

## Calendar of Events

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June 1, 2024  
- June 1, 2030

### **North Dakota Anytime CPE Subscription**

#### **Anytime CPE**

12:00 AM - 12:00 AM

*This On-Demand subscription includes more than 100 curated courses covering a wide range of topics in accounting and auditing, tax, technology, and more. Access to the Anytime CPE subscription begins immediately upon purchase and is available for up to one year after purchase. Please review our Anytime CPE FAQs for more information.*

June 21, 2024  
- December 31, 2034

### **Excel - Functions and Formula Shootout**

#### **Anytime CPE**

12:00 AM - 12:00 AM

*Are you aware there are 470+ formula functions in Excel? Do you realize that they add new functions in every major version of Excel? Did you know that Microsoft adds new functions throughout the year in the Office 365 version of Excel? Are you stuck using old or simple functions like SUM or ROUND? Do you want to expand your knowledge of the extensive function library in Excel?*

*If these questions perk your interest in becoming an Excel function expert, this course is right up your alley.*

*This past-paced course digs into some of the most powerful functions in Excel.*

*Although, we cannot cover 470 functions, we will look at over 20 functions that will allow you to create advanced calculations in your spreadsheets. Functions like: VLOOKUP, IF, IFS, FORECAST, RAND, SWITCH, TEXTJOIN, UNIQUE, SUBTOTAL, IS, TEXT and more! We will also provide example files that will include all the functions used during the class. It's time to take your Excel spreadsheets to the next level.*

*This session is presented using Excel 2019/Office 365. Regardless of the version you are using, most concepts covered in this course apply to all versions of Excel.***Objectives:**

*Apply formula creation best practices when developing spreadsheets*

*Use Excel functions to create better calculations in your spreadsheets*

*Select Excel functions to create advanced calculations***Instructor:**Bryan L. Smith,

**CPA.CITP, CISA****Fields of Study:**Computer Software & Applications

June 21, 2024  
- December 31, 2034

## **Excel - From a Blank Sheet to a Finished Workbook**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Have you ever opened a blank workbook in Excel and just stared at it, wondering where to begin? Or, do you spend most of your time just formatting cells to make your spreadsheet look pretty? Or, do you just wonder if there is a better way to creating your spreadsheets?*

*This course is designed to take you from a blank worksheet to a completed report. Our example will be a financial statement but you can use the knowledge gained in the course and apply it to your specific job function. You will learn to import data instead of manually entering it. Learn that you can use functions and formulas to build calculations that will eliminate the need to manually manipulate your data. Our goal is to make sure you have all the information needed to build reports without having to manually enter it every month.*

*You will learn techniques to use your data to build your reports. This will include building formulas that are flexible with your changing data. You will learn techniques to validate your report calculations so you can improve the accuracy of your reports. You will also learn how to quickly format reports and techniques that allow you to efficiently change the format. Lastly, you will learn how PivotTables can provide a more dynamic reporting option instead of using pre-defined report formats.*

*Obviously, we will be covering a lot of ground, so to enhance your learning experience all examples will be provided to each participant along with instructions. This will allow you to follow along and use as you apply your new knowledge to your spreadsheets.*

*This session is presented using Excel 2019/Office 365. Regardless of the version you are using, most concepts covered in this course apply to all versions of*

*Excel.***Objectives:**

*Recall best practices when creating reports in Excel*

*Identify ways to reduce manual entries when creating reports in Excel*

*Recognize features that are more efficient for creating reports in Excel*

*Indicate how you can use PivotTables to provide more flexibility in Excel*

*reports***Instructor:**Bryan L. Smith, CPA.CITP, CISAFields of Study:Computer Software & Applications

June 21, 2024  
- December 31, 2034

## **Excel - Feature Review in 100 minutes**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Over the years, Excel has added MANY new features and functionality, yet most people still use it the same way they first learned it. Many of the features were added to Excel to enhance your ability to create spreadsheets more efficiently and with more accurately. However, if you aren't aware of these new features, how can you use them?*

*This class will focus on walking through each ribbon (menu) to explain the capability of various features in Excel. It is a great overview for both new and advanced Excel users to make sure you know all the capabilities of Excel. You may have seen many of the features but had no idea what they could do for you. This class will help you to understand these features and determine how you might take advantage of their capabilities.*

*This session is presented using Excel 2019/Office 365. Regardless of the version you are using, most concepts covered in this course apply to all versions of*

*Excel.***Objectives:**

*Identify features that allow you to create spreadsheets more efficiently*

*Select the features that you can use to build better spreadsheets*

*Recognize features and functions to enhance your spreadsheets***Instructor:**Bryan L.

*Smith, CPA.CITP, CISAFields of Study:Computer Software & Applications*

June 21, 2024  
- December 31, 2034

## **Taxation of Business Entities**

### **Anytime CPE**

12:00 AM - 12:00 AM

*This course will introduce you the different types of business entities and the tax implications of contributions, distributions and earnings, among other topics. Objectives:*

*Be able to differentiate between the different types of business entities*

*Be able to determine if a business client is using the most tax efficient entity structure based on its business goals. Instructor: Allison M. McLeod, LL.M., CPA*

*Fields of Study: Taxes*

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## **Shorten Month-End Closing Best Practices**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Surveys show that the average North American company completes its monthly financial statement closing in six days. However, some companies can close their books in one day or less. You don't have to sacrifice accuracy for speed. This session will show you how to close month-end faster, better and cheaper. Objectives:*

*Gain ideas that will help your organization perform its month-end closing faster, better and cheaper. Instructor: John L. Daly, MBA, CPA, CMA, CPIM*

*Fields of Study: Accounting*

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## **Assessing Independence Under the New Yellow Book**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Individuals who work in a governmental environment have many rules of ethics that must be followed. The Government Accountability Office (GAO) issues Yellow Book providing rules related to ethics and independence, which received a significant update in 2018. We'll review some of the key elements of ethics relevant to governmental entities and auditors to prevent independence noncompliance. Objectives:*

*Threats and safeguards*

*Independence Rules*

*GAGAS Instructor: Melisa Galasso*

*Fields of Study: Regulatory Ethics*

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## **Excel - Using PivotTables for Data Analysis**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Excel is the #1 data analysis tool for accountants, yet many accountants have never learned the basics of data analysis using Excel or the tools that Excel offers to help with data analysis. This session is designed to teach participants the importance of PivotTables for analyzing data. We will demonstrate how PivotTables can make analyzing data an easy task for all accountants. Participants will learn the step-by-step process to create PivotTables and PivotCharts. We will also cover all the setup options and features. This session is presented using Excel 2013. Regardless of the version you are using, ALL concepts covered in this course apply to ALL versions of Excel. Objectives:*

*Understand the advantages of using PivotTables to analyze data from multiple dimensions.*

*Create a PivotTable using a step-by-step process that will analyze accounting data.*

*Use all PivotTable options to maximize your data analysis.*

*Create PivotCharts to present your data graphically for the most effective analysis. Instructor: Bryan L. Smith, CPA, CITP, CISA*

*Fields of Study: Computer Software & Applications*

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## **Excel - Auditing Your Spreadsheets for Maximum Accuracy**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Did you know Excel has 400-500 functions depending on your version? Did you know there are 12 different function categories? Did you know you could create your own functions? After you attend this class, you will be in the know!*

*In this course, we will focus on proofing and auditing your spreadsheets. You will learn how to build spreadsheets that validate the accuracy of your calculations and techniques to use the Data Validation feature to validate data entry. You will also learn techniques to cross-foot your data to ensure accuracy as well as how to use the various Excel Auditing Tools.*

*This session is presented using Excel 2013. Regardless of the version you are using, ALL concepts covered in this course apply to ALL versions of Excel. Objectives:*

*Use the Excel Auditing Tools to validate your calculations*

*Use the Data Validation feature to verify data entry*

*Apply various methods of ensuring the accuracy of your spreadsheets*  
Instructor: Bryan L. Smith, CPA.CITP, CISAF  
Fields of Study: Computer Software & Applications

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## **Excel - Create KPI Dashboards for Maximum Impact**

### **Anytime CPE**

12:00 AM - 12:00 AM

*In this course, you will learn how to build robust dashboards for analyzing key metrics in Excel. We will begin with some dashboard design guidelines, such as understanding your audience and identifying necessary metrics. Then we will work through importing data, setting up calculated fields and columns, and creating key performance indicators (KPIs) for the dashboards. Most business professionals use Excel to help them make decisions about their data. However, as the amount of data grows, it becomes more difficult to make strategic decisions based on rows and rows and columns and columns of data. You will learn how to add charts and eye-catching visuals with Power View, which will make your dashboards easily understood. This session is presented using Excel 2013. Regardless of the version you are using, ALL concepts covered in this course apply to ALL versions of Excel. Objectives:*

*Create KPI dashboards*

*Make strategic decisions based on the dashboards you've created*

*Use various Excel tools to easily create even more meaningful KPI*

*dashboards*  
Instructor: Bryan L. Smith, CPA.CITP, CISAF  
Fields of Study: Computer Software & Applications

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## **Excel - Using Charts for a Non-Financial Audience**

### **Anytime CPE**

12:00 AM - 12:00 AM

*This course will show you how to use Excel's charting and formatting features to present financial data to a non-financial audience. As the saying goes, "A picture is worth a thousand words." People tend to better understand the point when visuals are used. We will explore the many capabilities of presenting data without showing rows and rows or columns and columns of data. Help your audience visualize the meaning of the data, whether it is a trend, an exception, a distribution or a good vs. a bad relationship. This session is presented using Excel 2013. Regardless of the version you are using, ALL concepts covered in this course apply to ALL versions of Excel. Objectives:*

*Create charts with ease*

*Customize specific elements of your charts*

*Choose which chart will work best in your situation*

*Use charting to visually communicate your data*  
Instructor: Bryan L. Smith, CPA.CITP, CISAF  
Fields of Study: Computer Software & Applications

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### **Attestation Update: SSAE 19-22**

#### **Anytime CPE**

12:00 AM - 12:00 AM

*The Auditing Standards Board (ASB) has completed its update of the three engagement types in the SSAEs. In this course, we will review the changes to the examination, review, and agreed-upon procedures standard to provide you with an understanding of the changes to performance and reporting requirements. Objectives:*

*Identify changes to the performance requirements for attestation standards*

*Recall changes to reporting requirements*

*Instructor: Melisa Galasso*

*Fields of Study: Auditing*

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### **Accounting and Auditing for ESG**

#### **Anytime CPE**

12:00 AM - 12:00 AM

*Environmental, Social and Governance (ESG) has become a hot topic among standard setters. This session will look at the work of the FASB, GASB, and AICPA in the areas of ESG. We'll also look at the types of engagements CPAs can provide to entities who want assurance around their ESG reporting. Objectives:*

*Identify types of engagements CPAs can perform on ESG related items*

*Describe current projects of accounting standard setters"*

*Instructor: Melisa Galasso*

*Fields of Study: Auditing*

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### **GASB 87: Are you ready?**

#### **Anytime CPE**

12:00 AM - 12:00 AM

*Government leases are getting an overhaul. GASB Statement 87 was issued in 2017 and provides an update on the proper accounting for leases from both the lessee and lessor points-of-view. Objectives:*

*Define a lease per GASB 87*

*Prepare journal entries for lessee and lessor accounting compliant with GASB 87*

*Instructor: Melisa Galasso*

*Fields of Study: Accounting (Governmental)*

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### **Excel - Advanced Spreadsheet Troubleshooting Techniques**

#### **Anytime CPE**

12:00 AM - 12:00 AM

*In this course, we will focus on debugging and troubleshooting complex formulas. You will learn various techniques that will assist you in creating complex compound formulas. You will also learn methods to resolve issues when you receive errors. Do you dread that annoying ERROR! message popping up on your spreadsheets? Tired of using the same long, elaborate formulas when you could be using Excel's built-in formulas? Then this class is for you! This session will also discuss Excel's nine built-in error-checking options and then demonstrate different approaches to error resolution. We will also review techniques to resolve rounding errors. This session is presented using Excel 2013. Regardless of the version you are using, ALL concepts covered in this course apply to ALL versions of Excel. Objectives:*

*Create complex spreadsheets more quickly while maintaining accuracy*

*Apply advanced skills to build complex formulas*

*Troubleshoot complex formulas using various methods*

*Instructor: Bryan L. Smith,*

*CPA, CITP, CISA*

*Fields of Study: Computer Software & Applications*

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## **Excel - Advanced Financial and Statistical Calculations**

### **Anytime CPE**

12:00 AM - 12:00 AM

*In this course, we will focus on Financial, Statistical and Math functions. In the Financial functions section, you will learn how to use the financial functions to build better amortization schedules. In the Statistical and Math functions sections, you will learn how to use various statistical functions to analyze your data. Depending on your version, Excel has over 500 functions already built in and ready to use. How many of those do you incorporate into your spreadsheets? You will learn some powerful functions that will take your calculating power to the next level.*

*This session is presented using Excel 2013. Regardless of the version you are using, ALL concepts covered in this course apply to ALL versions of Excel. Objectives:*

*Create complex amortization schedules*

*Use math functions to make SUM functions more accurate*

*Analyze data using the statistical functions* Instructor: Bryan L. Smith, CPA.CITP,

CISA Fields of Study: Computer Software & Applications

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## **Excel - Building Powerful Lookup and Reference Formulas**

### **Anytime CPE**

12:00 AM - 12:00 AM

*In this course, we will focus on the Logical, Information and Lookup and Reference functions. In the Logical function section, you will learn to perform logical tests using the IF function along with AND, OR and NOT. In the Information function section, you will learn various ERROR checking functions that can be combined with the Logical functions. In the Lookup and Reference section, you will learn to use the various LOOKUP functions and the INDIRECT function. Excel has over 500 functions that are built in and ready to use. You just have to figure out which one to use and when. Integrating functions into each and every one of your spreadsheets not only improves efficiency, it also makes your task easier to execute.*

