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The benefits of Becker



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On demand course catalog



Accounting

Course	Description	Credits	
Accounting Changes and Error Corrections (ASC 250)	In-depth coverage of accounting changes (including definition and scope of various types of changes), primary considerations for error corrections, illustrated examples of how to apply ASC 250.	2	
Accounting and Auditing for Going Concern	Exploration of requirements of ASU 2014-15 concerning an entity's going concern, definition of substantial doubt and going concern determination rules issued by the AICPA and the PCAOB; compares US standards to international standards.	2	
Accounting for Derivative Financial Instruments & Hedging Activities (ASC 815)	Overview of how to account for hedging and derivatives activities and ensure compliance with the new standard.	2	
Accounting for Equity Instruments	Overview of accounting for equity securities and related ownership interests within the scope of ASC 321. Applying the net asset value practical expedient for qualifying investments and applying the modified cost alternative method of accounting for certain investments. Equity method accounting for investments in other entities in which there is significant influence. Review current common presentation and disclosure requirements and other considerations, such as when to consolidate another entity.	3	
Accounting for Goodwill and Acquisition Related Expenses	Overview of overall business combination concepts, recognizing all assets and liabilities in a business combination, including calculating goodwill or gain on bargain purchase, subsequent measurement of goodwill, including any impairment loss, impact of recent accounting standard updates and private company accounting alternatives.	3.5	
Accounting for Leases & Asset Retirement Obligations ASC 840 (SFAS 13)/ASC 410 (SFAS 143)	Exploration of accounting for leases in accordance with ASC 840 which will eventually be replaced by ASC 842 starting in December of 2018.	3	
Accounting Standard Updates (ASUs) Issued in 2017	Overview of accounting standards issues in 2017.	2.5	
Accounting and Auditing Hot Topics – June 2019	Overview of SEC developments and enforcement actions, PCAOB developments and guidance for leases and revenue recognition.	1.5	NEW
Accounting & Auditing Update – Q1 2019	Review the proposed standards issued in Q1 2019 and changes to accounting and auditing standards in Q1 2019.	1.5	NEW
Accounting & Auditing Update – Q2 2019	Review the proposed standards issued in Q2 2019 and changes to accounting and auditing standards in Q2 2019.	1.5	NEW
Accounting and Auditing Update – Q1 2018	Overview of accounting standards updates issued and proposed by FASB during Q1 2018, guidance issued by the AICPA during Q1 2018 and PCAOB and SEC guidance issued during Q1 2018.	1	
Accounting and Auditing Update – Q2 2018	Overview of accounting standards updates issued and proposed by FASB during Q2 2018, guidance issued by the AICPA during Q2 2018 and PCAOB and SEC guidance issued during Q2 2018.	1.5	
Accounting & Auditing Update – Q3 2018	Overview of exposure drafts issued by AICPA, exposure drafts issued by FASB and final ASUs issued by FASB.	1	
Accounting & Auditing Update – Q4 2018	Overview of accounting standards updates issued and proposed by FASB during Q4 2018 and proposals and guidance issued by the AICPA during Q4 2018.	0.5	
Accounting & Auditing Update – Q4 2017	Overview of ASUs issued and proposed by FASB during Q4 2017, exposure drafts and guidance issued by the AICPA during Q4 2017 and PCAOB guidance issued during Q4 2017.	1	

Accounting

Course	Description	Credits
Accounting and Auditing Update – Q3 2017	Insight into the recently issued standards from the major standard setters-AICPA, FASB and PCAOB.	1
NEW Activity-Based Costing to Manage Capacity	Discussion on the use of activity-based costing as a costing approach and the steps involved in developing an activity-based costing system.	1.5
AICPA Valuation and Consulting Standards	Introduction to Statement on Standards for Consulting Services (SSCS) No. 1, Consulting Services: Definitions and Standards (AICPA, Professional Standards, CS sec. 100).	2
Annual GAAP Update – June 2018	Overview of ASUs issued by the FASB that are effective now or will be effective by the end of 2018, recently issued ASUs that will be effective in the coming years, the big three convergence projects: leases, revenue recognition and financial instruments.	4
Asset Retirement and Environmental Obligations (ASC 410)	In depth coverage of how to recognize and measure an asset retirement obligation and presentation and disclosure requirements for asset retirement obligation liabilities in accordance with ASC 410.	2.5
ASUs Effective for 2018 Year-end and Beyond	This course will review ASUs effective for and/or after the 2018 calendar year-end.	2
Accounting Standards Updates (ASUs) Issued in 2018	Review of accounting standards updates issued by FASB during 2018.	2
Auditing & Accounting Update – Q2 of 2017	Summaries of new ASUs and proposed ASUs, proposed SAS and proposed and issued PCAOB released during the second quarter of 2017.	1.5
Bankruptcy How to Effectively Addr. Fin. Rptg. Iss. & Bankruptcy Code Provisions Part 1	Overview of bankruptcy process and accounting and tax consequences of bankruptcy.	2
Bankruptcy How to Effectively Addr. Fin. Rptg. Iss. & Bankruptcy Code Provisions Part 2	Overview of bankruptcy process and accounting and tax consequences of bankruptcy.	2
Business Combinations and Consolidations, Part 1 (ASC 805 & 810)	Overview of when to use consolidated statements and when not to and how to choose and execute the right accounting method for your organization's portfolio of subsidiaries and investments.	1.5
Business Combinations and Consolidations, Part 2 (ASC 805 & 810)	Overview of when to use consolidated statements and how to choose and execute the right accounting method for your organization's portfolio of subsidiaries and investments.	2
Business Combinations and Goodwill	Coverage of identifying the buyer, determining the acquisition date, recognition and measurement of assets acquired, liabilities assumed and noncontrolling interest, recognizing goodwill or bargain purchase gain, determining consideration transferred, proper treatment of special considerations.	2.5
Common Disclosures for Nonpublic SMEs	Insight into disclosures about the entity and its environment, common critical information that supplements the face financial statements, highlighting risks and uncertainties through robust footnotes and tailoring disclosures to the nature, size and complexity of the entity to provide useful information for economic decisions.	3
Comprehensive Income	This course will include the following: the rules governing comprehensive income contained in ASC 220, coverage of recognition and initial measurement, subsequent measurement and reclassifications and presentation and disclosure requirements. A series of interactive examples meant for users to practice the application of the standards governing comprehensive income.	1.5

Accounting

Course	Description	Credits	
Construction Industry Part 1	Examine the nature of construction contractors and the significant roles they play in the economy and the many facets of the industry. Learn the features of the business environment, including characteristics common to contractors, types of contracts, contract modifications and changes, the bonding and surety process, joint ventures and financial reporting impact.	2	UPD
Construction Industry Part 2	Analysis of the different methods of accounting for performance of construction type contracts, accounting for and reporting investments in construction joint ventures and the financial statement presentation of joint ventures.	2	
Construction Industry Part 3	Examination of the auditing procedures and additional audit considerations unique to the construction industry.	2.5	
Cracking the Codification: US GAAP Research Made Easy	Understanding of FASB Accounting Standards Codification and how to use the codification in real-world applications.	1.5	
Debt – Accounting and Financial Reporting Risks	Discussion of debt subject to classification and overview of debt with conversion options and other special debt considerations.	3	NEW
Deep Dive into Financial Instruments	Examines the background that led to ASU 2016-01, ASU 2016-13 and ASU 2017-12, the major changes to other comprehensive income, financial instruments, investments and income taxes. The major changes to the credit loss model for available for sale debt securities as well as debt securities held at amortized cost and the major changes to accounting for hedging instruments.	2	
Disclosure & Sustainability Reporting: An SEC Overview	Understanding of SEC rules governing Fair Disclosure and non-GAAP financial measures; overview of sustainability reporting.	1.5	
Divestitures, Separations and Deconsolidations	Analysis of divestitures and separations: asset vs. business, fair value measurements of disposal consideration, discontinued operations and carve-out financial statements. Overview of deconsolidations: changes in controlling interests and loss of control, reconsideration events and deconsolidation of variable interest entities.	2	
Earnings per Share (ASC 260)	Understanding of the earnings per share disclosure and its interpretation in US financial statements and computation of EPS for US financial statements.	2.5	UPD
Equity (ASC 505)	Overview of the definition and scope of elements classified as components of equity, terms associated with securities outstanding, applicable accounting and reporting requirements for equity transactions and illustrated examples of how to apply ASC 505.	2	
FASB's Disclosure Framework Project	Examines background of the disclosure framework, board considerations as related to the disclosure framework, decision questions for the board as related to the disclosure framework, ASUs issued as a result of framework project and assessing the materiality of disclosures.	2	
FASB Simplification Initiative	Overview of FASB simplification initiative, ASU issued as part of the initiative and current status of projects associated with the FASB simplification initiative.	1	
Financial Instruments – Recognition and Measurement (ASU 2016-01)	In-depth coverage of major changes to accounting for financial instruments under ASU 2016-01.	1	
Financial Instruments – Credit Losses (ASU 2016-13)	Overview of background that led to ASU 2016-13 and major changes to the credit loss model for available for sale debt securities and debt securities held at amortized cost.	1	
Financial Instruments: Derivatives & Hedging	Background on why ASU was issued, changes to presentation and disclosure and simplifications permitted by the new standard.	1.5	

Accounting

Course	Description	Credits
Financial Reporting Challenges for Corporations	Overview of some of the most significant changes in financial reporting arising from recent and new accounting standards issued by the FASB, recent guidance from the SEC and the PCAOB that are particularly relevant to financial executives, important risk management considerations, including the Committee of Sponsoring Organizations of the Treadway Commission's guidance on internal control over financial reporting issued in 2013 and new guidance on enterprise risk management issued in 2017 and important corporate governance trends including related guidance and statements of the SEC, PCAOB and AICPA.	2
NEW Financial Reporting Framework for Small- & Medium-Sized Entities	Summary of general concepts and principles, common statement of financial position line items, both current and long-term and risks and uncertainties.	3
NEW Forecasting for the Start-Up Business	Overview of expense and revenue for a start-up business plan and costing techniques for determining expenses for a start-up business.	3
Foreign Currency Accounting (ASC 830)	Introduction to functional currency approach using current (translation) and temporal (re-measurement) methods to translate assets, expenses and gains and losses in compliance with GAAP.	2
Forensic Accounting	Introduction to forensic accounting, understanding of how it differs from traditional accounting and the benefits of developing these skills and tools/ techniques to detect fraud.	2
UPD Foundations of Business Combinations and Noncontrolling Interests	Review the concepts related to accounting for business combinations under ASC 805 and consolidations under ASC 810. Course provides an understanding of the critical issues and understanding of the relevant guidance.	3
GAAP Financial Statements (ASC 205-235)	Overview of general requirements for financial statement reporting applicable to all reporting entities in accordance with GAAP, specific GAAP rules with regard to presentation of the financial statements, SEC accounting rules applicable to the preparation/inclusion of financial statements in form 10-K (annual report) and form 10-Q (quarterly report).	1.5
Goodwill Impairment Guidance	Analysis of goodwill impairment regulations as enacted by ASC and updated with ASU, goodwill impairment test, valuation techniques used for reporting units, disclosures as required by ASC 350 and example calculations.	2
Impairment and Exit and Disposal Activities (ASC 360 and ASC 420)	Insight into accounting for impairment or disposal of long-lived assets (ASC 360) and the costs associated with exit or disposal activities (ASC 420).	2
NEW Implementing Revenue Recognition – Lessons Learned	Course provides information on implementation issues identified for topic 606 and lessons learned from issuers.	2
NEW Implications from the Adoption of the New Leasing Standard	Overview of background, lessee and lessor accounting and implementation issues.	2
Income Taxes (ASC 740) (Updated for Tax Cuts and Jobs Act 2017)	Review of foundational knowledge and critical strategies, intraperiod and interperiod tax allocation and relevant issues surrounding accounting for income taxes.	2
Inspecting the Annual Report, Part 1	Provides insight into collecting annual report data from the SEC and a company's website. Learn required components of an annual report and analytical tools to research and review financial filings. Includes case study of annual report analysis using Starbucks's FY2018 10-K as an example.	2
NEW Inspecting the Annual Report, Part 2	Study how to apply horizontal, vertical, and ratio analysis to financial statements. Overview of calculating key liquidity, leverage, profitability, and efficiency ratios and conducting cash flow analysis.	2

Accounting

Course	Description	Credits	
Interim Reporting (ASC 270)	Summary of accounting and disclosure principles for interim financial reporting for entities other than publicly traded companies and the unique requirements for interim financial reporting for publicly traded companies.	2.5	
Introduction to Bookkeeping	Learn bookkeeping basics for small businesses and common bookkeeping systems available for small businesses.	2	
Inventory: Techniques to Manage, Account for and Value	Inventory management and valuation is one of the most critical functions of any business. Explore methodologies that are utilized in managing, costing and valuing inventory.	2	UPD
Leases – ASC 842	Overview of FASB's accounting standard update for leases (topic 842) and key differences between ASC topic 842 and the IASB's new lease accounting standard, IFRS 16, leases.	2	UPD
Lease Accounting	Overview of changes in identifying and classifying a lease, new lessee accounting for finance and operating leases, new lessor accounting for sales-type, direct finance and operating leases, presentation and disclosure and special considerations, such as impairment, capitalization of initial direct costs, subleases and more.	3	
Liabilities (ASC 400-480)	Examination of definition and scope of various types of liabilities. Understanding of the nature, types, valuation, disclosure, recognition of liabilities and primary considerations for accounting for liabilities including illustrated examples of how to apply FASB ASC 405 480, accounting for liabilities.	3	
Liquidation Basis of Accounting (ASC 205-30)	Overview of ASU 2013-07 presentation of financial statements (topic 205): The liquidation basis of accounting and ASU 2014-15 going concern.	1.5	
Managing the Company's Cash and Credit	Study the factors and considerations in establishing credit terms and financial ratios commonly used to make credit decisions and evaluate annual debt covenant compliance. Course identifies practices related to cash collections and cash management.	1.5	NEW
Meeting SEC Disclosure Requirements: Management's Discussion & Analysis of Financial Condition and Results of Operations, Part 1	Discussion of current MD&A issues with expert guidance that will clarify complex issues related to preparing MD&A disclosures.	2	
Meeting SEC Disclosure Requirements: Management's Discussion & Analysis of Financial Condition and Results of Operations, Part 2	Coverage of the compliance with Securities and Exchange Commission (SEC) regulations and guidelines which is critical and applies to the management's discussion and analysis section of an entity's annual financial report. Discussion on current MD&A compliance and the guidance that will clarify many of the complex issues related to preparing MD&A disclosures.	1	
Meeting SEC Disclosure Requirements: Management's Discussion & Analysis of Financial Condition and Results of Operations, Part 3	Coverage of the compliance with Securities and Exchange Commission (SEC) regulations and guidelines which is critical and applies to the management's discussion and analysis section of an entity's annual financial report. Discussion on current MD&A compliance and the guidance that will clarify many of the complex issues related to preparing MD&A disclosures.	1	
Non-GAAP Financial Measures	Discussion of background/history of non-GAAP financial measures, guidance and interpretations related to non-GAAP financial measures, SEC comment letter examples, other developments in pro-forma financial reporting and best practices in non-GAAP reporting.	1.5	
Nonmonetary Transactions	Overview of monetary and nonmonetary transactions including how to determine whether a nonmonetary transaction has commercial substance to it and how to account for it and the tax issues related to nonmonetary transactions according to Internal Revenue Code sections 1031 and 1032.	2	

Accounting

Course	Description	Credits
Not-For-Profit Accounting and Auditing Update	Overview of ASU 2016-14, proposed ASU on revenue recognition for grants, ASUs impacting not-for-profit (NFP) entities and SAS 133.	2
Not-for-Profit Entities: Financial Statement Presentation (ASU 2016-14)	Discussions of the history and overview of ASU 2016-14 and the types of entities affected by ASU 2016-14; identification of major changes to net asset classifications, liquidity disclosure and reporting and expense classification.	1.5
Opening a New Chapter: Fresh-Start Accounting and Subsequent Events	Overview of fresh-start accounting (ASC 852) and subsequent events (ASC 855).	1.5
Other Comprehensive Bases of Accounting (OCBOA)	Overview of defining what qualifies as a comprehensive basis of accounting other than GAAP, differentiating the advantages and disadvantages of using a special purpose framework, describing the major accounting and financial reporting differences between special purpose frameworks and GAAP and describing the impact on audit and other attest reports on financial statements prepared using a special purpose framework.	3.5
NEW PCAOB Inspection Findings	A look into the PCAOB inspection process, scope of inspections and the importance of the process.	1.5
PCAOB/SEC Update	Overview of the PCAOB's updated auditor's reporting model, other PCAOB projects (including international, enforcement and other standard-setting activities), changes ahead for PCAOB personnel and SEC regulators and other SEC projects and activities (including cybersecurity, statistics on comment letters and other rules and actions).	2
Pension Plan Update (ASU 2017-07)	Provides a review of net periodic pension cost before ASU 2017-07 and insight into the changes to net periodic pension cost after ASU 2017-07; gives examples of presentation of net periodic pension cost under ASU 2017-07.	1
Pensions: Implementing the Accounting & Financial Reporting Requirements (ASC 715 & 712)	Coverage of accounting and reporting of pension and other postretirement benefits.	1.5
Preparing the Statement of Cash Flows	Overview of basic format and presentation of the statement of cash flows, definition of cash and cash equivalents, disclosure of noncash activities, proper classification of cash flow activities and common complex cash flow issues, such as stock compensation, derivatives, business combinations, leases and other matters.	3
Private Company Financial Reporting	Overview of history of private company reporting movements, private company council and related ASUs, differences between US GAAP and AICPA financial reporting framework for SMEs and international option for IFRS for SMEs.	3
Quality Control Standards, Part 1	Overview of the applicability and elements of quality control, basic considerations when reviewing the work of others and basic objectives and definitions of quality control standards for nonissuer engagements under QC section 10 and the requirements for nonissuer engagements.	1
Quality Control Standards, Part 2	Learn how to apply the PCAOB's QC section 20 to an issuer engagement, the system of quality control, quality control policies and procedures and administration of a quality control system.	1
Quality Control Standards, Part 3	Learn what may be included in monitoring procedures, how inspection procedures contribute to the monitoring function, how to monitor one's own compliance and decide if it is beneficial to engage in external inspection procedures and assessing if a peer review may substitute for monitoring.	1

