & Credit Practice Sets		Set up company General Ledger	1.5	True/False & Multiple Choice	3.0
Debit & Credit Exercises 1 through 3	2.0	Record Transactions into Journals	1.5	Credit/Collection Practice Sets	2.5
Debit & Credit Exercises 4 through 6	2.0	Post from Journals to General Ledger	1.5	Journal Entry Mid-Term Exam	9.0
Debit & Credit Exercises 7 through 9	2.0	Reconcile Bank Account	1.5	Total Week 11	18.0
Debit & Credit Exercise 10	2.0	Prepare Trial Balance & Financials	1.5		
Total Week 2	18.0	Perform Financial Ratio Analysis	1.5		
		Total Week 5	18.0		

## The Accounting Academy

Syllabus: Job Training Program Course Code AA01 - Accounting & Bookkeeping Page 2 of 2

WEEK 12		WEEK 15		WEEK 20	
<b>REVIEW OF PRINCIPLES, PRACTICES AND PROCEDURES</b>	Hours	<b>QUICKBOOKS PRACTICE SET 01 JS LANDSCAPING COMPANY</b>	Hours	<b>PEACHTREE PRACTICE SET NO. 1 JS LANDSCAPING COMPANY</b>	Hours
Accounting Concepts/Principles Review		Instructor-Led Practice Set		Instructor Overview	2.5
Lecture	1.0	Create the Company File	0.5	Create the Company File	0.5
True/False & Multiple Choice Quiz	2.0	Using Advanced Setup	0.5	Using Advanced Setup	0.5
Practices and Procedures Review		Customize Preferences	0.5	Customize Using Global Options	0.5
Lecture	1.0	Overview of Preferences	0.5	Customize Peachtree Using Defaults	0.5
True/False & Multiple Choice Quiz	2.0	The Key Preferences to Customize	0.5	Company	0.5
World of Accounts Review		Set Up The Chart of Accounts	0.5	Customers	0.5
Lecture	1.0	Edit QuickBooks Default Accounts	0.5	Vendors	0.5
True/False & Multiple Choice Quiz	2.0	Sub-Accounts not Recommended	0.5	Employees	0.5
Chart of Accounts Review		Use Correct Account Types	0.5	Set Up The Chart of Accounts	0.5
Lecture	1.0	Print Chart of Accounts	0.5	Print Chart of Accounts	0.5
True/False & Multiple Choice Quiz	2.0	Additional QuickBooks Customization	0.5	Prepare and Save General Ledger	0.5
Review of the Six Journals		Customize General Ledger	0.5	Set Up Customers	0.5
Lecture	1.0	Prepare and Save General Ledger	0.5	Set Up Items List (Sales Items)	0.5
True/False & Multiple Choice Quiz	2.0	Add G/L Account Columns to Lists	0.5	Set Up Vendors	0.5
Review of the General Ledger		Set Up Customers	0.5	Set Up Employees	0.5
Lecture	1.0	Set Up Items List (Sales Items)	0.5	Record Transactions for the Period	0.5
True/False & Multiple Choice Quiz	2.0	Set Up Vendors	0.5	Sales Journal - Cash & On Account	0.5
Total Week 12	18.0	Set Up Employees	0.5	Purchases Journal-Vendor Invoices	0.5
<b>WEEK 13</b>		Record Transactions for the Period	0.5	Cash Receipts Journal - All Types	0.5
<b>FINANCIAL STATEMENT &amp; RATIO REVIEW, INTERNAL CONTROL, BUSINESS LAW</b>		Sales Journal-Customer Sales	0.5	Cash Payments Journal - All Types	0.5
Financial Statement Review		Purchases Journal-Vendor Invoices	0.5	Payroll Journal: Pay Employees	0.5
Lecture	1.0	Cash Receipts Journal 1-Customers	0.5	General Journal-Misc.Transactions	0.5
True/False & Multiple Choice Quiz	2.0	Cash Receipts Journal 2-All Others	0.5	Other Tasks	0.5
Financial Statement Ratio Review		Cash Payments. Journal 1-Vendors	0.5	Prepare and Save a Trial Balance	0.5
Lecture	1.0	Cash Payments Journal 2-All Others	0.5	Match Your Balances to Solution	0.5
True/False & Multiple Choice Quiz	2.0	Payroll Journal: Pay Employees	0.5	Correct All Errors	0.5
Internal Control		General Journal-Misc.Transactions	0.5	Print Final Corrected Trial Balance	0.5
Lecture	1.0	Other Tasks	0.5	Reconcile the Bank Account	0.5
True/False & Multiple Choice Quiz	2.0	Prepare and Save a Trial Balance	0.5	Print and Save Bank Reconciliation	0.5
Business Law		Match Your Balances to Solution	0.5	Print and Save Balance Sheet	0.5
Lecture	2.0	Correct All Errors	0.5	Print and Save Income Statement	0.5
True/False & Multiple Choice Quiz	4.0	Print Final Corrected Trial Balance	0.5	Total Week 20	18.0
Record Retention		Reconcile the Bank Account	0.5	<b>WEEKS 21 through 23</b>	
Lecture	1.0	Print and Save Bank Reconciliation	0.5	<b>PEACHTREE PRACTICE SETS 02 TO 10 AND FINAL LAST SECTIONS</b>	
True/False & Multiple Choice Quiz	2.0	Print and Save Balance Sheet	0.5	(02) Anderson Law Firm	6.0
Total Week 13	18.0	Print and Save Income Statement	0.5	(03) Freedom Furniture Store	6.0
<b>WEEK 14</b>		Total Week 15	18.0	(04) Betty's Bakery	6.0
<b>INTRODUCTION TO QUICKBOOKS</b>		<b>WEEKS 16 through 19</b>		(05) Atlas Architects	6.0
General Overview		<b>QUICKBOOKS PRACTICE SETS NO 2 THROUGH 12</b>		(06) American Garden Center	6.0
Lecture	1.0	(02) Anderson Law Firm	6.5	(07) Cricket Men's Store	6.0
True/False & Multiple Choice Quiz	1.0	(03) Freedom Furniture Store	6.5	(08) Pampered Pooch Dog Kennel	6.0
QuickBooks Home Page & Journals		(04) Betty's Bakery	6.5	(09) Vicki's Video Store	6.0
Exercise: Locating the Six Journals	1.0	(05) Atlas Architects	6.5	(10) Sterling Surf Shop	6.0
QuickBooks Preferences		(06) American Garden Center	6.5	Total Week 21	18
Exercise: Customizing Preferences	1.0	(07) Cricket Men's Store	6.5	Total Week 22	18
QuickBooks General Ledger		(08) Pampered Pooch Dog Kennel	6.5	Total Week 23	18
Exercise: Creating a True G/L	2.0	(09) Vicki's Video Store	6.5	Total Weeks 21 through 23	54
QuickBooks Beginning Balances		(10) Sterling Surf Shop	6.5	<b>WEEKS 24 through 25</b>	
Exercise: General Ledger Balances	2.0	(11) Republic Plumbing	6.5	<b>PROGRAM REVIEW/JOB PLACEMENT</b>	
Exercise: Customer Balances	2.0	(12) Victory Garden Supply	6.5	How to Speak with Confidence & Poise	4.5
Exercise: Vendor Balances	2.0	Total Week 16	18	Cover Letter & Resume Preparation	9.0
Exercise: Inventory Balances	2.0	Total Week 17	18	Interviewing Tips and Techniques	4.5
QuickBooks Manual Payroll		Total Week 18	18	Start Your Own Bookkeeping Business	4.5
Exercise: Configuring QuickBooks	2.0	Total Week 19	18	Accountant Hiring Final Exam	9.0
Exercise: Customize PR Item List	2.0	Total Weeks 16 through 19	72	Final Day Questions, Review Graduation	4.5
Total Week 14	18.0			Total Weeks 24 and 25	36.0
				Total Weeks 1 and 25	450.0

## The Accounting Academy

### Syllabus: Job Training Program Course Code AA02 - Administrative Assistant

<b>WEEK 1</b>	<b>Hours</b>	<b>WEEK 6: WORD-REPORTS</b>	<b>Hours</b>	<b>LESSON 10: POWERPOINT- CREATING, DELIVERING A PRESENTATION</b>	<b>Hours</b>
Student Orientation	4.0	Formatting Reports	1.5	Presenting PowerPoint	3.0
Typing, Ten-Key, Keyboarding	6.0	Using Paragraph Formatting	1.5	Using Document Themes	3.0
World of Admin Assistant	6.0	Indenting Text	1.5	Creating a Basic Presentation	3.0
Basic Computer Hardware	2.0	Using Custom Tab Stops	1.5	Delivering the Slide Show	3.0
Total	18.0	Using Bulleted and Numbered List:	1.5	Getting Help	3.0
<b>WEEK 2 - BASIC COMPUTER</b>		Setting Line Breaks	1.5	Working with Slides	3.0
Computer Software	4.0	Using Borders and Shading	2.0	Total Week 10	18.0
Starting Windows & Programs	3.0	Inserting Page Numbers	2.0	<b>WEEK 11: POWERPOINT-DESIGNING THE PRESENTATION</b>	
Controlling Windows	3.0	Basic Business Math	5.0	Working with Outlines	2.0
Organization Skills	4.0	Total Week 6	18.0	Working with Word Integration	2.0
Time Management	4.0	<b>WEEK 7: EXPLORING EXCEL</b>		Formatting Your Presentation	2.0
Total	18.0	Presenting Excel	3.0	Using the Format Painter	2.0
<b>WEEK 3 - BASIC COMPUTER</b>		Exploring the Excel Program Windo	3.0	Using the Slide Sorter	2.0
Browsing User Files	3.0	Entering Data in Excel	3.0	Organizing with Sections	2.0
Working with Folders	3.0	Working with Numbers	3.0	Printing Your Presentations	2.0
Moving and Copying Files	3.0	Understanding Save Concepts	3.0	Basic Bookkeeping-QuickBooks	4.0
Deleting Files and Folders	3.0	Business Vocabulary & Grammar	3.0	Total Week 11	18.0
Backing Up Your Files	3.0	Total Week 7	18.0	<b>WEEK 12: EXPLORING ACCESS</b>	
Telephone Skills	3.0	<b>WEEK 8: EXCEL-EDITING, VIEWING AND PRINTING WORKSHEETS</b>		Defining Access Databases	2.0
Total	18.0	Opening Workbooks	2.0	Exploring the Access Environment	2.0
<b>WEEK 4 - WORD BASICS</b>		Editing Entries	2.0	Elements of the Access Window	2.0
Presenting Word	2.0	Selecting Cells and Ranges	2.0	Identifying Features of the Databa	2.0
Starting Word	2.0	Working with Cut, Copy, and Paste	2.0	Window	2.0
Opening Documents	2.0	Using Undo and Redo	2.0	Creating Tables in Datasheet View	2.0
Working with Word Interface	2.0	Clearing Cell Contents and Format:	2.0	Previewing and Printing Data	3.0
Navigating in a Word Document	2.0	Using Auto Features	2.0	Closing a Database/Exiting Access	3.0
Closing Documents	2.0	Exploring the Many View of Excel	2.0	Total Week 12	18.0
Starting a New, Blank Document	2.0	Printing Worksheets	2.0	<b>WEEK 13: DESIGNING A DATA BASE</b>	
Getting Help in Word	2.0	Total Week 8	18.0	Planning a Database Design	2.0
Exiting from Word	1.0	<b>WEEK 9: EXCEL-WORKING WITH FORMULAS AND FUNCTIONS</b>		Enabling Macros	2.0
Positive Attitudes at Work	1.0	Using AutoSum Formula	3.0	Navigating Records in a Table	2.0
Total	18.0	Status Bar Functions/Customizing	3.0	Creating Database Objects	2.0
<b>WEEK 5: WORD-CREATING AND EDITING BUSINESS LETTERS</b>		Creating Formulas	3.0	Creating Tables Using Design View	2.0
Defining Typical Letter Styles	1.5	Using Cell Referenced in Formulas	3.0	Managing Database Objects	2.0
Inserting Text	1.5	Displaying and Printing Formulas	2.0	Final Exam	6.0
Saving Your Work	1.5	Using Formula AutoComplete	2.0	Total Week 13	18.0
Selecting Text	1.5	Using Insert Function	2.0	Total Weeks 1 through 13	234.0
Editing Text	1.5	Total Week 9	18.0		
Working with AutoCorrect	1.5				
Copying and Moving Text	1.5				
Switching Between Documents	1.5				
Using Page Layout Options	1.5				
Working with Print/Print Preview	1.5				
Business Etiquette	3.0				
Total	18.0				