*This session is presented using Excel 2013. Regardless of the version you are using, ALL concepts covered in this course apply to ALL versions of Excel. Objectives:*

*Create complex lookup formulas*

*Use the INDIRECT function to speed worksheet creation*

*Use ERROR checking functions in calculations* Instructor: Bryan L. Smith, CPA.CITP,

CISA Fields of Study: Computer Software & Applications

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## **Excel - Working With Text, Date and Time Functions and Formulas**

### **Anytime CPE**

12:00 AM - 12:00 AM

*In this course, we will focus on Text functions and Date and Time functions. Want to automatically update the date and time on your spreadsheet? Or pick text strings from other cells to automatically copy and update to a different cell? You will learn how to incorporate text, date and time functions in your spreadsheet that will make data entry a breeze. In the Text function section, you will learn how to use the various Text functions to join and separate text entries as well as formatting the results. In the Date and Time function section, you will learn how to perform various date and time calculations.*

*This session is presented using Excel 2013. Regardless of the version you are using, ALL concepts covered in this course apply to ALL versions of Excel. Objectives:*

*Create complex Text functions to separate text entries*

*Format cells using Text functions*

*Perform complex date and time calculations* Instructor: Bryan L. Smith, CPA.CITP,

CISA Fields of Study: Computer Software & Applications

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### **Intro to Governmental Accounting**

#### **Anytime CPE**

12:00 AM - 12:00 AM

*Governmental accounting is very unique. This course will introduce the financial reporting basics for governments, including fund accounting and the modified accrual basis of accounting. Attendees will analyze the layouts of the fund financial statements as well as the government-wide financial statements. Objectives:*

*Describe the unique accounting principles and transactions applicable to governmental entities*  
Instructor: Melisa Galasso  
Fields of Study: Accounting (Governmental)

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### **Intro to NFP Accounting**

#### **Anytime CPE**

12:00 AM - 12:00 AM

*Nonprofits face unique accounting challenges. This course will introduce attendees to the financial statements and unique accounting principles applicable to not-for-profit organizations. Specifically, we will focus on the typical transactions and account balances unique to NFPs, including net assets, agency transactions, contributions, endowments, and programmatic investments. Objectives:*

*Recall the unique accounting principles and transactions applicable to NFP organizations*  
Instructor: Melisa Galasso  
Fields of Study: Accounting (Governmental)

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### **Excel - Two Must Know Features; Defined Name and Tables**

#### **Anytime CPE**

12:00 AM - 12:00 AM

*This course is designed to build the foundation to becoming an Excel formula expert. Our focus will be on design techniques that should be used when creating formulas. Excel has over 500 functions and among those, Defined Names is one of the top choices in creating formulas that make your spreadsheets work better for you. After understanding what they are and how to properly create Defined Names, you will wonder how you managed without them for so long. You will learn how to use Defined Names and Excel Tables as an important and fundamental part of EVERY spreadsheet. You will learn techniques that most advanced users don't implement in their spreadsheets but should. This session is presented using Excel 2013. Regardless of the version you are using, ALL concepts covered in this course apply to ALL versions of Excel. Objectives:*

*Use Defined Names to create formulas more efficiently*

*Create Excel Tables to improve spreadsheet accuracy*

*Utilize structured calculations in Excel Tables*  
Instructor: Bryan L. Smith, CPA, CITP,  
CISA  
Fields of Study: Computer Software & Applications

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- December 31, 2034

## **Power BI - Introduction to MS Power BI Tools (Course 1)**

**Anytime CPE**

12:00 AM - 12:00 AM

*Excel is a popular data analysis tool, yet most users have never learned the basics of data analysis using Excel or the tools that Excel offers to help with data analysis. Those that learned to analyze data using PivotTables, soon learned there were many weaknesses in PivotTables that resulted in elaborate calculations in order to perform simple tasks.*

*In 2010, after much development and little hype, Microsoft released Power Pivot, a new data analytic tool that removed the weaknesses of PivotTables. This single product took Excel from a low-end data analytic tool to one of the most sophisticated and comprehensive tools. Since 2010, Microsoft has continued their development of end-user data analytic tools. This entire suite of products is called Power BI.*

*In this session, we will provide an overview of the various Power BI tools and discuss Microsoft's Power BI Strategy. We will begin by explaining the challenges faced by many accountants when it comes to analyzing data in Excel. You will learn how each Power BI tool reduces the challenges and improves your data analytic skills. You will also gain a complete understanding of when to use which tool.*

*This session is an overview of the various Microsoft Power BI tools and should be your first step in learning the complete set of Power BI tools. As an overview, we will not be teaching the details of each tool but you will receive a thorough understanding of what each tool can accomplish.*

*This session is presented using Excel 2019/Office 365. Regardless of the version you are using, most concepts covered in this course apply to all versions of Excel.***Objectives:**

*Recognize ways that the Power BI tools can help with your data analysis needs*

*Identify uses for each Power BI tool*

*Select which Power BI tool will meet your organization's strategy***Instructor:**Bryan L.

*Smith, CPA.CITP, CISA***Fields of Study:**Computer Software & Applications

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## **Power BI - Prepare Your Data Efficiently for Excel Analysis (Course 2)**

**Anytime CPE**

12:00 AM - 12:00 AM

*Before you can analyze data, you first must get the data. This course focuses on getting data into Excel using different data sources. Whether your data is text, comma delimited (CSV), reports, Excel, databases, web, applications and/or many others, Excel provides the ability to access that data. You will learn about tools that have been added to Excel that will make accessing that data even easier, such as data models and Power Query (Get and Transform). After this class, you will finally be able to get the data you need to perform data analysis.***This session is presented using Excel 2019/Office 365.**

*Regardless of the version you are using, most concepts covered in this course apply to all versions of Excel.***Objectives:**

*Differentiate between improper and proper data structure*

*Select the best way to import data into Excel*

*Identify ways to use Power Query to clean your data***Instructor:**Bryan L. Smith,

*CPA.CITP, CISA***Fields of Study:**Computer Software & Applications



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## **Section 174: New Rules for Research & Experimentation**

### **Anytime CPE**

12:00 AM - 12:00 AM

*This program addresses the most recent developments impacting taxpayers incurring research and experimentation costs. Emphasis will be placed on compliance with the 2022 change in Section 174 Amortization of research and experimental expenditures. Objectives:*

*identify recent changes affecting the deduction of research and experimental expenditures. Instructor: Steven C. Dilley, PhD, CPA, JD Fields of Study: Taxes*

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## **The Choice of Entity Decision: What is best for your client?**

### **Anytime CPE**

12:00 AM - 12:00 AM

*This course will identify the factors in the choice of entity decision while considering the impact of various recent tax act provisions. Objectives:*

*determine the factors in the choice of entity decision considering the impact of various recent tax act provisions. Instructor: Steven C. Dilley, PhD, CPA, JD Fields of Study: Taxes*

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## **Power BI - Analyze Your Data With Excel PivotTables (Course 3)**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Excel is a popular tool for data analysis, yet most users have never learned the basics of data analysis using Excel or the tools that Excel offers to help with data analysis.*

*This session is designed to teach participants the importance of PivotTables for analyzing data. We will demonstrate how PivotTables can make data analyzation an easy task for all accountants. Participants will learn the step-by-step process to create PivotTables and PivotCharts. We will also cover all the setup options and features.*

*This session is presented using Excel 2019/Office 365. Regardless of the version you are using, most concepts covered in this course apply to all versions of Excel. Objectives:*

*Determine the advantages of using PivotTables to analyze data from multiple dimensions*

*Apply the step-by-step process to create PivotTables*

*Choose the PivotTable options that best fit your needs*

*Use PivotCharts to present your data graphically for the most effective*

*analysis Instructor: Bryan L. Smith, CPA, CITP, CISA Fields of Study: Computer Software & Applications*

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## **Power BI - Create Excel Dashboards for Maximum Impact (Course 4)**

**Anytime CPE**

12:00 AM - 12:00 AM

*Most accountants use Excel to help them make decisions about their data. However, as the amount of data grows, it becomes difficult to make strategic decisions based on rows and rows and columns and columns of data. In this course, you will learn how to build robust dashboards for analyzing key metrics in Excel.*

*We will begin with some dashboard design guidelines, such as understanding your audience and identifying necessary metrics. Then, we will work through creating key performance indicators (KPIs) for the dashboards. You will learn how you can add charts and eye-catching visuals, in order to make your dashboards easily understood.*

*This course focuses on using standard Excel features to create visuals. Although we will introduce new tools like Power BI Desktop, this course is NOT about using Power BI to create visuals.*

*This session is presented using Excel 2019. Regardless of the version you are using, most concepts covered in this course apply to all versions of Excel.* Objectives:

*Use dashboards to make strategic decisions*

*Create KPI dashboards that graphically represent your data*

*Use Excel tools to easily create meaningful KPI dashboards* Instructor: Bryan L. Smith, CPA.CITP, CISA  
Fields of Study: Computer Software & Applications

June 21, 2024  
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## **Power BI - Use Power Query to Transform Your Data (Course 5)**

**Anytime CPE**

12:00 AM - 12:00 AM

*Data can be messy! In other words, it is not always clean and neat. Data comes from various sources like text files, Excel spreadsheets, databases, report files, etc. This is how most data analysis projects fail - the inability to get the correct data.*

*This class focuses on using Power Query (Get and Transform) to clean, shape and transform your messy data while still allowing you a one-click refresh. We will review various data issues including appending files, combining multiple files from a folder, adding custom columns, unpivoting data, creating a lookup table, and much more.*

*This session is presented using Excel 2019. Regardless of the version you are using, most concepts covered in this course apply to all versions of Excel.* Objectives:

*Use Power Query to solve your data clean-up issues*

*Determine how Power Query allows you to get more data into Excel*

*Apply a one-click step to refresh your data* Instructor: Bryan L. Smith, CPA.CITP, CISA  
Fields of Study: Computer Software & Applications

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## **Power BI - Go Beyond PivotTables with Power Pivot (Course 6)**

**Anytime CPE**

12:00 AM - 12:00 AM

*This course focuses on using the Power Pivot features to enhance data analysis. We will review the 4 features of Power Pivot (data model, calculations, hierarchies and KPI's) and you will learn how you can use each of these features. Although, the majority of the time will be spent on building the data model and using calculations. You will learn how to add data to your data model either directly into Power Pivot or from Power Query. We will discuss the benefits of the data model relationships versus using the VLOOKUP function to access data in different tables. One of the strengths of Power Pivot is the formula language called DAX (Data Analysis eXpressions). We will introduce DAX so that you can use basic DAX formulas to build various calculations in the data model. You will learn the difference between calculated columns and measures as we build these various calculations into our data model. This session is presented using Excel 2019/Office365. Regardless of the version you are using, most concepts covered in this course apply to all versions of Excel.*

*Objectives:*  
*Create a data model using Power Pivot*

*Differentiate between calculated columns and measures*

*Use Power Pivot for data analysis*  
Instructor: Bryan L. Smith, CPA.CITP, CISA  
Fields of Study: Computer Software & Applications

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## **Power BI - Use Advanced Calculations with DAX Formulas (Course 7)**

**Anytime CPE**

12:00 AM - 12:00 AM

*This course focuses on using DAX (Data Analysis eXpressions) to create advanced calculations in Power Pivot data models. We will review what you learned in "Power BI - Go Beyond PivotTables with Power Pivot" and take your calculations to the next level using advanced DAX formulas. You will learn over 20 DAX functions that will allow you to perform calculations that were not possible with standard Excel. We will also review the use of a date or calendar table that allows us to perform date analysis that was never possible before. This will allow us to use the new time-intelligent functions to perform complex calculations on our data like: month-to-date, quarter-to-date, year-to-date, last year same period, last year-to-date, etc. You will also learn the DAX calculation process in order to proof and validate your calculations. We will be using Power Pivot to create our DAX calculations, however, the process is very similar in Power BI Desktop and the functions and formulas are identical. If you are using Power BI Desktop, you should be able to follow along and learn how to create advanced calculations. This session is presented using Excel 2019/Office 365. Regardless of the version you are using, most concepts covered in this course apply to all versions of Excel.*

*Objectives:*  
*Create calculations using DAX formulas*

*Use a Date / Calendar table to perform complex date analysis*

*Use the DAX calculation process to validate calculations*  
Instructor: Bryan L. Smith, CPA.CITP, CISA  
Fields of Study: Computer Software & Applications

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## **Power BI - Use PBI Desktop to Create Reports and Dashboards (Course 8)**

**Anytime CPE**

12:00 AM - 12:00 AM

*Power BI Desktop is a new stand-alone tool that adds visualization to your data. This course focus on learning the Power BI Desktop interface, connecting to data sources and creating the visualizations. We will demonstrate the creation of each of the various visualizations and the various options related to each.*

*We will also show how the visualization can be connected together to provide fully-interactive reports with drill-down capabilities. This class does not require any Excel knowledge but understanding Power Pivot and Power Query can reduce your learning curve.*

*This session is presented using Excel 2019/Office 365. Regardless of the version you are using, most concepts covered in this course apply to all versions of*

*Excel.***Objectives:**

*Identify components of the Power BI Desktop interface*

*Use Power BI Desktop to connect to data sources*

*Use Power BI Desktop to create interactive visualizations of your data***Instructor:**Bryan L. Smith, CPA.CITP, CISAFields of Study:Computer Software & Applications

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## **Power BI - Share Your Data Analysis using PowerBI.com (Course 9)**