Accounting

Course	Description	Credits
Quality Control Standards, Part 4	Learn how to apply the PCAOB's QC section 40 to an attest engagement, the system of quality control and personnel management element of quality control, competencies expected in performing accounting, auditing and attestation engagements for quality control policies and procedures and the competency requirement of the Uniform Accountancy Act as it relates to the personnel management element of quality control.	1
Quality Control Standards, Part 5	Learn membership requirements (SEC practice sections), the types of quality control standards for personnel education, communication, firm obligations and compliance with independence that are included in the SEC practice section (SECPS) requirements of membership.	1
Reporting Discontinued Operations and Disclosures of Disposals of Components of an Entity ASU 2014-08	Explore recent updates for reporting discontinued operations and disposals of property, plants and equipment.	2
ASC 606 Analysis for the Construction/Real Estate Industry	High-level overview of the basic revenue recognition principles of ASC 606 and in-depth analysis and specific examples of how the new revenue recognition guidance shall be applied to entities that operate in the construction/real estate industry.	1
Revenue Recognition: ASC 606 Analysis for the Life Sciences Industry	High-level overview of the basic revenue recognition principles of ASC 606 and in-depth analysis and specific examples of how the new revenue recognition guidance shall be applied to entities that operate in the life sciences industry.	1
Revenue Recognition: ASC 606 Analysis for the Technology Industry	High-level overview of the basic revenue recognition principles of ASC 606 and in-depth analysis and specific examples of how the new revenue recognition guidance shall be applied to entities that operate in the technology industry.	1
Revenue Recognition – Clarifications to the Standard (ASC 606)	Review of the revenue recognition standard jointly issued by the FASB and IASB. Summary and clarification of the accounting standards updates released since the FASB/IASB standard was issued.	2
Revenue Recognition for Health Care Entities	Review of performance obligations, collectability from uninsured patients or patients with copayments and deductibles, third party settlements, risk sharing arrangements and financial statement disclosures.	1
Revenue Recognition Then-Now-Next, Part 1 (old standards)	Overview of GAAP revenue recognition requirements in connection with delivery of products and services including multiple element arrangements.	2.5
Revenue Recognition Then-Now-Next, Part 2 (new standard ASU 2014-09)	Outline of GAAP revenue recognition requirements in delivery of products and services including multiple element arrangements.	2.5
Revenue Recognition Disclosures	In-depth coverage of key disclosures required under topic 606.	2
SEC Comfort Letters	Review of components of comfort letters including purpose, information to be included, parties involved and guidelines applicable.	2
SEC Disclosure Requirements – MD&A	Discussion of current SEC management's discussion and analysis (MD&A) issues to clarify complex issues related to preparation of MD&A disclosures.	2.5
SEC Disclosure Requirements: Compensation Discussion & Analysis	Discussion of current SEC compensation discussion and analysis (CD&A) including required disclosures and guidance on how to maintain required information effectively and efficiently.	3

Accounting

Course	Description	Credits
SEC Initial Public Offering Requirements	Overview of IPOs including the pros and cons of going public, the process of bringing a company to market, the role of the independent auditor and other professionals and case studies of IPOs.	2
SEC Reporting Requirements, Part 1	Overview of the Securities and Exchange Commission's role in information reporting requirements of public companies and the purpose, requirements and deadlines of required filings.	2
SEC Reporting Requirements, Part 2	Overview of auditor's role in process of SEC reporting, statutory sources of auditor's obligations in SEC reporting process including the Securities Act of 1933, the Securities Exchange Act of 1934 and the Sarbanes-Oxley Act of 2002 and the PCAOB's role with respect to auditors and accounting standards.	1.5
SEC Reporting Requirements, Part 3	Overview of the various roles inherent in corporate governance, various concepts related to the auditor's role in SEC reporting, the complex SEC reporting rules in Regulation S-X, the information contained in Regulation A+ and the methods of research available and sources of guidance issued by the SEC.	1.5
NEW SEC Annual Update 2018	The Securities and Exchange Commission is an independent federal governmental agency that has the responsibility of maintaining orderly capital markets, facilitating capital formation and protecting investors. Gain insight into the core mission, departments and overall leadership of the SEC.	1.5
SEC Annual Update 2017	Overview of personnel changes and current issues at the SEC, new SEC rules, developments at the PCAOB, the SEC's division of corporation finance, recent trends in comment letters, the SEC's division of enforcement, enforcement actions and administrative proceedings and conclusions and predictions for the future.	2
Segment Reporting (ASC 280)	Overview of accounting standards applicable to identification and disclosure of reportable segments, terminology relevant to segment reporting and implementation issues related to reportable segments.	2
Share-Based Payments (ASC 718): Accounting for Stock Options & Other Stock-Based Compensation	Deep dive into the formulas, objectives and requirements related to share-based payments (ASC 718) including practical examples and models showing real-world applications.	1.5
Software Revenue & Expense Recognition (ASC 985, ASC 350 & ASC 730)	Exploration of software revenue and expense recognition (ASC 985, ASC 350 and ASC 730) including current standards, amendments, background and practical skills.	3
Standard Costing	Overview of standard costing including how standard costing is used, a detailed overview of variance analysis using standard costs, current trends and examples.	2
Statement of Cash Flows in Accordance with ASC 230 (SFAS 95)	Overview of statement of cash flows: basic format, definitions, disclosures of noncash activities, proper classification of activities and common complex issues.	3
Stock Compensation (ASC 718)	Overview of definition of stock compensation; differences between share-based payment transactions with employees, examples of stock compensation reporting and tax consequences of stock-based compensation plans.	2.5
Sustainability Accounting and Integrated Reporting	Overview of standards and conceptual framework behind sustainability accounting including discussion of the Sustainability Accounting Standards Board, integrated reporting and industry standards.	2
Tangible and Intangible Asset Impairment, Part 1	Recognize tangible and intangible assets and the process for testing goodwill for impairment in ASU 2011-08.	2

Accounting

Course	Description	Credits
Tangible and Intangible Asset Impairment, Part 2	Explore impairment testing for general intangibles other than goodwill, recognize rules to account for impairment of long-term tangible assets, recognize how to account for discontinued operations and understand the financial presentation requirements related to asset impairment.	2
Transfers and Servicing of Financial Assets (ASC 860)	Overview of ASC 860 including recognizing what qualifies as a transfer of a financial asset, the control criteria for transfers of financial assets, how to account for sales-type transfers, how to account for finance-type transfers and disclosure requirements.	2
Transparency & Accuracy Through Fair Value Measurements (ASC 820/SFAS 157)	Overview of ASC 820 (SFAS 157) Fair Value Measurements and Disclosures with practical insight to bring transparency and accuracy to financial statements.	2
Uncovering the Truth with Forensic Accounting	Exploration of forensic accounting including how it differs from traditional accounting and the benefits of developing and inserting skills into organizations. Discussion of tools and techniques used in detection of fraud.	2
What Is Integrated Reporting?	Explore the rationale for the move to integrated reporting and how to create a corporate report using the IR format.	1.5
Consolidation of VIEs, Part 1	Deep dive into FASB ASC 810 with a focus on defining and identifying variable interests in a business.	1
Consolidation of VIEs, Part 2	Deep dive into FASB ASC 810 with a focus on the testing utilized to determine if an organization qualifies as a variable interest entity.	2
XBRL Today's Language of Business Reporting	Overview of Extensible Business Reporting Language (XBRL), its applications and how it is reshaping the way business information is reported.	2

NEW

Auditing

Course	Description	Credits
The 2017 PCAOB Auditor's Report	Overview of new auditor's report, critical audit matters (CAM) and form AP.	2
2015 PCAOB Report on Risk Assessment	Overview of Public Company Accounting Oversight Board (PCAOB) Release No. 2015-007 inspection observations related to PCAOB Risk Assessment Auditing Standards (No. 8 through No. 15) released October 15, 2015. Discussion will include background of risk assessment standards on which the report is based and findings in the report.	2
Accountants' Responsibilities Regarding Fraud, Part 1	This course will help you recognize the profile of employees who commit fraud. Learn the CPA's responsibility relating to fraud as defined by SAS No. 99, Sarbanes-Oxley.	2
Accountants' Responsibilities Regarding Fraud, Part 2	Learn the common motivations to commit fraud and types of fraud including financial statement fraud, asset misappropriation and billing fraud. Review the CPA's responsibilities in detecting and preventing fraud.	2
AICPA Cybersecurity Standards, Part 1	Overview of recent cybersecurity threats and the professional standard-setter response. Guidance for performing and reporting on cybersecurity risk management program attestation engagements.	1
AICPA Cybersecurity Standards, Part 2	Overview of desirable elements for management's description of an entity's cybersecurity risk management program, relationship to COSO's Internal Control-Integrated Framework and Control criteria that can be used to evaluate the effectiveness of an entity's cybersecurity controls.	2

UPD

UPD

Accounting/Auditing

Auditing

	Course	Description	Credits
NEW	AICPA Control Risk Assessment Requirements	Learn required audit procedures for assessing internal controls.	2
NEW	AICPA Documentation Requirements	Discussion of documentation standard requirements and purposes of proper documentation.	2
NEW	AICPA Engagement Quality Control Review (EQCR)	Overview of quality control standards, audit requirements for EQCR and common deficiencies.	2
	AICPA Risk Assessment Requirements	Review of risk assessment procedures, five components of internal control and documentation requirements.	2
	Annual Audit & Attestation Update – June 2018	This course covers key recent audit guidance including SAS 132, SAS 133, SSAE 18 and SSARS 24, the AICPA's EAQ initiative and the proposed statement on auditing standards for an auditor's report.	4
	Analytical Procedures Used by Auditors	Overview of describing the definition and application of analytical procedures, using substantive analytic procedures to satisfy audit objectives, designing and performing substantive analytic procedures, strengthening substantive analytic procedures, performing overall final analytics on audit engagements, using analytic procedures on review engagements and using analytic procedures to identify potential fraud and other matters.	3
	Asset Misappropriation Schemes	Exploration of asset misappropriation including larceny, skimming fraudulent disbursements and embezzlement of client's funds. Discussion of who is misappropriating assets and how to protect your company and clients.	1.5
	Attestation Standards (SSAE 18)	Important coverage of the requirements of SSAE 18.	1.5
	Audit Risk Assessment: The Do's and Dont's, Part 1	Overview of the sources of material misstatements and discussion of methodology to assess the risk of material misstatements and understand audit risk assessment documentation requirements.	2
	Audit Risk Assessment: The Do's and Dont's, Part 2	Overview of appropriate audit evidence and how to assess and respond to the risk of material misstatement. Exploration of appropriate procedures to detect material misstatements including audit sampling and audit evidence evaluation.	2
	Audit Sampling, Part 1: Introduction to Basic Sampling Concepts and Terms	Coverage of audit sampling and its definition, when audit sampling is valuable, audit sampling and audit evidence, sampling risk in statistical and nonstatistical sampling, the steps used to perform an audit sampling application, the audit risk model and basic terms and concepts in sampling.	2.5
	Audit Sampling, Part 2: Attribute Sampling for Tests of Controls and Selecting a Representative Sample	Study of attribute sampling and audit sampling, sample size determination, sample selection, issues relating to tests of controls, performing audit procedures and evaluating sampling results and documentation.	2
	Audit Sampling, Part 3: Substantive Audit Sampling – An Introduction	Overview of determining the extent of further audit procedures, substantive audit sampling techniques and tolerable misstatement, audit implications of substantive test results, communications with management and governance, techniques for substantive detail test sampling, monetary unit sampling and selecting a PPS sample.	2.5
	Audit Sampling, Part 4: Classical Variables Sampling (CVS) Techniques	Discussion of classical statistical sampling, applying CVS sampling, theory of classical statistical sampling, the audit application of this theory, process of CVS statistical sampling, implementation of a classical statistical sample, variables sampling schematic for substantive sampling and emulating CVS using nonstatistical methods.	1.5

Auditing		
Course	Description	Credits
Auditing Accounts Receivable	Overview of the audit risks associated with accounts receivable and how to assess those risks, areas for internal control weaknesses within the accounts receivable cycle, audit procedures used to detect material misstatement in accounts receivable and financial statement presentation and disclosure requirements.	2
Auditing Cash and Cash Equivalents	Coverage of understanding different audit areas for cash and cash equivalents, areas for internal control weaknesses, audit procedures used to detect material misstatement in cash and financial statement presentation and disclosure requirements.	2
Auditing Contingencies	Overview of audit risks associated with contingencies and how to assess those risks, areas for internal control weaknesses within the contingency valuations process, audit procedures used to identify and value material contingencies and financial statement presentation and disclosure requirements.	2
Auditing Current Liabilities	Learn the audit risks associated with current liabilities and how to assess those risks; areas for internal control weaknesses within the payables cycle; audit procedures used to detect material misstatement in current liabilities and financial statement presentation and disclosure requirements.	2
Auditing Fair Value	Overview of accounting for fair value, auditing estimates (AU-C 540) and audit strategies.	2
Auditing Inventory	Coverage of audit risks associated with inventory and how to assess those risks, areas of internal control weaknesses within the inventory cycle, audit procedures used to detect material misstatement in inventory and financial statement presentation and disclosure requirements.	1.5
Auditing Long Term Liabilities	Coverage of audit risks associated with long term liabilities and how to assess those risks, areas for internal control weaknesses within the payables cycle, audit procedures used to detect material misstatement in long term liabilities and financial statement presentation and disclosure requirements.	2
Auditing Prepaid Expenses	Overview of the audit risks associated with prepaid expenses and how to assess those risks.	1.5
Auditing Property, Plant and Equipment	Learn about the audit risks associated with property, plant and equipment and how to assess those risks and areas for internal control weaknesses within the property, plant and equipment cycle.	2
Auditing Opinions: Understanding the Fundamentals from Standards to Reports	Overview of fundamental background and skills to conduct audits in accordance with generally accepted auditing standards (GAAS) and fairly present statements in accordance with generally accepted accounting principles (GAAP).	2.5
Auditing Revenue Recognition	Obtain knowledge of GAAP requirements for revenue recognition and identify important considerations in auditing revenue. Outline of frequent deficiencies identified by PCAOB inspection staff in auditing revenue and appropriate audit procedures to avoid those deficiencies.	2
Auditing Typical Investments	Learn the audit risks associated with a typical investment portfolio and how to assess those risks.	2
Comparing the Audit Standards – AICPA vs. PCAOB vs. International Standards	Discussion on the three primary audit standard-setting bodies. Compare and contrast the audit standard requirements of the AICPA, IAASB and PCAOB.	3
Compilations and Reviews – Avoiding Peer Review Deficiencies	Overview of general ethical and quality control considerations, when each type of SSARS engagement applies required procedures for each type of engagement, special purpose framework considerations, reporting and other required communication considerations and minimum documentation requirements.	3

Auditing

Course	Description	Credits
Corruption: The Dangers to The Economy, Part 1	Learn how and why corruption happens and how to deter and detect it in organizations.	2.5
Corruption: The Dangers to The Economy, Part 2	Learn how and why corruption happens and how to deter and detect it in organizations.	2.5
Drafting Audit Reports	Overview of basic elements of an unmodified report prepared under generally accepted auditing standards, types of financial statement audit opinions, common report modifications and explanatory language, special reporting considerations, such as reporting on special purpose financial statements, preparing audit reports under PCAOB auditing standards and compliance with audit reporting requirements under Yellow Book and single audit engagements.	3
Introduction to Employee Benefits, Part 1	Overview of the definition of different types of employee benefit plans and the effect of government regulations on employee benefit plans. The audit requirements of employee benefit plans will also be covered.	2
Employee Benefits, Part 2 – Defined Contribution Plans	Overview of differences between defined contribution and defined benefit plans and the components of net assets available for benefits. Discussion of the financial disclosures, audit considerations and tax filings and requirements for a defined contribution plan.	2
Employee Benefits, Part 3 – Defined Benefit Pension Plans	Overview of operation, administration, reporting and auditing of defined benefit plans. Outline of key components of reporting, financial disclosures, audit considerations, effect of specific events and tax status of a defined benefit plan.	2.5
Financial Statement Fraud: The Bottom Line on Protecting Your Bottom Line	Learn to identify financial statement fraud and gain insight to help companies prevent the most damaging type of fraud.	2
Fraud and Abuse in Nonprofit and Government Environments	Overview of the fraud environment, fraud triangle and common types of fraud, results of recent fraud surveys, unique concerns to governmental and nonprofit entity environments, tips for better cybersecurity risk management and the auditor's responsibility for fraud.	2.5
NEW Fraud in Not-for-Profits	Study policies, procedures and practices to prevent fraud in a nonprofit. Learn common scams for committing fraud in the nonprofit industry.	1.5
NEW Fraud Investigation, Part I	Overview of the existence of fraud and the circumstances that support the need for investigations and elements of fraud investigation and inquiry. Learn investigation approaches, methods and techniques.	1
Fundamental IT Auditing Concepts	Overview of the importance of IT-related controls and IT auditing, IT audit-related professional certifications, IT components and terms, IT organizational components, sources of criteria that may be applied during the course of an IT audit, including those that relate to overall IT operations, IT security and other specialized purpose types and core aspects of the IT audit process, including planning, testing and reporting considerations.	2
Group Audit (AU-C 600)	Key coverage of the requirements of AU-C 600 when there are no component auditors, when making reference to component auditor and when assuming responsibility for component auditor.	1.5
Healthcare Industry, Part 1 – Overview and Update	This course is designed as an update to provide important information for an audit risk assessment of entities in the healthcare industry. The course is also a good introduction to accounting professionals with a new focus in the healthcare industry. The content includes coverage of current trends in physician services, nursing care facilities and health insurers.	2.5

Auditing

Course	Description	Credits
Healthcare Industry, Part 2 – Understanding Healthcare Financial Statements	This course is designed as an update to provide important information related to the preparation of financial statements for entities in the healthcare industry. A basic knowledge of financial statement elements and disclosures is expected as this course is designed to cover the account balances and disclosures that are unique to healthcare.	2
How to Assess Internal Controls and Safeguard Assets	Introduction to internal control process. Exploration of the practical perspective to ensure operational efficiency and effectiveness, financial reporting reliability and compliance with laws and regulations.	2
How to Properly Prepare Audit Documentation & Workpapers, Part 1	Detailed study of auditing standards and workpaper content. Gain an understanding of GAAS, reasonable assurance, audit documentation, appropriate audit evidence, relevant management assertions, types of audit procedures and common workpaper requirements.	2
How to Properly Prepare Audit Documentation & Workpapers, Part 2	Detailed study of key components of auditing standards related to planning and supervision. Recognition of proper audit documentation and pitfalls to avoid when preparing audit documentation.	2
How to Properly Review Audit Documentation & Workpapers, Part 1	Gain working knowledge of the fundamental issues and processes necessary to review audit documentation and workpapers. Ensure review procedures comply with GAAS and explore audit risk and management issues related to audit documentation.	2
How to Properly Review Audit Documentation & Workpapers, Part 2	Gain working knowledge of fundamental issues and processes necessary to review audit documentation and workpapers. Ensure review procedures comply with GAAS and explore audit documentation requirements and AU-C Sec 530.	2
Introduction to Audit Sampling	Overview of sampling terminology, attribute verses variable sampling, sample size, sample selection and common findings.	2
Leveraging Internal Control Frameworks for Success	Overview of COSO 2013, Green Book and benefits of internal control frameworks.	2
Managing Professional Liability Risk in Nonattest Services	Learn the differences between attest and nonattest services. Overview of the Code of Professional Conduct and other professional requirements relevant to nonattest services. Best practices for engaging, performing, documenting and communicating the results of nonattest engagements. Examine requirements specific to SSARS section 70 related to nonattest engagements to prepare financial statements.	3
PCAOB Audit Standards, Part 1	Outline of auditing standards issued by the PCAOB and in-depth coverage of PCAOB auditing standards 1, 3, 4, 5, 6, 7, 8 and 9.	3
PCAOB Audit Standards, Part 2	Outline of auditing standards issued by the PCAOB and in-depth coverage of PCAOB auditing standards 10, 11 and 12.	3
PCAOB Audit Standards, Part 3	Outline of auditing standards issued by the PCAOB and in-depth coverage of PCAOB auditing standards 13 and 14.	1
PCAOB Audit Standards, Part 4	Outline of auditing standards issued by the PCAOB and in-depth coverage of PCAOB auditing standards 15, 16, 17 and 18.	2
Preparing Compilations and Reviews: 2018-2019, Part 1	Review of general ethical and quality control considerations, when each type of SSARS engagement applies, required procedures for each type of engagement, special purpose framework considerations, reporting and other required communication considerations and minimum documentation requirements.	1.5