## The Accounting Academy

### Syllabus: Job Training Program Course Code AA03 - Tax Preparer

WEEK 1 - ORIENTATION/TAX PAYMENTS	Hours	WEEK 3 - GAIN/LOSSES/DEDUCTIONS	Hours	WEEK 5 - CALIFORNIA TAX CONCERNS	Hours
Student Orientation	1.0	Gains & losses - property	1.0	Residency requirements	1.0
General Filing Issues	1.0	Calculating the sales price	1.0	Filing requirements	1.0
Ethics	0.5	Determining the adjusted basis	1.0	Community property	1.0
Who must file a return	0.5	Non-taxable transactions	1.0	Filing status	1.0
Which forms to use	0.5	Installment sales rules	1.0	Standard deduction	1.0
Special tax provisions	0.5	Capital asset defined	1.0	Personal exemption credit	1.0
When are returns due	0.5	Holding period requirements	1.0	Dependents	1.0
Where are returns to be filed	0.5	Capital gains and losses	1.0	California adjustments	1.0
Other filing issues	0.5	Recapture depreciation	1.0	Itemized deductions	1.0
Return assembly & Processing	0.5	IRAs	0.5	Other conformity issues	1.0
Correcting Mistakes	0.5	Self-employment plans	0.5	IRA differences	1.0
Penalties	0.5	Alimony paid to spouse	0.5	Sales and exchanges	1.0
Interest on Overpayment	0.5	Reimbursed employee expenses	0.5	Other credits	1.5
Underpayment of taxes	0.5	Moving expenses	0.5	Estimated taxes	1.5
Preparer Filing responsibilities	0.5	Interest on student loans	0.5	Penalties	1.5
Amended returns	0.5	Miscellaneous adjustments	0.5	Non-resident issues	1.5
Filing status	0.5	Standard deduction	0.5	Total	18.0
Five types	0.5	Itemized deductions	0.5		
Requirement of each	0.5	Residence interest	0.5	<b>WEEK 6 - SPECIAL CALIFORNIA TOPICS</b>	
Special situations	0.5	Investment interest	0.5	Sales & use tax collection	1.0
Abandoned spouse	0.5	Real estate taxes	0.5	Independent contractor issues	1.0
Divorce & separation	0.5	State and local taxes	0.5	Voluntary contributions	1.0
Decedent issues	0.5	Personal property taxes	0.5	SDI & VPD issues	1.0
Ememptions	0.5	Medical expenses	0.5	Power of attorney procedures	1.0
Taxpayer related-husband/wife	0.5	Charitable & casualty losses	0.5	No section 530 relief as federal	1.0
Dependency related	0.5	Wagering losses	0.5	Unique statutory employees	1.0
Exemption AGI phase-out	0.5	Miscellaneous deductions	0.5	Unique statutory non-employees	1.0
Tax payment issues	0.5	Total	18.0	Independent contractor reporting	1.0
Tax withholding	0.5			California depreciation rules	1.0
Estimated tax	0.5	<b>WEEK 4 - CREDITS</b>		When a form 3885A is required	1.0
Payment by credit card	0.5	Child tax credit	1.5	Changing depreciaton methods	1.0
Requirement to pay	0.5	Child care & disabled care	1.5	MACRS differences	1.0
Penalty for underpayment	0.5	Credit for elderly & disabled	1.5	ACRS re state vs federal	1.0
Exceptions to penalty	0.5	Foreign tax credit	1.5	ACA and CAP & repair	1.0
Totasl	18.0	Earned income credit	1.5	All applicable forms	1.0
		Off road use of fules	1.5	Final exam	2.0
<b>WEEK 2 - PAYMENT TAX ISSUES/INCOME</b>		Overpayment of FICA credit	1.0	Total	18.0
Wages, salaries, tips, etc.	1.5	Education credits	1.0	Total Weeks 1 through 6	108.0
Interest income	1.5	Adoption credit	1.0		
Dividens	1.0	Mortgage interest credit	1.0		
Retirement & Social Security	1.0	Hope credit	1.0		
Rental Income & expenses	1.0	Lifetime learning credit	1.0		
Self-employment income	1.0	Recapture of education credits	1.0		
Farm income	1.0	Miscellaneous credits	1.0		
Hobby rules	1.0	Other credit issues	1.0		
Passive activity rules	1.0	Total	18.0		
Miscellaneous income	1.0				
Sale of residence	1.0				
Scholarships and fellowships	1.0				
Debt discharges	1.0				
Gifts & inheritances	1.0				
Alimony	1.0				
Property settlement	1.0				
Child support payments	1.0				
Total	18.0				

## The Accounting Academy

### What's the difference between our accounting job training program compared to College and University Courses?

#### Accounting Academy Program

#### College/University Curriculum

##### *Mission*

Train students for entry and staff level jobs in the accounting and bookkeeping field or to start their own bookkeeping business.

Provide a general education and advanced information related to a specific field of study for upper management positions.

##### *Time • Class Size • Personalized Instruction • Cost*

Twenty-five week, 450 hour program of hands-on, real-world, repetitive training with strong instructor support. Small classes and cost of only \$8,500.

A commitment of four to five years. Large class sizes of up to 50 or more. Professors have very limited time to spend with students. Cost: \$50k-\$100k

##### *Curriculum*

Proprietary training program developed by a CPA with years of significant real-world experience combined with valuable third-party training resources,

Concentrates on complex, advanced theories and esoteric transactions related primarily to very large multi-national corporations.

##### *Emphasis*

Small and medium-sized sole proprietors since 89% of all U.S. businesses have fewer than twenty employees.

Big, public corporations. These firms account for only two percent of all businesses in the United States.

##### *Methodology*

Practical, real-world training utilizing true-to-life business documents, 10-key, and multiple manual, QuickBooks, and Peachtree accounting practice sets.

Finance concepts and theory related to advanced corporate debt and equity transactions applicable to large, publicly-traded corporations.

##### *Instructors*

Trainers are seasoned professionals and entrepreneurs with years of broad-based and real-world accounting and bookkeeping experience.

Professors are academically oriented with limited real-world, practical accounting and bookkeeping experience in the profession.

##### *Materials*

Real-world training materials: realistic source documents for both manual and computerized accounting practice sets. Heavy concentration on AR, AP, payroll, account reconciliation, journal entries, and financial statement preparation/analysis.

Expensive textbooks and related materials focused primarily on big business. Virtually no hands-on, real-world training on the day-to-day tasks and work in demand at the entry or staff level of accounting.

##### *Results*

You receive real-world training and practical skills to qualify for entry-level accounting jobs...and you will be qualified to start your own bookkeeping business.

You receive a degree in your field of study and have no valuable, specific, real-world skills to offer a prospective employer.

## The Accounting Academy

### Bookkeeping and Accounting Occupational Outlook

Employment of bookkeeping, accounting, and auditing clerks is projected to decline 8 percent from 2014 to 2024. Technological change is expected to reduce demand for these workers. ... Therefore, economic growth should create some openings for **bookkeepers** to keep these organizations' financial records.



**UNITED STATES DEPARTMENT OF LABOR - BUREAU OF LABOR STATISTICS**  
 Website: [www.bls.gov/ocos144.htm](http://www.bls.gov/ocos144.htm)

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# OCCUPATIONAL OUTLOOK HANDBOOK

Office and Administrative Support >

## Bookkeeping, Accounting, and Auditing Clerks

EN ESPAÑOL | PRINTER-FRI

- Summary
- What They Do
- Work Environment
- How to Become One
- Pay
- Job Outlook**
- State & Area Data
- Similar Occupations
- More

### Job Outlook

About this section

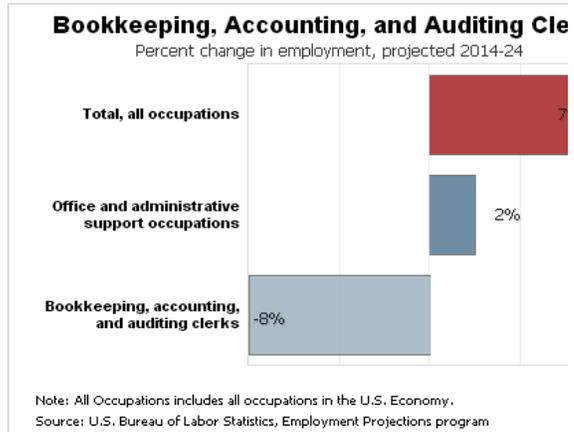
Employment of bookkeeping, accounting, and auditing clerks is projected to decline 8 percent from 2014 to 2024.

Technological change is expected to reduce demand for these workers. Software improvements, such as cloud computing, have automated many of the tasks performed by bookkeepers. As a result, bookkeepers will increasingly be hired on a contract basis through third party bookkeeping firms, rather than being held on staff.

Demand for bookkeeping is tied particularly to the growth of small businesses, which tend to hire bookkeepers rather than accountants due to their relatively lower cost. Therefore, economic growth should create some openings for bookkeepers to keep these organizations' financial records.

### Job Prospects

Because bookkeeping, accounting, and auditing clerks make up a large occupation, there will be a large number of job openings from workers leaving the occupation. Thus, opportunities to enter the occupation should be plentiful.



### Summary

Quick Facts: Bookkeeping, Accounting, and Auditing Clerks	
2016 Median Pay ?	\$38,390 per year \$18.46 per hour
Typical Entry-Level Education ?	Some college, no degree
Work Experience in a Related Occupation ?	None
On-the-job Training ?	Moderate-term on-the-job training
Number of Jobs, 2014 ?	1,760,300
Job Outlook, 2014-24 ?	-8% (Decline)
Employment Change, 2014-24 ?	-148,700

## The Accounting Academy

### Administrative Assistant Occupational Outlook

**Job Outlook.** Employment of secretaries and administrative assistants is projected to grow 3 percent from 2014 to 2024, slower than the average for all occupations.