**Anytime CPE**

12:00 AM - 12:00 AM

*What good is data analysis if you can't share it? This course will focus on using Microsoft's cloud-based sharing/publishing platform, PowerBI.com. You will learn the interface as well as the benefits of using PowerBI.com. You will learn how to use PowerBI.com to leverage the work performed in Power Pivot or Power BI Desktop. Using PowerBI.com to create visuals is very similar to Power BI Desktop, so we will only review this feature. If you want detailed instructions on creating visualizations, please attend the Power BI Desktop course. This class can be taken with no Excel or Power BI Desktop knowledge, but some concepts will be a repeat from those classes and will serve as a knowledge reinforcement for experienced users. Many data analysts may create models in Power Pivot or Power BI Desktop, so we will spend time to learn how to share that data with PowerBI.com. This will ensure that everyone is looking at the same data, no matter the toolset. PowerBI.com adds the ability to create and share dashboards, so we will demonstrate how to create visualizations that can be turned into dashboards that allow users to customize their PowerBI.com with dashboards that are meaningful to them. This session is presented using Excel 2019/Office 365. Regardless of the version you are using, most concepts covered in this course apply to all versions of Excel.***Objectives:**

*Identify the components of the PowerBI.com interface*

*Use PowerBI.com to connect data models*

*Use PowerBI.com to create interactive visualizations and dashboards***Instructor:**Bryan L. Smith, CPA.CITP, CISAFields of Study:Computer Software & Applications

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## **Power BI - OLAP Formulas & More Time Intelligent Functions**

### **Anytime CPE**

12:00 AM - 12:00 AM

*This course is an extension of the Power BI series of courses that specifically explores using OLAP formulas and advanced time intelligent functions. OLAP formulas provide the ability to create a calculation in a cell that is based upon the measure in the data model. This powerful tool provides the ability to create calculations in an Excel worksheet without using a PivotTable to perform the calculation. Gone are the days of creating a PivotTable, then using those values in the PivotTable for additional calculations. When using Power BI to build a data model that connects to data files, you may want to know the date of these files. This class teaches you how to create a measure based upon the refresh date of your data. In the class "Power BI - Use Advanced Calculations with DAX Formulas," you learned the basics of time intelligent functions, the ability to calculate measures based upon dates. In THIS course, we will take it to the next step and teach you how to perform many more date-based calculations. This session is presented using Excel 2019/Office 365. Regardless of the version you are using, most concepts covered in this course apply to all versions of Excel.***Objectives:**

*Formulate worksheet calculations that use the Power Pivot data model*

*Create measures that provide a visual of the date of the data*

*Formulate calculated measures that calculate based upon the date of the filters*

*Instructor: Bryan L. Smith, CPA. CITP, CISAFields of Study: Computer Software & Applications*

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## **Excel - New Features That Benefit Excel 2019 & O365 Users**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Over the years, Excel has added MANY new features and functionality, yet most people still use it in the same way they first learned. Part of the reason is new features were added when the newest version was announced approximately every 3 years. The list was so extensive, making it difficult to learn what was new. Microsoft attempted to solve this for Office 365 customers by releasing new features more often, making it difficult to pinpoint the latest update. This class focuses on the specific added elements to Excel 2019 plus new functionality available to Office 365 users. Not only is this a great class to learn about what's new, it provides those who have not upgraded an opportunity to determine the value of upgrading or purchasing an Office 365 license.***Objectives:**

*Identify features that allow you to create spreadsheets more efficiently*

*Select the features that you can use to build better spreadsheet*

*Recognize features and functions to enhance your spreadsheets*

*Instructor: Bryan L. Smith, CPA. CITP, CISAFields of Study: Computer Software & Applications*

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## **Excel - Advanced Defined Names & Excel Tables**

### **Anytime CPE**

12:00 AM - 12:00 AM

*The importance of Defined Names and Excel Tables is detailed in our course "Excel - Two Must Know Features: Defined Names & Tables." Once you understand these two features, how can you use them to build advanced spreadsheets? This course is designed to demonstrate how you can use these features to build better spreadsheets that are easier to read, easier to update and more accurate. Learn about the INDIRECT function and how to use it with Defined Names to build a summary table. You will also learn the importance of Consistent Column Calculations and how tables can help. We will demonstrate the use of Structured Table References, as this is the foundation for using the advanced data analytics. This session is presented using Excel 2019/Office 365. Regardless of the version you are using, most concepts covered in this course apply to all versions of Excel. Objectives:*

*Use the INDIRECT function and Defined Names to build a summary table*

*Determine the importance of having Consistent Column Calculations*

*Use Excel Tables to build Consistent Column Calculations*

*Build formulas that use Structured Tables References*  
Instructor: Bryan L. Smith, CPA.CITP, CISA  
Fields of Study: Computer Software & Applications

June 21, 2024  
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## **Excel - Formatting Spreadsheets for Beginners**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Formatting Excel spreadsheets to look their best can be a tedious task. From deciding which fonts to use to cell formatting to multiple sheets to printing to distribution, these factors can take considerable valuable time. This class is designed to help you efficiently format spreadsheets, so you can spend time on more profitable tasks like analyzing data. Learn to format multiple sheets at the same time as well as use Cell Styles to quickly format cells and ranges. Learn how to create and use templates that are pre-formatted. We will also review print options. This session is presented using Excel 2019/Office 365. Regardless of the version you are using, most concepts covered in this course apply to all versions of Excel. Objectives:*

*Identify all the formatting options*

*Select formatting features / tools that help you format more efficiently*

*Recognize options that allow you to print your spreadsheets*

*Identify ways to use templates for create spreadsheets more efficiently*  
Instructor: Bryan L. Smith, CPA.CITP, CISA  
Fields of Study: Computer Software & Applications

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## **Excel - Fundamentals, Data Entry and Basic Formulas**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Are you self-taught on Excel? Have you ever wondered if you really know how to use Excel? Do you want to build a great foundation for using Excel? Are you new to using Excel? If you answered YES to any of these questions, this is for you. This course is designed to start with the basics of using Excel from the interface to the structure to data entry to formula basics. Whether you're a beginner or an intermediate user, you will gain valuable foundational knowledge for using Excel. This session is presented using Excel 2019/Office 365. Regardless of the version you are using, most concepts covered in this course apply to all versions of Excel. Objectives:*

*Select features from the Excel interface that will help you create spreadsheets*

*Recognize efficient ways to add data to your spreadsheets*

*Identify ways to create better formulas*  
Instructor: Bryan L. Smith, CPA.CITP, CISA  
Fields of Study: Computer Software & Applications

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## **Excel - Advanced Formatting to Improve Your Spreadsheets**

**Anytime CPE**

12:00 AM - 12:00 AM

*In the "Excel - Formatting Spreadsheets for Beginners" class, you learned basic formatting of a spreadsheet. In this class, we take you to the next level by teaching you how to customize many of the formatting options. Learn to customize cell styles and how to use these styles in other workbooks. Most Excel users know how to select number formats but this class shows how to leverage the Custom Number Formatting option to create special formatting options. Many of the formatting options are applied manually, cell-by-cell or by range. This can be tedious if there is a condition by which you want to apply a format. You will learn to use Conditional Formatting to format based upon a criteria. Have you ever finalized a spreadsheet, only to accidentally make changes over the top? This action is something that is very easy to do. This class demonstrates various options to prevent this from happening and will look at various security options within Excel. This session is presented using Excel 2019/Office 365. Regardless of the version you are using, most concepts covered in this course apply to all versions of Excel. Objectives:*

*Create custom cell styles that can be used in other Excel workbooks*

*Create custom number formatting that can be used to format the content of cells*

*Apply Conditional Formatting to cells where the format is based upon a defined criteria*

*Determine the best options to protect your workbook and worksheets*  
Instructor: Bryan L. Smith, CPA. CITP, CISA  
Fields of Study: Computer Software & Applications

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## **Internal Controls to Mitigate Financial Reporting Risk**

**Anytime CPE**

12:00 AM - 12:00 AM

*Internal controls are applied within an organization to satisfy objectives related to operations, compliance, and financial reporting. This course provides practical analysis and tips for how a reporting entity can manage financial reporting risk in an effective and efficient way. This course also differentiates the auditor's responsibilities for internal controls under Sarbanes Oxley, Government Auditing Standards, and Single Audit requirements. Objectives:*

*Discuss the evolution of internal control through the decades*

*Describe the revamped 2013 COSO Internal Control - Integrated Framework, including how the various components and principles interrelate to form a strong system of internal control over reliable financial reporting*

*Identify special considerations for internal control in a smaller-entity environment*

*Explain important varying audit considerations*  
Instructor: Jennifer F. Louis, CPA  
Fields of Study: Auditing

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## **The Lifecycle of a Criminal Tax Investigation**

**Anytime CPE**

12:00 AM - 12:00 AM

*Who investigates tax crimes and how are tax crimes prosecuted? Considered the "World's Finest Financial Investigators", the IRS-Criminal Investigation (IRS-CI) has sole jurisdiction in tax crimes and boasts a greater than 90% conviction rate. This agency was responsible for Al Capone going to federal prison and 90 years later they continue to investigate tax crimes such as tax evasion, filing false tax returns, and unpaid employment taxes. The course discusses how IRS-CI finds tax cases to prosecute, what happens during the course of the investigation, what techniques are used to prove tax crimes, what federal criminal statutes are commonly used, how IRS-CI evaluates an investigation, and the expected consequences of a successful prosecution. Objectives:*

- Understand the role of IRS-Criminal Investigation (IRS-CI) in the IRS mission*
- Learn how IRS-CI finds and evaluates investigations for prosecution potential*
- Understand the two ways that IRS-CI can investigate tax crimes*
- Know the tools that IRS-CI uses in investigating potential criminal violations*
- Explain the common criminal statutes used to prosecute criminal tax violations*
- Learn the approval process for a criminal tax investigation*
- Understand the expected consequences of defendant in a successful criminal tax prosecution*
- Discuss case studies of various criminal prosecutions*

*Instructor: Robert Nordlander, CPA, CFE*  
*Fields of Study: Accounting*

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## **Accountants and Malpractice; Can We Get Sued for This?**

**Anytime CPE**

12:00 AM - 12:00 AM

*This seminar reviews situations in which a CPA or accounting professional may be in danger of being sued. We cover common law causes of action, such as negligence, and the relevant standards and case law defining what constitutes reasonable practitioner behavior. This course is ideal for lawyers, CPAs, EAs, tax preparers, accountants and insurance personnel. Objectives:*

- Define the elements of negligence, the common law cause of action.*
- Explain what constitutes reasonable practitioner behavior with reference to practice standards and common law.*
- Ascertain how to avoid common pitfalls that could lead to the practitioner being sued.*

*Instructor: Allison M. McLeod, LL.M., CPA*  
*Fields of Study: Regulatory Ethics*



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## **Fraud & Embezzlement; Case Studies from the Trenches**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Governmental entities are the second largest victims of embezzlement. This seminar examines recent events involving theft of public money and circumstances that allowed the fraud to occur. Case studies we examine include the 2012 \$54 million embezzlement from the City of Dixon by Rita Crundwell. The events that impacted the small Illinois town of 16,000 residents was the largest governmental fraud case to date, and spanned an astonishing 20 years. This remarkable story inspired an award-winning documentary, "All the Queen's Horses." We will also examine factors that led to scandals involving the Baptist Foundation of Arizona, World Com, Collin Street Bakery and the Ohio American Cancer Society, among others. This course is ideal for CPAs, government finance personnel, all Internal Auditors, lawyers, governance professionals, accountants and human resource personnel. Objectives:*

*Understand the factors that create an environment for fraud to easily occur.*

*Identify areas where there could be an inadvertent failure to separate duties.*

*Ascertain the proper role of an external auditor and identify areas where independence can be compromised. Instructor: Allison M. McLeod, LL.M., CPAFields of Study: Regulatory Ethics*

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## **Independence and Conflicts of Interest**

### **Anytime CPE**

12:00 AM - 12:00 AM

*This course focuses on how to integrate independence and avoid conflicts of interest in situations accounting professionals face daily. Participants will be able to know not just what is the right thing to do according to the AICPA Code of Professional Conduct, but how to put values into action. As part of this course, we also walk through real-world examples of individuals and companies faced with these dilemmas. Objectives:*  
*Have the ability to define independence as promulgated by the AICPA Code of Professional Conduct and understand its importance to the CPA.*

*Be able to ascertain situations which could threaten a CPA's independence.*

*Understand how conflicts of interest and the use of contingency fees can subvert independence. Instructor: Allison M. McLeod, LL.M., CPAFields of Study: Regulatory Ethics*

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## **Integrity, Objectivity and Judgment; Values in Action**

### **Anytime CPE**

12:00 AM - 12:00 AM

*This course focuses on how to integrate integrity and objectivity in situations accounting professionals face daily. The participant will be able to know not just what is the right thing to do according to the AICPA Code of Professional Conduct, but how to put values into action! As part of this course, we will also walk through real world examples of individuals and companies faced with these dilemmas. Objectives:*  
*Define integrity and objectivity as promulgated by the AICPA Code of Professional Conduct and understand its importance to the CPA.*

*Have the ability to identify situations where the CPA may be susceptible to subordinating his/her judgment to a client or employer. Instructor: Allison M. McLeod, LL.M., CPAFields of Study: Regulatory Ethics*

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## **Like-kind Exchanges in Real Estate Transactions**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Please join us for a discussion on like-kind exchanges (LKE), known as one of the last great tax legal "shelters" available to those buying and selling real property. We cover the basic structure of a LKE, and ways a taxpayer can utilize qualified third-party intermediaries (QI), and tenancy-in-common structures including Delaware Statutory Trusts (DST). We also explore creative solutions to sticky situations a taxpayer may find itself in obtaining replacement property. This course is ideal for CPAs, EAs, lawyers, real estate professionals, accountants or other tax professionals. Objectives: Determine whether a LKE can be used to defer taxes upon the sale of real property.*

*Know when it is appropriate to use a QI in effecting a LKE.*

*Define a DST and how it can be used in obtaining replacement property on a timely basis.*

*Become knowledgeable about ways to appropriately use the LKE structure in unusual situations. Instructor: Allison M. McLeod, LL.M., CPA Fields of Study: Taxes*