Auditing

Course	Description	Credits
Preparing Compilations and Reviews: 2018-2019, Part 2	Review of general ethical and quality control considerations, when each type of SSARS engagement applies, required procedures for each type of engagement, special purpose framework considerations, reporting and other required communication considerations, minimum documentation requirements and interim review procedures.	2
Professional Judgment in Audit	Overview of Center for Audit Quality's new guide, Professional Judgment Resource, common potential judgment tendencies, traps and biases, strategies to avoid potential judgment tendencies and traps and to mitigate possible biases and guidelines pertaining to documentation of an auditor's decision-making process.	2
Professional Skepticism for Public Accountants	Overview of professional skepticism defined and differentiated from professional judgment, characteristics of sufficient appropriate audit evidence and relationship to audit risk, applying concepts to both audit and non-audit engagements, specific tips for enhancing the exercise of professional skepticism, real-life examples of applying professional skepticism and relationship to responsibilities for fraud and noncompliance.	3.5
Proposed Changes to Auditor's Report for Private Companies	Overview of proposed changes to the auditors report, new format for auditor's report, key audit matters and comparison with PCAOB auditor's report.	2
Recent AICPA and PCAOB Activity	Explore SAS 128, AICPA technical practice aids and PCAOB auditing standards No. 17. Review proposed changes to guidance, recent critical changes and expected revisions.	2
NEW Reporting on Subject Matters Other Than Historical Financial Statements	Review the most common attest engagements on subject matters other than historical financial statements and common threads between relevant attest standards contained in the SSARSs and the SSAEs.	3.5
Required Auditor Communications	Overview of establishing the terms of engagement, fraud and noncompliance considerations, AU-C section 260, the auditor's communication with those charged with governance, communicating internal control related matters identified in an audit, comparison to PCAOB, international audit standards and government audit standards.	3.5
Required Communications in an Audit	Summary of communications used by those charged with governance, communication of internal control deficiencies and additional Yellow Book considerations.	2
Root Cause Analysis, Part 1	This is part one of a two-part course that will take a look at how to effectively use root cause analysis (RCA). We will dive into understanding why events occur and how to develop effective recommendations to prevent recurrence of negative outcomes and promote recurrence of positive ones. The course will also cover how internal auditors can use RCA.	2
Root Cause Analysis, Part 2	This is part two of a two-part course that will take a look at how to effectively use root cause analysis (RCA). We will dive into understanding why events occur and how to develop effective recommendations to prevent recurrence of negative outcomes and promote recurrence of positive ones. The course will also cover how internal auditors can use RCA.	1.5
SSARS 21	Summary of newly issued SSARS 21 guidance and general principles for engagements performed in accordance with SSARS. Outline objectives, requirements and reporting for preparation, compilation and review engagements.	1.5
The Impact of Sarbanes-Oxley on Internal Controls	Learn how Committee of Sponsoring Organizations (COSO) principles enables compliance with stringent requirements of the Sarbanes-Oxley Act.	2
NEW The New AICPA Auditor's Report	A look into key audit matters, trickle down implications on other AU-C sections and interplay with EOM, OM and report modifications.	2

Auditing			
Course	Description	Credits	
Upcoming Peer Review, Part 1	Overview of the recent changes to the peer review standards, interpretations and other related guidance. This course summarizes these changes and will help with preparation for upcoming peer reviews.	1.5	NEW
Upcoming Peer Review, Part 2	Become familiar with the new quality control forms related to the review of the design of and the firm's compliance with a firm's system of quality control. Learn the differences between system and engagement reviews and differences in engagement selection by the peer reviewer.	1.5	NEW
Updated COSO Internal Control Framework	Gain practical familiarity with important updates to the Committee of Sponsoring Organizations (COSO) Framework to assess and improve internal control systems.	2	
Use of Internal Auditors and Initial Audits	Examination of two areas recently updated by the AICPA when performing audits. First we will look at how an auditor can use an internal auditor and what the requirements to use an internal auditor are. We'll then switch gears to discuss the requirements under the clarity standards for initial audits.	2	
Use of Specialists and Auditing Estimates	Examination of the audit procedures required when using a specialist and the audit procedures required when auditing an estimate.	2	
Economics			
Course	Description	Credits	
Macroeconomic Analysis: Bringing the Big Picture into Focus, Part 1	Introduction to the business cycle, fiscal policy, money and banking systems, monetary policy and economic stabilization. A detailed examination of the foundations of modern macroeconomics and differing economic models.	2	
Macroeconomic Analysis: Bringing the Big Picture into Focus, Part 2	Introduction to the business cycle, fiscal policy, money and banking systems, monetary policy and economic stabilization. Critical examination of conflicting economic models and theories.	2	
Microeconomic Analysis: Understanding the Effect on Supply and Demand, Part 1	Gain a practical understanding of basic forces in economics: laws of supply and demand, shortages and surpluses and the relationship between time and the market adjustment process.	2	
Microeconomic Analysis: Understanding the Effect on Supply and Demand, Part 2	Gain a practical understanding of basic forces in economics including an examination of the competitive market structures, supply and demand, capital markets and interest rates.	2	
Finance			
Course	Description	Credits	
Budgeting Behavioral Issues: Techniques to Properly Align Your Organization	Understand how to align management and organizational goals. Explore the associated budgeting, performance evaluation and reporting behavioral issues.	3	
Capital Budgeting: The Tools to Enhance Shareholder Value, Part 1	Learn the right techniques and tools to ensure an effective and accurate capital budgeting process that safeguards the future, strengthens balance sheets and enhances shareholder value. In part one, participants will obtain a practical overview and application of the capital budgeting process and focus on cash flow and investment decision criteria.	2.5	
Capital Budgeting: The Tools to Enhance Shareholder Value, Part 2	Learn the right techniques and tools to ensure an effective and accurate capital budgeting process that safeguards the future, strengthens balance sheets and enhances shareholder value. In part two, participants focus on required rate of return, risk analysis, optimal capital budgeting and capital rationing and real options.	3	

Finance

Course	Description	Credits
Financial Statement Analysis, Part 1	Obtain a solid working foundation and familiarity with critical ratios and techniques used to analyze an organization. Part one focuses on the analysis of short-term liquidity, operating activity and capital structure and solvency.	2
Financial Statement Analysis, Part 2	Obtain a solid working foundation and familiarity with critical ratios and techniques used to analyze an organization. Part two focuses on the analysis of short-term liquidity, operating activity and capital structure and solvency.	2.5
NEW Financial Therapy and the CPA	A look into the financial therapy industry, including what financial therapy is and who practices financial therapy. Course provide insight into the resources and ethical support available for a CPA and the certification process.	2
Identity Theft: How to Detect, Deter and Fix	Learn effective measures to prevent identity theft and learn how to put life back in order if you become a victim.	3.5
Identify Theft: How to Detect, Prevent and Recover in the Digital Age	Overview of various identity theft schemes, the most common mistakes made by individuals in failing to protect their identity, tips for protecting your identity and guidance for fixing problems related to identity theft.	2
Identity Theft Prevention	Explore ways to stay a step ahead of this ever-changing crime by taking effective preventative measures. Learn how to put your life back in order if you do fall victim.	1
Investment Decision: Techniques to Determine the Optimal Allocation of Resources	Deepen your understanding and application of financial tools that assist organizations in allocation of resources.	3
The New Controllershship: Keys to Boosting Financial Performance, Part 1	Overview of organizational management to allow for change to occur, modern, dynamic management techniques, planning and reorganizing old ways of budgeting to work in today's new environment, risk management and avoidance and productive and increased efficiencies.	1
The New Controllershship: Keys to Boosting Financial Performance, Part 2	Overview of benchmarking and how to use it to measure control, cash management in modern day society, electronic systems and cloud computing and predicting the movement of future interest rates.	1

Government

Course	Description	Credits
Accounting for Revenues in Government (Emphasis on Non-Exchange Transactions)	Overview of government revenue recognition rules and GAAP requirements.	3
Enterprise Risk Management in the Federal Government OMB Circular A-123	Gain a perspective of how federal agencies are to implement enterprise risk management into their strategic planning and consideration of internal control in accordance with OMB circular A-123.	2
Evaluating the Effectiveness of Not-for-Profit Entities	Exploration of unique financial characteristics of nonprofits organized for charitable purposes and the economic warning signs of financial weakness threatening service delivery.	2
Federal Appropriation Principles – An Overview	Examination of the federal appropriation principles and processes.	1.5
Federal Government Contracting – An Introduction	Gain a practical and relevant understanding of the federal government contracting environment.	2
Federal Government Contracting – Contract Fraud	Gain a practical and relevant understanding of the potential for fraud in the federal government contracting environment.	1.5

Government		
Course	Description	Credits
GAO Green Book – Government Internal Control Standards	Gain practical familiarity with the adaptation the Committee of Sponsoring Organizations (COSO) framework in federal settings, the Green Book.	3
GASB Other Postemployment Benefits (OPEB)	This course will cover the following: GASB statement no. 74, financial reporting for postemployment benefit plans other than pension plans and GASB statement no. 75, accounting and financial reporting for postemployment benefits other than pensions.	2
GASB Statement 87: Leases	Overview of lessee accounting and lessor accounting.	2
2019 Not-For-Profit Accounting & Auditing Update	Overview of ASU 2016-14, ASU 2018-08 and ASUs impacting nonprofit entities. coverage of Yellow Book update.	2
2019 GASB Update	This course takes you through debt disclosures, fiduciary activities, leases and GASB projects.	2
2018 GASB Update	Overview of OPEB, fiduciary activities, split interest agreements, leases and GASB projects.	2
Government/Fund Accounting: Introduction to Government Accounting, Financial Reporting and Financial Statement Analysis	Gain a practical and relevant understanding of issues involved with government financial statements. Exploration of GAAP relationship to government accounting and financial reports, government fund accounting, government consolidated financial statements and analysis of government financial statements.	4
Governmental Accounting Standards Board (GASB) Update	Overview of most recently issued GASB statements including GASB 68 and 71, GASB 69 and GASB 72. Exploration of current GASB projects including OPEB, fiduciary responsibilities and leases.	1.5
HUD Audits for Financial Service Institutions	Review current regulations of Housing and Urban Development (HUD) lending environment, appropriate sources of information and guidance and review of HUD forms and procedures.	2.5
HUD: An Auditing Introduction	Summary of US Department of Housing and Urban Development (HUD) basics, FHA (Federal Housing Administration) and related auditing requirements.	3
Improper Payments: Legislation and Mitigation	In-depth coverage of trends and causes of improper payments. Coverage of key legislation and guidance to educate the public to help eliminate and recover improper payments.	3.5
Intermediate Governmental Accounting	Learn about the process used to convert fund financial statements to government-wide financial statements. In-depth coverage of the underlying internal control and financial reporting principles that guide the process of converting fund financial statements to government-wide financial statements.	3.5
Internal Control Considerations – Focus on Non-profits and Governmental Entities	Overview of objectives, components and principles of internal control. Includes coverage of special considerations for internal control over compliance with federal awards and auditor's responsibilities related to internal control.	3
Introduction to Federal Accounting and Reporting	Learn about inventory management and explore the methodologies utilized in managing, costing and valuing inventory.	3.5
New Accounting Guidance on Not-for-Profit Revenue Recognition	Introduction to topic 606 and ASU 2018-08.	2
Not-for-Profit Accounting and Reporting: An Introduction	Overview of accounting and reporting functions in the nonprofit world including practical aspects of financial statements and revenue recognition. Exploration of anecdotal examples and relevant scenarios related to asset transfers, unique issues presented by artwork capitalization, split interest agreements, investments, fixed assets and fund accounting.	3

Government

Course	Description	Credits
Risk Management in the Public Sector	In-depth coverage of the enterprise risk management (ERM) framework and discussion of techniques to improve risk management. Coverage of the critical differences between private and public sector risk management and tools to maximize your ability to apply appropriate techniques.	2.5
NEW 2019 Single Audit Update	Review the approved methods of procurement, changes happening in single audits and common deficiencies.	2
Single Audit: Best Practices to Avoid Common Audit Problems and Pitfalls	Gain an understanding of the revised compliance standards, single audit regulations, audit guidance and practice aids to help reduce quantity of unacceptable single audit reports.	3.5
Single Audit Quality – Focus on Designing and Performing Tests of Control and Compliance	Review of the primary regulations and regulatory bodies, relevance of AU-C 935, compliance audits to a single audit, internal control and compliance auditor responsibilities, allowable cost and allocable cost testing, subrecipient monitoring testing requirements, sampling considerations, single audit reporting highlights and audit documentation.	3
Single Audit Quality – Focus on Risk Assessment, Evaluating Results and Reporting	Overview of major players and relevant guidance, AU-C 935, compliance audit, single audit applicability, major program determination, internal control and compliance responsibilities and Yellow Book and single audit reporting requirements.	3
Super Circular: Staying Current with Grant Management Reform	Learn to navigate relevant portions of Title 2 of the Code of Federal Regulations, meet current accounting and administrative requirements and unravel complexities surrounding allowable costs and governmental audits.	3
Yellow Book 2018 Revision	Overview of changes to Yellow Book in 2018 revision and effective date for 2018 revision by engagement type.	2
Yellow Book Financial Audits and Attest Engagements (Updated for Government Auditing Standards 2018 Revision)	Generally Accepted Government Auditing Standards (GAGAS) provide a sturdy and solid framework for conducting high-quality financial audits of government entities and other entities that receive government awards. This course explains those standards and how they can assist auditors to objectively acquire and evaluate sufficient, appropriate evidence and report the results. Real-world examples will describe and demonstrate the fieldwork standards designed to plan, complete, report and distribute these important financial audit results.	3
Yellow Book Financial Audits and Attest Engagements	Explanation of generally accepted government auditing standards (GAGAS) and how they assist auditors to objectively acquire and evaluate sufficient and appropriate evidence and report results. Includes real-world examples to describe and demonstrate fieldwork standards designed to plan, complete, report and distribute these important financial audit results.	3
Yellow Book Overview and Update (including 2018 revisions)	Review of scope and nature of government auditing standards (Yellow Book), Yellow Book general standards, (including independence), requirements for performing financial statement audit performed in accordance with generally accepted auditing standards and Yellow Book, reporting and communication requirements of a financial statement audit performed under Yellow Book and differences in audit objectives and reporting requirements for various Yellow Book engagements (including performance audits).	4
NEW Yellow Book Performance Audits (Updated for Government Auditing Standards 2018 Revision)	Review of GAO GAGAS and audits of government programs. Includes real-world examples of the application of GAGAS.	3.5
Yellow Book Performance Audits	Explanation of GAO generally accepted government auditing standards (GAGAS) and how they assist auditors to objectively acquire and evaluate sufficient and appropriate evidence and report results. Includes real-world examples to describe and demonstrate the practical application of GAGAS.	2.5

Regulatory/ethics		
Course	Description	Credits
2018 Professional Ethics Update	Outlines hosting, knowing misrepresentation, pressure to breach, definition of client, records requests and disclosing information to clients.	1
AICPA's Ethics Codification Project	Outlines history, purpose and organization of AICPA's Ethics Codification. Discussion includes key changes implemented and explanation of conceptual framework approach to the new codification. Concrete examples illustrate how to use the new codification and research features available online.	2
Alaska Ethics	Overview of the AICPA Code of Professional Conduct, the state-specific rules governing professional conduct in Alaska and the processes, procedures and governing bodies responsible for enforcing the rules applicable to those engaged in the practice of public accounting in Alaska.	4
Arizona Ethics	Explores foundations of ethical behavior and standards established by the AICPA Code of Professional Conduct. Emphasis is placed on the role of integrity and its importance in preparing deliverables and interactions with colleagues and clients. Check with your state board of accountancy to determine if this course will meet your ethics CPE requirement.	3
California Regulatory Review	This course provides California licensees an understanding of provisions of the California Accountancy Act and the board of accountancy regulations specific to the practice of public accountancy in California emphasizing the provisions applicable to current practice situations. The course also includes an overview of historic and recent disciplinary actions taken by the California Board of Accountancy, highlighting the misconduct which led to licensees being disciplined. This course includes a discussion of the following laws and regulations: California Accountancy Act Articles – articles 1.5, 3, 3.5, 4, 5.5, 6, 6.5 and 7. California Board of Accountancy Regulations – articles 1, 6, 9, 12, 12.5 and 13.	2
California Ethics	Explores foundations of ethical behavior and standards established by the AICPA Code of Professional Conduct. Emphasis is placed on the role of integrity and its importance in preparing deliverables and interactions with colleagues and clients. Check with your state board of accountancy to determine if this course will meet your ethics CPE requirement.	4
Colorado Ethics	Overview of the AICPA Code of Professional Conduct, the state-specific rules governing professional conduct in Colorado and the processes, procedures and governing bodies responsible for enforcing the rules applicable to those engaged in the practice of public accounting in Colorado.	4
Colorado Rules & Regulations	Overview of the governing bodies responsible for enforcing the rules and regulations applicable to public accountants in Colorado, state-specific rules governing professional conduct in Colorado and the processes/procedures applicable to those engaged in the practice of public accountancy in Colorado. This course provides the CPA with guidance on identifying and navigating ethical situations.	2
Connecticut Ethics	Explores foundations of ethical behavior and standards established by the AICPA Code of Professional Conduct. Emphasis is placed on the role of integrity and its importance in preparing deliverables and interactions with colleagues and clients. Check with your state board of accountancy to determine if this course will meet your ethics CPE requirement.	4
D.C. Ethics	Explores foundations of ethical behavior and standards established by the AICPA Code of Professional Conduct. Emphasis is placed on the role of integrity and its importance in preparing deliverables and interactions with colleagues and clients. Check with your state board of accountancy to determine if this course will meet your ethics CPE requirement.	4
Delaware Ethics	Overview of The AICPA Code of Professional Conduct, the state-specific rules governing professional conduct in Delaware and the processes, procedures and governing bodies responsible for enforcing the rules applicable to those engaged in the practice of public accounting in Delaware.	4