**UNITED STATES DEPARTMENT OF LABOR - BUREAU OF LABOR STATISTICS**  
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## Secretaries and Administrative Assistants

EN ESPAÑOL

Summary | What They Do | Work Environment | How to Become One | Pay | Job Outlook | State & Area Data | Similar Occupations | More Info

### Summary

Quick Facts: Secretaries and Administrative Assistants	
2016 Median Pay <sup>?</sup>	\$37,230 per year \$17.90 per hour
Typical Entry-Level Education <sup>?</sup>	High school diploma or equivalent
Work Experience in a Related Occupation <sup>?</sup>	<a href="#">See How to Become One</a>
On-the-job Training <sup>?</sup>	<a href="#">See How to Become One</a>
Number of Jobs, 2014 <sup>?</sup>	3,976,800
Job Outlook, 2014-24 <sup>?</sup>	3% (Slower than average)
Employment Change, 2014-24 <sup>?</sup>	118,800

**What Secretaries and Administrative Assistants Do**

Secretaries and administrative assistants perform clerical and administrative duties. They organize files, prepare documents, schedule appointments, and support other staff.

**Work Environment**

Although secretaries and administrative assistants work in nearly every industry, many are employed in schools, hospitals, governments, and legal and medical offices. Most work full time.

**How to Become a Secretary or Administrative Assistant**

High school graduates who have experience using computer software applications usually qualify for entry-level positions. Although most secretaries learn their job in several weeks, many legal and medical secretaries require additional training to learn industry-specific terminology. Executive secretaries usually need



Secretaries and administrative assistants provide clerical and organizational support.

# The Accounting Academy

## Tax Preparer Occupational Outlook

**Employment Growth Rates.** Employment for tax preparers is expected to grow between 8 and 14 percent between 2012 and 2022, according to O\*Net Online. The Bureau of Labor Statistics estimates that job growth for accountants, who may also serve as tax preparers, will grow 13 percent between 2012 and 2022.



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## Occupational Employment Statistics

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- CONTACT OES

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**OES TOPICS**

- RESPONDENTS
- DOCUMENTATION
- SPECIAL NOTICES

### Occupational Employment and Wages, May 2016

#### 13-2082 Tax Preparers

Prepare tax returns for individuals or small businesses. Excludes "Accountants and Auditors" (13-2011).

[National estimates for this occupation](#)  
[Industry profile for this occupation](#)  
[Geographic profile for this occupation](#)

**National estimates for this occupation: Top**

Employment estimate and mean wage estimates for this occupation:

Employment <a href="#">(1)</a>	Employment RSE <a href="#">(3)</a>	Mean hourly wage	Mean annual wage <a href="#">(2)</a>	Wage RSE <a href="#">(3)</a>
70,030	2.8 %	\$21.80	\$45,340	1.7 %

Percentile wage estimates for this occupation:

Percentile	10%	25%	50% (Median)	75%	90%
Hourly Wage	\$9.42	\$11.80	\$17.57	\$27.83	\$38.58
Annual Wage <a href="#">(2)</a>	\$19,600	\$24,550	\$36,550	\$57,880	\$80,250

## The Accounting Academy

### California State License and Catalog Disclosures

#### Approval Disclosure Statement

The Accounting Academy, a division of American Business College, Inc., is a private educational institution, incorporated in the State of California.

- ◆ The school is approved to operate in the State of California based on provisions of the California Private Postsecondary Education Act of 2009, effective January 1, 2010.
- ◆ The institution was approved August 31, 2005 as a non-degree granting program and it has been continuously approved to date and through September 10, 2020.

For additional information, call or write the California Bureau for Private Postsecondary Education at (916) 431-6959, or fax at (916) 263-1897, 2535 Capital Oaks Drive, Suite 400, Sacramento, California 95798-0818. Or visit the Bureau's website at [www.bppe.ca.gov](http://www.bppe.ca.gov).

- ◆ Any questions a student may have regarding this catalog that have not been satisfactorily answered by the institution may be directed to the Bureau for Private Postsecondary Education at (916)431-6959, or fax at (916)263-1897, 2535 Capitol Oaks Drive, Suite 400, Sacramento, CA 95798-0818, or visit its website at [www.bppe.ca.gov](http://www.bppe.ca.gov).

- ◆ As a prospective student, you are encouraged to review this **School Catalog** prior to signing an **Enrollment Agreement**. You are also encouraged to review the **School Performance Fact Sheet**, which must be provided to you prior to signing an enrollment agreement.

- ◆ A student or any member of the public may file a complaint about this institution with the Bureau for Private Postsecondary Education by its toll-free number at (888) 370-7589 or by completing a complaint form, which can be obtained on the Bureau's website at: [www.bppe.ca.gov](http://www.bppe.ca.gov).

**Helpful Hint:** check out the [Bureau's Tips for Students to Consider Before Enrolling at a Private Postsecondary School](#) located at the back of this catalog.

## **The Accounting Academy**

### **School Pre-Enrollment Disclosures**

#### **NOTICE CONCERNING TRANSFERABILITY OF CREDITS AND CREDENTIALS EARNED AT OUR INSTITUTION**

The transferability of credits you earn at the Accounting Academy is at the complete discretion of the institution to which you may seek to transfer. Acceptance of the certificate you earn in the Accounting Academy is also at the complete discretion of the institution to which you may seek to transfer. If the certificate you earn at this institution is not accepted at the institution to which you seek to transfer, some or all of your course work at that institution. For this reason, you should make certain that your attendance at this institution will meet your educational goals. This may include contacting an institution to which you may seek to transfer after attending the Accounting Academy to determine if your certificate will transfer.

#### **Other Pre-Enrollment Disclosures**

- ◆ The school is currently not accredited by a national accreditation agency.
- ◆ The school makes no expressed or implied claim and/or any assurance that the will guarantee employment subsequent to graduation.
- ◆ The school makes no expressed or implied claim and/or any assurance that the will guarantee accounting and bookkeeping clients subsequent to the training.
- ◆ This training program does not provide English-as-a-Second-Language instruction.
- ◆ We make no expressed or implied claim about the salary you may earn after completing this program of instruction, or any claim that you may be able to repay a student loan the salary received at a job obtained following completion of this training program.
- ◆ We do not represent in any manner that this training program might lead to employment in an occupation or job title for which a state licensing examination is
- ◆ We do not offer state or federal student loan guarantees or other federal financial grant-in-aid programs at the present time.
- ◆ If a student obtains a loan to pay for the course of instruction, the student is personally responsible for repayment of the full amount of the loan plus interest, less the amount of any refund.
- ◆ The Accounting Academy is a private institution and is not affiliated with any public educational institution.
- ◆ The Accounting Academy has never filed, nor has it ever had filed against it, a petition bankruptcy. The institution does not have a pending petition in bankruptcy, is not operating as a debtor in possession, has not filed a petition within the preceding five years, nor has it had a petition in bankruptcy filed against it within the preceding five that resulted in reorganization Chapter 11 of the United States Bankruptcy Code.

## **The Accounting Academy**

### **School Mission**

#### **Mission Statement:**

The Accounting Academy's mission is to prepare students for entry-level employment full-time, part-time, temporary agency placement, self-employment, and/or to enhance current job skills in accounting and bookkeeping and related fields by providing a hands-on, real-world and practical education and training program in a positive, professional and supportive environment.

#### **Goals and Objectives:**

To provide a program of study and training that is educationally sound, current, high quality and real-world effective.

To maintain a clear and consistent admissions process that accurately represents the program and the institution while producing sufficient enrollments to sustain and maintain the program.

To provide effective student services that recognize individual differences and to ensure successful student retention, graduation, and employability where applicable.

To establish and maintain employer relationships to ensure industry contacts necessary for student success.

To demonstrate the effectiveness of private educational training, thereby providing essential skills to support a productive workforce.

To ensure proper and ethical administration of all financial aspects of the institution.

#### **Planning and Management:**

The institution has sound, written, one-year and multi-year plans that encompass both its educational and business objectives.

The plans support the mission, facilitate the accomplishment of the institutional goals, and are updated at least annually.

The plans include clearly defined specific objectives and operational strategies with time frames, resources, and measurable results identified for subsequent evaluation.

## **The Accounting Academy**

### **School History**

The development of the school curriculum and related educational and training materials began in 2000 and the initial application for licensure was submitted to the California Department of Consumer Affairs Bureau for Private and Post-Secondary Vocational Education in 2004. The Bureau awarded the school a temporary license to operate in August 2005 and a permanent license in 2006.

### **Background**

The school's proprietary accounting and bookkeeping curriculum was developed, designed and constructed by a seasoned California Certified Public Accountant (retired) with fifty years of 'real-world' continuous experience with companies of all sizes and at all levels of responsibility. His background included work at both private and public corporations, and large and small CPA firms. He also owned and operated a public accounting/consulting firm for a dozen years.

He decided to open a career/vocational school that specialized in basic accounting and bookkeeping job skills when he continuously encountered extreme difficulty in recruiting qualified people who were well-trained in all the key areas of basic accounting and bookkeeping: accounts receivable and payables; inventory; payroll journal entries; bank reconciliations; month-end closing; and preparation of financial statements.

Even college and university graduates with accounting degrees required significant hands-on job training: they had never seen a real set of books and had no idea how to record and post disbursements, deposits and invoices, prepare adjustments financial statements, etc. Their college curriculum was entirely oriented toward large, multi-national corporations with a heavy emphasis on financial theory. The real-life, day-to-day accounting and bookkeeping job skills required by small and medium-sized businesses were simply not included in their education program.

### **Major Milestones**

- 2004 - Obtained business license to operate as The Accounting Academy.
- 2004 - Submitted application for approval to operate to the BPPVE.
- 2005 - Opened San Marcos location in San Diego County.
- 2005 - Received temporary approval from BPPVE to operate.
- 2006 - Received permanent approval from BPPVE to operate.
- 2006 - Incorporated in California as American Business College, Inc.
- 2007 - Approved as a training provider by California Workers Compensation.
- 2007 - Approved as a training provider by San Diego Workforce Partnership.
- 2008 - Approved as a training provider by VA GI Bill & Defense Dept. MyCAA.
- 2009 - Branch location established in city of San Diego.
- 2010 - San Diego branch location approved by BPPE.
- 2011 - San Marcos campus temporarily closed pending new larger site.
- 2013 - New Carlsbad campus opened six miles from old San Marcos campus.
- 2014 - San Diego school relocated to a larger facility in same business park.
- 2016 - Carlsbad campus closed.
- 2016 - Filed application to SEVIS to train international students.

## The Accounting Academy

### School Ownership

#### ***Institution***

Corporate Name.....American Business College, Inc.  
(A sub-chapter S Corporation)

DBA Name.....The Accounting Academy  
(Website:theaccountingacademy.com)

San Diego Campus.....7283 Engineer Road Suite H  
San Diego, California 92111  
Tel:(858)836-1420 Fax:(858)836-1438  
Email: accountingacademy@sbcglobal.net

#### ***School Ownership***

Name..... William R. Setterlund, CPA (ret.)

Title..... President/School Director

Percent of Ownership..... 100%

Percent Owned Since..... August 2005

Street Address.....7283 Engineer Road Suite H

City/State/Zip.....San Diego, California 92111

Tel/Fax..... Tel:(858)836-1420 Fax:(858)836-1438

Email Address..... accountingacademy@sbcglobal.net

Website..... theaccountingacademy.com

## The Accounting Academy

### Facility and Equipment

#### Overview of Facility

The school's training center is located in the Kearny Mesa area of San Diego. The site is located in professionally maintained business park in a centrally-area of the city with sufficient student parking and special needs access. The inside of the school is configured in a modern, clean and professional office setting with adequate heating and cooling systems, natural light, etc.