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## **Fundamentals of Income Taxation**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Please join us for an introductory course on the fundamentals of preparing and filing an individual federal income tax return. We will cover topics such as what the federal income tax is and how it is computed. This course is ideal for CPAs, CFPs, EAs and other tax preparers. Objectives:*

*Identify how the federal income tax differs from other types of federal taxes.*

*Determine the steps in computing a taxpayer's federal income tax liability.*

*Differentiate tax consequences for terms commonly used for the federal income tax, such as "adjusted gross income," "qualifying child," "tax credits," "filing status," and "kiddie tax."*

*Recognize how an individual's standard deduction is determined.*

*Explain differences in the tax for ordinary income, capital gains, and qualified dividend income.*

*Discuss the difference between the cash and accrual method, and the correct period in which taxpayers must recognize income and/or deductions.*

*Identify deadlines for filing income tax returns and estimated taxes and how to obtain an extension of time for filing a return. Instructor: Allison M. McLeod, LL.M., CPA Fields of Study: Taxes*

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## **Schedule C of Form 1040**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Many self-employed or sole proprietors find themselves having to navigate Schedule C in reporting business income. While this attachment to Form 1040 seems straightforward on the surface, there are many traps for the unwary. This course is ideal for CPAs, EAs, or other tax professionals.*

*Objectives:*  
*Identify the appropriate taxpayers who should be filing Schedule C.*

*Discuss the difference between the cash and accrual method, and the correct period in which taxpayers must recognize income and/or deductions.*

*Develop a working knowledge of related issues, such as reporting the deduction of self-employed health insurance, employment taxes, home office deductions, and proper reporting of employee/independent contractor salaries. and retirement contributions.*

*Discuss types of typical deductions, such as advertising, utilities, supplies, etc.*

*Determine the methods of deducting the cost of a company car.*

*Be able to apply the rules, such as Section 179 or bonus depreciation, which permit the immediate expensing of some or all of the cost of certain assets.*  
*Instructor: Allison M. McLeod, LL.M., CPA*  
*Fields of Study: Taxes*

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## **Advanced Excel: Hidden Secrets and Gems**

### **Anytime CPE**

12:00 AM - 12:00 AM

*This course dives into the powerful, but potentially under-utilized, capabilities of Microsoft Excel. Designed for sophisticated users willing to approach spreadsheets from a unique perspective, this program encourages users to challenge the status quo by considering opportunities to take acceptable spreadsheets to a new level.*

*Objectives:*  
*Evaluate lesser-known but powerful Excel functions*

*Categorize your level of intellectual curiosity as you unearth ways to utilize Excel in manners you may not have previously considered*

*Assess your mindset of professional skepticism that helps you explore the edges of Excel's capabilities*  
*Instructor: Chris Harper, CPA*  
*Fields of Study: Computer Software & Applications*

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## **Compilations, Reviews and Audits: How They Differ**

### **Anytime CPE**

12:00 AM - 12:00 AM

*This session provides an overview of compilation, review, and audit engagements. We will explore major considerations regarding each type of engagement in addition to contrasting and comparing these three major professional services provided by certified public accountants.*

*Objectives:*  
*Compare and contrast the three major types of engagement services*

*Comprehend procedures that are typically accomplished for each type of engagement*

*Identify documentation requirements and best practices*  
*Instructor: Chris Harper, CPA*  
*Fields of Study: Auditing*

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## **Entertainment, Meals & Travel Expenses: Review & Update**

### **Anytime CPE**

12:00 AM - 12:00 AM

*This program reviews the statutory and regulatory guidance as they relate to fringe benefits. There will be an emphasis on entertainment, meals and business transportation expenses, including qualified employer-provided parking, with a focus on planning opportunities. Recent federal tax legislation, cases and rulings will also be addressed.* Objectives:

*Apply guidance of the "big picture" of qualified deductible expenses and strategies and guidance on what to do and when to do it* Instructor: Steven C. Dilley, CPA, JD, PhD Fields of Study: Taxes

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## **Cases in Corporate Ethics**

### **Anytime CPE**

12:00 AM - 12:00 AM

*If you have ever had someone just read you the rules in an ethics class, you know there is a better way. Cases in Corporate Ethics reviews 10 real life cases and puts you in the position of someone in the middle of it all. You'll learn about conflicts that corporate financial professionals often encounter, you'll gain skills for dealing with a boss who is behaving badly and find out where to go for help. Once you have studied ethics using real world cases, you'll never want to do it any other way.* Objectives: Prepare for possible ethical conflicts in your career by discussing real life cases. Instructor: John L. Daly, MBA, CPA, CMA, CPIM Fields of Study: Regulatory Ethics

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## **Corporate Ethics: Cases in Diversity and Inclusion**

### **Anytime CPE**

12:00 AM - 12:00 AM

*The AICPA Code of Professional Conduct makes it clear that workplace harassment and discrimination is unacceptable, but gives little further guidance. Other behavior standards can help us fill the gaps. This session will discuss cases involving ethical issues relating to diversity, including age discrimination, ethnicity, sexually hostile work environments, and gender identity.* Objectives:

*Understand what the AICPA Code of Professional Conduct has to say about harassment and discrimination and look at real world cases.* Instructor: John L. Daly, MBA, CPA, CMA, CPIM Fields of Study: Regulatory Ethics

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## **Aligning Budgets to Strategy**

### **Anytime CPE**

12:00 AM - 12:00 AM

*In most organizations, strategic planning and budgeting are separate processes, making them out of alignment from their inception. This webinar explores a practical "real world" planning approach that aligns spending to long-term strategy, creates a culture of accountability and responsibility, and might actually be fun when everyone gets on board. The result will create a model for your organization's future growth and profitability.* Objectives:

*Make your organization's budgets and strategic plan reflect the same vision of reality*

*Choose the appropriate model for your organization's future growth and profitability* Instructor: Jay Giannantonio Fields of Study: Business Management and Organization

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## **Financial Statement Shenanigans**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Senior management yearns to report positive news and impressive financial results that will please investors, bankers and drive value higher. While most companies act ethically and follow prescribed accounting rules, some take advantage of gray areas in the rules or ignore them altogether in order to portray their financial results in a misleading way.*

*This session will discuss some common financial statement shenanigans to help prevent them from fooling you. Objectives:*

*Identify common ways that financial statement fraud fools users*

*Prevent financial fraud from fooling you*  
Instructor: Jay Giannantonio  
Fields of Study: Auditing

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## **Communicating Financial Information to Non-Accountants**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Do you ever get blank looks when you present your company's financial statements? Does your board nod knowingly, during your presentation, but never seem to have any meaningful questions? It could be that they have no idea what you are talking about and are just pretending to understand! Learn how to connect with your CEO, board, fellow managers, and ordinary employees so they understand your message.*

*Learn to motivate them to action. Come hear a veteran CFO tell you how. Objectives: Understand how to connect with your stakeholders who do not have a financial background.*  
Instructor: John L. Daly, MBA, CPA, CMA, CPIM  
Fields of Study: Accounting

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## **IRS Penalties and Abatements**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Penalty abatement is a technique that tax practitioners can utilize to help their clients reduce penalties and interest they owe to the IRS if the taxpayer can prove "reasonable cause".*

*This informative and insightful webinar will provide you with some insider tips, practical steps and effective strategies to help your client manage IRS tax penalties and interest. Learn about various types of penalties that you may face, and the various forms and procedures used for requesting penalty and interest abatement, including First Time and Reasonable Cause abatement. Plus, learn about the procedure to follow when requesting refund of paid penalties. Objectives:*  
*Identify situations where penalties can be imposed*

*Utilize techniques for preventing or reducing any penalty assessments*

*Ascertain when the First Time Abatement can be used*

*Obtain a working knowledge of the procedure governing the request for refund*  
Instructor: Allison M. McLeod, LL.M., CPA  
Fields of Study: Taxes

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### **Advanced Planning: Balance Sheet and Cash Flow Projections**

#### **Anytime CPE**

12:00 AM - 12:00 AM

*Unless you expect your organization to be stable in the short, medium and long term, you need to understand how to create long-term balance sheet and cash flow projections. Growing organizations must know whether they will have the resources to execute their business plan. Struggling organizations need to know if they will have the cash to survive. This session will increase your organization's ability to see its future and increase the confidence that your CEO, Board and bank have in you. Objectives: Understand how to create a projected Balance Sheet and Statement of Cash Flow Instructor: John L. Daly, MBA, CPA, CMA, CPIM Fields of Study: Accounting*

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### **Dream Wide Awake**

#### **Anytime CPE**

12:00 AM - 12:00 AM

*With more than 30 years working with entrepreneurs and their employees, Sherré has been able to identify five wishful thinking mindsets and six fearful thinking mindsets that hold individuals back from reaching their goals and achieving their desired level of success in life and at work.*

*Based on her nationally acclaimed book, Me, Myself & Inc., DREAM WIDE AWAKE will help you shift your thinking from can't imagine to can-do, inspiring and motivating you to take action and shift from daydreaming to dream doing! Objectives: Understand issues that may be limiting your ability to excel and achieve your goals. Instructor: Sherre L. DeMao, CGS Fields of Study: Business Management and Organization*

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### **Fixing Your Chart of Accounts**

#### **Anytime CPE**

12:00 AM - 12:00 AM

*A well-organized chart of accounts supports robust responsibility reporting, makes it easy to answer "what if?" questions and helps eliminate data entry errors. However, many organizations cling to the primitive practices of a half-century ago that impose barriers to developing budgets, holding people accountable, gathering useful data and keeping errors from creeping into their financial statements.*

*Best practices today look little like the examples you may have seen in business school. If you sense that your general ledger could do far more, this session will show you how to fix your problems Objectives: Understand current chart of accounts best practices and how to fix the current mess that you may have. Instructor: John L. Daly, MBA, CPA, CMA, CPIM Fields of Study: Accounting*

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## **Risk Management in a Post-Covid World**

### **Anytime CPE**

12:00 AM - 12:00 AM

*With each new crisis, surviving organizations revise their risk management plans, often modeling situations which look like the one just past. Whatever crisis troubles your organization next, it is not likely to be another pandemic, but may resemble some other crisis from the distant past.*

*Research shows that top performing organizations do no better than their mediocre-performing peers at predicting the next crisis. However, because they have plans in place to handle one possible risk, they are better prepared when a different crisis happens as a result of having important elements of a solution in place. Often well-prepared organizations actually end up better off because the crisis occurred.*

*Objectives:*  
*Recall the risk management lessons from the COVID pandemic*

*Realize the role of Auditors in risk management*  
Instructor: John L. Daly, MBA, CPA, CMA, CPIM  
Fields of Study: Auditing

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## **Ethics: Get Rich, Lose Weight, and Enjoy True Love**

### **Anytime CPE**

12:00 AM - 12:00 AM

*The title of this webinar is NOT a joke. If you consistently apply the five principles of ethical intelligence that Forbes Contributor Bruce Weinstein, The Ethics Guy, presents, your business will prosper, you will take better care of yourself and lose that weight, and either find or keep the love of your life.*

*However, you are the one that will have to do the work, day in and day out. All Bruce can do is show you the way. If you are willing to commit (or renew your commitment) to leading your business and your personal life with ethical intelligence, this is the perfect webinar for you. The work you put in during and after the webinar will help to make you a better CPA and a better person.*

*Objectives:*  
*Recognize the top six changes that will occur if lessons are put into practice*

*Identify how to keep track of progress*

*Recall the Call to Action items to achieve long-term goals*  
Instructor: Bruce Weinstein  
Fields of Study: Behavioral Ethics

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## **Ethics: How to Build and Keep Your A-Team**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Can you afford to hire a single dishonest person? Of course not. But what are you doing to ensure that you hire and promote only honest, accountable people?*

*One of the most common complaints in business is, "I can't find and keep good people on my team." This distinctive, results-focused webinar will show you the four things you must do to hire and retain the very best employees at every level of your organization.*

*This one-hour presentation in behavioral ethics disguised as one of the most practical, revenue-building webinars you'll take this year. Objectives:*

*Identify a powerful four-step strategy that will help you find the most qualified people*

*Recognize the steps to follow to keep the best people at every level of your organization*

*Recognize that you must be willing to take each of these four steps promptly if you truly want to build your A-team*  
Instructor: Bruce Weinstein  
Fields of Study: Behavioral Ethics

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## **Ethics: How to Ensure Zombie Ethics Won't Kill Your Business**

### **Anytime CPE**

12:00 AM - 12:00 AM

*The walking dead aren't the only threat to your business. So are several dangerous, even terrifying myths about what ethical leadership is and is not.*

*This fun and distinctive webinar will present what Forbes contributor Bruce Weinstein, The Ethics Guy, calls "zombie ethics"-myths about accounting that hinder your ability to serve your clients and enjoy a thriving business.*

*Taking a page from Nobel laureate Paul Krugman's recent work, zombie ethics are ideas about ethical leadership that deserve to remain buried but keep resurfacing from time to time. They walk the earth and wreak havoc. In this engaging webinar, The Ethics Guy will show you how to send them back to the cemetery for good. You can then fearlessly bring in new business--and watch your practice soar! Objectives:*  
*Discuss better ways to lead your practice without fear, which may lead to higher client retention and additional business opportunities*

*Recognize the myths about ethical leadership*  
Instructor: Bruce Weinstein  
Fields of Study: Behavioral Ethics



June 21, 2024  
- December 31, 2034

## **Ethics: Lead Like a Superstar and Build a Rocking Business**

### **Anytime CPE**

12:00 AM - 12:00 AM

*How did the world's superstars build such powerful businesses? What lessons from the biggest musicians, movie stars, athletes, and innovators will help you become more successful?*

*We'll explore how the principles of ethics and the traits of high-character leaders have made your favorite celebrities who they are and how you can follow in their footsteps. This webinar is based on presenter Bruce Weinstein, The Ethics Guy's popular Forbes.com columns, "Lead Like..."*