Regulatory/ethics

	Course	Description	Credits
NEW	Ethical Foundations	This course demonstrates not only how unethical behavior can ruin careers, bring debilitating expenses and fines to any company and lead to prison terms for executives and others, but also how individuals and companies that act with integrity can drive employee and customer satisfaction while improving company performance.	1
	Ethics – Integrity, A Foundation for Success	Overview of how unethical behavior can ruin careers, bring debilitating fines to companies and lead to prison terms for executives and others, how regulation and compliance influence the standards and expectations for ethical behavior and how a sound understanding of ethical theory may help in identifying unethical employees or fraudulent behavior.	1.5
UPD	Ethics – Understanding and Applying the AICPA Code of Professional Conduct	This course will cover the AICPA Code of Professional Conduct and its applicability for accounting professionals and also covers ethical standards addressed by the International Ethics Standards Board for Accountants and IRS Circular 230.	3
	Ethics, Integrity and the AICPA Code of Professional Conduct	Outline of ethical standards and guidelines established by the AICPA Code of Professional Conduct. Check with your state board of accountancy to determine if this course will meet your ethics CPE requirement.	3
UPD	Ethics, Integrity and the AICPA Code of Professional Conduct (Expanded Version)	This course will introduce participants to the foundations of ethical behavior and will cover the AICPA Code of Professional Conduct and its applicability for accounting professionals but also covers ethical standards addressed by the International Ethics Standards Board for Accountants and IRS Circular 230.	4
	Florida Ethics	Introduction to foundations of ethical behavior including examinations of ethical dilemmas with behavioral insight and guidance into real-world situations. Outline of the AICPA Code of Professional Conduct including specific requirements for CPAs licensed in the state of Florida. Course approved to meet the ethics requirement in the state of Florida.	4
	Government Ethics and Independence	Review of contemporary rules that govern ethical behavior and independence in government environment. Check with your state board of accountancy to determine whether this course will meet your ethics CPE requirement.	2
	Guam Ethics	Explores foundations of ethical behavior and standards established by the AICPA Code of Professional Conduct. Emphasis is placed on the role of integrity and its importance in preparing deliverables and interactions with colleagues and clients. Check with your state board of accountancy to determine if this course will meet your ethics CPE requirement.	3
	Hawaii Ethics	Explores foundations of ethical behavior and standards established by the AICPA Code of Professional Conduct. Emphasis is placed on the role of integrity and its importance in preparing deliverables and interactions with colleagues and clients. Check with your state board of accountancy to determine if this course will meet your ethics CPE requirement.	4
	Illinois Ethics	Explores foundations of ethical behavior and standards established by the AICPA Code of Professional Conduct. Emphasis is placed on the role of integrity and its importance in preparing deliverables and interactions with colleagues and clients. Check with your state board of accountancy to determine if this course will meet your ethics CPE requirement.	4
	Independence – Historical Insights and Today's Rules	Critical coverage of the most current ethics and independence rules to help accounting professionals maintain objectivity in the always-changing profession.	3

Regulatory/ethics		
Course	Description	Credits
Independence Overview	High-level overview of the independence rules from the American Institute of Certified Public Accountants (AICPA), the independence rules from the Securities and Exchange Commission (SEC), the independence rules from the Public Company Accounting Oversight Board (PCAOB), the IRS independent tax return preparer rule and if additional coverage of independence rules by the GAO and IFAC is desired, Becker's course titled Independence Technical Update discusses the independence rules of these organizations.	1.5
Independence Technical Update	Summary of relevant independence rules from various governing organizations including updated content to reflect the revised AICPA Code of Professional Conduct.	1.5
Indiana Ethics	Explores foundations of ethical behavior and standards established by the AICPA Code of Professional Conduct. Emphasis is placed on the role of integrity and its importance in preparing deliverables and interactions with colleagues and clients. Check with your state board of accountancy to determine if this course will meet your ethics CPE requirement.	4
Iowa Ethics	Explores foundations of ethical behavior and standards established by the AICPA Code of Professional Conduct. Emphasis is placed on the role of integrity and its importance in preparing deliverables and interactions with colleagues and clients. Check with your state board of accountancy to determine if this course will meet your ethics CPE requirement.	4
Kansas Ethics	Introduction to the AICPA Code of Professional Conduct including specific guidance when preparing audits, special reports, compilations, reviews, financial forecasts and projections or when performing attestation engagements.	2
Kentucky Ethics	Introduction to the AICPA Code of Professional Conduct including specific guidance when preparing audits, special reports, compilations, reviews, financial forecasts and projections or when performing attestation engagements.	2
Maine Ethics	Introduction to ethical standards and guidelines established by the AICPA Code of Professional Conduct.	3
Maryland Ethics	Explores foundations of ethical behavior and standards established by the AICPA Code of Professional Conduct. Emphasis is placed on the role of integrity and its importance in preparing deliverables and interactions with colleagues and clients. Check with your state board of accountancy to determine if this course will meet your ethics CPE requirement.	4
Massachusetts Ethics	Introduction to ethical standards and guidelines established by the AICPA Code of Professional Conduct.	4
Michigan Ethics	Introduction to ethical standards and guidelines established by the AICPA Code of Professional Conduct.	3
Minnesota Ethics	Explores foundations of ethical behavior and standards established by the AICPA Code of Professional Conduct. Emphasis is placed on the role of integrity and its importance in preparing deliverables and interactions with colleagues and clients. Check with your state board of accountancy to determine if this course will meet your ethics CPE requirement.	4
Mississippi Ethics	This course and the associated content has been submitted and approved by the Mississippi State Board of Public Accountancy to fulfill its required 4 CPE credit hours in ethics, professional conduct, public accountancy law and regulations. This course is an expanded version of our course titled Ethics, Integrity and the AICPA Code of Professional Conduct.	3.5
Missouri Ethics	Introduction to ethical standards and guidelines established by the AICPA Code of Professional Conduct.	3

Regulatory/ethics

Course	Description	Credits
Montana Ethics	Introduction to the AICPA Code of Professional Conduct including specific guidance when preparing audits, special reports, compilations, reviews, financial forecasts and projections or when performing attestation engagements.	2
Nebraska Ethics	Explores foundations of ethical behavior and standards established by the AICPA Code of Professional Conduct. Emphasis is placed on the role of integrity and its importance in preparing deliverables and interactions with colleagues and clients. Check with your state board of accountancy to determine if this course will meet your ethics CPE requirement.	4
Nevada Ethics	Explores foundations of ethical behavior and standards established by the AICPA Code of Professional Conduct. Emphasis is placed on the role of integrity and its importance in preparing deliverables and interactions with colleagues and clients. Check with your state board of accountancy to determine if this course will meet your ethics CPE requirement.	4
New Hampshire Ethics	Explores foundations of ethical behavior and standards established by the AICPA Code of Professional Conduct. Emphasis is placed on the role of integrity and its importance in preparing deliverables and interactions with colleagues and clients. Check with your state board of accountancy to determine if this course will meet your ethics CPE requirement.	4
New Mexico Ethics	Explores foundations of ethical behavior and standards established by the AICPA Code of Professional Conduct. Emphasis is placed on the role of integrity and its importance in preparing deliverables and interactions with colleagues and clients. Check with your state board of accountancy to determine if this course will meet your ethics CPE requirement.	4
New York Ethics	Coverage of laws and regulations as promulgated by the New York State Board for Public Accountancy. Summary of the AICPA's ethical guidance and codification of ethical standards.	4
North Carolina Ethics	Introduction to the AICPA Code of Professional Conduct including specific guidance when preparing audits, special reports, compilations, reviews, financial forecasts and projections or when performing attestation engagements.	2
North Dakota Ethics	Explores foundations of ethical behavior and standards established by the AICPA Code of Professional Conduct. Emphasis is placed on the role of integrity and its importance in preparing deliverables and interactions with colleagues and clients. Check with your state board of accountancy to determine if this course will meet your ethics CPE requirement.	5
Ohio Ethics	Introduction to ethical standards and guidelines established by the AICPA Code of Professional Conduct.	3
Oklahoma Ethics	Explores foundations of ethical behavior and standards established by the AICPA Code of Professional Conduct. Emphasis is placed on the role of integrity and its importance in preparing deliverables and interactions with colleagues and clients. Check with your state board of accountancy to determine if this course will meet your ethics CPE requirement.	4
UPD Oregon Ethics	Oregon approved ethics course that provides coverage of the scope and nature of the statutes adopted by the Oregon legislature, the rules and policies set forth by the Oregon Board of Accountancy, the process by which those rules and policies are adopted by the board and case studies, case law and examples related to the laws and rules governing accountants in Oregon.	5
Pennsylvania Ethics	Explores foundations of ethical behavior and standards established by the AICPA Code of Professional Conduct. Emphasis is placed on the role of integrity and its importance in preparing deliverables and interactions with colleagues and clients. Check with your state board of accountancy to determine if this course will meet your ethics CPE requirement.	4

Regulatory/ethics		
Course	Description	Credits
Puerto Rico Ethics	Introduction to ethical standards and guidelines established by the AICPA Code of Professional Conduct.	3
Rhode Island Ethics	Introduction to ethical standards and guidelines established by the AICPA Code of Professional Conduct.	3
Texas Ethics – Power of Choices	Overview of Texas Rules of Professional Conduct including discussion of the power of choices and importance of ethical behavior for certified public accountants. This course is designed to satisfy the ethics requirements of §523.130 for Texas State Board of Public Accountancy.	4
Utah Ethics	Introduction to ethical standards and guidelines established by the AICPA Code of Professional Conduct.	3
Vermont Ethics	Explores foundations of ethical behavior and standards established by the AICPA Code of Professional Conduct. Emphasis is placed on the role of integrity and its importance in preparing deliverables and interactions with colleagues and clients. Check with your state board of accountancy to determine if this course will meet your ethics CPE requirement.	4
2019 Virginia Ethics: Charting an Ethical Course	Review of the parameters surrounding volunteer work as a Virginia CPA, the Virginia CPE requirements, responsibilities that accompany the CPA license and best practices for social media as a CPA.	2
2018 Washington State Ethics	Overview of the foundations of ethical behavior, the AICPA Code of Professional Conduct and its applicability to accounting professionals and ethical standards addressed by the International Ethics Standards Board for Accountants and IRS Circular 230.	4.5
West Virginia Ethics	Explores foundations of ethical behavior and standards established by the AICPA Code of Professional Conduct. Emphasis is placed on the role of integrity and its importance in preparing deliverables and interactions with colleagues and clients. Check with your state board of accountancy to determine if this course will meet your ethics CPE requirement.	4
Wisconsin Ethics	Introduction to ethical standards and guidelines established by the AICPA Code of Professional Conduct.	3
AICPA and the Future of the Profession	Overview of trends in the profession, impact of disruption on CPAs, enhancing audit quality initiative, change in auditors' reports and new services.	2
Soft skills		
Course	Description	Credits
Becoming a Highly Effective Performer! Making the Best of YOUR Time!	What is difficult about managing your time? This course teaches the distinction between distractions and procrastination and how to set priorities.	1.5
Careers in Accounting	Practical overview of accounting's specialized areas with a discussion of varied roles of an accountant by organization and function. Course includes sample job descriptions with an insider's look at jobs in accounting.	1.5
Change Management	Learn the definition of change management and the change management process. Walkthrough of the roles, tools and best practices in change management.	1
Characteristics of an Effective Organization: Success Inside and Out	Learn best practices of companies that build success from the inside out with its decision-making processes, the way it manages and motivates people and styles of its leaders.	3

UPD

NEW

NEW

Regulatory/ethics/Soft skills

Soft skills

	Course	Description	Credits
	Client Management	Overview of building, developing and sustaining positive client relationships throughout life cycle of a client. Focus on understanding client needs, developing skills in CPAs of all levels to serve client needs and managing tasks and tools to develop additional work with existing clients and new client relationships.	1.5
	Coaching Employees for Better Results	Discover how to better coach and mentor staff to help them achieve their professional goals.	1
NEW	Collaborating to Build Your Personal and Professional Networks	This course provides guidance on defining the personal and professional role sets that define your network(s). Understand better the behavioral differences between traditional command and control skills and the collaboration and influence skills required for developing personal and professional networks.	1
NEW	Considering an ESOP	Discover the purposes for which ESOPs can be used along with the benefits and disadvantages of ESOPs.	2
	Creating Effective Presentations	Learn from an expert presenter on how to best prepare and deliver a presentation.	2
NEW	Data Visualization	Discover how to visualize data effectively and choose the best format to analyze data for different situations. Learn how "rock stars" of data visualization (data viz) turn boring information into beautiful and effective presentations.	1
NEW	Developing Client Rapport: Making Everyone a Match!	Learn techniques to significantly reduce client problem-solving cycle time. Course teaches how to address and eliminate potential conflict before it occurs thru understanding and applying the rapport communication cycle.	2
	Drive Organizational Efficiency & Effectiveness Through Control & Performance Evaluation	Learn how proper control and performance evaluation techniques can ensure companywide success when applied to operations, marketing and finance.	3
	Effective Business Communication	Overview of importance of clear and compelling communications in business settings. Topics include understanding differences among communicating with peers, subordinates, superiors and clients. Examples of common forms of business communications, when to use each method and best practices for email communications are covered.	2
UPD	Effective Business Writing for CPAs, Part 1	Learn to prepare clear and logical written communication to convince others to do something, give permission or simply to inform.	2
	Effective Business Writing for CPAs, Part 2	Learn to prepare clear and logical written communication to convince others to do something, give permission or simply to inform.	2.5
	Email Communications	Coverage of effective email communication including learning from mistakes of others and reviewing best practices to produce meaningful and impactful emails.	1.5
	Emotional Intelligence	Exploration of advantages of emotional intelligence (ability to relate to people, manage difficult situations, influence and inspire others). Also learn to position executive leaders to assess and improve their own emotional intelligence.	3
	Establishing a Successful Mentoring Program	Review the components of successful mentoring programs and best practices.	2
	Executive Leadership Tools and Tactics, Part 1	Understand who you are and what motivates you to help effectively manage relationships and influence others.	2
	Executive Leadership Tools and Tactics, Part 2	Understand who you are and what motivates you to help effectively manage relationships and influence others.	1.5
	Executive Presence	Learn key components of executive presence and where you need to step up your confidence and enhance your self worth and capabilities.	2

Soft skills			
Course	Description	Credits	
Finding a Better Work-Life Balance	Discussion on the causes and dangers of work-life imbalance and strategies for achieving balance between work and life.	2.5	NEW
Getting “UP!” Supercharging Your Energy	Learn about the time management trap and the energy supercharger model in this course. Discover how you can boost physical, intellectual and emotional energy and get energy-building tips and tricks.	2	NEW
Launching a Winning Team	Learn what a team-based organization is and how a team-based organization differs from a hierarchy.	1	NEW
Leadership Skills	Exploration of non-traditional traits for effective leadership to become an exceptional leader.	2	
Leadership, Integrity & Success	Discussion of characteristics and skill sets of good leaders including real-world individuals who exemplify exceptional leadership capability. Gain understanding of how leadership, integrity and success can better prepare professionals for the future.	1	
Leadership: Based on the Book "Lead...for God's Sake!"	A conversation about the pursuit of leadership between Todd Gongwer and Tim Gearty. Gongwer is the author of the book titled "LEAD...for God's Sake!". The book is a parable for finding the heart of leadership.	1.5	
Leadership – Others	This course helps users master powerful communication and create followership. After taking the course, users should also be able to recognize the different styles of communication, understand the possible limitations in each communication style; know how to build and/or restore trust, listen generously and understand the five modes of conflict.	2.5	
Leadership – Self	Recognize how your leadership style is viewed by others and become familiar with emotional intelligence; gain insight on how to flex your leadership style.	2	
Leadership – Team	This course helps users listen better and with more empathy. After taking the course, users should be able to improve their communication with others by hearing them and interacting with what they hear through improved listening and increased empathy.	2	
Leveraging Social Media for Firm Success	Explore how social media began and its evolution to the present day and the duties of a social media manager and how they cultivate a brand.	1	
Managing a Virtual Team	Overview of research on high-performing virtual teams, situations, behaviors and techniques that enhance or deter a virtual team's performance, the challenges of the remote team members and virtual meetings that engage the whole virtual team to produce successful results.	2	
Managing Your Career Using the 70-20-10 Rule	Overview of best practices in career development including research on time-tested guidelines for successfully developing managers into leaders. Study the 70-20-10 rule for career development and self-assessment process of career development plan.	1.5	
Management Keys to Success: Culture and Leadership	Discussion on why some organizations are more successful than others. Learn how a finance professional can best navigate the new-style organization and influence its success.	2	NEW
Management Keys to Success: Hiring the Best Personalities	Discover the importance of strong hiring procedures and how to differentiate between technical skills and people skills. Course provides insight on how to motivate to keep the best people.	1	NEW
Management Keys to Success, Leadership, Continued Improvement and Self-Management	Learn new leadership techniques, positions and methods of problem solving. Course provides guidance on how to motivate today's workers and how to negotiate with others about change.	2.5	NEW

Soft skills

Course	Description	Credits
Meetings That Work	Learn how to hold effective meetings in workplace including self-assessment of soft skills strengths and weaknesses, setting expectations for meetings and recognizing and addressing problems in meetings.	1.5
NEW MOTIVATORS: Understanding What Drives Your Behaviors and What Drives Others' Behaviors	Discover why individuals behave the way they do. Course provides insights into patterns of combinations of motivators and the importance of this knowledge in self-awareness.	1
Negotiation Skills	Recognize how negotiations apply within the accounting career including basics of negotiation skills, stages of successful negotiations and interpersonal skills required to complete negotiations. Coverage includes methods for overcoming objections, counteracting negativity and reaching consensus during negotiations.	1.5
Networking Skills	Discussion of commonly accepted etiquette and practices for in-person business and accounting networking events. Topics covered include communication basics for professional networking via writing, best uses for online platforms for networking, common networking challenges and tips to handle those challenges.	1.5
New Leader Assimilation	Explore the differences between leaders and managers and types of leadership styles. Learn leadership strategies to promote a positive culture, motivate others, enact change and address workplace challenges and ways to develop leadership skills in yourself and others.	1
NEW Performance Management Essentials	Review the elements of the performance management cycle and process for planning the timeline of activities. Learn the dos and don'ts of performance management.	1
NEW Power of Positivity	Explore the different forms of positivity and how to apply positivity to your life and career.	2
NEW Practical Project Management Series #1: Overview of Practical Project Management (for Any Effort)	Review the lifecycle of stages for a team to organize a project and collaborate throughout. Discover the philosophy of a "just enough, just right" approach and foundational tenets that determine project success.	1.5
NEW Practical Project Management Series #2: Kicking Off a New Project Right with Strong Goals and Support	Learn the benefits of a strong project kick-off and how to summarize goals and priorities for a project.	1.5
NEW Practical Project Management Series #3: Building a Strong Team and Communicating Throughout	Learn how to build a strong team and how to recognize, handle and avoid conflicts in a project team.	1.5
NEW Problem Solving	Discussion on how to identify real problems, not just the symptoms and how to help analyze the issues.	1
Public Speaking and Presentation Skills	Examination of accountant presentations and speeches including discussion of best practices for researching, planning and preparing presentations, techniques to handle distractions and unexpected problems, how to combat nervousness and effective methods of sharing information (financial/accounting data) in presentations.	2
Role of the Leader in Talent Development	Engaging course on the critical skills needed by a leader in developing new talent.	1

