

REVIEW DRAFT | NOT EXECUTED | VERSION 2026-09-26-D1

Learn With Clear Boundaries

Status And Purpose

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What You Receive

The initial orientation addresses roles, reading offers, organizing work, secure handoffs, budgets and professional readiness. These are general business-learning resources. The orientation is not tax-return-preparation or tax-law instruction, continuing education, licensing, certification or a substitute for advice on a particular client's facts.

Provider Training Stays Separate

Complete the provider training required for your actual role in its authorized environment. A Cima checklist or quiz result does not prove completion of provider training. No upstream course, Handbook, Zoom recording or proprietary document is licensed for redistribution through the Academy.

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Progress And Conduct

Open orientation progress may be stored locally in your browser; account-based progress may be stored in the classroom. Browser resets and curriculum updates can affect displayed progress. Keep work free of confidential taxpayer information and respect other participants. Accessibility or content questions can be sent to Rasheeda@cimatapro.com.

No Paid Course Assumption

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