*It's an ethics presentation disguised as a fun, engaging, and entertaining journey into what makes superstars so influential and how they are able to sustain their stellar success. Objectives:*

*Identify the ethical principles that guide the world's most successful leaders*

*Recognize several of the high-character traits that define several of your favorite superstars*

*Prepare a strategy for putting the leadership lessons you learn into practice immediately*  
Instructor: Bruce Weinstein  
Fields of Study: Behavioral Ethics

June 21, 2024  
- December 31, 2034

## **Coping With the Growth of Online Fraud**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Just about every company, no matter its size or the types of activities it undertakes, is at greater risk because of all the types of fraud that can be carried out electronically.*

*Potential perpetrators can be operating internally or externally and the scope of the damage that occurs is almost never limited to cyber-assets. While threat awareness is improving, there are still too many owners or top level executives that underestimate the scale of the issue. In this session, we delve into the types and the nature of many electronic defalcation schemes. The material then explores measures that organizations can implement to help stop these activities and add additional layers of security. Objectives:*

*Recall the primary methods of online fraud*  
*Identify the types of weaknesses that can be exploited by those undertaking electronically based frauds*

*Recognize specific internal control measures that can help to reduce these types of fraud activities.*  
Instructor: Karl Egnatoff  
Fields of Study: Accounting

June 21, 2024  
- December 31, 2034

## **Understanding Internal Control Constructs**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Organizations of all sizes often fail to successfully install needed foundational components of an internal control system. Whether large or small, entities must view policies, procedures, and all controls in a wholistic manner in order to develop a system of controls that will keep the entity on its intended course. Moreover, those that design policies and procedures benefit by knowing why control measures are necessary. This session sets forth internal control concepts and explains the importance of strong internal control policies. It provides an understanding of the interrelated nature of all controls created by any organization. Objectives:*

*Distinguish key internal control concepts, including the four types of internal control: preventive, detective, deterrent and compensating*

*Determine how each control becomes a piece of an overall internal control structure*

*Identify both organization-wide measures as well as more segmented controls and how these must co-exist*  
Instructor:Karl EgnatoffFields of Study:Accounting

June 21, 2024  
- December 31, 2034

## **Steps to Stop External Fraud**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Until recently, a percentage of organizations discounted the risk related to external fraud attempts. Most were only concerned with protecting physical assets such as inventory or fixed assets. However, because of the many highly publicized corporate hacking events, such as the ones that affected the Colonial Pipeline and JBS Meats, more attention is being paid to external fraud risk of all types. In this session, we look at what is included in a definition of external fraud and then delve into specific control issues that can give rise to increased risk. We then discuss measures that organizations can employ to help reduce exposure to external attacks. Objectives:*

*Recognize external fraud*

*Identify control issues that can give rise to external fraud occurrences*

*Recall ways to reduce external fraud risk*  
Instructor:Karl EgnatoffFields of Study:Accounting

June 21, 2024  
- December 31, 2034

## **Combating Internal Fraud**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Fraud in the workplace is not new, however, statistics show that the number of instances of internally actuated fraud schemes is increasing. Additionally, because of all the changes that have come about due to recent upheaval, fraud risk is at an all-time high. This session starts by reviewing the many reasons that fraud occurs; it then looks at ways to detect internal fraud and finally explores control measures that can help to reduce fraud risk. Those that take the class will learn just how invasive and damaging internal fraud can be. They will also know ways to detect and thwart fraudulent activity. Objectives:*

*Identify reasons employees and others internal to an organization choose to undertake fraudulent acts*

*Recall the types of control measures that work best as entities strive to mitigate fraud risk*

*Recognize specific internal control measures that can help to reduce fraud activities*  
Instructor:Karl EgnatoffFields of Study:Accounting

June 21, 2024  
- December 31, 2034

## **Defining Where & Why Internal Controls are Needed**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Most organizations have many of the basic controls required to operate in place. However, a notable percentage of these companies do not have important measures that can help enhance security, productivity, and the quality of information available for decision making. In this session, we work to identify areas where important internal control measures are needed. We spend time explaining why these controls should be created, and show in detail some specific controls that would be beneficial if utilized. Those wishing to strengthen an internal control system should strongly consider attending this session.* Objectives:

*Control design basics*

*Areas or segments of an enterprise to control*

*Controls to reduce risk*

*Controls to drive operations* Instructor: Karl Egnatoff Fields of Study: Accounting

June 21, 2024  
- December 31, 2034

## **If You Only Knew What Microsoft Word Could Do**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Did you know that simply by utilizing the built-in headings found under Styles in Microsoft Word you can create an automatic table of contents that can be updated in a matter of seconds if the body of the document changes? Did you know that Word can be used to open, edit, and re-save PDF documents? How about the fact that by using the Insert Caption tool in conjunction with the Cross-Reference feature, users can rid themselves of the need to manually renumber figures, tables or illustrations and will not even need to update references to these in the document text? This material shows tools and features that are easy to understand and use, will save time, and add consistency to documents. Participants in this session will come away knowing the power of Microsoft Word; this knowledge will benefit them greatly!* Objectives:

*Recognize ways to improve Word documents and presentations*

*Recall three benefits of using Word Styles in documents*

*Identify features hidden within the application that people should know about*

Instructor: Karl Egnatoff Fields of Study: Computer Software & Applications

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## **How Fraud Can Affect Smaller Organizations**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Many small to medium sized companies do not properly address the risk that arises related to fraud because these organizations do not have the resources needed to mitigate this risk or because owners or those in top level management underestimate the scope of the issue. All organizations, regardless of size, must be aware of the risks associated with intentional fraudulent acts and know that a significant and effective fraud scheme could even create going concern issues for some entities. In this session, we delve into the reasons that fraud takes place. The material discusses the types of defalcations that are often executed against smaller entities and then explores measures that organizations can implement to help stop fraud activities and add security.* Objectives:

*Identify reasons that employees and others that are internal to an organization choose to undertake fraudulent acts*

*Recall the factors that make smaller organizations attractive to those considering fraud*

*Recognize specific internal control measures that can help to reduce fraud activities*

*executed against smaller and medium sized companies* Instructor: Karl Egnatoff Fields of Study: Accounting

June 21, 2024  
- December 31, 2034

## **Internal Control Changes for Remote Workers**

### **Anytime CPE**

12:00 AM - 12:00 AM

*For the past two decades the trend has been to move away from brick and mortar offices and have a greater number of people work or telecommute from home. Because of the upheaval caused by recent events, the rate of this move has been accelerated. This has and will continue to create control challenges and organizations must work to address these. Such things as moving from time based employee value to task completion based measurement and the ability to drive needed inter-company communication are just a sample of the issues with which entities must contend. This session looks at the benefits and pitfalls of workers that telecommute. It then discusses important risks and controls to consider as this trend continues and evolves in the business world.*

**Objectives:**

*Recall the effects of the rapid move to distance employees*

*Indicate the factors that make supporting and controlling telecommuters challenging, and*

*Identify the types of controls to consider for the new geographically dispersed work environment*

**Instructor:**Karl Egnatoff**Fields of Study:**Accounting

June 21, 2024  
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## **Online Fraud Targeting Individuals & Companies**

### **Anytime CPE**

12:00 AM - 12:00 AM

*We have all heard the statement that it is the people that work at a company that gives it value. It is, sometimes and unfortunately, also the people that provide fraudsters with an entry point into an organization that can lead to hardship. This is even more true now because cyber-attacks on both organization and individuals have increased notably. Many highly publicized corporate hacking events are successful, at least in part, because an individual was targeted. In this session, we look the types of fraud that take aim at individuals with a special focus on the growth of cyber-attacks. We then discuss measures that can be put forth to help employees protect both themselves and the organization.*

**Objectives:**

*Recall fraud methods that affect individuals*

*Identify how the connection between an employee and an employer can be exploited*

*Indicate ways to reduce this type of fraud risk.*

**Instructor:**Karl Egnatoff**Fields of Study:**Accounting

June 21, 2024  
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## **Controls to Secure a Growing Digital Footprint**

### **Anytime CPE**

12:00 AM - 12:00 AM

*The amount of electronic content that business organizations contend with is growing at incredible rates. Terms like "Big Data" and "Information Overload", are being used by overwhelmed information workers on a daily basis. Additionally, because of the move to a much larger telecommuter footprint, electronic data is now even more prevalently utilized. This session discusses the places that businesses keep digital information and addresses the importance of securing corporate electronic data. The material effectively shows ways to achieve high security standards for content stored in fixed locations, on mobile devices and in the cloud. Participants in this session will gain an understanding of the concepts needed to improve the way they, and their companies secure digital information.*

**Objectives:**

*Identify some of the security risks that affect electronic information*

*Select cloud storage providers by employing vetting process*

*Recognize the steps to effectively set up and control cloud storage*

*Recall ways to add security to individual electronic documents as well as to storage areas that must be controlled*

**Instructor:**Karl Egnatoff**Fields of Study:**Accounting

June 21, 2024  
- December 31, 2034

## **Operations Level Internal Control**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Many leaders in business organizations of all sizes view the system of Internal Control almost purely as a protective security measure. A well-designed internal control system can and will drive all entity objectives which includes successful operations. This session uses information gathered from years of creating internal control systems as well as concepts from well-respected authoritative pronouncements and frameworks to illustrate the power of a strong and well supported control system as well as actions that can help establish such a system. Those that work with internal controls who are tasked with developing ways to improve operation level capabilities should strongly consider this session.*Objectives:

*Identify important components and sub-components of an Internal Control System*

*Recognize how the control environment can help or hinder the operation of control measures and help or hinder operational effectiveness*

*Recall important steps that an organization can undertake, specifically related to control development that can drive the methodologies of the entity*Instructor:Karl EgnatoffFields of Study:Accounting

June 21, 2024  
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## **Shortcuts that Excel Users Love**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Many people that use Microsoft Excel know a great deal about the functionality of the application. There are, however, a tremendous number of hidden tools that a high percentage of users overlook. Additionally, there are newer features that some have not had the opportunity to explore. This session shows some of the numerous time-saving tools and features that often go unused by spreadsheet creators. People that wish to become more efficient when using Excel should take this session!*Objectives:

*List and use powerful but often hidden tools available in Excel*

*Discuss some of the new features built into the spreadsheet application*

*Work in a more efficient manner because of keyboard and ribbon-based tools*Instructor:Karl EgnatoffFields of Study:Computer Software & Applications

June 21, 2024  
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## **What's New in Excel**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Everyone knows that Excel is the most widely used spreadsheet application in the world today. However, because it is ever-changing, many users are unable to keep up with the latest features and capabilities of this ubiquitous application. In this session, we look at some of the most helpful new features and tools that have been added to both the Desktop version of Excel and the Web version. Content like this is valuable to anyone that regularly works with Excel - We hope you will attend!*Objectives:

*Recall helpful new features that will help users work more efficiently*

*Recognize how new functions in the Excel Function Library can be beneficial*Instructor:Karl EgnatoffFields of Study:Computer Software & Applications

June 21, 2024  
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## **An Exhaustive Look At Fraud & Ways To Control It (Part 1)**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Fraud activities can be executed from within an organization, by parties outside an entity, or by both. Importantly, as the business world becomes more technological, the way fraud is carried out is changing. There must be an increased focus on understanding where new fraud vulnerabilities exist. In this session, we delve into the reasons that both internal and external intentional defalcations take place. The material discusses the new ways fraud is being actuated and looks at the factors driving those that undertake fraud. We spend time examining measures that can be implemented in order to stop fraud via the deployment of added security across the enterprise.*

*Objectives:*

*Distinguish reasons that employees and others that are internal to an organization choose to undertake fraudulent acts*

*Determine the ways that fraud activities are changing as business methods change*

*Differentiate between the types of control measures that work best as entities strive to mitigate fraud risk*

*Select specific internal control measures that reduce fraud activities*

*Identify how anti-fraud measures add security to all segments and aspects of a business organization*

*Instructor: Karl Egnatoff*

*Fields of Study: Accounting*

June 21, 2024  
- December 31, 2034

## **An Exhaustive Look At Fraud & Ways To Control It (Part 2)**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Fraud activities can be executed from within an organization, by parties outside an entity, or by both. Importantly, as the business world becomes more technological, the way fraud is carried out is changing. There must be an increased focus on understanding where new fraud vulnerabilities exist. In this session, we delve into the reasons that both internal and external intentional defalcations take place. The material discusses the new ways fraud is being actuated and looks at the factors driving those that undertake fraud. We spend time examining measures that can be implemented in order to stop fraud via the deployment of added security across the enterprise.*

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*Instructor: Karl Egnatoff*

*Fields of Study: Accounting*

June 21, 2024  
- December 31, 2034

## **Implementing and Maintaining an Internal Controls (Part 1)**

**Anytime CPE**

12:00 AM - 12:00 AM

*Many organizations are successful as they create a system of internal controls, however some fail to properly implement the measures that are established. Moreover, entities regularly neglect the important process of testing, monitoring, and updating control procedures, which weakens the entire internal control structure. This session provides an overview of control creation methods and discusses ways to successfully implement policies and procedures. Additionally, it includes an array of control maintenance checklists that participants can take and adapt to their organization as they work to improve policies and procedures. Finally, it provides an understanding of the need for dynamic, fluid controls that adapt to changes in business tools and methods.*

*Participants that take this course will have a strengthened ability to implement and maintain an internal control system. Objectives:*

*Determine the steps needed to implement a developed system of internal controls*

*Apply steps to build control measure schedules that function weekly, monthly, quarterly, and yearly, and that are designed to test and monitor the internal control structure of an organization*

*Analyze developed control measures to make sure they are working properly*

*Determine why there is a need to update existing controls to keep them viable as business operations change*

*Identify methods that can be used to communicate policy and procedure changes to those that are affected by these changes*