Soft skills		
Course	Description	Credits
Seeking Millennials and Generation Z	Discussion of characteristics of millennials and Generation Z and common life experiences of millennials and Generation Z. Learn strategies for recruiting, hiring and engaging millennials and Generation Z within an accounting firm workplace.	1.5
Serving on a Board: What a CPA Needs to Know	Course provides general information about board service for both corporate and nonprofit entities. Coverage of governance considerations for board members and professional benefits to the CPA of serving on a board.	2
Sexual Harassment – Creating a Safe and Positive Workplace	Explore the current climate, events and trends associated with sexual harassment in the workplace. Review model sexual harassment prevention policies and appropriate training requirements and contents. Learn next steps for enacting ongoing cultural change. Note: New York State requires employers to provide employees with sexual harassment prevention training fulfilling set requirements. This course covers all New York State requirements with the exception of the employer/employee interactive portion. New York employers should be prepared to address questions raised by employees including those specific to their industry, questions about the organization's reporting process and questions about how hypothetical cases would be handled.	2
Smart Contracts on the Blockchain	Discussion of distributed ledger concepts, with a focus on smart contracts and blockchain. Learn the benefits, challenges and tradeoffs of using smart contracts.	2.5
Stress Management at Work	Gain an understanding on how to recognize symptoms of stress and the emotional and physical impacts of stress. Discussion on appropriate coping skills to alleviate stress in the workplace and how to create a healthy work environment (managers).	2
Storytelling with Data	Data storytelling is the art of telling a story using images, graphs, charts, infographics, data visualization or videos. Learn how to define a story and choose the best structure to craft your story.	1
Take Control: Use Conflict to Your Advantage	Identify conflict resolution styles and learn how to manage conflict to produce positive outcomes.	2
The Art of High Impact Conversations	Focus is on the steps one must take to lead high impact conversations and why leaders need the skills to engage in high impact conversations.	1.5
The Future of the Accounting and Tax Profession	The overall accounting industry's outlook, key challenges and changes anticipated in the industry and recommended best practices for managing these changes effectively.	1.5
The Millennial Generation	Discussion of characteristics of the millennial generation including challenges and motivations around hiring millennials, specific techniques to help organizations attract and retain this generation and methods to use to help employees adapt to working with the millennial generation.	1.5
The Ultimate Endorsement: Unleash the Power of You	Learn to acquire an executive presence, professional foundation and micro messaging to gain powerful support.	2
Time Management for Accountants	Explore causes of time-wasters in the workplace, common and effective time management systems, productivity-enhancing techniques, holding productive meetings and creating a culture of productivity in the workplace.	1
Training and Developing Employees Using a Competency Framework	Learn the elements of a competency framework and the steps involved in developing a training and development plan.	1.5
Transitioning from Buddy to Boss	Review the essential roles and skills of an independent contributor, a manager and a leader. This course takes you through the progression of learning from self development to managing your team.	1.5

Specialized knowledge

	Course	Description	Credits
NEW	A Sampling of Industries and Sectors, Part 1	Explore current trends in the different industries and the basic components of the most common industries in the marketplace.	2.5
NEW	A Sampling of Industries and Sectors, Part 2	Explore current trends in the different industries and the basic components of the most common industries in the marketplace.	2
	Accounting Firm's System of Quality Control, Part 1	Comprehensive review of the quality control (QC) standards and emphasize on tailoring a QC system for your firm's accounting and auditing practice. Create an environment focused on quality and continuous improvement through QC monitoring.	1
	Accounting Firm's System of Quality Control, Part 2	Examine policies and procedures for each of the six elements of a QC system (QCPP). Move beyond mere compliance to improve audit quality and increase profitability.	1
	Big Data, Part 1	Overview of big data including the definition and how it is used, types of business analytics, types of decision models used to analyze data, definition of descriptive statistics and overview of data visualization.	1.5
	Big Data, Part 2	Summary of opportunities associated with big data and data analytics. In-depth coverage of the steps in data analysis, types of data used in data analysis, statistical analysis procedures, data visualization techniques for optimal reporting, current trends in use of big data and data analytics in accounting profession.	1.5
	Bridging the Gap between Understanding and Applying Data Analytics	Learn how big data can be utilized within multiple industries and the importance of data analytics, including specific data analytic examples.	1.5
	Building Your Business in the Cloud	Learn cloud computing advantages and disadvantages with a focus on storage and software as a service. Overview of using cloud computing and cloud storage in the context of an accounting or financial firm.	1.5
	Business Development	Build an understanding of business development, branding and marketing skills for business development, factors and methods in building a business and maintaining business relationships and interpersonal and communication skills.	1.5
	Business Valuation Approaches, Methods & Procedures, Part 1	Overview of income, market and asset-based business valuation approaches. Part one focuses on the income and market approaches.	1.5
	Business Valuation Approaches, Methods & Procedures, Part 2	Overview of income, market and asset-based business valuation approaches. Part two focuses on the asset-based approach.	2
	Business Valuation Discounts and Premiums	A look into the world of discounts and premiums and the valuation impact of control premiums and minority interest discounts. Overview of the usage of marketability and liquidity discounts and discussion of lesser applied discounts by valuers.	4
NEW	Business Valuation: Introduction to Fair Value Measurement: Part 1	Understand the concepts, history and current usage of fair value and how the fair value option interplays with the fair value measurement standard.	1.5
NEW	Business Valuation: Introduction to Fair Value Measurement: Part 2	Understand the rules for fair value in connection with assets and liabilities and gain an appreciation of the pros and cons of the fair value regime.	2
	Business Valuation, Special Considerations	Summary of appraisers' common valuation methods, overview of most common special valuation scenarios and issues and the right techniques to apply in unique situations.	2

Specialized knowledge			
Course	Description	Credits	
Business Valuation: Valuing Intangibles: Part 1	Course provides an introduction to intangibles and its impact on financial statements.	2	NEW
Business Valuation: Valuing Intangibles: Part 2	Course covers valuation techniques for brands and customer relations, purchase price allocations, goodwill and impairments.	1.5	NEW
Conflict Management: Using Conflict to your Advantage	Explore what conflict is, the five modes of conflict, what conflict mode you use most/least often and what conflict mode to use in different situations.	1	
Contract Law for Accountants	Overview of how contracts can be defined as agreements that are enforceable in a court of law and the elements necessary for there to be an enforceable contract: agreement, consideration, legal capacity and legality. Explore available defenses that may result in the contract not being enforced and the rules of interpretation that courts use in enforcing the requirements of a contract. Learn how a contract must be performed, discharged or breached (not performed) and the legal and equitable remedies available to address a breach of contract.	2.5	
Crowd Funding	Overview of raising funds from investors via crowd funding, SEC regulations regarding crowd funding and accounting and tax implications for crowd funding. Course includes real-life anecdotes of crowd funding in action.	1	
Cost of Capital, Part 1	Learn to grasp the full meaning of the cost of capital and fundamental cost of equity mechanics.	1.5	
Cost of Capital, Part 2	Learn advanced techniques in calculating the cost of equity, cost of debt, preferred stock and weighted average cost of capital calculations and routine mistakes in the calculation of the cost of capital.	1.5	
Developing Powerful Business Acumen	Review of business acumen definitions and importance, key components of business acumen and strategies for building business acumen in an accounting firm.	1.5	
Enterprise Risk Management – Integrating with Strategy & Performance, Part 1	Overview of the definition of enterprise risk management, key enterprise risk management concepts including strategy, risk profile, risk appetite, performance and business context, the components and principles of enterprise risk management and their supporting principles and the details of the governance and culture component of enterprise risk management and supporting principles.	2	
Enterprise Risk Management – Integrating with Strategy & Performance, Part 2	Overview of components and principles of enterprise risk management, techniques used to define risk appetite and evaluate alternative strategies, techniques used to identify, evaluate and respond to risk, linking risk management results to ongoing strategy development, steps taken to review and revise application of enterprise risk management components and principles and techniques to effectively communicate that review on an ongoing basis.	2	
Introduction to Business Valuation	Recognize the basics of business valuations. Learn to start engagements the right way and how to gather and analyze data for a successful conclusion.	1.5	
An Introduction to Cybersecurity for CPAs	Overview of current cybersecurity threats and how to mitigate data breach risk, SEC guidance on cybersecurity risk and responses of other professional standard setters, review of trust services criteria and guidance for performing and reporting on cybersecurity risk management program attestation and consulting engagements.	3	
Introduction to IT Security	Introduction to cybersecurity concepts such as risk management and security concepts. Coverage of best practices for securing data and other critical infrastructure in an organization. Review examples of cybersecurity threats and vulnerabilities.	3.5	UPD

Specialized knowledge

Course	Description	Credits
Overview of the Business Valuation Profession and Current Events	Overview of the profession of business valuation and business valuation methodologies. Learn types of engagements, reports and research sources and database and current events and happenings.	3
Overview of Net Neutrality	Overview of the definition of net neutrality, the history of net neutrality, legal actions involving Comcast and Verizon, FCC rulemaking on net neutrality under Presidents Obama and Trump, economic implications of net neutrality and the future of net neutrality.	1
Personal Financial Planning	Prepare to help clients with personal financial planning through gaining knowledge about advising on budget preparation, income tax planning, estate planning and saving for retirement and college.	2
Strategic Management: The Tools to Compete in the Era of Rapid Change, Part 1	Learn how strategic analysis, strategic and tactical plans and the budgeting process interact. Explore underlying core concepts and the process of successful planning and budgeting. Part one examines corporate planning, budgeting and forecasting processes.	3
Strategic Management: The Tools to Compete in the Era of Rapid Change, Part 2	Learn how strategic analysis, strategic and tactical plans and the budgeting process interact. Explore underlying core concepts and the process of successful planning and budgeting. Part two applies formulas and realistic examples to illustrate effective budgeting systems in today's world.	3
Successful PM Techniques: The Keys to Managing Cost & Quality	Examination of proven strategies and techniques that guarantees success in project management by satisfying stakeholders' needs while controlling project costs.	1.5
Successful PM Techniques: The Keys to Managing HR & Effective Communications	Learn proven strategies that guarantee success by ensuring effective control over human resource needs and maintaining efficient communications between the project manager, team and stakeholders.	1.5
Successful PM Techniques: The Keys to Managing Risk & the Procurement Process	Learn how to anticipate, quantify and communicate risks and contingencies. Explore how to gather and document project requirements in the procurement phase, execute the bid process and manage the vendor relationship.	1.5
Techniques for Project Scope and Time Management	In-depth coverage of established project scope and time management techniques including proven strategies and tools to ensure timely completion of critical projects with success.	2
Technology A B C – Artificial Intelligence, Blockchain, Cybercrime	Overview of artificial intelligence and its uses. Discussion on blockchain and virtual currencies including methods to combat cybercrime and enhance security.	3
Understanding Blockchain Technology	Overview of the basics of blockchain, applications of blockchain to virtual currencies, applications of blockchain to other types of transactions, investments in blockchain technology and regulatory responses to the use of blockchain.	1
Understanding the Fundamentals of Investments – A Guide for Accountants	Overview of the securities market, the financial firms providing services to individual investors and the agencies providing oversight of securities markets and investment professionals. Study the various types of investment securities (stocks, bonds, mutual funds, exchange-traded funds, stock options) and the risk-return characteristics of each. Discover the principles and tools of investment analysis and selection of suitable investments: the risk-profile questionnaire, asset allocation, style box, benchmarks and the efficient frontier.	3

Taxes		
Course	Description	Credits
Accounting for Income Taxes (ASC 740): Overview and Special Issues	Learn the tax return provision process and the requirements of ASC 740 to complex transactions.	1.5
Advanced Income Tax Preparation (form 1040) – 2017 Tax Returns	Overview of tax rules involving investments, passive losses and at-risk rules, tax issues of divorce, Affordable Care Act, pension and retirement plans and capitalization and depreciation.	2
Advanced Income Tax Preparation (1040) Part III – H.R. 1 Tax Cuts and Jobs Act	Review of tax rules involving deductions-itemized and above the line, business income changes, tax issues of divorce, health care, pension and retirement plans and capitalization and depreciation.	2
Advanced Individual Tax – Schedule C (Updated for TCJA 2017)	Overview of the following topics and includes tax law changes resulting from the Tax Cuts and Jobs Act of 2017: what type of entity reports on schedule C, specific deductions on schedule C, treatment of business assets on schedule C, retirement and health insurance options for the sole proprietor and application of the payroll tax and self-employment tax.	2.5
Application of Sales and Use Tax to Construction Contractors – Part 1	Course provides a detailed review of the application of sales and use taxes to construction contractors. Coverage of background and basics of sales and use taxes and fundamental issues with respect to tax treatment for construction contractors. Discussion on special tax issues including contractors as manufacturers, contracting with exempt entities and international construction work.	2.5
Application of Sales and Use Tax to Construction Contractors – Part 2	Course provides a detailed review of the application of sales and use taxes to construction contractors. Coverage of compliance issues such as registration, administration and reporting obligations. Learn how to recognize the application of local sales taxes and application of gross receipts taxes to construction contractors.	1.5
Amending Business Income Tax Returns: Why, When and How	Learn how to file amended business tax returns including appropriate forms to file for C corporations, S corporations, partnerships and proprietorships seeking to amend a filed return.	1
Analysis of the Section 199A Final Regulations: What Every Tax Practitioner Needs to Know for Busy Season	This course provides detailed coverage on section 199A. Gain an understanding of when real estate qualifies for the deduction, what service businesses qualify and what other items affect the calculation of the deduction.	3
At Risk & Passive Activity Loss Rules – How They Impact You	Detailed coverage of at risk rules (ARR) and passive activity loss (PAL) rules. Topics include the prevention of the spread of tax shelters and understanding of complex rules to minimize suspended losses for clients.	2
Being Employment Tax Savvy	Review of employment tax fundamentals, specifically focused on employer's obligations. Learn withholding and remittance requirements, penalties for failure to withhold appropriate amounts and tax consequences for certain employee benefits.	2
Building Blocks of Taxation: Interest and Debt Investments (Updated for Tax Cuts and Jobs Act 2017)	Overview of issues surrounding interest and debt instruments in taxation. Coverage of appropriate practices that will ensure compliance with current regulations and various types of interest and the respective tax treatment.	2
Capital Assets and Preparing Schedule D	Defining and characterizing capital assets, calculating the tax on capital assets and evaluating the tax effects from the disposal of capital assets.	1.5
Capital Gains and Losses: The Fundamentals (Updated for TCJA 2017)	Overview of capital gains and losses, capital assets and capital gains taxation, nuances and complications of section 1231 and the critical issues related to continually fluctuating capital gains taxes.	1

Taxes

Course	Description	Credits
Close Examination of Personal Casualty Losses After the Tax Cuts and Jobs Act	Overview of personal casualty losses pre-TCJA, safe harbor methods to determine losses under Rev. Proc. 2018-08, safe harbor methods to determine losses under Rev. Proc. 2018-09, computing casualty losses for 2016 and 2017 for disaster-related losses and personal casualty losses post-TCJA.	2
Compliance Issues of Sales and Use Tax in the United States – Part 1	Three courses on US sales and use tax provides a comprehensive overview of the sales and use tax system in the United States. This is part one of course two focusing on which transactions are taxable, who bears the taxes, which location are the sales taxed, requirements for licensing and registration, how the taxes are calculated, what the tax base is, which rate to use and compliance requirements.	3
Compliance Issues of Sales and Use Tax in the United States – Part 2	Three courses on US sales and use tax provide a comprehensive overview of the sales and use tax system in the United States. This is part two of course two focusing on consequences for noncompliance and how taxpayers respond to audit by tax administrations.	2.5
Consumption Taxes	Provides fundamental understanding of national consumption taxes, including a national retail sales tax, value-added tax, flat tax and destination-based cash flow tax.	2.5
Controlled Foreign Corporations	Overview of US taxation of international transactions, taxation of US person's foreign activities, anti-abuse regimes, controlled foreign corporations and subpart F income.	3
NEW Corporate Earnings and Profits: An Overview	Overview of the basics on what corporate earnings and profits (E&P) are and how a computation works.	1
Corporate and Pass-through Entity Taxation – February 2018	Program content includes implications of the new Tax Cuts and Jobs Act of 2017, analysis of new code section 199A, comparing entities under the new act, developments in partnership audit rules and other corporate developments.	3.5
Corporate Distributions: The Tax Treatment of Dividends, Redemptions and Liquidations (Updated for TCJA 2017)	Overview of the tax rules and regulations governing dividends, redemptions and liquidations.	1.5
Corporate Tax Inversions	Understand corporate tax inversions including the costs and benefits from the perspective of managers, shareholders and governments.	2
Corporate Tax Strategies Maximizing the Use of Net Operating Losses	Review of corporate net operating losses (NOLs). Discussion of limitations placed on a single corporation and how to maximize use of losses.	2
Corporate Taxation and Preparation Strategies, Part 1 (Updated for TCJA 2017)	Overview of formation of C and S corporations, taxation of C and S corporations, distributions by C and S corporations, liquidation of C and S corporations and preparation of C and S corporation tax returns.	2
Corporate Taxation and Preparation Strategies, Part 2 (Updated for TCJA 2017)	Overview of the formation of C and S corporations, the taxation of C and S corporations, the distribution of C and S corporations, the liquidation of C and S corporations and the preparation of C and S corporation tax returns.	2
Corporate Taxation Strategies: Fundamentals of Reorganizations	Review of corporate reorganizations including techniques, limitations and tax consequences to help corporate reorganizations proceed smoothly.	2
Debt and Capital Basis for S-Corporations	Review of basis in general and S corporation basis specifically, calculation of stock basis and calculation of debt basis.	2
Debtor and Creditor Income Taxation, Part 1: Cancellation of Debt Income and Related Issues	Overview of cancellation of debt income (CODI) including discussion of related tax code, regulations, IRS rulings and case law. Coverage of critical concepts and historical view.	2