7283 Engineer Rd. Suite H San Diego CA 92111

#### Overview of Equipment

The school maintains state-of-the-art general office and specialized business equipment, including: large, professional-grade desks and chairs; computers; monitors; keyboards and mice; printers; heavy-duty ten-key calculators; CD and video players; plasma televisions; scanners; electronic hole-punch and pencil sharpeners.



7283 Engineer Rd. Suite H San Diego CA 92111

#### Library and Other Learning Resources

The school maintains a limited library of books, periodicals, videos, and other training materials. Students may check out any of the learning resources for a maximum of one week after signing out for the materials with the instructor.

## **The Accounting Academy**

### **Admission Requirements**

#### **Overview**

The school accepts only those applicants who are capable of successfully completing the training program offered. Eligible students are those who have a high school diploma or General Education Diploma (GED) Certificate.

The State of California Department of Consumer Affairs, Bureau for Private Postsecondary Education, pursuant to the California Education Code requires each student admitted to an undergraduate degree program, or a diploma program, to possess a high school diploma or its equivalent, or otherwise successfully take and pass the relevant examination.

#### **Ability-to-Benefit Students**

The school does not offer specialized testing of prospective students who have not earned a high school diploma or GED. These prospective 'ability-to-benefit' students are therefore not qualified for admission to the training program.

#### **Age**

The minimum age for admission to the training program is 17 years old. A prospective student may be admitted prior to attaining 17 years of age if the student will reach the minimum age within the first half of the program. There is no maximum age limit for admission to the program.

#### **Testing**

A prospective student must complete and pass an entrance examination. The exam is a basic intelligence test which assesses basic clerical skills in the areas of math, grammar and spelling, and general cognitive abilities. If a student fails the test, he or she may request a re-test within two weeks after the failed test. A second failure will preclude admission to the program.

#### **Pre-Enrollment Assessment Interview**

A prospective student is required to meet with the School Director prior to enrollment for a pre-enrollment interview. The Director will assess the student's relative degree of individual integrity and character, evaluate the student's potential for gaining true benefit from the program, and make a determination with respect to the student's chances of success in the accounting profession.

## The Accounting Academy

### Admission Policies for Veterans and Students with Special Needs

#### **Veterans**

The school is an approved training provider of the United States Veterans Administration's Educational Benefit Program. The school welcomes veterans from all branches of the military. It is committed to assisting veterans in the admission process, including an evaluation of all of his or her previous education and training. Based on this evaluation, the school will determine the applicable veteran's earned credit in accordance with the school's Transfer of Credit policy.

#### **Students with Special Needs**

Students with special needs who meet the entrance criteria are encouraged to consider our training program. By working to create an accessible learning environment, the President/Director and faculty of the school endeavor to provide a program that will enable students with special needs to approach their training more effectively and to enhance understanding of student special needs within the school.

#### **Special Needs Policy**

The school strives to provide a fair and supportive learning environment for academically qualified students with special needs. To this end, the school seeks ways to develop and provide services which support the endeavors of students with special needs.

#### **Special Needs Procedures**

While students and faculty are expected to follow the procedures listed below, it is understood that allowances will be made for extenuating circumstances. In situations where there are no extenuating circumstances and the student has not followed these procedures, the policy will not apply.

- **Students**

Prior to submitting an application, prospective students with special needs should meet with the School Director to discuss whether or not desired assistance is available and whether adaptations to teaching or evaluation procedures are needed and can be accommodated. There may be requests that the school is unable to meet.

- **Faculty**

Instructors are expected to ask students with special needs to present themselves to discuss requested adaptations to teaching or evaluation procedures, and if appropriate, develop a process for implementing the accommodations.

## **The Accounting Academy**

### **Statement of Non-Discrimination**

#### **General Policy**

The school does not discriminate on the basis of race, sex, age, religion, national or ethnic origin, sexual orientation, disability, marital status, employment status, or prior military service in connection with admission to the facility, or in the administration of the school, or in its education and student services.

The school does not discriminate on the basis of handicaps that would not preclude employment or enrollment in the school. No qualified individual with a disability shall be denied access to and/or participation in services, programs and activities of the school.

Nondiscrimination has been the policy of the school since its founding.

#### **Specific Policy**

The school is committed to providing equal educational opportunities for qualified candidates with disabilities in accordance with state and federal laws and regulations, including the American Disabilities Act of 1990 and Section 504 of the Rehabilitation Act of 1973.

To provide equality of access for students with disabilities, the school will provide accommodations to the extent necessary to comply with state and federal laws.

For each student these accommodations will specifically address the functional limitations of the disability that adversely affect equal opportunity.

Student applicants who would like to request disability accommodations must make a request to the School Director.

## **The Accounting Academy**

### **General Transfer of Credit Policy - Page 1 of 2**

#### **Overview**

It is the policy of the school to ensure fair and equitable treatment of students relative to transfer of credit. The criteria used by the school to evaluate transfer of credits are the quality of the credits earned relative to comparability and applicability to the school's training curriculum.

Generally, the school will only accept credits earned from an accredited institution, or if not accredited, an institution whose program is specifically aligned and consistent with established, recognized industry training standards.

The school maintains a written record of the previous education and training of eligible persons, veterans and others, and with the record clearly indicating that credit was or was not granted, with appropriate notification given to each person, veteran and others.

#### **Requirements for Transfer of Credits**

1. The credits must be a component of a college or university curriculum related to core courses in accounting that formed the basis for earning a four-year bachelor degree in Business Administration.
2. Earning credit through examination is applicable only to students who have successfully passed the national Certified Public Accountant (CPA) exam.
3. The minimum acceptable grade and/or grade point average is 80% or better; equivalent to a 'B' average.
4. Students must be able support grade point averages, degrees and other credit-related items by submitting the appropriate official documentation.

#### **Procedures for Requesting Transfer of Credit**

Students requesting acceptance of transfer of credits must submit a written request along with supporting documentation 30 days prior to the beginning of the first training session. The school will make a determination of the acceptability of credits and inform the student prior to the first session.

#### **Procedures for Appealing Transfer of Credit Decision**

Students have a right to appeal transfer of credit decisions by submitting a written response within three business days to the School Director outlining in detail the reasons for objecting to the decision. The response should include appropriate documentation in support of the objection.

The School Director shall have three business days to review the appeal and submit to the student a written final determination.

**The Accounting Academy**

**Transfer of Credit Policy - Page 2 of 2**

And Veteran Confirmation Receipt of School Catalog  
and other Documents Containing VA Policies

**How Transfer of Credits Adjust Total Program Charges**

To the extent a student is granted transfer credit based on the above policies, procedures and requirements, total program charges will be adjusted as follows:

- **College or University Core Accounting Courses**  
Students who have completed a full-semester college or university core accounting course will be credited a one credit adjustment for each completed course; such total credit adjustments to be applied against total charges.
- **Successfully Passing the National CPA Exam**  
In addition to transfer credits applicable to college/university core accounting courses, students who have successfully passed the national CPA examination will be credited with additional five percent (5%) credit adjustment to be applied against total program charges.

**How Transfer of Credit Adjusts Financial Aid**

To the extent a student is granted transfer credit as described above and had qualified for local, state or federal financial aid, the same credit adjustments applicable to non-financial aid students apply to financial aid students.

**Transfer of Credit to other Institutions**

The school will assist students when requesting transfer to other institutions, including providing guidance, counseling, official transcripts, and syllabi.

**Articulation/Transfer Agreements with other Institutions**

The school has not entered into any articulation and/or transfer agreements with other institutions, colleges, or universities.

**Fees Assessed for Evaluating and Granting Transfer of Credit**

The school does not charge students for testing, evaluating, or granting transfer of credit.

**VETERAN CONFIRMATION RECEIPT OF SCHOOL CATALOG  
AND DOCUMENTS CONTAINING VA POLICIES**

I have received a copy of the school's Veterans Information Bulletin (2017-18 School Catalog), the Veterans Bill of Rights, and the school's most recent School Performance Fact Sheet, and I acknowledge that I have read the rules, regulations, course completion requirements, and costs for the specific course in which I have enrolled.

Print Name (Veteran or Eligible Person): \_\_\_\_\_

Signature: \_\_\_\_\_

Social Security or C-Number: \_\_\_\_\_ Enrolled by: \_\_\_\_\_ Date: \_\_\_\_\_

## The Accounting Academy

### Financial Aid and Assistance Available

#### Overview

The school is currently not an approved training provider by the United States Department of Education under Title IV and therefore it does not participate in any federal aid programs as administered by that agency.

However, the school is an approved training provider for several other federal and state agencies as described below. These agencies offer educational grants-in-aid to qualifying individuals based on available funding and other factors.

- **U.S. Veterans Administration Educational Benefit Program**  
The school is an approved training provider for the Veterans Administration's Post 911 and VA Rehabilitation and other educational programs. Website: [www.gbill.va.gov](http://www.gbill.va.gov)
- **U.S. Department of Defense MyCAA Program**  
The school is an approved training provider for the Department of Defense's Military Spouse MyCAA Educational Benefit program. Website: [www.militaryonesource.mil](http://www.militaryonesource.mil)
- **San Diego Veteran's Village**  
The school is an approved training provider for the San Diego Veteran's Village, a non-profit organization whose mission is to assist ex-military individuals in obtaining job training. Website: [www.vvsd.net](http://www.vvsd.net)
- **U.S. Department of Labor**  
The school is an approved training provider for the Department of Labor's Rehabilitation Educational Benefit program. The department pays for job training for injured federal employees. Website: [www.dol.gov](http://www.dol.gov)
- **California Employment Development Department**  
The school is an approved training provider for the California Employment Development Department via the Cal-Jobs program and the Workforce Partnership Career Centers. Websites: [www.caljobs.ca.gov](http://www.caljobs.ca.gov) and [www.edd.ca.gov](http://www.edd.ca.gov)
- **California Department of Industrial Relations**  
The school is an approved training provider for the California Department of Industrial Relations. The department provides back-to-work job training grants to injured workers through its workers compensation insurance program. Website: [www.dir.ca.gov](http://www.dir.ca.gov)



## **Educational Objectives of the Training Programs**

### **COURSE CODE AA01 - ACCOUNTING AND BOOKKEEPING JOB TRAINING PROGRAM**

This job-training program specializes in preparing adult students for entry and mid-level positions in bookkeeping and accounting as accounting clerks and bookkeepers trained for staff-level jobs in the areas of general accounting, bookkeeping, billing and collection, accounts payable, and payroll.

Students work hands-on with real-world accounting practice sets consisting of realistic-looking and colorful source documents: sales invoices, vendor bills, checks, receipts, employee time sheets, bank statements, etc. Over the course of the program, they complete five manual sets of books; a dozen QuickBooks practice sets, and ten Sage 50 (previously Peachtree) sets of books. In addition, they are taught no-look ten-key at a high level of proficiency.

### **COURSE CODE AA02 - ADMINISTRATIVE ASSISTANT JOB TRAINING PROGRAM**

This program offers job training in basic and technical office skills, as well as a variety of general and specialized clerical duties required by every business. This includes, but not limited to typing, ten-key, computer hardware and software concepts, Microsoft Office suite, and good written, oral, telephone, and email communication skills. In addition, the program will teach students how to create and maintain organized files and records, learn good telephone habits, develop strong proofreading and editing skills for grammar and spelling, become competent in the use of basic business math, and acquire a basic knowledge of bookkeeping.