*Instructor: Karl Egnatoff*

*Fields of Study: Accounting*

June 21, 2024  
- December 31, 2034

## **Implementing and Maintaining an Internal Controls (Part 2)**

**Anytime CPE**

12:00 AM - 12:00 AM

*Many organizations are successful as they create a system of internal controls, however some fail to properly implement the measures that are established. Moreover, entities regularly neglect the important process of testing, monitoring, and updating control procedures, which weakens the entire internal control structure. This session provides an overview of control creation methods and discusses ways to successfully implement policies and procedures. Additionally, it includes an array of control maintenance checklists that participants can take and adapt to their organization as they work to improve policies and procedures. Finally, it provides an understanding of the need for dynamic, fluid controls that adapt to changes in business tools and methods.*

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*Identify methods that can be used to communicate policy and procedure changes to those that are affected by these changes*

*Instructor: Karl Egnatoff*

*Fields of Study: Accounting*

June 21, 2024  
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## **Building Security/Efficiency via Internal Control (Part 1)**

### **Anytime CPE**

12:00 AM - 12:00 AM

*A well-designed internal controls system can and will drive all entity objectives. Too many times control creators focus too much on security. It is important to properly balance protection-based measures with those designed to enhance efficiency. This session works to illustrate the power of a strong and well supported control system. It also discusses steps to take in order to establish such a system. This material is becoming more and more beneficial as companies strive to address many new business challenges such as evolving markets, the rapid rate of change in the business world and the notable increase in governmental and industry-based regulation. Those that desire a balanced and workplace enhancing control system should strongly consider this session.*Objectives:

*Identify the components of a control system*

*Identify the ways that risk affects all business activities*

*Use concepts such as risk appetite and risk tolerance to properly create controls*

*Apply the concepts set forth in the COSO framework that relate to the control environment*

*Choose the necessary steps to increase the quality of control development*

*activities*Instructor:Karl EgnatoffFields of Study:Accounting

June 21, 2024  
- December 31, 2034

## **Building Security/Efficiency via Internal Control (Part 2)**

### **Anytime CPE**

12:00 AM - 12:00 AM

*A well-designed internal controls system can and will drive all entity objectives. Too many times control creators focus too much on security. It is important to properly balance protection-based measures with those designed to enhance efficiency. This session works to illustrate the power of a strong and well supported control system. It also discusses steps to take in order to establish such a system. This material is becoming more and more beneficial as companies strive to address many new business challenges such as evolving markets, the rapid rate of change in the business world and the notable increase in governmental and industry-based regulation. Those that desire a balanced and workplace enhancing control system should strongly consider this session.*Objectives:

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*Choose the necessary steps to increase the quality of control development*

*activities*Instructor:Karl EgnatoffFields of Study:Accounting



June 21, 2024  
- December 31, 2034

## **You Don't Know What You Don't Know About Excel Part 1**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Many Excel users have received little or no formal training to help them use the ubiquitous productivity application. This session can help users that wish to improve their Excel skills to increase their productivity. The material starts by covering basic topics such as time saving tips and keyboard shortcuts and then moves to more advanced areas like conditional formatting and complex formula building. Users that find themselves looking at the spreadsheets that others design and wishing they could do as much with Excel will benefit greatly by taking this course. Objectives:*

*Understand the many keyboard shortcuts that are available to save time and effort*

*Use Excel Templates, Styles, and Themes to add uniformity to workbooks they design or edit*

*Design custom number and date formats to meet their specific needs*

*Add security to the workbooks they use. This includes workbook encryption, and the use of sheet level, range level and cell level security features*

*Understand formula building conventions such as order of operation*

*Troubleshoot formulas that are not working properly*

*Work with functions in the function library to create powerful formulas*

*Instructor: Karl Egnatoff*

*Fields of Study: Computer Software & Applications*

June 21, 2024  
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## **You Don't Know What You Don't Know About Excel (Part 2)**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Many Excel users have received little or no formal training to help them use the ubiquitous productivity application. This session can help users that wish to improve their Excel skills to increase their productivity. The material starts by covering basic topics such as time saving tips and keyboard shortcuts and then moves to more advanced areas like conditional formatting and complex formula building. Users that find themselves looking at the spreadsheets that others design and wishing they could do as much with Excel will benefit greatly by taking this course. Objectives:*

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*Work with functions in the function library to create powerful formulas*

*Instructor: Karl Egnatoff*

*Fields of Study: Computer Software & Applications*

June 21, 2024  
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## **Understanding/Creating Internal Control Systems (Part 1)**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Successful organizations, both large and small, must understand the importance of effective internal controls and be able to develop a system of controls that will keep the entity on its intended course. Moreover, those that design policies and procedures benefit by knowing why control measures are necessary. This session sets forth internal control concepts and explains the importance of strong internal control policies. The material highlights some of the reasons that measures are needed and it also provides an overview of control creation methods. Finally, it discusses ways to successfully implement the developed policies and procedures. Participants that take this course will gain a well-rounded understanding of internal control procedures of all types.*  
**Objectives:**  
*Distinguish key internal control concepts, including the four types of internal control: preventive, detective, deterrent and compensating  
Identify ways to create strong internal controls  
Identify reasons that control measures are required, such as to deter fraud or reduce operational inefficiencies  
Determine why the control environment is important as implementation efforts are ongoing  
Apply COSO Framework concepts to three segments of an organization's technology infrastructure that must be controlled.*  
Instructor: Karl Egnatoff  
Fields of Study: Accounting

June 21, 2024  
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## **Understanding/Creating Internal Control Systems (Part 2)**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Successful organizations, both large and small, must understand the importance of effective internal controls and be able to develop a system of controls that will keep the entity on its intended course. Moreover, those that design policies and procedures benefit by knowing why control measures are necessary. This session sets forth internal control concepts and explains the importance of strong internal control policies. The material highlights some of the reasons that measures are needed and it also provides an overview of control creation methods. Finally, it discusses ways to successfully implement the developed policies and procedures. Participants that take this course will gain a well-rounded understanding of internal control procedures of all types.*  
**Objectives:**  
*Distinguish key internal control concepts, including the four types of internal control: preventive, detective, deterrent and compensating  
Identify ways to create strong internal controls  
Identify reasons that control measures are required, such as to deter fraud or reduce operational inefficiencies  
Determine why the control environment is important as implementation efforts are ongoing  
Apply COSO Framework concepts to three segments of an organization's technology infrastructure that must be controlled.*  
Instructor: Karl Egnatoff  
Fields of Study: Accounting

June 21, 2024  
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## **Reference Rate Reform**

### **Anytime CPE**

12:00 AM - 12:00 AM

*At its height, LIBOR was the benchmark for over US \$350 trillion in financial contracts worldwide. Yet, due to concerns over the manipulation of the rate, standard setters determined that LIBOR should be discontinued. The global response to reference rate reform required financial reporting standard setters to provide practical expedients and exceptions to current modification guidance. This course will provide an overview of the standards issued (including amendments) from both the FASB and GASB to address the transition away from LIBOR. Objectives:*

*Recall the optional expedients for entities as a result of reference rate reform*  
Instructor: Melisa Galasso  
Fields of Study: Accounting

June 21, 2024  
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## **Taxation of Non-fungible Tokens (NFTs)**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Non-fungible Tokens (NFTs), unique, identifiable digital assets based on blockchain technologies, have become a fast-growing industry. This course will provide a background on how NFTs came into the mainstream marketplace. These materials will assist the practitioner to understand the tax implications of the creation, purchase and sale of these assets. Objectives:*

*Be able to define NFTs and describe how they are created.*

*Develop a working knowledge of how NFTs are recorded and transferred.*

*Determine what type of transaction involving an NFT creates a taxable event.*

*Be able to identify how NFTs are classified.*

*Discuss the current legislative environment and actions taken to regulate NFTs.*

*Become knowledgeable of current enforcement actions employed by the IRS.*  
Instructor: Allison McLeod  
Fields of Study: Taxes

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## **Talk This Way - Communication Skills for the CPA**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Have you ever met an accountant who exhibits solid technical prowess but possesses lackluster communication skills? It is not unusual to meet a savvy accountant who is a technical expert but could enhance the delivery of written and spoken words. This course is designed to help CPAs improve their written and verbal communication skills. Participants will learn how to tailor communication to their audience, with particular emphasis on techniques for crafting a message that effectively conveys technical information in an engaging manner. The course's author will share personal success tips gleaned from more than two decades of experience communicating myriad topics to a variety of audiences.*Objectives:

*Develop an outline of presentation topics*

*Draft talking points for a media interview*

*Edit your written work for clarity and length*

*Adapt content depth and delivery as appropriate for the intended audience*

*Recognize best practices for both written and verbal formats*

*Avoid plagiarism by providing appropriate credit for sourced material*

*Enhance audience engagement*Instructor:Chris HarperFields of Study:Communications and Marketing

June 21, 2024  
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## **What You Can Learn From the Statement of Cash Flows**

### **Anytime CPE**

12:00 AM - 12:00 AM

*This course will allow you to get reacquainted with the statement of cash flows. We will refresher your skills regarding both the preparation and utilization of the statement of cash flows. Significant emphasis will be placed on the informational role of the statement of cash flows and insights that can be obtained using the statement of cash flows in concert with the other elements of a company's accrual-basis financial statements.*Objectives:

*Recall major elements of the statement of cash flows*

*Identify the two broad methods for preparing the statement of cash flows*

*Perform certain calculations for preparing both the indirect and direct statements of cash flows*

*Use the statement of cash flows as part of financial statement analysis*Instructor:Chris HarperFields of Study:Accounting

June 21, 2024  
- December 31, 2034

## **Roadmap to Ethical Decision Making**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Practitioners need to exercise caution to ensure they maintain independence as they assist their clients with reviews, audits, and compilation engagements. This course provides a roadmap to best practices and guidance provided by the AICPA's Code of Professional Conduct and analyzes and applies it to actual scenario-based case studies, providing accounting professionals with ethical standards to integrate into their practices. Objectives:*

*Apply key strategies in maintaining independence in client engagements.*

*Assess circumstances that threaten independence.*

*Identify safeguards that may reduce independence threats to an acceptable level.*

*Apply ethical guidance to scenarios that accounting professionals may encounter in public practice. Instructor: Chris Harper Fields of Study: Regulatory Ethics*

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## **2023 Tax Legislation: The Secure Act 2.0**

### **Anytime CPE**

12:00 AM - 12:00 AM

*After a false start in 2022 when it failed to pass through Congress, the Secure Act 2.0 was passed in a flurry of year-end legislation. This two hour program will cover the important changes in savings and distributions of retirement plans that impact individuals. Employers will also need to consider how Secure Act 2.0 will the administration of existing plans or the creation of new ones. This course will provide a concise look at these hot topics. Objectives:*

*Understand the newest tax developments contained in in the Secure Act 2.0.*

*Become knowledgeable about the new provisions modifying the administration of employer retirement plans.*

*Learn about the expanded contribution and catch-up limits for individuals.*

*Obtain understanding on the new required beginning dates for distributions.*

*Understand the newest developments on required minimum distribution dates. Instructor: Allison McLeod Fields of Study: Taxes*

June 21, 2024  
- December 31, 2034

## **Taxation of Judgement and Settlements**

### **Anytime CPE**

12:00 AM - 12:00 AM

*In the course of legal actions, payments may be made pursuant to a final disposition of a court case or a mutually agreed-upon settlement. This course will cover the tax implications for payments made for personal injury, emotional distress, lost wages, punitive awards, pre- and post-judgement interest, contract claims, among other damages. Objectives:*

*Obtain a working knowledge of the IRC, Treasury Regulations and case law governing the taxation of litigation payments.*

*Be able to differentiate between the different types of damage payments and whether they are taxable to the recipient or deductible by the payor.*

*Be able to draft pleadings and agreements to order to allocate the payments among the different categories of damages.*

*Have an ability to advise clients on the most advantageous manner of categorizing settlement payments. Instructor: Allison McLeod Fields of Study: Taxes*

June 21, 2024  
- December 31, 2034

## **Treasury Circular 230 for EAs and Other Tax Preparers**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Please join us for a discussion on Treasury Circular 230 and other ethical issues faced by enrolled agents and other tax preparers. In addition to covering the practice standards espoused by Treasury Circular 230, there will also be an overview of the applicable provisions in the Internal Revenue Code (IRC) and common law which will affect tax preparers. The discussion will conclude with other ethical issues, such as avoiding conflicts of interest, proper fee structure and maintaining competency. Also included will be case studies illustrating dilemmas faced by tax practitioners. Objectives: Know the expectations for tax practitioners in serving clients, including the duty of confidentiality, competency and proper administration of the tax law.*

*Understand the practitioner's obligations to disclose certain client information when representing them against the IRS.*

*Understand the provisions of Treasury Circular 230, the IRC and common law as it pertains to tax practitioners.*

*Know the IRS requirements before an individual may file returns on behalf of others as a preparer. Instructor: Allison McLeod Fields of Study: Taxes*

June 21, 2024  
- December 31, 2034

## **Exploring Internal Controls: That Could Have Prevented Frauds**

### **Anytime CPE**

12:00 AM - 12:00 AM

*This course examines actual fraud circumstances through the lens of potential prevention. We will examine how selected frauds were accomplished and consider what internal controls may have prevented fraudsters' ability to accomplish their nefarious acts. Objectives:*

*Determine what factors allowed certain frauds to occur*

*Identify what internal controls may have prevented the frauds*

*Consider application of these lessons to circumstances you encounter in your professional endeavors Instructor: Chris Harper, CPA Fields of Study: Auditing*

June 21, 2024  
- December 31, 2034

## **CPA Ethics in a Crisis World: Tales from the Front**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Based on real life experiences! This program addresses the many issues impacting CPA practice with a world in crisis. The unique challenges facing practitioners are related through actual practice situations - and then analyzed for their ethical implications. Objectives:*

