

INTERNET LINKS*:

[CALENDAR](#) [MBA HOME PAGE](#) [WORKBOOKS](#) [MBA OFFICE HOURS](#) [CLASS REPLAYS](#)

LINKS IN THIS DOCUMENT:

[TOPIC 1](#) [EXERCISE FA-2-5-1-1 for Topic 1*](#) [EXERCISE FA-2-5-1-2](#)
[EXERCISE FA-2-5-1-3](#) [TOPIC 2](#)
[TOPIC 3](#) [HOMEWORK](#)

* If prompted for a password, use the password that was emailed to you.

FA-2-5-1-1 Means FA **SEMESTER 2 **CLASS 5** **TOPIC 1** EXERCISE 1

WORKBOOK FOR FINANCE & ACCOUNTING SEMESTER #2 & CLASS #5 (ALSO CALLED FA-2-5***)

3 TOPICS COVERED IN THIS LESSON: (Brief Recaps in Brackets. Click the text to jump to the page in this workbook where we cover the Topics).

- 1** [FA-2-5-1: TAX STRATEGIES TO SAVE YOU MONEY](#) (An in-depth discussion of retirement and educational savings strategies that are amazing tax shelters.)
- 2** [FA-2-5-2: INTRODUCTION TO TAX FORMS AND FILING PERSONAL AND CORPORATE TAXES](#) (A discussion and demonstration of how to file taxes.)
- 3** [FA-2-5-3: AN ORGANIZED PAPER BASED FILING SYSTEM FOR MANAGING YOUR MONEY](#) (A discussion and demonstration of how to stay incredibly organized with your financial documents.)

Please have this workbook open during the FA-2-5*** lecture and fill in the blanks or answer the questions in this workbook when Chris asks you to do so during the live lesson (or during the replay of the live lesson). The homework for all lessons is always listed on the last page.

If you are watching a live version of this lesson, please let Chris explain the concepts and then we will have many opportunities for live Q&A when he mentions: “Does Anyone Have Any Questions?” You can also ask Chris questions about the concepts taught in this class during his weekly *For MBA Degree Program Students Only Weekly Q&A Webcast*, which is available at the following [link](#) using the password that was emailed to you.

Please note that after the class is finished, Chris will direct you where to go online in order to take a quiz based on the concepts taught in FA-2-5. If you can't watch this class live, then Chris' team will have an edited replay of the lesson online within one day after this class has ended.

TOPIC 1 OF 3: FA-2-5-1: Tax Strategies to Save You Money

Tax rates in all countries: https://en.wikipedia.org/wiki/List_of_countries_by_tax_rates

Optional: Type your notes for Topic #1 in this box:

Optional: How can you apply what you have learned about Topic #1 today to enhance your career (or to make you happier and more successful in general)?

Optional: Type a question(s) below that you want to ask Chris on the live webcast about Topic #1. If you are watching the live webcast of this lesson, after Chris finishes discussing each Topic, he will say “Does anyone have any questions about Topic #1. At that point you can copy and paste the text that you type below into the YouTube message box to ask him a question. If you are not on the live webcast, you can also ask him your questions during the [MBA Only Students Office Hours Webcast](#) (use the password that was emailed to you). Before asking the question about Topic #1, please look at the first page of this document to see what he will discuss in Topic #2 and Topic #3 (in case your question will be addressed during Topic #2 and Topic #3). Thanks:

EXERCISE FA-2-5-1-1: How Much Money Do You Need to Retire?

When Chris asks you to, please download the Excel document that he mentions from harouneducation.com/fa-2-5 [all lower-case as always]. Thanks

EXERCISE FA-2-5-1-2: How Much Do You Need for Education Expenses?

When Chris asks you to, please download the Excel document that he mentions from harouneducation.com/fa-2-5 [all lower-case as always]. Thanks

EXERCISE FA-2-5-1-3: Pay Less Tax Strategies

When Chris asks you to, please download the Excel document that he mentions from harouneducation.com/fa-2-5 [all lower-case as always]. Thanks

TOPIC 2 OF 3: FA-2-5-2: Introduction to Tax Forms and Filing Personal and Corporate Taxes

When Chris asks you to copy these items and paste them into the Excel spreadsheet (he will explain this in more detail in Topic 2):

=HYPERLINK("https://www.google.com/search?q="&YOURCOUNTRY&"&annual+personal+tax documents+to+file", "Click me for tax documents to file in "&YOURCOUNTRY&".")

=HYPERLINK("https://www.google.com/search?q="&YOURCOUNTRY&"&wage+and+tax+statement", "Click me for tax wage documents to file in "&YOURCOUNTRY&".")

Optional: Type your notes for Topic #2 in this box:

Optional: How can you apply what you have learned about Topic #2 today to enhance your career (or to make you happier and more successful in general)?

Optional: Type a question(s) below that you want to ask Chris on the live webcast about Topic #2. If you are watching the live webcast of this lesson, after Chris finishes discussing each Topic, he will say “Does anyone have any questions about Topic #2. At that point you can copy and paste the text that you type below into the YouTube message box to ask him a question. If you are not on the live webcast, you can also ask him your questions during the [MBA Only Students Office Hours Webcast](#) (use the password that was emailed to you). Before asking the question about Topic #2, please look at the first page of this document to see what he will discuss in Topic #3 (in case your question will be addressed during Topic #3). Thanks:

Workbook for FA-2-5 (Semester #2 and Class #5 for Finance & Accounting)

TOPIC 3 OF 3: FA-2-5-3: An Organized Paper Based Filing System for Managing Your Money
Please download the tax organization documents in PowerPoint, PDF and Excel format from:
harouneducation.com/fa-2-5 [all lower case]

Here are items similar to what Chris discusses for being more organized:

CASE TO HOLD YOUR TAX DOCUMENTS:

CHEAPER VERSION:

[Size/dp/B01B25NN64/ref=pd_sim_229_6?encoding=UTF8&pd_rd_i=B01B25NN64&pd_rd_r=ZBCRZ1QSZGXA13GG7B35&pd_rd_w=vGDt&pd_rd_wg=TISoB&psc=1&refRID=ZBCRZ1QSZGXA13GG7B35](https://www.amazon.com/dp/B01B25NN64/ref=pd_sim_229_6?encoding=UTF8&pd_rd_i=B01B25NN64&pd_rd_r=ZBCRZ1QSZGXA13GG7B35&pd_rd_w=vGDt&pd_rd_wg=TISoB&psc=1&refRID=ZBCRZ1QSZGXA13GG7B35)

MORE EXPENSIVE VERSION:

https://www.amazon.com/dp/B0017D6QFM/ref=pd_luc_rh_sbs_03_01_t_img_lh?encoding=UTF8&psc=1

Optional: Type your notes for Topic #3 in this box:

Optional: How can you apply what you have learned about Topic #3 today to enhance your career (or to make you happier and more successful in general)?

Optional: Type a question(s) below that you want to ask Chris on the live webcast about Topic #3. If you are watching the live webcast of this lesson, after Chris finishes discussing each Topic, he will say “Does anyone have any questions about Topic #3. At that point you can copy and paste the text that you type below into the YouTube message box to ask him a question. If you are not on the live webcast, you can also ask him your questions during the [MBA Only Students Office Hours Webcast](#) (use the password that was emailed to you).

HOMEWORK

After this lecture, please complete any exercise(s) in this workbook that you have not yet completed (if applicable) and the quiz associated with this lecture. The quiz is always in the last lecture for each class.
Thanks