Taxes		
Course	Description	Credits
Determining the Business Interest Expense Deduction under New Section 163(j)	Overview of the new section 163(j) limitation contained in the Tax Cuts and Jobs Act. Learn the exceptions to the limitation for small businesses, real estate businesses and farming businesses.	1.5
Dissecting the Internal Revenue Code	Review the basic concepts of the Internal Revenue Code and revisions that have been made.	1.5
Energy Efficiency Federal Tax Credits and Incentives	Overview of federal tax energy credits available to individuals and businesses and coverage of forms used to apply for available credits.	1.5
Ethics Checklist for Tax Practitioners	Walkthrough of the ethical and professional responsibilities of the tax practitioner, including those under the IRS's circular 230 and codes of professional conduct applicable to attorneys and accountants.	1
Estate and Gift Taxes Part 1 (Updated for TCJA 2017)	Overview of the estate and gift tax system, a comparison between current tax law and anticipated future law changes and the complex and constantly changing rules that govern estate and gift taxes.	1.5
Estate and Gift Taxes, Part 2 (Updated for TCJA 2017)	Overview of the tax systems that govern the transfer of wealth at death and the estate and gift tax system.	1
Estate and Gift Taxes, Part 3 (Updated for TCJA 2017)	Overview of the generation-skipping transfer tax and the knowledge and practical experience needed to navigate through the complex and constantly changing rules that govern estate and gift taxes.	1
Estate and Gift Taxes, Part 4 (Updated for TCJA 2017)	Overview of the income tax treatment of trusts and estates.	1
Expatriation – Individuals and Corporations	Overview of US tax provisions related to US individuals working abroad, US tax provisions related to US individuals who relinquish their citizenship and US tax provisions related to US companies that become expatriated entities.	1.5
Federal Tax Accounting, Part 1 Cash and Accrual Methods of Accounting (Updated for TCJA 2017)	Overview of the differences between federal tax rules and financial accounting in computing income and deductions, the cash and accrual methods of tax accounting under the federal code and how disputed amounts are handled for the two methods.	1
Federal Tax Accounting, Part 2 Deferred Payment Sales	Overview of the tax treatment for deferred payment sales including coverage of the installment method of accounting.	1.5
Federal Tax Accounting, Part 3 Inventory (Updated for TCJA 2017)	Overview of the ways in which the federal tax code, treasury regulations and case law have shaped inventory accounting for US companies today and which practices are acceptable and which are not.	1.5
Federal Tax Accounting, Part 4 Transactional Issues and Net Operating Loss Concepts and Computations (Updated for TCJA 2017)	Overview of the case law that now governs transactional issues and practical insight into net operating loss concepts and computations.	1.5
Federal Tax Update – March 2018	This course will provide the following: coverage of certain provisions under the Tax Cuts and Jobs Act (TCJA), coverage of recent court cases, review of tax extenders, coverage of certain compliance matters and coverage of other recent tax matters.	2.5
Federal Tax Update – June 2018	Key coverage of developments since the passage of the Tax Cuts and Jobs Act and recent court cases covering important tax issues.	2
Federal Tax Update – December 2018	Coverage of several new court cases and new regulations on meals and entertainment. Review of final regulations on charitable contributions and of other IRS announcements.	2

Taxes

Course	Description	Credits
Federal Taxation of Bitcoin & Virtual Currencies	Overview of the digital currency bitcoin and the federal taxation treatment of transactions using bitcoin.	1
Foreign Account Tax Compliance Act (FATCA)	Understand the background and technical requirements of the Foreign Account Tax Compliance Act.	1.5
NEW Foreign Currency Transactions	Gain an understanding of important considerations when investing outside the United States. Explores foreign currency translation rules and basic foreign currency transactions.	2
Foreign Tax Credit – Limitations and Benefits	Learn to maximize the use and benefits of FTC.	2
Form 990 Reporting (Updated for TCJA 2017)	Overview of implications to form 990 from the Tax Cuts and Jobs Act, purpose of form 990, form 990's filing requirements, schedules of form 990 and best practices when preparing form 990.	2
NEW Form 1040 Walkthrough	Learn the rationale surrounding the changes in form 1040 for 2018 and recognize the new, numbered schedules that accompany form 1040 for 2018. Apply recent changes in income tax law in the Tax Cuts and Jobs Act (TCJA) to form 1040 for 2018 and related schedules and forms.	1.5
Fundamentals of Consolidated Returns	Overview of corporate motivations for filing a consolidated return, requirements for electing to file a consolidated return and computations of consolidated groups including taxable income, intercompany transactions and net operating loss limitations.	2
Fundamentals of Equity-Based Compensation	Learn the basics of equity compensation and common terms used when discussing equity compensation and key characteristics that define each type of equity compensation.	2
Fundamentals of International Tax (Updated for Tax Reform Provisions)	Overview of US taxation of international transactions, outbound and inbound taxation, the new international provisions and global tax policies.	4.5
Fundamentals of Sales and Use Tax in the United States	Three courses on US sales and use tax provides a comprehensive overview of the sales and use tax system in the United States. This is part one of the course focusing on addressing the nature and purpose of sales and use taxation, implications of US constitutional issues on sales and use tax what is nexus why does (or doesn't) it matter.	3
Fundamentals of State and Local Taxation	Learn the basics of state and local taxes and common types of state and local taxes, state nexus requirements and factor presence in nexus, basics of the voluntary disclosure agreement offered by most states, state apportionment, including apportionment factors and apportionment methods, federal and state tax differences for income tax purposes, state filing requirements for pass-through entities and evolving state and local tax law, including the Wayfair decision and the impact it has on state sales tax.	2.5
NEW Global Tax Policy – Rules Targeting Base Erosion and Profit Shifting (BEPS)	Overview of OECD BEPS Initiative, the digital economy, hybrid arrangements and harmful tax practices. Gain an understanding of treaty policy and provisions, transfer pricing rules and US tax rules that limit base erosion and profit shifting.	3
How to Understand Subchapter K	Walk through the code sections that are relevant for subchapter K and learn the implications for talking with clients and preparing returns.	2
Impact of the Final Section 199A Regulations on Forms 1065 and 1120S	Gain knowledge on the provisions contained in the section 199A final regulations, related revenue procedures and safe harbor election under 199A. Discussion on the decisions the preparer must make and the decisions the preparer and client must make when applying 199A. Learn what to look for when preparing 2018 returns and planning for 2019.	2

Taxes		
Course	Description	Credits
Individual Alternative Minimum Tax: What Every Practitioner Needs to Know	Learn the history of the alternative minimum tax (AMT) in modern taxation, the reasoning behind the AMT and its justification and how the Tax Cuts and Jobs Act affects the AMT.	2
Individual Taxes – Income & Deductions (Impact of Tax Cuts and Jobs Act)	Overview of framework for form 1040, income inclusions, income exclusions, deductions to arrive at AGI, deductions from AGI and tax liability and tax credits.	3
Individual Taxes – Itemized Deductions (Impact of Tax Cuts and Jobs Act)	Overview of form 1040 framework, income inclusions and exclusions, deductions to arrive at AGI, calculating itemized deductions and tax liability and tax credits.	3
Individual Tax Planning 101	Overview of the changes made by the Tax Cuts and Jobs Act of 2017, 2018 COLA adjustments for retirement-related plans, 2018 COLA adjustments for health and welfare-related plans and section 529 plans for education.	2
Individual Taxation and Preparation Strategies, Part 1 (Updated for Tax Cuts and Jobs Act 2017)	This individual taxation course helps to prepare for busy season. With increasing complexities and continual changes to the Individual Income Taxation Code, yesterday's knowledge and best practices may be perilously out-of-date. Learn what is new, what it means and the best strategies to comply with the ever-changing tax laws used in preparing form 1040.	2.5
Individual Taxation and Preparation Strategies, Part 2 (Updated for Tax Cuts and Jobs Act 2017)	Overview of most recent revisions for individual income tax return form 1040 preparation and best practices for staying in compliance.	2
International Taxation: US Taxation of Inbound Transactions	Overview of US taxation of inbound transactions including practical understanding of US taxation of FDAP income and effectively connected income.	2
IRA Mastery	Focus on general tax rules related to IRAs and provides comparison of traditional IRAs and Roth IRAs and inherited IRAs.	2
IRS Circular 230	Introduction to foundations of ethical behavior including discussion of the AICPA Code of Professional Conduct and its applicability for accounting professionals. Also examine ethical standards addressed by International Ethics Standards Board for Accountants and IRS circular 230.	1.5
IRS Practices & Procedures – Gain a Fundamental Edge, Part 1	Gain practical insight into Internal Revenue Service practices and procedures to level the playing field and ensure success.	2
IRS Practices & Procedures – Gain a Fundamental Edge, Part 2	Gain practical insight into Internal Revenue Service practices and procedures to level the playing field and ensure success.	2
IRC Sections – 465 and 469	Review the issues involved in passive activities and the at risk rules of partnerships and the ordering process and the calculations needed to properly determine allowable losses and carryovers.	2
K-1 Analysis: Form 1120S and Form 1065	Overview of the nuances of the 1065 and 1120S K-1's, purpose of each line of the K-1 and the whats and whys of reporting.	2
Key Tips on Reading Brokerage Statements	Learn the purpose and composition of a consolidated 1099. Review terms used in a consolidated 1099 and specific issues that can arise in connection with a consolidated 1099.	2
Meals and Entertainment After Tax Reform – What Is Deductible?	Review of deductible meals and entertainment (M&E) expenditures following 2017's Tax Cuts and Jobs Act. Become familiar with the various requirements for the deductibility of business M&E expenditures and how to determine the deductible percentage of various types of M&E expenditures.	1

Taxes

Course	Description	Credits
Navigating M&A Transaction Costs From a Tax Perspective	Overview of the type of transactions and costs contemplated by Treas. Reg. 1.263(a)-5, the general rule for the tax treatment of transaction costs, the primary exceptions to the general rule, the special considerations for success-based fees and the various ancillary issues that arise in connection with a transaction cost analysis.	2
New Tax Cuts and Jobs Act and Busy Season Update	This course will provide the following: detailed coverage of the provisions under the Tax Cuts and Jobs Act, in-depth coverage of new section 199A, discussion of how the new law impacts choice-of-entity decisions, discussion of how and in what ways there are tax savings opportunities, discussion of traps to avoid for individuals and businesses, coverage of certain compliance matters and coverage of other recent tax matters.	4.5
Non-Qualified Deferred Compensation – The Impact of Section 409A	Coverage of non-qualified deferred compensation (NQDC), section 409A and practical understanding of related rules and regulations.	1.5
OECD BEPS Initiative	Overview of OECD BEPS background, the digital economy, hybrid arrangements and harmful tax practices, treaty abuse and transfer pricing provisions, measuring OECD BEPS outcomes and US tax rules that limit base erosion and profit shifting.	3
Organizing, Operating and Closing a Partnership	Learn the basics of the life of a partnership, including the process of starting the entity, running the entity, adding and removing partners and terminating the entity.	2
Outbound Transactions	Detailed coverage of transactions which are classified as subpart F income, tax implications of US companies conducting business abroad and tax implications of expatriated US citizens.	3
NEW Part 1: Tax Issues Associated With the Gig Economy	The gig economy has become a significant source of employment in the United States. Part one, tax issues associated with the gig economy, starts with an introduction to the trends and development of the gig economy, followed by detailed discussions on tax issues associated with the gig economy.	4.5
Partnerships & Multiple-Member LLCs: Taxation & Other Considerations	Focus on limited liability companies (LLCs) and partnerships. Topics covered include benefits and tax implications of the entities. Discussion of differences between partnerships and other relationships and fundamentals of partnerships and LLCs.	2
Partnerships: Legal and Taxation Considerations (Updated for Tax Cuts and Jobs Act 2017)	Updated for the Tax Cuts and Jobs Act. Insights into legal and tax challenges surrounding key partnership issues including partners' rights, selling of partnership interest, dissociation and dissolution.	3
Partnerships: Understanding the New Audit Rules and the Implications of the Repeal of the Technical Termination Rules	Learn how the new partnership rules will affect current and new entities. This course will help guide the preparer to help guide the client.	2
Planning for Foreign Operations	Discussion on entering a foreign market, subpart F regime, tax reform provisions tied to outbound transactions, foreign tax credit rules and filing requirements for outbound transactions.	3
Preparing 2017 Form 1040-Individual Income Tax Return	Overview of: filing considerations and exemptions, income inclusions and exclusions, adjusted gross income and taxable income, standard deduction and itemized deductions, computing credits and total tax and key changes under the Tax Cuts and Jobs Act.	3

Taxes		
Course	Description	Credits
Preparing 2018 Form 1040– Individual Income Tax Return	Learn how to determine filing status and exemptions and understand income inclusions and exclusions. Learn how to calculate adjusted gross income and taxable income and to compare standard deduction to itemized deductions. Review of key changes under the Tax Cuts and Jobs Act.	3
Preparing California Income Tax Returns for Businesses	Learn how to accurately prepare California tax forms for both corporate and pass-through entities. Examine the filing requirements for different entities and which forms to use when filing a business income tax return in California.	2
Preparing New York Income Tax Returns for Businesses	Course takes you through the New York economy and income tax structure. Learn how to accurately prepare New York tax forms for both corporate and pass-through entities.	2
Preparing for a Tax Audit	Examination of the audit selection process, types of audits, responses to an audit, common audit issues, professional standards for tax preparers and results of an IRS audit.	1.5
Preparing Passthrough Entity Returns Under the New Law	Summary of new forms and other key schedules on the 2018 form 1065 and 1120S. Become familiar with the flow of creating the tax returns, starting with data input and ending with the K-1, primarily as it relates to new issues for 2018. Learn how to input information for the 199A deduction and the impact of K-1 information on partners and shareholders.	2
Quarterly Estimates for Corporations	Overview of corporate estimated tax payment requirements, methods available for computing estimated tax payments and special issues which may arise for corporations.	1.5
Real Estate Taxation, Part 1: Like-Kind Exchanges (Updated for Tax Cuts and Jobs Act 2017)	Overview of implications to like-kind exchanges from the Tax Cuts and Jobs Act, characteristics and like-kind exchanges, requirements of qualifying parties and qualifying property, mechanics of like-kind exchanges, reporting requirements and tax planning considerations.	1.5
Real Estate Taxation, Part 2: Involuntary Conversions, Character of Dispositions and Rentals	Review of tax rules and regulations related to real estate transactions. In-depth coverage of IRC sections 1033 and 1031 including IRS interpretation of critical requirements, related statutory and case law.	1
Reducing Income Taxes for Small Business Owners	Discussion of how business owners perceive tax planning, the most effective ways to approach tax planning, specific tools and techniques of tax planning and relevant tax-saving approaches.	2
Reform and Development of Sales and Use Tax in the United States – Part 1	Three courses on US sales and use tax intend to provide a comprehensive overview of the sales and use tax system in the United States. This is part one of course three focusing on addressing purposes and consequences of sales tax reforms such as SST, the impact of the case of Quill and the case of Wayfair on sales and use tax reform, impact of the growth of e-commerce and Internet sales on sales and use tax reform and the sales tax treatment of special transactions such as M&A.	2.5
Reform and Development of Sales and Use Tax in the United States – Part 2	Three courses on US sales and use tax intend to provide a comprehensive overview of the sales and use tax system in the United States. This is part two of course three focusing on addressing the tax treatment of special goods and services derived from the development of Internet and technology, how is local sales tax levied are administered, the gross receipts tax and how different is it from sales tax.	3
Repair Regulations	Overview of repair regulations including determination of costs eligible for current deduction vs. capital improvements.	2.5

Taxes		
	Course	Description Credits
NEW	2018 Reviewing Tax Returns for Accuracy and Efficiency	Walkthrough of the role of the reviewer in the tax return preparation process. 1.5
	Reviewing Tax Return Basics	Explanation of the job of the reviewer, tools needed by the reviewer, steps in the review, specific procedures for the review, finishing up the review, signing the returns and follow-up after filing. 1.5
	S Corporation Formation and Termination, Part 1: Qualification	Overview of S corporations including discussion of corporate and shareholder eligibility, decision to make election and pros and cons of S corporations. 2
	S Corporations Formation and Termination, Part 2: Operations	Overview of S corporations. In-depth coverage of the framework of S corporations, operating guidelines and stock sale rules and regulations. Other topics include taxation implications and issues and questions relating to making the election. 2
	S Corporation Formation and Termination, Part 3: Revocation, Termination, Reorganization and Special Topics	Overview of S corporations. Topics covered include tax implications of voluntary revocation and regulations governing redemptions, liquidations and reorganizations. 1.5
	S Corporations from A to Z – Getting Ready to Prepare the S Corp Return	Overview of S corporation basics, including qualification and tax requirements, form 1120-S, the S corporation annual tax return, unique aspects of S corporation taxes (including separately stated items and deduction limitations) and taxes and credits applicable to an S corporation. 1.5
	Section 199A – Tax Cuts and Jobs Act	This course will provide the following: detailed coverage of section 199A, various examples illustrating section 199A concepts, planning strategies surrounding section 199A, choice-of-entity comparisons and explanation of uncertainties with this new section. 2
	Section 199A Proposed Regulations – Navigating the New Guidance	In-depth coverage of the proposed regulations under section 199A, coverage of specified service businesses, review of basic calculations, coverage of aggregation rules, examination of related party issues, coverage of loss limitation and carryover rules and examination of wage and employee issues. 2
	Section 382: An Overview	Overview of the history and underpinnings of section 382, what constitutes an ownership change and the key variables for determining when one occurs, the base section 382 limitation and the main adjustments to that base limitation, net unrealized built-in gains and losses and recognized built-in gains and losses. 1.5
	Section 338 Elections: An Overview	Examine the various types of transactions for US federal income tax purposes and the purpose of section 338. Gain knowledge of the different types of section 338 elections and when they are available. 1
NEW	Section 355 Spin-offs: An Overview	Overview of the different types of corporate divisions, the US federal income tax consequences of corporate divisions and requirement of qualification under section 355. 1
NEW	Section 754 Elections: Tax Implications of Partnership Step-ups	Course provides guidance on code sections 754, 743 and 734, how to make a 754 election and when code sections 734 and 743 are applicable. 2
UPD	Social Security and Medicare Tax Issues	Explanation of social security and Medicare benefits and tax issues. Coverage of recent changes. 2
	Special Valuation Rules: See Clearly Through the Clutter	In-depth coverage of partial and split interests. Overview of practical understanding of Chapter 14's special valuation rules and purpose for enactment. 1.5

Taxes		
Course	Description	Credits
State Tax Update: How States are Responding to the TCJA	Discussion of the key provisions of the 2017 Tax Cuts and Jobs Act with state and local tax implications. Review strategies that high-tax states, such as California, Connecticut, New York and New Jersey are using to preserve state and local tax deductions for their residents.	1
State Tax Update Q1 2019: How States are Responding to the Tax Cuts & Jobs Act, the Wayfair Decision and Other Hot Topics	Examine the impact of the Supreme Court's 2018 decision in South Dakota v. Wayfair. Course takes a look into the key provisions of the 2017 Tax Cuts and Jobs Act with state and local tax implications.	1
State Tax Update Q4 2018: The Wayfair Decision and How States Are Responding to the Tax Cuts and Jobs Act	Overview of key provisions of the Supreme Court's 2018 decision in South Dakota. Wayfair, key provisions of the 2017 Tax Cuts and Jobs Act with state and local tax implications and strategies high-tax states, such as California, Connecticut, New York and New Jersey are using to preserve state and local tax deductions for their residents.	1
Staying on Top of Opportunity Zone Developments	Overview of opportunity zones and the types of gains eligible for deferral through investment in an opportunity fund.	1.5
Tackling Tax Depreciation Issues	Addresses the tricky areas of tax depreciation and helps to get the preparer ready for reviewing depreciation records that will be used for tax return preparation purposes.	2
Taxation of Inbound Investment	Coverage of US system for taxing foreign persons, withholding on foreign persons and taxation of US real property interests and branch level taxes.	3
Tax Compliance and Planning for Gig Workers	Course provides an introduction to the trends and development of the gig economy and detailed discussions on tax issues associated with the gig economy.	3
Tax Consequences of Changing Business Entities	Gain knowledge on starting a business and choices to be made when setting up the entity. Course examines changing from a schedule C business to a partnership and converting a business from a partnership to a corporation.	1.5
Tax Fraud Due to Identity Theft	Overview of identity theft basics, including defining tax fraud due to identity theft, warning signs and why a criminal may want to commit identity theft.	1.5
Tax Implications of a Change in Accounting Method	Learn why accounting changes are made, when and how accounting method changes are triggered, basic principles of Internal Revenue Code (IRC) section 481 and form 3115, application for change in accounting method.	2
Tax Implications for Charities and Charitable Contributions	Overview of the difference between public charities and private foundations, how to substantiate contributions and how to help ensure compliance for everything from collection plate contributions at church to complicated property donations	2
Tax Issues of Foreign Professionals Entering the US Workforce	Gain an understanding of nonresident alien status and resident alien status, background knowledge and practical experience to advise foreign professionals facing US income tax issues.	1.5
Taxation Implications for Controlled Foreign Corporations	Examination of controlled foreign corporations (CFC) including definitions, shareholder taxation and previously taxed income. Course includes in-depth discussion and practical charts and tables.	2
Taxation of Foreign Inbound Investments	Overview of US system for taxing foreign persons, withholding on foreign persons, taxation of US real property interests, branch level taxes and impact of income tax treaties.	2.5