*Identify ethical guidelines of the AICPA Code of Professional Conduct*

*Identify ethical guidelines of the IRS Circular 230*

*Explore numerous practice situations occasioned by the world in crisis and relate them to various ethical authorities. Instructor: Steven C. Dilley, PhD, CPA, JDFields of Study: Regulatory Ethics*

June 21, 2024  
- December 31, 2034

## **Fraud Trends - Applying Real-life Lessons to Small- and Mid-Size Entities**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Fraud Trends - Applying Real-life Lessons to Small- and Mid-Size Entities will focus on real-life and practical examples of fraud in smaller- and mid-size environments, including nonprofits. Fraud involves an intentional act to deceive, which may result in material misstatement in the financial statements due to fraudulent financial reporting or misappropriation of assets. Management's responsibility is to design, implement, maintain and monitor a system of internal control to prevent, or detect and correct, fraud. Objectives:*

*Identify the cause and impact on real-life fraud cases*

*Determine what to be alert for in an audit to identify fraud potential Instructor: Jennifer F. Louis, CPA Fields of Study: Auditing*

June 21, 2024  
- December 31, 2034

## **Auditing Contingencies and Going Concern Uncertainty - Testing for Completeness and Proper Disclosure**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Auditing Contingencies and Going Concern Uncertainty - Testing for Completeness and Proper Disclosure will provide tips and techniques for obtaining sufficient appropriate audit evidence to support conclusions related to contingencies and going concern uncertainty. Financial statements may contain significant uncertainties requiring special audit consideration for evaluating proper accounting and financial reporting treatment. Objectives:*

*Recognize accounting and auditing requirements for commitments and contingencies*

*Identify litigation, claims and assessment special considerations*

*Recall the auditor's responsibility for evaluating the appropriateness of going concern accounting and disclosure Instructor: Jennifer F. Louis, CPA Fields of Study: Auditing*

June 21, 2024  
- December 31, 2034

## **The Art of Discipline and Getting Things Done - Applying Better Time, Team, and Project Management Anytime CPE**

12:00 AM - 12:00 AM

*The Art of Discipline and Getting Things Done - Applying Better Time, Team, and Project Management Techniques provides best practices for various areas that support this culture of discipline, including time, team, and project management. Those in a supervisory or managerial role must create a culture of discipline, where a high priority is placed in accomplishing responsibilities in an effective and efficient manner.* Objectives:

*Identify the traits of a disciplined culture for teams*

*Recognize best practices for project and time management*

*List ways to manage stress for maximum productivity*

*Recall best practices for effective meetings* Instructor: Jennifer F. Louis, CPA  
Fields of Study: Personal Development

June 21, 2024  
- December 31, 2034

## **Personality Styles - Adapting to Different Types of Personalities for Improved Relationships and Interactions Anytime CPE**

12:00 AM - 12:00 AM

*Personality Styles - Adapting to Different Types of Personalities for Improved Relationships and Interactions provides guidance for effectively adapting to various personality styles. Every individual has a dominant personality style, which includes relevant strengths and weaknesses. Effective interactions require individuals to adapt behaviors to complement, balance or counteract the traits of others.* Objectives:

*Recognize four primary personality styles, including relative strengths and weaknesses*

*Identify what traits you and others demonstrate*

*List factors to consider to more effectively communicate and otherwise interact with others*

*Recall best practices for modifying personal behaviors in appropriate circumstances to result in better situational outcomes with others* Instructor: Jennifer F. Louis, CPA  
Fields of Study: Personal Development

June 21, 2024  
- December 31, 2034

## **LinkedIn Profile Secrets for CPAs Anytime CPE**

12:00 AM - 12:00 AM

*Today's CPAs can expect their prospects, clients, referral partners, and candidates to research them on LinkedIn. The good news is that you can leverage LinkedIn to craft a digital presence that demonstrates your expertise, showcases your personal brand, and aligns with your values. Learn how to create a LinkedIn profile that is not just a resume but a valuable marketing tool for your CPA business.* Objectives:

*Make immediate improvements to your LinkedIn profile*

*Position yourself to attract clients, prospects, or candidates (instead of your current resume version)*

*Showcase your credentials, education, experience, and personal brand* Instructor: Sandra Long  
Fields of Study: Communications and Marketing



June 21, 2024  
- December 31, 2034

### **CFO Career Upgrade with LinkedIn**

#### **Anytime CPE**

12:00 AM - 12:00 AM

*Today's senior executives use LinkedIn to impress hiring managers, find talent, develop opportunities, and build relationships. This interactive session is for the financial executive who wants to position themselves internally and externally for career success by leveraging the #1 professional digital platform. Objectives:*

*Make immediate improvements to your LinkedIn profile*

*Expand and upgrade your career network on LinkedIn*

*Find and develop new career and leadership opportunities with*

*LinkedIn*  
Instructor: Sandra Long  
Fields of Study: Personal Development

June 21, 2024  
- December 31, 2034

### **Bitcoin Fundamentals - What Every CPA Should Know**

#### **Anytime CPE**

12:00 AM - 12:00 AM

*After more than 10 years in the marketplace, Bitcoin has been firmly planted in the global financial system as the de facto leader in the cryptocurrency market. Bitcoin is no longer looked at as a mystical concept of money made of pixie dust. Bitcoin has evolved to be a major force in the financial technology (FinTech) industry. With the collapse of the FTX cryptocurrency exchange, among others, it is important to understand how Bitcoin separates itself from all the other alternative cryptocurrencies, aka alt coins, as well as how you can protect your Bitcoin investment from these exchange collapses. Objectives:*

*Recognize the impact that Bitcoin and other crypto currencies are having on the global monetary ecosystem*

*Identify the components of the Bitcoin ecosystem and how they all work together as a global crypto currency*

*Recognize how you can participate in the Bitcoin ecosystem*

Instructor: John H. Higgins, CPA, CITP  
Fields of Study: Specialized Knowledge

June 21, 2024  
- December 31, 2034

### **Blockchain Technology: What Every CPA Should Know**

#### **Anytime CPE**

12:00 AM - 12:00 AM

*One of the most talked about emerging technologies that has the potential to significantly disrupt the accounting profession is blockchain. This course is designed to bring you up to speed on what this revolutionary technology is all about. You will learn about the concepts, nomenclature, technology and potential applications related to blockchain. This will prepare you to participate in conversations about blockchain technology with your colleagues, peers and others. Objectives:*

*Recognize the concepts and terminology of blockchain technology*

*Formulate a solid understanding of how blockchain works*

*Recognize potential applications for blockchain*

*Apply the knowledge gained to participate in discussions about blockchain*

Instructor: John H. Higgins, CPA, CITP  
Fields of Study: Specialized Knowledge

June 21, 2024  
- December 31, 2034

## **Common Findings in Single Audits**

### **Anytime CPE**

12:00 AM - 12:00 AM

*This CPE course provides an examination of the recent reports from a selection of Single Audit results. The instructor will go over the most common deficiencies found in Yellow Book and Single Audits and common peer review findings and OIG investigations. This course will also provide examples of common controls, best practices, and mitigation techniques. Objectives:*

*Recall an overview of Single Audit requirements*

*Identify common deficiencies found in Single Audits, common peer review findings and OIG investigations and weaknesses in internal controls which may have been at the root cause of findings*

*Apply mitigation techniques and internal controls in order to be prepared for audits and to prevent future audit findings and weaknesses*

*Instructor:Adelina Burke, CPAFields of Study:Auditing (Governmental)*

June 21, 2024  
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## **NFP Reporting and Presentation**

### **Anytime CPE**

12:00 AM - 12:00 AM

*This CPE course provides an overview and changes with respect to ASU 2016-14 Presentation of Financial Statements and ASU 2016-18 Restricted Cash and Cash Equivalents in Statement of Cash Flows for Not-for-Profit Entities. This course provides common pitfalls and tips on functional expense reporting and, how to manage liquid resources, common peer review findings related to ASU 2016-14, and tips and suggestions on a successful audit. This course also reviews items to consider, given COVID-19, when preparing for an audit and reviewing financial statements. The instructor will explain the key facts and impacts of ASU 2018-08 Clarifying the Scope and Accounting Guidance for Contributions Received and Contributions Made, ASU 2019-03: Updating the Definition of Collections, ASU 2019-06: Extending the Private Company Accounting Alternatives on Goodwill and Certain Identifiable Intangibles to NFP Entities, and ASU 2020-07 Presentation and Disclosures by NFP Entities for Contributed Nonfinancial Assets. Lastly, this course will cover Cybersecurity Issues. Objectives:*

*Identify the major components of reporting in not-for profit organizations*

*Determine how to prepare, in accordance with GAAP, the note disclosures for a not-for-profit entity's (NFP)'s financial statements relating to ASU 2016-14 and ASU 2016-18*

*Evaluate going concern and subsequent events resulting from COVID-19*

*Recognize appropriate accounting for recording and recognizing contributions*

*Recognize key facts and impacts of current accounting standard updates*  
*Instructor:Adelina Burke, CPAFields of Study:Auditing*

June 21, 2024  
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## **Yellow Book Independence and Single Audit Fundamentals**

### **Anytime CPE**

12:00 AM - 12:00 AM

*This CPE course explains Yellow Book independence including the general requirements, requirements for auditors providing nonaudit services and documentation requirements. This course also explains the basic elements of a Uniform Guidance compliance audit, including an overview of requirements, major program determination with examples, an understanding of compliance requirements and related internal control over compliance, sampling and single audit reporting. Objectives:*

*Identify the conceptual framework for making independence determinations*

*Identify independence threats related to preparing financial statements and accounting records*

*Identify specific non-audit services that would and would not impair independence*

*Complete proper audit documentation to support adequate consideration of auditor independence*

*Identify what a single audit entails*

*Identify the basic audit requirements in a Uniform Guidance compliance audit*

*Identify key auditee and auditor responsibilities in the compliance audit of federal awards*

*Recognize key consideration related to the auditor's responsibilities regarding testing and reporting on compliance under the Uniform Guidance*

*Instructor: Adelina Burke, CPA Fields of Study: Auditing (Governmental)*

June 21, 2024  
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## **Auditing, SSARS and Attest Update**

### **Anytime CPE**

12:00 AM - 12:00 AM

*This course covers recently issued standards from the AICPA Auditing Standards Board and AICPA Accounting and Review Services Committee including the new Quality Management Standards. The session will highlight projects in progress at the Public Company Accounting Oversight Board, and International Auditing and Assurance Standards Board. The course will also recap recent changes and present common peer review findings and best practices to improve practice quality. Objectives:*

*Identify the most recent changes in auditing, reviews, compilations and other attestation engagements*

*Select practice tips for achieving high quality engagements*

*Instructor: Allison M. Henry, CPA, CGMA Fields of Study: Auditing*

June 21, 2024  
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## **Ethics and Technology for CPAs**

### **Anytime CPE**

12:00 AM - 12:00 AM

*This course will explore the ethical principles included in the Code of Professional Conduct that address emerging practice issues created by new technologies. Consider the how technologies could impact audit quality and the integrity of the financial systems and whether they create a need for CPAs to change their skill sets to address those challenges. Discuss the changes being proposed by the profession to address emerging ethics challenges. Consider whether there are new ethical challenges created by the data related to privacy, security, and its application. Objectives:*

*Recognize the ethical challenges created by emerging technologies such as artificial intelligence and the foundational principles included in the Code of Professional Standards.*

*Recall the ethical imperative to remain competent in this new environment in order to serve in the public interest.*

*Consider whether current ethics standards address all of the challenges associated with data privacy and security.*

*Instructor: Allison M. Henry, CPA, CGMA Fields of Study: Regulatory Ethics*

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## **Compilation, Preparation and Review Basics and Peer Reviews**

### **Anytime CPE**

12:00 AM - 12:00 AM

*The course will cover the basic requirements for performing preparation, compilation and review engagements under the current SSARS standards including the new SSARS No. 25, Materiality in a Review of Financial Statements and Adverse Conclusions. The session will highlight common issues found on SSARS engagements in connection with peer reviews and the impact of various findings on the results of a firm's peer review. The discussion will highlight the key issues to consider during your upcoming SSARS engagements and will incorporate quality control recommendations and tips for performing high-quality SSARS engagements. Objectives:*

*Recognize the foundational principles of SSARS.*

*Identify the new requirements included in SSARS No. 25, Materiality in a Review of Financial Statements and Adverse Conclusions.*

*Indicate processes to achieve high-quality SSARS engagements.*

*Instructor: Allison M. Henry, CPA, CGMA Fields of Study: Accounting*

June 21, 2024  
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## **Comprehensive Accounting and Financial Reporting Update**

### **Anytime CPE**

12:00 AM - 12:00 AM

*This comprehensive course will highlight the impact of the current financial reporting environment on financial statement reporting, evaluate recently issued accounting and financial statement reporting standards from the Financial Accounting Standards Board, recall other financial reporting frameworks, and key implementation challenges and identify emerging financial reporting trends. Objectives:*

*Identify the most recent FASB accounting and financial statement reporting standards.*

*Instructor: Allison M. Henry, CPA, CGMA Fields of Study: Accounting*

June 21, 2024  
- December 31, 2034

## **Peer Reviews of SSARS Engagements**

### **Anytime CPE**

12:00 AM - 12:00 AM

*The course will cover the basic requirements of a peer review performed in accordance with the AICPA's Peer Review Standards for firms that perform preparation, compilation, and review engagements. Topics to be covered include the documents reviewed by the peer reviewers, the evaluation of the engagements, the types of matters and peer review reports, the administrative process, the peer review committee involvement, and the requirements of the state boards of accountancy. Objectives:*

*Recognize basic tenets of engagement reviews performed in accordance with the AICPA Peer Review Standards.*

*Recall tips to make sure that your firm has a successful peer review.*

*Instructor: Allison M. Henry, CPA, CGMA Fields of Study: Accounting*

June 21, 2024  
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## **Ethics - Regulatory and Standards Update**