### **COURSE CODE AA03 - TAX PREPARER JOB TRAINING PROGRAM**

Job training includes, but not limited to, interviewing clients, prepare or assist in preparing simple to intermediate income tax returns for individuals and/or small businesses, compute taxes owed or overpaid, using adding machines, computers, and software, follow tax form instructions and tax tables. Technology skills include, but not limited to, basic computerize tax preparer software, electronic mail software, database software, electronic mail software, and keyboarding and ten-key proficiency.

## **The Accounting Academy**

### **Maximum Number of Students - Student/Instructor Ratio**

#### **Overview**

The accounting and bookkeeping field is new to most students and it requires learning new concepts and principles, as well as the ability to grasp many new specific tasks and procedures.

By its very nature, the accounting and bookkeeping field requires a good work ethic, average intelligence, attention to detail and an ability to accomplish the required tasks efficiently and accurately.

As a result, the program includes a significant number of hours of hands-on, real-world, practical applications requiring the instructor to be constantly available for one-on-one assistance as the students complete their work.

It is for these reasons that the school strives to maintain relatively small classrooms and low student-to-instructor ratios.

#### **Maximum Number of Students**

The maximum number of students per classroom is twelve (12). However, most classes average between five and seven students.

#### **Student-to-Instructor Ratio**

The maximum student-to-instructor ratio is twelve (12) students to one (1) instructor, however this ratio varies depending on the size of the each class.

## The Accounting Academy

### Minimum Requirements for Graduation

#### Overview

This training program teaches students real-world, hands-on, practical skills that can be used productively on the job. Therefore, a major portion of the course consists of mastering specific small, medium and large projects and practice sets. Students are therefore expected to not only complete all of the assigned projects and practice sets on a timely basis, the projects and practice sets must be in 100% agreement with the solutions.

#### Projects and Practice Sets

All required projects must be completed to school standards including all manual and all computerized accounting and bookkeeping practice sets. Students can also volunteer for extra credit by completing additional practice sets that are available.

#### Tests and Grading Scale

The training program also consists of many tests, quizzes, and exercises. Students must maintain an average cumulative grade of 75% or better to graduate from the program. The grading scale is as follows:

Grade	Performance	Grade	Value
A	Excellent	4.0	90-100%
B	Good	3.0	80-89%
C	Average	2.0	75-79%
F	Failure	Fail	0-74%

#### Ten-Key Proficiency

Accountants and bookkeepers must be proficient and productive using the ten-key calculator and computer using all their fingers while still looking at the data and detail from which they are entering figures. A student must attain and maintain an average of 150 keystrokes per minute and at least 99% accuracy using the school's ten-key software testing program in order to be awarded a certificate of completion.

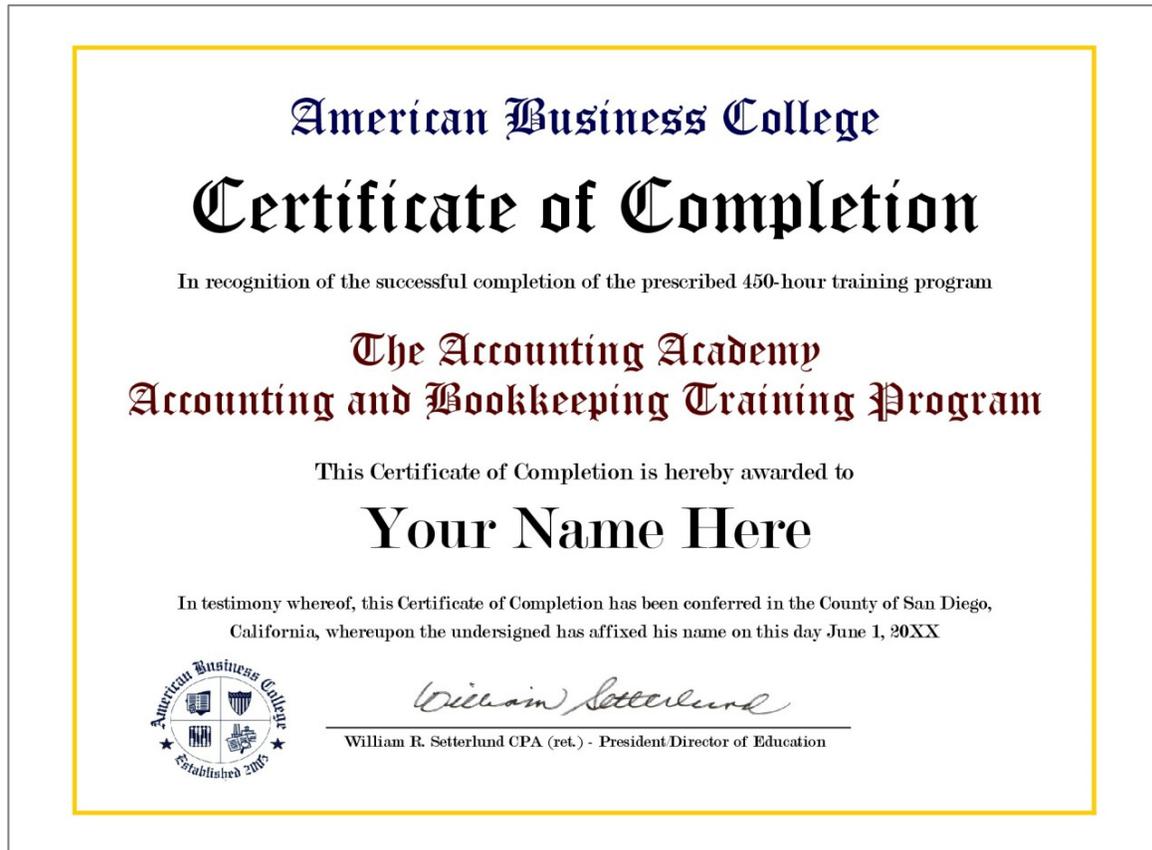
#### Final Exams

Students are required to take two final exams: The Accountant and Bookkeeper Hiring Exam, and the Journal Entry Exam. A student must score at least 75% on each exam in order to graduate from the program. If a student fails a final exam, he or she will be able to re-take the exam within one week of failing. A second exam failure will preclude a student from receiving a certificate of completion.

## The Accounting Academy

### Type of Credential Earned

Students who meet all the training program academic quantitative, qualitative and proficiency standards as outlined in the school's minimum requirements for graduation will be awarded a Certificate of Completion as shown below:



**Important note:** The Accounting Academy Certificate of Completion is not a degree and/or license of any kind. The only license available in the accounting profession is the Certified Public Accountant (CPA) license issued by the State of California's State Board of Accountancy. For more information contact the state board website at: [www.dca.ca.gov](http://www.dca.ca.gov)

## **The Accounting Academy**

### **Student Placement Assistance Services**

#### **Overview**

The mission of the school is to prepare students for entry-level employment full-time, part-time, temporary agency placement, self-employment and/or to enhance current job skills in accounting and bookkeeping and related fields.

Therefore, to ensure the value and effectiveness of the program and to validate the quality of the training services, the school is committed to providing placement assistance services necessary for student success. To achieve this goal, the school provides these services both before and after graduation as described below.

#### **Interviewing Skills and Techniques**

The school devotes an entire session to teaching and instructing students on how to develop strong and effective interviewing skills and techniques.

#### **Cover Letter and Resume Building**

School staff assist and instruct students on how to prepare a professional and customized cover letter and resume which effectively highlights the specific accounting and bookkeeping job skills acquired during the program.

#### **Employment and Occupational Information**

Students will have access to current employment and occupational-related area job information from local newspapers, periodicals, and websites.

#### **Internet Strategies**

Students will learn how to post their cover letter and resume online and learn how to locate and evaluate job openings on the major career websites.

#### **Employer Relationships and Referrals**

The school continues to develop business relationships with potential employers, and job referrals are communicated to the students and alumni.

#### **Temp Agencies and Recruiters**

The school maintains relationships with temporary placement agencies and with recruiters who specialize in the accounting and bookkeeping field.

#### **Individual Job Counseling and Assessment**

The school also offers individual job counseling and assessment for those students who request it. Career and job placement advice is personalized to each student in order to develop a rational and effective plan for achieving his or her current and long-term career objectives.

## **The Accounting Academy**

### **Other Student Services**

#### **Advising**

Student advising is part of the teaching process and the delivery of supportive services provided to students. The School Director and the instructors are available to advise students and, if possible, assist them to overcome any difficulties they may encounter in the school. Students are encouraged to take advantage of this service whenever difficulties arise and when available.

#### **Career Services**

While the school provides assistance with job placement, no guarantee for employment or income level is made. Agencies and companies contact the school for likely candidates for employment. The School Director provides graduates with job leads and may arrange for an interview with prospective employers.

#### **Housing**

The school does not maintain housing for students, nor does it make specific recommendations regarding housing. However, there are a variety of accommodations available throughout the community.

#### **Transportation**

Public transportation is available with stops located close to the school. It may also be possible for students to arrange for transportation by another student if schedules are compatible.

#### **Reference Materials**

The school maintains a number of reference materials, including books, trade publications, magazines and other pertinent and related audio and visual instructional aides. Reference materials are kept for use at the school and/or arrangements can be made with the School Director for home use.

#### **Financial Aid**

The school is currently not an institution recognized by the United States Department of Education and/or approved to offer financial aid in connection with Title IV programs.

## The Accounting Academy Program Charges and Financing

### Basic Student Charges

#### *Course Code AA01 - Accounting & Bookkeeping Training Program*

The total amount of all fees and charges a student is obligated to pay for the training program is \$8,500.00 as shown below:

Non-refundable registration fees.....	\$125.00
Supplies and materials.....	\$375.00
Tuition.....	<u>\$8,000.00</u>
TOTAL CHARGES.....	<u><u>\$8,500.00</u></u>

#### *Course Code AA02 - Administrative Assistant & Microsoft Office Skills Training*

The total amount of all fees and charges a student is obligated to pay for the training program is \$4,950.00 as shown below:

Non-refundable registration fees.....	\$50.00
Supplies and materials.....	\$100.00
Tuition.....	<u>\$4,800.00</u>
TOTAL CHARGES.....	<u><u>\$4,950.00</u></u>

#### *Course Code AA03 - Tax Preparer Job Skills Training*

The total amount of all fees and charges a student is obligated to pay for the training program is \$2,250.00 as shown below:

Non-refundable registration fees.....	\$50.00
Supplies and materials.....	\$200.00
Tuition.....	<u>\$2,000.00</u>
TOTAL CHARGES.....	<u><u>\$2,250.00</u></u>

### Other Special Charges

Transcript Fee.....	\$15.00
Late Payment Fee.....	\$10.00
Returned Check Fee.....	\$25.00
Attorney/Court Collection Fees.....	\$1,500.00

Payments are accepted by cash, check or credit card. Financing is available as described below. Monthly payments vary according to the down payment, interest rate and length of time (number of months) defined in the payment contract. Students who do not make payment arrangements or fail to make their scheduled payments may be subject to suspension, termination and/or having the student's account turned over for collection.

### Financing

The school offers internal financing based on a student's reasonable assurance that he or she has the means and resources to repay any charges financed by the school.