Taxes

Course	Description	Credits
Tax Reform Update – Nov 2017	Overview of the federal income tax system, consumption tax alternatives, reforming our current system, concepts for evaluating tax systems and political viability of tax reform.	2
Tax Reform and Multinational Entities	Deep dive into how recent tax reform is impacting multi-national entities and what issues should be watched closely.	3
Tax Research Basics	Learn how to conduct effective tax research, including utilizing primary and secondary research authority and tools.	1.5
Tax Treaties	Through discussion, diagrams and examples, participants will gain a fundamental understanding of the policies and provisions included in US income tax treaties.	2
The New International Provisions (TCJA Changes)	Review of taxing jurisdiction, US taxation of foreign operations, global intangible low-taxed income (GILTI) provisions, base erosion and anti-abuse tax, foreign-derived intangible income (FDII) deduction and considerations for controlled foreign corporations (CFCS).	3
The Tax Cuts and Jobs Act and How to Benefit from it – Client Planning Opportunities	This course will provide the following: In-depth coverage of new section 199A; discussion of how the new law impacts choice-of-entity decisions, discussion of how and in what ways there are tax savings opportunities, discussion of traps to avoid for individuals and businesses and coverage of certain compliance matters.	3.5
The Transition Tax-Section 965, Proposed Regulations and Filing Requirements	Overview of worldwide tax system vs. territorial tax system, section 965 and the proposed regulations and filing requirements for the transition tax.	1.5
Transfer of an Interest in Trust: Section 2702	In-depth coverage of IRC section 2702 governing grantor retained income trusts (GRIT) and other partial interests including real-life examples that ensure compliance.	1.5
Transfer Pricing Friend and Foe	Overview of transfer pricing including how it relates to the US tax code and real-life examples that can ensure compliance.	1.5
Understanding Like-Kind Exchanges	Study the requirements for a valid like-kind exchange and review basic mechanics of a like-kind exchange, including deferred forward and reverse exchanges.	2
Understanding the Foreign Tax Credit Rules and Calculations	Overview of taxing jurisdiction and tax systems, source rules for income and deductions, foreign tax credit calculation and limitation, special rules for the foreign tax credit and filing requirements for the foreign tax credit.	3
Understanding the Tax Cuts and Jobs Act	This course will provide the following: Complete coverage of the new legislation, discussion of the law's impact on individuals, small businesses, large companies, estates and trusts, international matters and other issues, how the law impacts 2017, 2018 and later years and what the new law means for the tax practitioner.	2
NEW Understanding the Tax Implications of the Legal Marijuana Industry	Explore the dichotomy between federal and state law, including relevant case law as it relates to taxation of this industry. Gain a perspective on considerations a CPA must weigh in deciding whether or not to provide services to this industry.	2.5
What Every Tax Practitioner Needs to Know about Section 529 Plans	Review of section 529 plans, eligibility, qualified expenses, state requirements, tax implications and updated tax law changes.	2

Special interest courses

Becker offers courses in specific areas of interest such as SEC, fraud and industry niches.

Emerging technologies

AICPA Cybersecurity Standards, Parts 1 and 2

An Introduction to Cybersecurity for CPAs

Big Data, Parts 1 and 2

Building Your Business in the Cloud

Smart Contracts on the Blockchain

Technology A B C – Artificial Intelligence, Blockchain and Cybercrime

Understanding Blockchain Technology

Fraud

Accountants' Responsibilities Regarding Fraud, Parts 1 and 2

Asset Misappropriations Schemes

Corruption, Parts 1 and 2

Federal Government Contracting – Contract Fraud

Financial Statement Fraud

Forensic Accounting

Fraud and Abuse in Nonprofit and Government Environments

Fraud Investigation, Parts 1, 2 and 3

Identity Theft: How to Detect, Deter and Fix

Identify Theft: How to Detect, Prevent and Recover in the Digital Age

Identity Theft Prevention

Professional Skepticism for Public Accountants

Tax Fraud Due to Identity Theft

Industry niches

Construction Industry – Parts 1, 2 and 3

Employee Benefits – Parts 1, 2 and 3

Healthcare Industry, Part 1 – Overview and Update

Healthcare Industry, Part 2 – Understanding Health Care Financial Statements

Revenue Recognition: ASC 606 Analysis for the Construction/Real Estate Industry

Revenue Recognition for Health Care Entities

Revenue Recognition: ASC 606 Analysis for the Life Sciences Industry

Leadership/professional development

Becoming a Highly Effective Performer

Coaching Employees for Better Results

Creating Effective Presentations

Developing Powerful Business Acumen

Effective Business Communication

Emotional Intelligence

Executive Leadership Tools and Tactics, Parts 1 and 2

Executive Presence

Leadership Skills

A Manager's Guide to Performance Management

Management Keys to Success: Culture and Leadership

Managing a Virtual Team

Managing Your Career Using the 70-20-10 Rule

Meetings That Work

Negotiation Skills

New Leaders Assimilation

Public Speaking and Presentation Skills

Role of the Leader in Talent Development

Time Management for Accountants

Training and Developing Employees Using a Competency Framework

Transitioning from Buddy to Boss

SEC

Disclosure and Sustainability Reporting: An SEC Overview

Meeting SEC Disclosure Requirements: Management's Discussion & Analysis of Financial Condition and Results of Operations, Parts 1, 2 and 3

Meeting SEC Disclosure Requirements: Compensation Discussion & Analysis

PCAOB Audit Standards – Parts 1, 2, 3 and 4

PCAOB/SEC Update

Quality Control Standards – Parts 1, 2, 3, 4 and 5

Recent AICPA and PCAOB Activity

SEC Comfort Letters

SEC Initial Public Offering Requirements

SEC Reporting Requirements – Parts 1, 2 and 3

SEC Annual Update

Sustainability Accounting and Integrated Reporting

The Impact of Sarbanes-Oxley on Internal Controls

Updated COSO Internal Framework



Government solutions

Becker also supports professional development for civil servants. As a DoD and NASBA-approved provider, we provide courses for government accountants, auditors and financial managers.

Becker government partnerships

- Association of Government Accountants (AGA)
- American Society of Military Comptrollers (ASMC)
- GSA Federal Supply Schedule Contract (GSA)
- National Treasury Employees Union (NTEU)
- Office of Under Secretary of Defense Comptrollers (OUSD (C))

Benefits of membership include:

- More than 1,400 CPE hours of Continued Professional Education (CPE) courses
- CPE courses aligned with OSD OCFO competencies for DFMCP*
- Meeting CPE requirements for Yellow Book (GAGAS), DFMCP, CGFM, CDFM, CPA, CIA, CFE, CMA certifications and more
- Becker supports more than 100 government agencies with their training needs

Visit **becker.com/government** for more information.

Current and relevant topics include:

Yellow Book financial and performance marketing

Green Book internal controls

Government ethics and independence

Government/fund accounting

Federal accounting manual

Management accountability and control

OMB circular

Enterprise risk management

Improper payments

Fraud and forensics

Leadership skills

Emotional intelligence

Negotiation skills

Networking skills

Public speaking and presentation skills

Effective business writing

Not-for-profit accounting

+ Much, much more

* "These courses have been aligned by the DoD, Office of the Under Secretary of Comptroller, to the DoD approved Financial Management and Leadership competencies for the specific area of study. The DoD course alignments serve neither as an advertisement, endorsement or recommendation of any privately developed and maintained courses for continuing education."

– Office of the Under Secretary of Comptroller.

Yellow Book

Becker offers many courses that may qualify for Yellow Book CPE credit.

2018 GASB Update

2019 Single Audit Update

Accounting for Revenues in Government (Emphasis on Non-Exchange Transactions)

AICPA Cybersecurity Standards, Part 1

AICPA Cybersecurity Standards, Part 2

Annual Audit & Attestation Update – June 2018

Auditing Opinions: Understanding the Fundamentals from Standards to Reports

Enterprise Risk Management – Integrating with Strategy & Performance, Part 1

Enterprise Risk Management – Integrating with Strategy & Performance, Part 2

Enterprise Risk Management in the Federal Government: OMB Circular A-123

Ethics – Integrity, A Foundation for Success

Ethics – Understanding & Applying the AICPA Code of Professional Conduct

Ethics, Integrity & the AICPA Code of Professional Conduct

Evaluating the Effectiveness of Not-For-Profit Entities

Federal Appropriation Principles – An Overview

Federal Government Contracting – An Introduction

Federal Government Contracting – Contract Fraud

Financial Reporting Challenges for Corporations

Fraud & Abuse in Nonprofit & Governmental Environments

GAO Green Book – Government Internal Control Standards

GASB Other Postemployment Benefits (OPEB)

GASB Statement 87: Leases

GASB 84, Fiduciary Activities

Government Ethics & Independence

Government/ Fund Accounting: Introduction to Government Accounting, Financial Reporting & Financial Statement Analysis

Housing & Urban Development Audits for Financial Service Institutions

Housing & Urban Development: An Auditing Introduction

Improper Payments: Legislation & Mitigation

Independence – Historical Insights & Today's Rules

Independence Overview

Independence Technical Update

Intermediate Government Accounting

Internal Control Considerations – Focus on Nonprofits & Governmental Entities

Introduction to Federal Accounting & Reporting

New Accounting Guidance for Not-For-Profit Revenue Recognition

Not-For-Profit Accounting & Auditing Update

Not-For-Profit Accounting & Reporting: An Introduction

Not-For-Profit Entities: Financial Statement Presentation (ASU 2016-14)

Required Auditor Communications

Revenue Rec for NFPs

Risk Management in the Public Sector

Single Audit Quality – Focus on Designing & Performing Tests of Control & Compliance

Single Audit Quality – Focus on Risk Assessment, Evaluating Results & Reporting

Single Audit: Best Practices to Avoid Common Audit Problems & Pitfalls

Yellow Book 2018 Revision

Yellow Book Financial Audits & Attest Engagements (Updated for Government Auditing Standards 2018 Revision)

Yellow Book Overview & Update, Including 2018 Revisions

Yellow Book Performance Audits (Updated for Government Auditing Standards 2018 Revision)

Webcast calendar



Becker live webcasts cover current and critical issues to help keep financial professionals up-to-date. Our subject-matter experts present the latest topics at set dates and times in an easy-to-follow, interactive format where you can ask questions during the webcast.

Visit [**cpe.becker.com/calendar**](https://cpe.becker.com/calendar) for a complete, up-to-date webcast calendar.

September 2019

MON	TUE	WED	THUR	FRI
2	3	4	5	6
	Accounting for Stock-Based Compensation (Live) ● 10 AM CDT 3 credits Introduction to Bookkeeping (Rebroadcast) ● 2 PM CDT 1.5 credits	State Tax Update – Q2 2019 (Rebroadcast) ● 12 PM CDT 1 credit Yellow Book Independence & Quality Control (Live) ● 2 PM CDT 2 credits	Federal Tax Update – September 2019 (Live) ● 10 AM CDT 2 credits Overview of Practical Project Management (for any effort) (Rebroadcast) ● 2 PM CDT 1 credit	Accounting and Auditing Hot Topics – June 2019 (Rebroadcast) ● 10 AM CDT 1 credit Serving on a Board: What a CPA Needs to Know (Rebroadcast) ● 10 AM CDT 2 credits
9	10	11	12	13
Accounting and Auditing Update – Q2 2019 (Rebroadcast) ● 12 PM CDT 1 credit	Seeking Millennials and Generation Z (Rebroadcast) ● 10 AM CDT 1 credit Excel: Predictive Analytics II and Forecasting (Live) ● 2 PM CDT 2 credits	Overview of the Federal Tax System (Live) ● 10 AM CDT 2 credits	Storytelling with Data (Live) ● 2 PM CDT 1 credit	Social Security and Medicare Update (Rebroadcast) ● 10 AM CDT 1.5 credits Accounting and Auditing Hot Topics – June 2019 (Rebroadcast) ● 2 PM CDT 1 credit
16	17	18	19	20
Accounting and Auditing Update – Q2 2019 (Rebroadcast) ● 12 PM CDT 1 credit	Federal Tax Deep Dive (Live) ● 9 AM CDT 8 credits	Transition Tax (Live) ● 10 AM CDT 2 credits Serving on a Board: What a CPA Needs to Know (Rebroadcast) ● 2 PM CDT 2 credits	Professional Judgement in Audit (Live) ● 10 AM CDT 2 credits Introduction to Bookkeeping (Rebroadcast) ● 2 PM CDT 1.5 credits	Accounting and Auditing Hot Topics – June 2019 (Rebroadcast) ● 10 AM CDT 1 credit The New Employee Benefit Plan Auditor's Report (Live) ● 2 PM CDT 2 credits
23	24	25	26	27
Retirement Planning – Options and Tax Implications (Live) ● 10 AM CDT 2 credits Seeking Millennials and Generation Z (Rebroadcast) ● 2 PM CDT 1 credit	Implementing Revenue Recognition – Lessons Learned (Rebroadcast) ● 10 AM CDT 2 credits Excel: Data Model, Power Query and Power Pivot (Live) ● 2 PM CDT 2 credits	Serving on a Board: What a CPA Needs to Know (Rebroadcast) ● 10 AM CDT 2 credits Ethics – Integrity, A Foundation for Success (Live) ● 2 PM CDT 2 credits	Overview of Practical Project Management (for any effort) (Rebroadcast) ● 2 PM CDT 1 credit	Accounting and Auditing Hot Topics – June 2019 (Rebroadcast) ● 2 PM CDT 1 credit
30				
Social Security and Medicare Update (Rebroadcast) ● 10 AM CDT 1.5 credits				

● Accounting ● Auditing ● Economics ● Finance ● Government ● Regulatory/ethics ● Soft skills ● Specialized knowledge ● Taxes

October 2019

MON	TUE	WED	THUR	FRI
	1	2	3	4
	Excel: Prescriptive Analytics (Live) ● 2 PM CDT 2 credits	Yellow Book Performance Audits (Updated for Government Auditing Standards 2018 Revision) (Rebroadcast) ● 8:30 AM CDT 3 credits PCAOB Inspection Finding (Rebroadcast) ● 12 PM CDT 1 credit	Independence Overview (Live) ● 10 AM CDT 2 credits	Introduction to Bookkeeping (Rebroadcast) ● 10 AM CDT 1.5 credits
7	8	9	10	11
Serving on a Board: What a CPA Needs to Know (Rebroadcast) ● 2 PM CDT 2 credits	Yellow Book Performance Audits (Updated for Government Auditing Standards 2018 Revision) (Rebroadcast) ● 8:30 AM CDT 3 credits Accounting for Variable Interest Entities (Live) ● 10 AM CDT 3 credits	Proposed Changes to Audit Evidence (Live) ● 10 AM CDT 1 credit Accounting and Auditing Update – Q3 2019 (Rebroadcast) ● 12 PM CDT 1 credit	Federal Tax Update – October 2019 (Live) ● 10 AM CDT 2 credits Emotional Intelligence (Rebroadcast) ● 2 PM CDT 2 credits	Seeking Millennials and Generation Z (Rebroadcast) ● 10 AM CDT 1 credit Good Accountant's Guide to Bad Guys: What Hackers Want and How to Stop Them (Live) ● 2 PM CDT 1.5 credits
14	15	16	17	18
	Year-long Tax Planning (Live) ● 10 AM CDT 2 credits Overview of Practical Project Management (for any effort) (Rebroadcast) ● 2 PM CDT 1 credit	GILTI *will include New Regs and Forms (Live) ● 10 AM CDT 2 credits	Introduction to Bookkeeping (Rebroadcast) ● 10 AM CDT 1.5 credits Financial Reporting Challenges for Corporations (Live) ● 12 PM CDT 2 credits	Social Security and Medicare Update (Rebroadcast) ● 2 PM CDT 1.5 credits
21	22	23	24	25
Tax Implications of Divorce (Live) ● 10 AM CDT 2 credits	Serving on a Board: What a CPA Needs to Know (Rebroadcast) ● 10 AM CDT 2 credits Excel: Prescriptive Analytics II (Live) ● 2 PM CDT 2 credits		Training and Developing your Employees (Live) ● 2 PM CDT 1 credit	Overview of Practical Project Management (for any effort) (Rebroadcast) ● 10 AM CDT 1 credit
28	29	30	31	
Social Security and Medicare Update (Rebroadcast) ● 10 AM CDT 1.5 credits	Serving on a Board: What a CPA Needs to Know (Rebroadcast) ● 10 AM CDT 2 credits		2019 GAAS Update (Live) ● 10 AM CDT 4 credits	

● Accounting ● Auditing ● Economics ● Finance ● Government ● Regulatory/ethics ● Soft skills ● Specialized knowledge ● Taxes

November 2019

MON	TUE	WED	THUR	FRI
4	5	6	7	8
	Excel: Monte Carlo Simulation I ● 2 PM CDT 2 credits	Federal Tax Update – November 2019 ● 10 AM CDT 2 credits	Asset Misappropriation Schemes ● 10 AM CDT 1.5 credits	
11	12	13	14	15
	Identifying and Communicating Internal Control Matters on an Audit ● 10 AM CDT 3 credits	Federal Tax Business Update ● 10 AM CDT 4 credits A Manager's Guide to Performance Management ● 2 PM CDT 1 credit	Comprehensive Income ● 10 AM CDT 2 credits	
18	19	20	21	22
Changes to the SSAE Standards ● 10 AM CDT 2 credits	Excel: Monte Carlo Simulation II ● 2 PM CDT 2 credits	BEAT *will include New Regs and Forms ● 10 AM CDT 2 credits		
25	26	27	28	29
	The Auditor's Responsibilities Relating to Other Information Included in Annual Reports ● 10 AM CDT 1 credit			

● Accounting ● Auditing ● Economics ● Finance ● Government ● Regulatory/ethics ● Soft skills ● Specialized knowledge ● Taxes

December 2019

MON	TUE	WED	THUR	FRI
2	3	4	5	6
Excel: Array Functions and Formula ● 2 PM CDT 2 credits		Federal Tax Update – December 2019 ● 10 AM CDT 2 credits		
9	10	11	12	13
Disclosure and Sustainability Reporting: An SEC Overview ● 10 AM CDT 4 credits 2019 GAAP Update ● 10 AM CDT 2 credits	Nonprofit Accounting and Auditing Update ● 10 AM CDT 3 credits	Managing the Company's Cash and Credit ● 10 AM CDT 1.5 credits		
16	17	18	19	20
	Excel: Macros ● 2 PM CDT 2 credits	1040 *updates for 2019 brackets, indexed amounts, rules ● 10 AM CDT 3 credits	Federal Tax Deep Dive ● 9 AM CDT 8 credits Managing Your Career Using the 70-20-10 Rule ● 10 AM CDT 2 credits	
23	24	25	26	27
				GASB's Projects: Major Changes Coming – What You Need to Know ● 1 PM CDT 2 credits

● Accounting ● Auditing ● Economics ● Finance ● Government ● Regulatory/ethics ● Soft skills ● Specialized knowledge ● Taxes



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Course pricing

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- Accounting
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- Audit (government)
- Communication
- Economics
- Ethics
- Finance
- Management advisory services
- Soft skills
- Tax
 - Corporations
 - Partnerships
 - Other pass-through entities
 - Individuals
 - International

In-house training rates
Sample cost = Flat fee + individual participants
\$2,999 flat fee (includes the first 10 participants)
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Participants 51–100 @ \$100 each
Participants > 100 @ \$75 each
Participants > 150 – contact us for details

Course pricing (based on an 8-hour day)

Course pricing is flexible depending on the number of participants (optimal class size: 20 to 70 participants) and includes an expert instructor and course materials.