### **Anytime CPE**

12:00 AM - 12:00 AM

*This course will help you to stay current on recent changes to the AICPA Code of Professional Conduct, as well as keep you abreast of emerging trends in ethics standards and regulatory initiatives and their potential impact on your practice. We will also explore frequent practitioner ethics compliance challenges, including competence, due professional care, audit quality, and independence. Objectives:*

*Identify recent changes to the AICPA Code of Professional Conduct and other ethics standard-setters.*

*Recognize the regulatory requirements created by other state boards of accountancy, the National Association of State Boards of Accountancy, and recent regulatory initiatives.*

*Recognize the application of those standards in practice, emphasizing the experience of other practitioners.*

*Instructor: Allison M. Henry, CPA, CGMA Fields of Study: Regulatory Ethics*

June 21, 2024  
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## **Creating a Culture of Trust in a Fraud-filled World**

### **Anytime CPE**

12:00 AM - 12:00 AM

*This session will highlight recent cases of ethical failures and fraud and will highlight concepts of trust, personal accountability, responding to fraud, and the conduct expected of CPAs outlined in the Code of Professional Conduct. Objectives:*

*Identify situations that create pressure for practitioners to violate professional standards, the Code of Professional Conduct and/or the law.*

*Construct safeguards against these pressures.*

*Instructor: Allison M. Henry, CPA, CGMA Fields of Study: Regulatory Ethics*

June 21, 2024  
- December 31, 2034

## **AICPA Audit Quality Update and Quality Management Standards**

### **Anytime CPE**

12:00 AM - 12:00 AM

*This session will identify the progress of the AICPA Enhancing Audit Quality Initiative and evaluate whether audit quality is improving. Analyze the trends that are contributing to audit quality and recall the major issues identified and the related resources issued by the AICPA to improve practice quality. Objectives:*

*Evaluate the AICPA's enhancing audit quality initiative and the AICPA's new SQMS*

*Recall trends in the practice landscape*

*Evaluate how AICPA's Enhancing Audit Quality Initiative is improving practice quality*

*Identify SQMS implementation resources*

*Instructor: Allison M. Henry, CPA, CGMA Fields of Study: Auditing*

June 21, 2024  
- December 31, 2034

## **ASC 842, Leases: Implementation Issues and Lessons Learned**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Recall lessons learned and practical implementation challenges and complexities with the FASB's Accounting Standard Update for Leases (ASC Topic 842). Identify key differences between ASC Topic 842 and ASC Topic 840, Practical Expedients, remeasurement-triggering events. Session will go beyond the basics and will apply to specific examples. Objectives:*

*Identify the complexities of the new FASB lease standard and its implementation challenges.*

*Instructor: Allison M. Henry, CPA, CGMA Fields of Study: Accounting*

June 21, 2024  
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## **International Cross Border Transactions**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Please join us for an introductory course in international cross border transactions. We will discuss typical situations in which a cross-border transaction arises, and how a taxpayer can utilize the rules to potentially decrease an entities effective tax rate. Other issues, such as documentation and IRS audit risk will also be covered. These rules will be illustrated by a hypothetical US- Canada transaction. Objectives:*

*Identify a cross border transaction and be able to discuss potential implications.*

*Determine potential audit risks involved with cross border transactions.*

*Explain the role of competent authority, advanced pricing agreements and other alternative methods in reducing audit risk.*

*Understand the types of contemporaneous documentation needed.*

*Apply these principles in order to decrease and entity's effective tax rate. Instructor: Allison M. McLeod, LL.M., CPA. A PLLC Fields of Study: Taxes*

July 18, 2024

- December 31, 2034

## **ChatGPT for Accountants: 50+ Use Cases**

### **Anytime CPE**

12:00 AM - 12:00 AM

*This course will explore the use of ChatGPT and artificial intelligence chatbot technologies in the accounting profession. Participants will learn how to utilize ChatGPT to automate tasks, improve efficiency and accuracy, and provide real-time support to clients. Objectives: After attending this presentation, you will be able to...*

*Identify the basics of ChatGPT and artificial intelligence chatbot technologies*

*Use ChatGPT to automate tasks and improve efficiency in the accounting profession*

*Utilize ChatGPT to improve accuracy and reduce the risk of mistakes in financial records*

*Supply real-time support to clients using ChatGPT*

*Generate financial reports using ChatGPT*

*Use ChatGPT to automate tax return preparation and financial planning*

*Deliver guidance on financial decision making using ChatGPT*

*Instructor: Garret Wasny, MA, CMC, CITP/FIBP Fields of Study: Information Technology*

July 18, 2024  
- December 31, 2034

## **Advanced ChatGPT for Accountants**

### **Anytime CPE**

12:00 AM - 12:00 AM

*This course concisely explains the latest "see, hear, speak" multi-modal updates to ChatGPT and how they can be used in an accounting context. New features include vision processing, voice conversation, image generation, real-time Internet access, advanced data analysis, plugins and more. Discover how this technology can be used in mind-blowing ways to analyze financial data, optimize processes, and solve problems in the accounting domain. Through the lens of ChatGPT, practitioners can explore innovative solutions, automate routine tasks, and generate deeper insights and value to their clients and organizations in previously unimaginable workflows. You'll walk away with scores of advanced ChatGPT strategies and tips that can be immediately applied and deliver instant results to elevate the efficiency and effectiveness of your accounting projects and tasks. Objectives: After attending this presentation you will be able to...*

*Identify the fundamental features and functionalities of ChatGPT in an accounting context.*

*Apply Custom Instructions to tailor ChatGPT's responses for specific financial scenarios.*

*Analyze financial statements, news releases, and other relevant data using ChatGPT.*

*Explore and identify business opportunities using hyper-local and sectoral analysis techniques.*

*Utilize Advanced Data Analysis for financial comparisons, and capital project evaluations.*

*Evaluate assets, space, and user interfaces using image analysis with ChatGPT.*

*Implement voice interaction with ChatGPT to enhance user experience and accessibility in financial tasks.*

*Instructor: Garrett Wasny, MA, CMC, CITP/FIBP Fields of Study: Information Technology*



July 18, 2024  
- December 31, 2034

## **Erase the Mark: Best Practices in Penalty Abatement**

### **Anytime CPE**

12:00 AM - 12:00 AM

*If there is a potential error, the IRS will assess a tax and add a hefty penalty, without even knowing the facts. As a tax professional, you will be exposed to the IRS and their methods of penalizing taxpayers for the smallest of violations. This presentation will focus on the rules and regulations that create the penalty, and the reasons that exist that the IRS will consider to remove those penalties. Objectives: After attending this presentation, you will be able to...*

*Identify the authority of the IRS to assess penalties.*

*Recognize the common types of penalties that can be abated.*

*Develop a plan to request penalty abatement.*

*Review real examples of successful penalty abatement.*

*Instructor: Robert Nordlander Fields of Study: Taxes*

July 18, 2024  
- December 31, 2034

## **CFO Solutions to IRS Problems**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Many CPAs are becoming full-time or fractional CFOs for small businesses. In that position, they are the resident expert in finances, cash flow planning, and budgeting. But what about dealing with the IRS? The IRS has broad powers to administer the assessment and collection of taxes. From removing penalties to criminal prosecutions, this presentation focuses on how CFOs can prevent problems with the IRS and how to develop winning strategies if the IRS knocks on the door. Objectives: After attending this presentation you will be able to...*

*Identify the authority and regulations of the IRS.*

*Develop a plan of action to prepare for an audit.*

*Recognize questionable tax strategies by owners.*

*Develop a plan for unpaid taxes.*

*Recognize possible criminal tax violations.*

*Instructor: Robert Nordlander Fields of Study: Taxes*

July 18, 2024  
- December 31, 2034

## **Criminal Tax: How CPAs Bring Value to Defense Attorneys**

### **Anytime CPE**

12:00 AM - 12:00 AM

*CPAs can be requested to assist attorneys in litigation support in criminal proceedings. For criminal tax cases, the IRS has recommended prosecution. However, the rules and stakes are different than a simple civil audit. This presentation will focus on how to assist defense attorneys in calculating tax loss, asking the right questions, and probe possible weaknesses in criminal tax investigations. Objectives: After attending this presentation you will be able to...*

*Determine the common weaknesses in a criminal tax investigation.*

*Identify the key documents to review (In a sea of thousands of documents).*

*Select questions for your client to use in court proceedings.*

*Instructor: Robert Nordlander* Fields of Study: Taxes

February 11, 2025  
- December 31, 2034

## **Behind the Curtain: Exploring IRS Audit Technique Guides**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Have you ever considered a tax audit from the perspective of an IRS examiner? This session explains how you can use IRS Audit Technique Guides (ATGs) to enhance tax compliance. You will obtain a glimpse of the audit process from the viewpoint of an IRS agent as we explore insights that the IRS provides to its own examiners. Objectives: Instructor: Chris Harper* Fields of Study: Taxes

February 11, 2025  
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## **Unlocking Deep Secrets: Case Studies in Financial Analysis**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Unlock the secrets to understanding a company's financial health and management performance through comprehensive financial analysis. This seminar will guide you through essential tools such as vertical analysis, horizontal analysis, and ratio analysis to gain deep insights into business performance. Objectives: After attending this presentation, you will be able to...*

*Utilize vertical analysis by converting each financial statement line item into a percentage of a base figure, facilitating effective comparisons across different companies and identifying significant financial trends.*

*Calculate horizontal analysis for review of financial data over multiple periods, to identify notable changes and trends that reflect a company's growth and performance trajectory.*

*Calculate and interpret key financial ratios, assessing aspects such as profitability, liquidity, and solvency. Gain insights into management performance and business viability, leveraging this analysis to make informed decisions based on real-world financial data.*

*Instructor: Eric Knight* Fields of Study: Finance

February 11, 2025  
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## **Guide Strategy, Attract Investments with Financial Forecasts**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Financial statement forecasting is essential for predicting a company's future financial health, guiding strategic decisions, and attracting investments. By analyzing historical data, market trends, and assumptions, businesses can anticipate risks and opportunities, enabling effective planning, resource allocation, and long-term stability and growth. Objectives: After attending this presentation, you will be able to...*

*Formulate the ability to project future income, expenses, and resources using historical data and market trends for strategic planning and investment decisions.*

*Calculate future earnings and financial positions to evaluate growth potential, solvency, and capital structure for effective budgeting and risk management.*

*Apply forecasting insights to enhance resource allocation, manage risks, and attract investments, supporting long-term financial stability and growth*

*Instructor: Eric Knight* Fields of Study: Finance

February 11, 2025  
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## **Income Tax Analysis: Exploring In-Depth Concepts**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Financial statements prepared for stockholders and external users follow Generally Accepted Accounting Principles (GAAP), while tax returns adhere to the Internal Revenue Code (IRC). These frameworks differ in recognizing profitability, influencing reported income significantly. Companies often aim to minimize taxable income within legal bounds, while maintaining compliance with both financial reporting and tax regulations. Objectives: After attending this presentation, you will be able to...*

*Recognize variations in income recognition.*

*Recognize deductible expenses between GAAP and IRC affect reported profitability and tax liabilities.*

*Compute deferred tax assets and liabilities, learning their impact on financial statements and future tax obligations.*

*Instructor: Eric Knight* Fields of Study: Taxes

February 11, 2025  
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## **Hold Your Horses! How Landmark Fraud May Have Been Avoided**

### **Anytime CPE**

12:00 AM - 12:00 AM

*What can we learn from one of the largest municipal frauds in U.S. history? Rita Crundwell stole nearly \$54 million from the citizens of Dixon, Illinois over the course of two decades. This course examines circumstances that allowed this landmark fraud to occur. We will explore internal control deficiencies and other circumstances that hindered prevention or timely detection of Rita's scheme. Objectives: After attending this presentation, you will be able to...*

*Recall factors that allowed the Dixon fraud to occur*

*Identify internal controls that could have prevented the fraud*

*Recognize lessons that CPA firms should learn from this case*

*Analyze the intricacies of independence*

*Distinguish best practices for government agencies and other organizations that utilize employees*

*Instructor: Chris Harper* Fields of Study: Auditing

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## **Learning to Teach "Tax" as a Second Language**

### **Anytime CPE**

12:00 AM - 12:00 AM

*Sometimes the vernacular of accounting seems more challenging than technical aspects. This session offers suggestions for translating the foreign language of taxation into tangible terms for non-accountants. We explore techniques for simplifying the complexity of taxation terminology. This course will equip you with tools for demystifying tax technicalities so you can help clients and other non-tax professionals grasp fundamental concepts. Objectives: After attending this presentation, you will be able to...*

*Identify taxation nuances that are important but difficult for non-tax professionals to understand.*

*Apply techniques for educating clients regarding taxation.*

*Distinguish methods for simplifying and communicating complicated tax concepts.*

*Instructor: Chris Harper* Fields of Study: Taxes

February 11, 2025  
- December 31, 2034

## **Build Better Budgets: Fundamental Techniques**

### **Anytime CPE**

12:00 AM - 12:00 AM

*This session provides insights for enhancing the preparation and utilization of budgets. Seasoned accountants will benefit from a refreshed awareness of popular techniques. Budding financial professionals will obtain novel insight regarding fundamental budgeting concepts. All participants will develop an appreciation for the holistic nature of budgeting as an integral tool for planning and control. Objectives: After attending this presentation, you will be able to...*

*Recognize the importance of budgeting*

*Identify components of a master budget*

*Distinguish the utility of flexible budgets*

*Analyze the role of variances*

*Apply capital budgeting techniques*

*Instructor: Chris Harper Fields of Study: Finance*

June 21, 2024  
- December 31, 2034

## **Secure Act 2.0: What you need to know**

### **Anytime CPE**

12:00 AM - 12:00 AM

*This program provides an explanation of the Secure Act 2.0 tax provisions impacting both individuals and business taxpayers. Objectives:*

*Identify and recall key compliance issues and significant changes in retirement provisions. Instructor: Steven C. Dilley, PhD, CPA, JD Fields of Study: Taxes*