## **The Accounting Academy**

### **Faculty and Administrative Staff**

#### **William Setterlund - School Director/Registrar/Instructor**

Mr. Setterlund is owner and founder of the school. He is a California Certified Public Accountant (inactive/retired). He holds a Bachelor of Science Degree in Accounting from California State University at Long Beach. He has fifty years of continuous accounting and bookkeeping experience with companies of all sizes and at all levels of responsibility. His background includes work at both for-profit and non-profit organizations, private and public corporations, and large and small CPA firms. Mr. Setterlund also owned and operated his own CPA accounting and consulting firm for twelve years.

#### **Instructor Qualifications**

Instructors possess a combination of education and experience consisting of a minimum of five years of direct, hands-on experience working in the the accounting and bookkeeping field as a full-charge bookkeeper and/or staff accountant.

They also have a thorough knowledge of accounting concepts and principles and are intermediate users of computers, Microsoft Office, and QuickBooks Pro accounting software.

#### **Administrative Staff**

The school utilizes student graduates as either paid or non-paid admin staff on a short-term, internship basis. The student grads gain office experience, as well as periodically assist the instructors.

## **The Accounting Academy**

### **Student Debt Collection Policy**

#### **Purpose**

The school adopts as its collection goal the full collection of all outstanding student loans according to industry performance and professional standards. The purpose of this policy is to ensure that there is a consistent understanding of the process regarding the payment of student charges and how the school will deal with non-payment. Default rates will be maintained that are equal to or better than industry standards.

#### **Policy**

The school offers internal financing based on a student's reasonable assurance that he or she has the means and resources to repay any charges financed by the school.

Students who request tuition financing must complete a student loan and credit application prior to enrollment. The responsibility for ensuring payment of all financed charges remains the responsibility of the student.

Students who qualify for a monthly installment loan are required to enter into a Retail Installment Contract which obligates the student in accordance with the terms and conditions contained in the contract and with all federal and state 'truth-in-lending' regulations.

Students are required to adhere to the terms and conditions of the Retail Installment Contract, including timely payment of monthly installments. A monthly installment payment coupon book will be provided to students for their convenience. The school will mail statements each month showing the status of the account.

If any required monthly installment payment is more than ten (10) business days past due, the loan may be declared in default by the school.

The following action may be taken against a student with past-due debt:

- A \$10 late fee will be assessed for each late monthly payment.
- The entire outstanding loan balance may become due and payable.
- Academic progress reports may be withheld.
- Attendance reports may be withheld.
- Student transcripts may be withheld.
- Students may be unable to graduate and receive a certificate.

Student installment loans more than ninety (90) days past due may be placed with either a collection agency or an attorney at the discretion of the school and a \$1,500 fee added to the outstanding balance to reimburse the school for collection related expenditures.

## The Accounting Academy

### Student Rights to Access to Records and Privacy Policy

The Accounting Academy adheres to a policy of compliance with the Family Educational Rights and Privacy Act of 1974 (FERPA). Educational records as defined by FERPA include all records that schools or education agencies maintain concerning their students. FERPA affords students certain rights with respect to their education records.

#### Summary of Rights

The right to inspect and review their records. Students should contact the Director's Office to determine the location of appropriate records and the procedure for reviewing such records.

The right to request that any records believed to be inaccurate or misleading be amended. The request should be submitted in writing to the Director's Office. If the request for change is denied, the student has a right to a hearing on the issue.

The right to consent to disclosures of personally identifiable information contained in the student's education records. The school must have written permission from the student before releasing any information from the student's record.

The right to file a complaint with the U.S. Department of Education and/or California's Bureau for Private Postsecondary Education if they feel their rights are being violated. Complaints should be in writing and sent to:

**United States  
Department of Education**  
400 Maryland Avenue SW  
Washington, D.C. 20202-4605

**California Bureau for Private  
Postsecondary Education**  
2535 Capitol Oaks Drive Suite 400  
Sacramento, CA 95833

Upon request, the school will disclose education records without consent to officials of another school in which the student seeks or intends to enroll. The school may also disclose general 'directory' information without the student's prior consent. Directory information consists of:

Student Name	Dates of Attendance	Date Certificate Awarded
Student Address	Certificate Awarded	Enrollment Status
Telephone/Email	Primary Field of Study	Previous Education

Students have the right to prevent directory information from being released. In order to maintain directory information as confidential, a student must submit a written request prior to the end of his or her program training.

## **The Accounting Academy**

### **Student Copyright Infringement Policy**

#### **Overview**

Copyright infringement is the act of exercising, without permission or legal authority, one or more of the exclusive rights granted to the copyright owner under section 106 of the Copyright Act (Title 17 of the United States Code). As a general matter, copyright infringement occurs when a copyrighted work is reproduced, distributed, performed, publicly displayed, or made into a derivative work without the permission of the copyright owner.

The purpose of copyright law is to promote creativity, innovation and the spread of knowledge. The law does this by balancing the right of both copyright holders and users of copyright materials.

#### **Copyrighted School Educational Materials**

The Accounting Academy training program is a privately-owned institution. It is the original creator and author of all the educational and training materials utilized in the program and it is the sole copyright owner. Identifiers with respect to copyrights have been affixed to the training materials. The school has not assigned any portion of its copyright to another person or persons.

#### **Penalties**

Penalties for copyright infringement include civil and criminal penalties.

Anyone found liable for civil copyright infringement may be ordered to pay either actual damages or 'statutory' damages at not less than \$750 and not more than \$30,000 per work infringed. For 'willful' infringement, a court may award up to \$150,000 per work infringed. In addition, courts, at their own discretion, may assess costs and attorney's fees.

Willful copyright infringement can also result in criminal penalties, including imprisonment of up to five years and fines of up to \$250,000 per offense.

For more detailed information, see the U.S. Copyright Office website at: [www.copyright.gov](http://www.copyright.gov)

## **The Accounting Academy**

### **Assessment, Tracking and Grading System of Academic Progress**

Part 1 of 2

The school monitors the academic progress of each student to evaluate and determine that he or she is making satisfactory academic progress toward understanding the training materials, is grasping and effectively using newly obtained skills, and is meeting the minimum achievement standards of the program.

The school monitors student satisfactory academic progress, including attendance, on a cumulative weekly basis applied consistently to all students attending the training program. The evaluation is based both quantitative (grade-point average) and also on qualitative (attendance/completed work projects). Students who withdraw from the program will receive a grade of 0% and all sessions must be repeated upon readmission.

#### **Quantitative Progress Toward Program Completion**

Students are required to make quantitative progress toward program completion. To be making satisfactory academic progress, a student must attend at least 90% of the scheduled class hours on a cumulative basis during each monthly evaluation period.

#### **Qualitative Progress Toward Program Completion**

Students are required to make qualitative progress toward program completion. To be making satisfactory academic progress, a student must maintain at least a minimum grade point average of 75% at the conclusion of each evaluation period.

#### **Evaluation Process**

Satisfactory student academic progress is monitored on a cumulative basis at the end of each month. Progress reports are prepared and maintained in each student's file and copies are distributed to each student for their records.

#### **Maximum Time Frame for Completing the Program**

The maximum time frame for completing for Course Code AA01 is six months. The maximum time frame for completing for Course Code AA02 is two months. If a student cannot complete a program within this time frame due to circumstances beyond the student's control, they must meet with the school director to discuss possible options.

#### **Veterans Conditions for Interruption of Unsatisfactory Progress**

The above qualitative, quantitative and satisfactory academic progress standards also apply to veteran and other affected students. Their educational benefits will discontinue whenever the veteran or eligible persons ceases at the point in time the student fails to maintain these minimum standards.

#### **Veterans Probation Policy**

Veterans and other eligible and affected students using VA educational benefits are permitted no more than two terms of probation during the training program.

**The Accounting Academy**  
**Assessment, Tracking and Grading System of Academic Progress**

Part 2 of 2

**Consequences of Failure to Meet Satisfactory  
Academic Progress Standards**

If a student fails to meet the cumulative 90% attendance or 75% grade average for any evaluation period, or both, he or she will be placed on warning for the next evaluation period. Failure to achieve either of these two standards at the end of the warning period will result in the administrative withdrawal of the student.

Students will be notified in writing when they are placed on warning and of the steps necessary to be removed from warning status. Students will also receive attendance or academic counseling from the School Director, as appropriate, when they are placed on warning. The school will notify a student by certified mail if he or she is being administratively withdrawn for unsatisfactory academic progress.

**Appeal Process**

The student may submit a written appeal of his or her dismissal within five calendar days of their receipt of the dismissal notice. The appeal must be accompanied by documentation of the mitigating circumstances that have prevented the student from attaining satisfactory academic progress and evidence that changes have occurred to allow the student to now meet standards of satisfactory academic progress. Only extraordinary circumstances will be considered, such as death or severe illness in the immediate family. Before an appeal may be granted, a written academic plan must be provided to the student which clearly identifies a viable plan for the student to successfully complete the program within the maximum time frame allowed. The School Director will assess all appeals and determine whether the student may be permitted to continue in school on a warning status, despite not meeting the satisfactory progress requirements. The student will be sent the written decision within ten days of the school's receipt of the appeal. The decision of the School Director is final.

Students reinstated upon appeal are on a probationary status for the next evaluation period, during which time they must meet the terms and conditions set out in the School Director's letter granting the appeal. At the end of the evaluation period, and at the end of every evaluation period thereafter, the student's academic status will be reviewed.

The student may continue on probation as long as he or she meets the terms of the academic plan approved at the time the student's appeal was granted, and/or until such time as satisfactory academic progress status is regained. The student reinstated after dismissal and appeal is not eligible for financial aid until he or she regains satisfactory progress status by meeting the minimum satisfactory academic progress standards.

## **The Accounting Academy**

### **Attendance and Makeup Policy**

#### **Part 1 of 2**

#### **Minimum Attendance Standard**

The school expects students to attend every training session every scheduled day. When you miss a class, you not only fall behind on new material, you miss the hands-on repetition that is so important in learning and developing your new skills. Employers are looking for graduates with perfect or near-perfect attendance.

The school's minimum attendance standard for graduation is ninety percent (90%) cumulative attendance in the classroom. Students are expected to call the school when they will not be in attendance so that the instructor can be advised.

#### **Attendance Tracking**

Attendance is tracked in every class period by the instructor to the nearest half hour. If you miss more than thirty (30) minutes of any class period, you will be marked absent for the whole hour.

Each day the instructor records the student's class hour data in the student's electronic records. The cumulative attendance information is summarized on a progress report given to all students each month.

If a student does not agree with any of the attendance data, he or she must submit a written appeal to the School Director within one week of the progress report distribution. At the end of the month after progress end date, the attendance data becomes permanent and can no longer be challenged.

#### **Tardiness and Early Departures**

The school's attendance policy expects students to be in class on time for every scheduled session. Late arrivals not only miss the material that has been presented, but it is disruptive both to the instructor and to fellow students.

If you consistently arrive late and/or depart early, the instructor will record a tardy and/or early departure. If a student is tardy and/or departs more than five times in a month, he or she will be placed on probation for the remainder of the session and will be required to meet with the School Director for counseling.

## **The Accounting Academy**

### **Attendance and Makeup Policy**

#### **Part 2 of 2**

#### **Attendance Probation**

If a student does not maintain a cumulative attendance of at least ninety (90%) throughout the program, he or she will be placed on Attendance Probation. The student must meet with the School Director and abide by the terms outlined in the Attendance Probation notice.