Popular course titles offered as in-house training options

Tax Cuts and Jobs Act

Under the guidance of tax practitioners with decades of practical tax experience, this course examines all significant provisions of the Tax Cuts and Jobs Act of 2017 with a comprehensive overview of the law and examples of client planning opportunities. Becker has your planning and implementation questions covered as it relates to the taxation of corporations and individuals under the revised tax code.

Individual Tax Update

New tax legislation and difficult areas of tax compliance impacting individuals will be discussed, including the most recent legislative activity impacting income and deductions, retirement and health insurance and the application of the payroll tax and self-employment tax.

Federal Tax Update

This course covers the far-reaching implications of the Tax Cuts and Jobs Act and what this new tax law means to individuals, businesses, estates and retirement plans. Learn how these tax changes will impact you and your clients' or stakeholders' businesses. Key coverage will be provided on recent guidance issued in connection with the Tax Cuts and Jobs Act such as the section 199A proposed regulations. This course will also cover significant tax rulings and cases over the past 12 months.

Revenue Recognition

Revenue recognition is one of the most important reporting areas faced by accountants and standard setters. Avoid the many traps related to recognizing revenue in the delivery of products and services while you become familiar with GAAP requirements, including multiple element arrangements. This course reviews the revenue recognition standard jointly issued by the FASB and IASB, plus details on the accounting standards updates released since the issuance of the converged standard.

Leases

Participants will gain an understanding of the FASB's new lease accounting standard, ASU 2016-02, leases (topic 842). The history and objectives of the standard will be discussed in addition to key definitions and how to apply the standard. Differences between the FASB's ASC topic 842 and the IASB's new lease accounting standard, IFRS 16, leases, will also be addressed.

SEC Reporting Update

Learn about emerging issues, hot topics and current projects within the SEC, plus the impact of recent developments on financial statement preparers and auditors, recent trends in comments letters issued to registrants and enforcement actions by the SEC.

Excel Tips and Tricks

Taught by Dr. Wayne Winston, an expert in the field of Microsoft Excel, this course will increase your productivity along with your Excel knowledge. According to Wayne, "The spreadsheet is the canvas for the business analyst." Learn some formula shortcuts that will enhance your Microsoft Excel experience.



Pass-Through Entities Update

Learn about the pass-through entity business structures used in practice to maximize tax savings. Key coverage on the calculation of the section 199A deduction is included.

International Tax Update

Through the use of effective examples and in-depth discussion, participants will gain a practical and clear understanding of international tax developments. This update provides a thorough analysis of legislative changes that impact business transactions.

Accounting and Auditing Update

Stay current with recent pronouncements by FASB and other bodies that contribute to GAAP with this review of important GAAP topics.

Yellow Book Update

GAO GAGAS provide a solid framework for conducting high-quality audits of government programs and their implementation by government entities and other entities that receive government awards. This course explains those standards (including the 2018 revisions) and how they can help auditors objectively acquire and evaluate sufficient, appropriate evidence and report the results. Real-world examples will demonstrate the practical application of GAGAS.

Ethics

Participants will cover foundations of ethical behavior and the AICPA Code of Professional Conduct and its applicability for accounting professionals. All it takes is a look at news headlines to see a business world littered with victims of unethical behavior. Coverage will include not only how unethical behavior can ruin careers, bring debilitating expenses and fines to any company and lead to prison terms for executives and others but also how individuals and companies that act with integrity can drive employee and client satisfaction while improving company performance. Courses meeting state specific ethics requirements are available.

Independence

Because auditor objectivity can be crucial to investor confidence, regulators and others become concerned when they perceive actions that may impair or appear to impair independence. That's why accounting compliance in today's business world demands a solid understanding of the most current ethics rules relating to independence, no matter the regulatory body. This course will cover key independence concepts.

Blockchain

Today's workforce is in need of blockchain training. Accounting Today has cited that only 1% consider themselves as an expert on the topic and 50% are asking "What is blockchain?" Blockchain technology has enormous potential to solve real auditing and control problems. Learn about the basics and application of blockchain technology and how to integrate smart contracts into your business.

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Custom content development

With more than 60 years of experience in creating comprehensive and accurate instructional content, Becker will work with your internal subject-matter experts to create a custom course, from ideation to development and final review – or develop a full turnkey custom course to your specifications.

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Organizations that create and offer in-house webinar training often produce one-time events, but with the help of Becker, you can leverage your proprietary intellectual property into reusable online training that meets the requirements for providing continuing education credit.

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Instructors

Our expert instructors produce the highest quality courses based upon accurate and up-to-date information, reinforced by decades of practical experience. This ensures the training your employees receive from Becker provides the most comprehensive learning experience available.



Cheryl Weir, Executive Coach

Cheryl has been coaching individuals and corporate teams since 1992. Some of Cheryl's most popular workshops include Developing YOUR Unique Leadership Style and The Executive Leadership Program for high potentials in organizations. Her workshop for sales organizations, Rocket YOUR Results, was featured in FORTUNE magazine. She is certified in Hay Group's Emotional Intelligence 360° Multi-rater assessment (ECI) and TTI's DISC style and behavior assessment.



Jennifer F. Louis, CPA

Jennifer has more than 25 years of experience in designing high-quality training programs in a variety of technical and soft-skills topics necessary for professional and organizational success. In 2003, she founded Emergent Solutions Group, LLC, where she focuses on designing and delivering practical and engaging accounting and auditing training. Jennifer started her career in audit for Deloitte & Touche. She graduated summa cum laude from Marymount University with a bachelor's in accounting.



Elizabeth Walsh, CPA

Elizabeth Lester Walsh, CPA, CITP has 30 years of management experience in accounting, systems innovation and change management. Besides assisting clients on accounting and technology change initiatives, she has also authored various technical accounting courses for the AICPA and Becker. She has also worked as a senior auditor for Arthur Andersen, taught classes at the college level and served as the director of knowledge management for the AICPA.



Jennifer McAllister, CPA

Jennifer McAllister works full time as a senior curriculum tax specialist with Becker. Jennifer previously owned her own accounting firm in a suburb of Atlanta and served as the business director of a private school. An instructor for Becker for more than 20 years, Jennifer is currently the lead instructor in Atlanta. She instructs all four sections of the CPA Exam, both live and online. She also writes and records CPE courses and instructs live CPE throughout the United States.



Holly Hawk, CPA, CGMA

Holly Hawk is a lecturer within the Terry College of Business at the University of Georgia, teaching undergraduate and graduate level courses. She was also an adjunct lecturer at Clemson University. Holly is currently earning her PhD in higher education and received the 2018 Emerging Scholars Leader Award from the 2018 Innovation in Teaching Conference. Holly is a graduate of the AICPA Leadership Academy and currently serves as chair of the AICPA Student Recruitment Committee.



John Stevko, CPA

John has more than 40 years of experience as a tax practitioner, national seminar instructor, writer and business owner. He began his career at a Big 4 public accounting firm before founding a local CPA firm in Beaverton, Oregon. At the same time, John began speaking for Gear Up Tax seminars, eventually becoming a managing partner in the business. He has lectured on tax law and healthcare reform at national conferences and in-house for top 100 CPA firms and the large banking industry.

**Kayla Stevko, CPA**

Kayla Stevko is a CPA based out of Northern California with more than 10 years of public accounting experience. For seven years, Kayla worked at a top 10 national accounting firm, rising to the role of senior manager – where she oversaw financial statement audits, served as a national training instructor and spoke about recent accounting and auditing changes. She currently works at a local accounting firm in the Bay Area where she specializes in accounting and tax assistance for mid-size businesses.

**Michael Brown, CPA**

Mike Brown is director of product management for Becker and has extensive experience in public accounting, corporate accounting and education. Mike's career started with Ernst & Young in their Atlanta assurance practice working with clients in manufacturing, financial services and retail. He then spent several years in corporate accounting as a controller in the real estate and service fields.

**Krys Amdurer, EdD**

Krys Moskal Amdurer is a managing partner at the Southwest Center for Organization Effectiveness (SWCOE), which provides custom programs on optimizing team performance, problem solving and decision making. She has provided a wide range of services to Fortune 500 companies for 15 years, specializing in programs addressing performance management, candidate selection, succession planning, leadership, talent management, change management, innovation and teamwork. Krys has doctorate and master's degrees from Rutgers University.

**Mike Potenza, CPA, JD**

A CPA and an attorney, Michael Potenza began teaching for Becker in 1998. He also taught as an adjunct professor at Fordham University for more than 10 years and in the New York University graduate program. He spends much of his time managing Point & Click, Inc., a computer consulting corporation where he's served as president and in-house counsel for more than 20 years. Currently, Mike teaches regulation, business environments & concepts and financial reporting as Becker's New York lead instructor.

**Melissa Critcher, CPA**

Melissa has extensive experience in auditing and accounting, which includes manufacturing, professional services, healthcare and retail industries with a specialization in employee benefit plans. Her practice concentrates on auditing employee benefit plans and consulting with CPA firms and plan sponsors. She has served as a member of the NCACPA Board of Directors and a committee member for the NCACPA Accounting and Attestation Committee.

**Mike Shumann**

Mike Schumann spent 20 years in public accounting specializing in subchapter C and M&A US federal income tax matters. He now runs his own boutique practice focused on these topics.

**Melisa Galasso, CPA**

Melisa is the lead instructor in North Carolina for Becker CPA Review and also serves as a subject-matter expert writing and teaching CPE courses for Becker. She owns Galasso Learning Solutions, where she specializes in creating courses in technical accounting and auditing. She was honored as one of "40 under 40" by CPA Practice Advisor in 2017 and 2018, was named the 2019 Rising Star by her regional NAWBO chapter and received the Don Farmer award for achievement in technical content instruction.

**Patrice Johnson, CPA**

With a background in public accounting – where she worked for PwC in their industry services group for six years – Patrice taught accounting and taxation courses at the University of Georgia's J.M. Tull School of Accounting and Wesleyan College in Georgia, where she was recognized for her outstanding instruction. Patrice is now the director of national curriculum for Becker.

**Peter Olinto, CPA, JD**

One of our most dynamic instructors, Peter Olinto serves as a national lead instructor for Becker. After graduating magna cum laude from Pace University, he completed Becker's CPA Exam Review and worked as an auditor for Deloitte & Touche. Earning his juris doctorate degree from Fordham University School of Law, he worked as a tax attorney for EY. Peter has taught law, accounting, financial statement analysis and tax at Fordham's business school for almost 10 years.

**Tara Fisher, CPA**

Tara Fisher is an independent tax consultant with nearly 20 years of experience practicing international tax. In the past she's worked for the US Congress Joint Committee on Taxation, the national tax practice of PwC, the University of Pittsburgh and American University in Washington, D.C. Tara is a licensed CPA with undergraduate and graduate degrees from the University of Virginia.

**Salvatore Collemi, CPA**

Salvatore is the managing member and founder of Collemi Consulting and Advisory Services, LLC, where he guides US and international public accounting firms, litigation attorneys, valuation experts, the C-suite and related institutions in promoting audit quality. His experience at the SEC and the AICPA, as well as his work as external auditor and technical partner to local and global public accounting firms, gives him a keen understanding of both regulators and standard-setters.

**Timothy F. Gearty, CPA, MBA, JD**

Tim is the editor-in-chief and a national lead instructor at Becker, a partner in Gearty & McIntyre, LLP, CPA and a member of the New Jersey and American Bar Associations. He is a recognized expert on a number of accounting and tax-related topics and has appeared as a keynote speaker for several Fortune 100 companies. Tim has a bachelor's of science in accounting from Fairleigh Dickinson University and an MBA in finance, as well as a juris doctorate from Seton Hall University.

**Stan Pollock, CPA**

Stan earned his bachelor's degree in business administration from California State University, Northridge in 1980. He now runs a two-office tax, accounting and consulting practice in Oakland and San Francisco focused on high net worth individuals and small businesses – providing personalized expert financial and tax guidance. Stan has taught continuing education courses across the country for more than 10 years. He previously taught accounting courses across Southern California.

**Tom Cox, CPA**

Tom has nearly 20 years of experience as the CFO of a nonprofit community mental health center, along with 10 years at EY where he was an audit manager specializing in governmental and nonprofit accounting and auditing. He has presented on a variety of accounting and auditing topics at seminars sponsored by the AICPA, NABA and the Florida Institute of CPAs.

**Susie Duong, PhD**

Dr. Duong is an accounting subject-matter expert for Becker. Her professional background includes working in academia as well as in the accounting industry. Her academic research focuses on financial reporting issues in the banking industry and the use of accounting information in small business lending and debt contracting. In addition, Dr. Duong owns a firm that provides tax compliance, research and consulting services. She is also a CPA, CMA, CIA and an EA.

**Dr. Wayne Winston, PhD**

Wayne is a visiting professor at Wake Forest University and professor emeritus of decision sciences at the Kelley School of Business at Indiana University, where he's won more than 40 teaching awards. He has written more than a dozen books on topics, including marketing analytics, data analysis and decision making, operations research, practical management science, Excel 2016 data analysis and business modelling and mathematics and has consulted for global organizations including the NBA's Dallas Mavericks and New York Knicks.

Testimonials



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Keep your accounting team ahead of the curve.

Artificial intelligence isn't something on the horizon – it's here. For CPAs and other financial services professionals, success means finding a way to keep pace with AI and its growing impact on auditing, tax preparation and other accounting practices.

Becker has partnered with Northeastern University, a thought leader in artificial intelligence, to create **Artificial Intelligence for Financial Services**, a certificate course designed to help your business navigate the way forward by putting the necessary knowledge in the hands of your workforce.

Creating AI champions

Designed and taught by AI experts, Artificial Intelligence for Financial Services provides your team – from the tech-savvy to those with no prior knowledge of AI – with a solid foundation to help employees excel in the fast-changing financial industry.

Give your team the tools to:

- Assess the organization's readiness level for AI solutions
- Develop tactical plans for the implementation for AI solutions
- Evaluate ongoing business processes that could benefit from an AI solution
- Build a shared vocabulary around AI

Make your workforce a force to be reckoned with.

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Developed by a partnership between Becker Professional Education and Northeastern University's D'Amore-McKim School of Business.

Becker™



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- Four modules with fresh and current videos by industry experts
- Earn 11.5 CPE credits and a certificate from Becker

MODULE 1

Understanding artificial intelligence

An introduction to the basics of AI and its impact on financial services.

- Learning the fundamentals of AI in finance
- Identifying various AI tools in the marketplace
- Discovering patterns in big data sets
- Using automation technology to rapidly reduce costs and improve quality

MODULE 2

Applications of AI for financial services

An overview of the potential implementations of AI within an organization.

- Leveraging the use of data analysis to reduce cost
- Integrating AI technologies that shift employee skillsets
- Using predictive analysis to improve customer interactions and services
- Understanding AI and machine learning to detect fraud

MODULE 3

Assessing your organization's AI readiness

A deep dive into determining if your business is prepared for the future.

- Managing stakeholder expectations of AI integration projects
- Developing strategy framework and evaluation methods for AI
- Using internal business metrics and key performance indicators to measure success
- Understanding your data, technical infrastructure and team

MODULE 4

Becoming an AI champion

A focus on successful implementation of AI solutions.

- Influencing AI projects
- Understanding the leadership and commitment to lead AI projects
- Preparing your plan to integrate an enterprise-wide technological transformation
- Learning strategies to overcome organizational barriers





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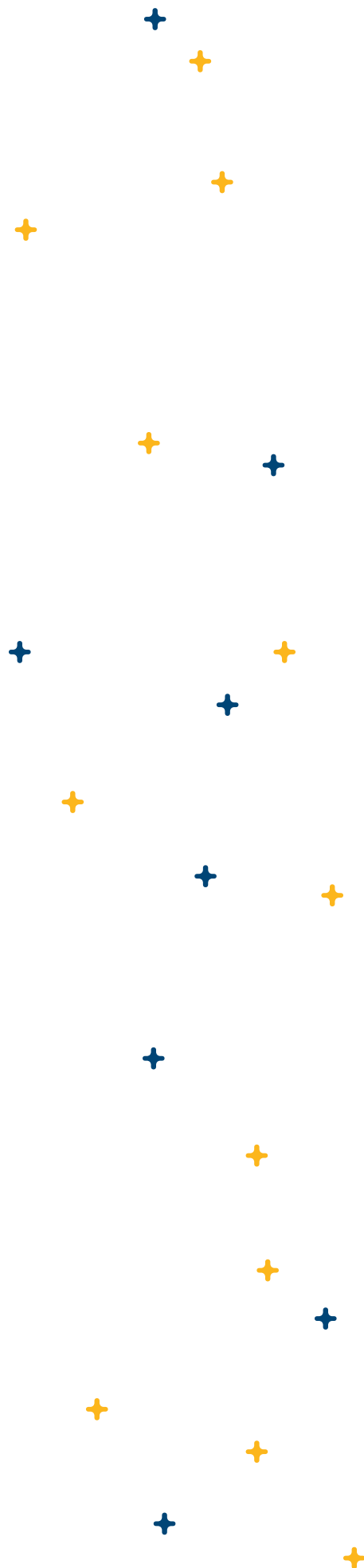
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