At the end of the attendance probation period, a student must be making progress toward meeting the ninety (90%) cumulative attendance requirement and must have met all of the terms of the Attendance Probation. Failure to do so may result in termination from the school.

#### **Makeup Class Work**

All makeup class work must be prearranged with the instructor and must be completed outside normally scheduled class hours. Only time spent on instructor approved activities will count as makeup hours. Such activities may include completing class exercises, quizzes, viewing class lectures, videos, or other program-related assignments.

Students will have a ten-calendar-day period in which to make up class work. If the class work is not made up within the ten-day period, the applicable class work will be dropped five percent (5%) for each day not made up.

#### **Consecutive Absences**

A student who is absent for eight consecutive class days or fourteen consecutive calendar days without an approved leave of absence will be terminated.

#### **Dismissal/Reinstatement**

Any student dismissed for attendance related reasons such as consecutive absences, failure to maintain the ninety (90%) cumulative attendance, excessive tardiness or early departures, failure to meet the terms of attendance probation, or failure to return from a leave of absence, may be reinstated back into the program with the School Director's written authorization accompanied by the student's documentation of the make up of all missed class work.

## **The Accounting Academy**

### **Leave of Absence Policies**

#### **GENERAL POLICIES**

##### **Definition of Leave of Absence**

A leave of absence is a temporary break in a student's attendance during which he or she is considered to be continuously enrolled.

##### **Leave of Absence Policy**

A student must request the leave of absence in writing in advance of the beginning date of the leave of absence, unless unforeseen circumstances prevent the student from doing so. If a student does not request a leave of absence within the time frame described below, he or she must be withdrawn from the program.

A leave of absence is limited to 14 calendar days within the six-month scheduled period of the student's training program. Multiple leaves of absence may be permitted provided the total of the leaves does not exceed fourteen (14) class days.

The student must sign and date the leave of absence request and specify a reason for the leave. The reason must be specified in order for the school to have a reasonable expectation of the student's return within the time frame of the leave of absence as requested.

The student must attest to understanding the procedures and implications for returning or failing to return to the training program. The school is required to document its approval of the leave of absence request in accordance with the above policies. The school will not assess the student any additional charges as a result of a leave of absence.

An approved leave of absence may be extended for an additional period of time provided that the extension request meets all of the above requirements, and the total length of the leave of absence does not exceed the specified limit as noted above.

#### **VETERANS LEAVE OF ABSENCE POLICY**

The school will provide a leave of absence to students who are affected individuals for any portion of a period of instruction such student was unable to complete, or for which such individual did not receive academic credit because he or she was called up for active duty or active service; and, if affected individuals temporarily withdraw from our course of study as a result of such active duty or service, the school will make every effort to minimize deferral of enrollment or reapplication requirements and will provide great flexibility with respect to administrative deadlines related to those reapplications.

## **The Accounting Academy**

### **Student Conduct and Termination Policy**

#### **Purpose**

To establish guidelines and ethical standards for how students should conduct themselves while attending the training program.

#### **Student Conduct**

Students shall be responsible for their personal conduct while attending classes. School rules must be followed at all times. School administration maintains the right to dismiss students for violation of school rules or for conduct which reflects unfavorably on the reputation or operation of the school.

#### **Rules of Conduct**

- Students are required to maintain a clean and neat working area and maintain good personal grooming and attire.
- All educational materials must be returned to the designated, proper places at the end of each class session.
- Creating distractions during class sessions which impairs the reasonable freedom of other persons to pursue their studies is not acceptable.
- Leaving the classroom during class hours without authorization from the instructor and/or School Director is not allowed.
- Damaging or wrongfully dealing with any school property, including intellectual property, is grounds for dismissal.
- Cheating during examinations and/or plagiarism of work product is subject to counseling, disciplinary action.
- Students attending class under the influence of alcohol or prohibited drugs will not be allowed in class and will be subject to automatic dismissal.

#### **Termination**

If a student is terminated for any reason, subsequent readmittance will be determined on an individual basis at the sole discretion and assessment by the School Director.

## **The Accounting Academy**

### **Student Complaint Policy**

The Accounting Academy designates the School Director to receive and resolve student complaints. This person is regularly accessible for reasonable periods of time before and after class sessions and during the range of time students are scheduled to attend.

Specific information with respect to the student complaint designee's name, title, address, and other contact information, is contained on a document entitled **Student Complaint Designee and Record of Student Complaint**. A copy of the signed and dated form is included in this catalog and it is distributed to each student on the first day of class.

The School Director has the authority and duty to: investigate complaints thoroughly; reject complaints if, after investigation, they are determined to be unfounded; record a summary of the complaint and its disposition; notify appropriate agencies if the complaint is valid and involves a violation of law; determine effect on other students if complaint is valid; implement policies and procedures to avoid similar complaints in the future; and communicate directly with any person in control regarding complaints.

A student may lodge a complaint by communicating orally or in writing to any staff member of the Academy who is then obligated to transmit it as soon as possible to the designated complaint officer. Oral complaints must be resolved within a reasonable time or before a second complaint is lodged. The Academy may require the complaint be submitted in writing, in which case the Academy will provide the student with a written response, including a summary of its investigation and disposition, within ten (10) days of receiving the complaint.

A student complaint more than ninety (90) days after the event(s) and/or incident(s) will be considered invalid and will not be accepted for resolution by the School Director.

A student's participation in the complaint procedure and the disposition of a student's complaint will not limit or waive any of the student's rights or remedies. Any document signed by a student that purports to limit or waive his or her rights and remedies is void. If a student's attempt to resolve his or her grievance with the school fails, they may contact:

**Bureau for Private Postsecondary Education**  
2535 Capitol Oaks Drive Suite 400  
Sacramento, California 95833 (916) 431-6959 [www.bppe.ca.gov](http://www.bppe.ca.gov)



**STUDENT COMPLAINT DESIGNEE &  
RECORD OF STUDENT COMPLAINT**

**INSTRUCTIONS:** Before submitting this form to the School Director, please read the school's Student Complaint Policy given to you at the start of your first session. Please provide all information requested. Be specific when discussing the complaint. Attach additional materials as needed. Do not use this form for academic or disciplinary appeals.

Student Name	Date
Address	Telephone
City, State, Zip	Email
Student Signature	Enrollment Date

**Student Complaint Designee**

Name	William R. Setterlund, CPA (Ret.)	Title	School Director	Date
Signature	<i>William R. Setterlund</i>	Tel/Fax	(T) 858-836-1420 (F) 858-836-1438	
Address	7283 Engineer Road, Suite H San Diego, California 92111	Email	accountingacademy@sbcglobal.net	

**Type of Student Complaint**  
(check all that apply)

<input type="checkbox"/>	Sexual Harassment	<input type="checkbox"/>	Race/Ethnicity
<input type="checkbox"/>	Disability Accommodation	<input type="checkbox"/>	National Origin
<input type="checkbox"/>	Records Access/Disclosure	<input type="checkbox"/>	Religion
<input type="checkbox"/>	Age Discrimination	<input type="checkbox"/>	Alienate
<input type="checkbox"/>	Gender Discrimination	<input type="checkbox"/>	Disability
<input type="checkbox"/>	Marital Discrimination	<input type="checkbox"/>	Other:

**Summary of Complaint**  
(attach additional worksheets if needed)


**Expected Resolution**  
(attach additional worksheets if needed)


**Send this form with full details and documentation related to your complaint to:**  
 William Setterlund, School Director  
 The Accounting Academy  
 7283 Engineer Road Suite H  
 San Diego, California 92111 T: 858-836-1420

**If your attempt to resolve your grievance with the school fails, you may contact:**  
 Bureau for Private Postsecondary Education  
 2535 Capitol Oaks Drive Suite 400  
 Sacramento, California 95833  
 Tel: 916-431-6959 Website: www.bppe.ca.gov

## **The Accounting Academy**

### **Cancellation Policy**

It is the policy of the school to comply with and conform to applicable government laws and regulations, to clearly state this policy to prospective enrollees before enrollment, and to consistently apply these policies.

#### **Rejection of Student Applicant**

If a student application is rejected for enrollment by the school, a full refund of tuition monies paid will be made to the applicant.

#### **School Program Cancellation**

If the school cancels a program subsequent to a student's enrollment, the school will refund all monies paid by the student.

#### **Student Cancellation Prior to the Start of Class or No Show**

If an applicant accepted by the school cancels prior to the start of scheduled classes or never attends class (no-show), the school will refund all monies paid, less the non-refundable \$125 registration fee (10.00 for veterans) as described within this catalog and in the school's enrollment agreement.

#### **Student Cancellation from First Session through the 7th Business Day**

Students may cancel their Enrollment Agreement for school, without any penalty or obligation, within the seventh business day from the first day of the initial class session as described in the Notice of Cancellation form included in this catalog and also distributed at the first class session.

#### **Student Cancellation Prior to the Start of Class or No Show**

If an applicant accepted by the school cancels prior to the start of scheduled classes or never attends class (no-show), the school will refund all monies paid, less the non-refundable \$125 registration fee (\$10.00 for veterans) as described within this catalog and in the school's enrollment agreement.

#### **Student Cancellation from First Session through the 7th Business Day**

The student has the right to cancel the Enrollment Agreement and obtain a refund of charges paid through attendance at the first class session, or the seventh day after enrollment, whichever is later.

The date by which the student must exercise his or her right to cancel or withdraw, and the refund policy, including any alternative method of calculation if approved by the Bureau pursuant to section 94921 of the Code is seven business days from the first session day.

Students have a right to stop school at any time, and have a right to receive a refund for part of the course not taken. These refund rights are described in this catalog and in the school's enrollment agreement. If the school closes before a student graduates, a student may be entitled to a refund. Contact the Bureau for Private Postsecondary and Education Education at 2535 Capitol Oaks Dr. Suite 400 Sacramento, CA 95833.

## The Accounting Academy Refund Policy and Refund Tables

Non-Veterans

It is the policy of the school to comply with and conform to applicable state laws and regulations, to clearly state this policy to prospective student enrollees before they enroll and to consistently apply these policies.

### Refund Policy

The student has the right to cancel the Enrollment Agreement and obtain a refund of charges paid through attendance at the first class session, or the seventh day after enrollment, whichever is later.

The date by which the student must exercise his or her right to cancel or withdraw and the refund policy, including any alternative method of calculation if approved by the Bureau pursuant to section 94921 of the Code is seven business days from the first day of instruction.

*Note: Refunds do not apply to the registration fee. And refunds are not applicable to program instructional materials and use of school equipment.*

Students have a right to stop school at any time, and have a right to receive a refund for part of the course not taken. These refund rights are described in the school's Enrollment Agreement and Refund Policy.

### Refund Table - Course Code AA01

The following tables set forth examples of the amount of refund to which a student would be entitled if a student withdrew from the programs after completing a period of course hours, days or weeks of instruction equivalent to 10%, 50%, and 75% of the program of instruction, respectively.

**Refund Table - Course Code AA01**

(A)	(B)	(C)	(D)	(E)	REFUND AMOUNT (Col. B x E)
% Completed	% to Finish	Total Charges	Less Registration Fee	Tuition	
10%	90%	\$ 8,500	\$ 125	\$ 8,375	\$ 7,537.50
50%	50%	\$ 8,500	\$ 125	\$ 8,375	\$ 4,187.50
75%	25%	\$ 8,500	\$ 125	\$ 8,375	\$ 2,093.75

**Refund Table - Course Code AA02**

(A)	(B)	(C)	(D)	(E)	REFUND AMOUNT (Col. B x E)
% Completed	% to Finish	Total Charges	Less Registration Fee	Tuition	
10%	90%	\$ 4,950	\$ 50	\$ 4,900	\$ 4,410.00
50%	50%	\$ 4,950	\$ 50	\$ 4,900	\$ 2,450.00
75%	25%	\$ 4,950	\$ 50	\$ 4,900	\$ 1,225.00

**Refund Table - Course Code AA03**

(A)	(B)	(C)	(D)	(E)	REFUND AMOUNT (Col. B x E)
% Completed	% to Finish	Total Charges	Less Registration Fee	Tuition	
10%	90%	\$ 2,250	\$ 50	\$ 2,200	\$ 1,980.00
50%	50%	\$ 2,250	\$ 50	\$ 2,200	\$ 1,100.00
75%	25%	\$ 2,250	\$ 50	\$ 2,200	\$ 550.00

**The Accounting Academy**  
**Refund Policy and Refund Tables**  
 VETERANS

It is the policy of the school to comply with and conform to all applicable Department of Veterans' Administration laws and regulations, as well as those of the California State Approving Agency for Veterans Education, and to clearly state these policies to prospective veteran student enrollees and others before enrollment, and to consistently apply these policies.

**Refund Policy**

The school will provide a full refund to students who are affected individuals for that portion of a period of instruction such student was unable to complete, or for which such individual did not receive academic credit, because he or she was called up for active duty or active service; and, if affected individuals withdraw from our course of study as a result of such active duty or active service, the school will make every effort to minimize deferral of enrollment or reapplication requirements and will provide the greatest flexibility possible with administrative deadlines related to those applications.

A full refund includes a refund of required tuition and fees, or a credit in a comparable amount against future tuition and fees. A full refund is a 100% pro-rata refund, including non-refundable registration fees.

The following tables set forth examples of the amount of refund to which a student would be entitled if a student withdrew from the programs after completing a period of course hours, days or weeks of instruction equivalent to 10%, 50%, and 75%, of the program of instruction, respectively.

**Refund Table - Course Code AA01**

(A)	(B)	(C)	(D)	(E)	REFUND AMOUNT (Col. B x E)
% Completed	% to Finish	Total Charges	Less Registration Fee	Tuition	
10%	90%	\$ 8,500	\$ 125	\$ 8,375	\$ 7,537.50
50%	50%	\$ 8,500	\$ 125	\$ 8,375	\$ 4,187.50
75%	25%	\$ 8,500	\$ 125	\$ 8,375	\$ 2,093.75

**Refund Table - Course Code AA02**

(A)	(B)	(C)	(D)	(E)	REFUND AMOUNT (Col. B x E)
% Completed	% to Finish	Total Charges	Less Registration Fee	Tuition	
10%	90%	\$ 4,950	\$ 50	\$ 4,900	\$ 4,410.00
50%	50%	\$ 4,950	\$ 50	\$ 4,900	\$ 2,450.00
75%	25%	\$ 4,950	\$ 50	\$ 4,900	\$ 1,225.00

**Refund Table - Course Code AA03**

(A)	(B)	(C)	(D)	(E)	REFUND AMOUNT (Col. B x E)
% Completed	% to Finish	Total Charges	Less Registration Fee	Tuition	
10%	90%	\$ 2,250	\$ 50	\$ 2,200	\$ 1,980.00
50%	50%	\$ 2,250	\$ 50	\$ 2,200	\$ 1,100.00
75%	25%	\$ 2,250	\$ 50	\$ 2,200	\$ 550.00

## The Accounting Academy

### Notice of Cancellation Form

**Student Name:** \_\_\_\_\_

**Date of First Session:** \_\_\_\_\_

You may cancel your Enrollment Agreement without any penalty or obligation, within seven (7) business days from the beginning of the first session.

If you cancel, any payment you have made and any negotiable instrument signed by you shall be returned to you within 30 days following the school's receipt of your cancellation notice.

If the school gave you any equipment, you must return the equipment within 30 days of the date you signed a cancellation notice. If you do not return the equipment within this 30-day period, the school may keep an amount out of what you paid that equals the cost of the equipment. The total amount charged for each item of equipment shall be separately stated. The amount charged for each item of equipment shall not exceed the equipment's fair market value. The institution shall have the burden of proof to establish the equipment's fair market value. The school is required to refund any amount over that as provided above, and you may keep any amount over that as provided above, and you may keep the equipment.

To cancel the contract for school, mail or deliver a signed and dated copy of this cancellation notice, or any other written notice, or send overnight express to the applicable school training center you as follows:

**The Accounting Academy 7283 Engineer Rd. Suite H San Diego, CA 92111**

**NO LATER THAN:**

Midnight of the date that is the seventh business day following the day of the first class or day the first lesson was received.

*I cancel the contract for school:*

Student Signature

Date

**REMEMBER, YOU MUST CANCEL IN WRITING.**

You do not have the right to cancel by just telephoning or emailing the school or by not coming to class. If you have any complaints, questions, or problems which you cannot work out with the school, contact:

## The Accounting Academy

### Student Tuition Recovery Fund

The Student Tuition Recovery Fund (STRF) was established by the Legislature to protect any California resident who attends a private postsecondary institution from losing money if you prepaid tuition and suffered a financial loss as result of the school closing, if the institution failed to live up to its enrollment agreement, or if the institution refused to pay a court judgment.

You are not eligible for protection from the STRF if either of the following applies: (1) You are *not* a California resident, and (2) your total charges are paid by a third-party, such as an employer, government program or other payer, and you have no separate agreement to repay the third party.

The state of California created the Student Tuition Recovery Fund (STRF) to relieve or mitigate economic losses suffered by California residents who were students attending schools approved by, or registered to offer Short-term Career Training with, the Bureau for Private Postsecondary Education.

You may be eligible for STRF if you are a California resident, prepaid tuition, the STRF fee has been paid, and you have suffered an economic loss as a result of any of the following:

- (1) The school closed before the course of instruction was completed.
- (2) The school's failure to pay refunds or charges on behalf of a student to a third party for license fees or any other purpose, or to provide equipment or material for which a charge was collected within 180 days before the closure of the school.
- (3) The school's failure to pay or reimburse loan proceeds under a federally guaranteed student loan program as required by law or to pay or reimburse proceeds received by the school prior to closure in excess of tuition and other costs.
- (4) The school's breach or anticipatory breach of the agreement or the course of instruction.
- (5) There was a decline in the quality of the course of instruction within 30 days before the school closed, or if the decline began earlier than 30 days prior to closure, the period of decline will be determined by the Bureau.
- (6) The school committed fraud during the recruitment or enrollment or program participation of the student. You may also be eligible for STRF if you were a student who was unable to collect a court judgment rendered against the school for violation of the Private Postsecondary Education Reform Act of 2010.

## The Accounting Academy

Department of Consumer Affairs

### **Bureau for Private Postsecondary Education**

#### **Tips For Students to Consider Before Enrolling at a Private Postsecondary School**

To get the most out of your educational experience, do your homework and make an informed decision before making a commitment. The following list of "enrollment tips" is provided to assist students in determining what steps they may want to take when considering enrollment at a private postsecondary educational institution, or postsecondary "school."

##### **1. INVESTIGATE THE SCHOOL YOURSELF BEFORE ENROLLING.**

Prior to enrolling, interview students in the program, or take a tour of the school. Ask if the school will let you sit in or observe the class or course that you are interested in before enrolling.

##### **2. CHECK OUR WEB SITE TO SEE IF THE SCHOOL HAS SIGNED A VOLUNTARY AGREEMENT.**

If a school has entered into a voluntary agreement with the Department of Consumer Affairs they should comply with the student bill of rights.

##### **3. GET A COPY OF THE STUDENT CATALOG.**

A school's catalog contains important information that you will need to review prior to making a decision to enroll. Pay special attention to school policies, such as attendance, leave-of-absence, cancellation and refund.

##### **4. GET A COPY OF AN ENROLLMENT AGREEMENT TO REVIEW ALL BINDING TERMS, CONDITIONS, COSTS AND STUDENT DISCLOSURES.**

An enrollment agreement should reflect information about the school's total costs for the contracted-for course of instruction, a list of the charges that are non-refundable, the name and description of the program of instruction, the total amount of classes or hours needed to complete the program, payment schedules, cancellation and refund policies, and other mandatory disclosures regarding your rights and responsibilities as a student at the institution. (Education Code section 94810.)

##### **5. CONTACT THE ACCREDITING AGENCY THAT THE SCHOOL CLAIMS TO HAVE ACCREDITATION FROM AND VERIFY THE SCHOOL'S CLAIMS.**

To qualify for some state licensing examinations or for your degree to be recognized by certain employers, some educational programs and training must be obtained from a school that maintains "accreditation" from a U.S. Department of Education recognized accrediting agency. Be sure to check with the licensing agency or employer where you wish your educational experience to be recognized and verify accreditation status with the accrediting agency before enrolling. For more information about accreditation and to obtain a list of Regional and National Accrediting Agencies, visit the U.S. Department of Education Web site at: <http://www2.ed.gov/admins/landing.jhtml>.

##### **6. REVIEW ALL ADVERTISING CAREFULLY AND COMPARE WHAT IS BEING ADVERTISED WITH WHAT IS DISCLOSED IN THE SCHOOL'S CATALOG AND COURSE SYLLABUS.**

Make sure that the school is being truthful in what has been advertised. Watch out for hidden costs and promises that seem too good to be true.

##### **7. REQUEST TO SEE THE SCHOOL'S STUDENT COMPLETION AND JOB PLACEMENT RATES.**

A "student performance fact sheet" enables you to check to see whether students are staying in the class and finishing the course, and whether the school is assisting students in finding jobs after they have completed the course.

##### **8. FIND OUT WHAT THE SCHOOL NEEDS FROM YOU.**

If you are transferring from another school or enrolling for the first time at a post-secondary school, make sure you inquire as to what documents you will need to submit when you enroll.

##### **9. MAKE SURE YOU KNOW THE AMOUNT AND TYPES OF FINANCIAL AID YOU WILL NEED BEFORE YOU ENROLL.**

There are several options in obtaining financial aid to attend a school. Make sure you know whether you are going to receive or need Federal student loans, Pell grants, private loans or a combination of grants and loans, and understand what the advantages and disadvantages are of obtaining each type of loan or grant. Make sure you know the total amount of loans you are to receive. Match the amount of the loans against the total cost of tuition. For more information on financial aid, contact EDFund at <http://www.edfund.org/>, or the California Student Aid Commission at <http://www.csac.ca.gov>.

##### **10. GET EVERYTHING IN WRITING.**

Never accept a promise to deliver a service verbally. Make sure all contracted-for services are in writing and signed by a school official before you sign the enrollment agreement.

##### **11. KEEP A COPY OF YOUR DOCUMENTS!**

If you decide to enroll in a private postsecondary school, be sure to keep a copy of all contracts, policies, catalogs, disciplinary actions, attendance records, letters you've written to the school, etc. In the future, you may need to verify your payment obligations, any refunds owed to you by the school, or the educational services that you contracted to receive from the school.

##### **12. LASTLY – ENJOY YOUR EDUCATIONAL EXPERIENCE!**

California Department of Consumer  
Bureau for Private Postsecondary Education  
[www.bppe.ca.gov](http://www.bppe.ca.gov)

