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Summer 2020








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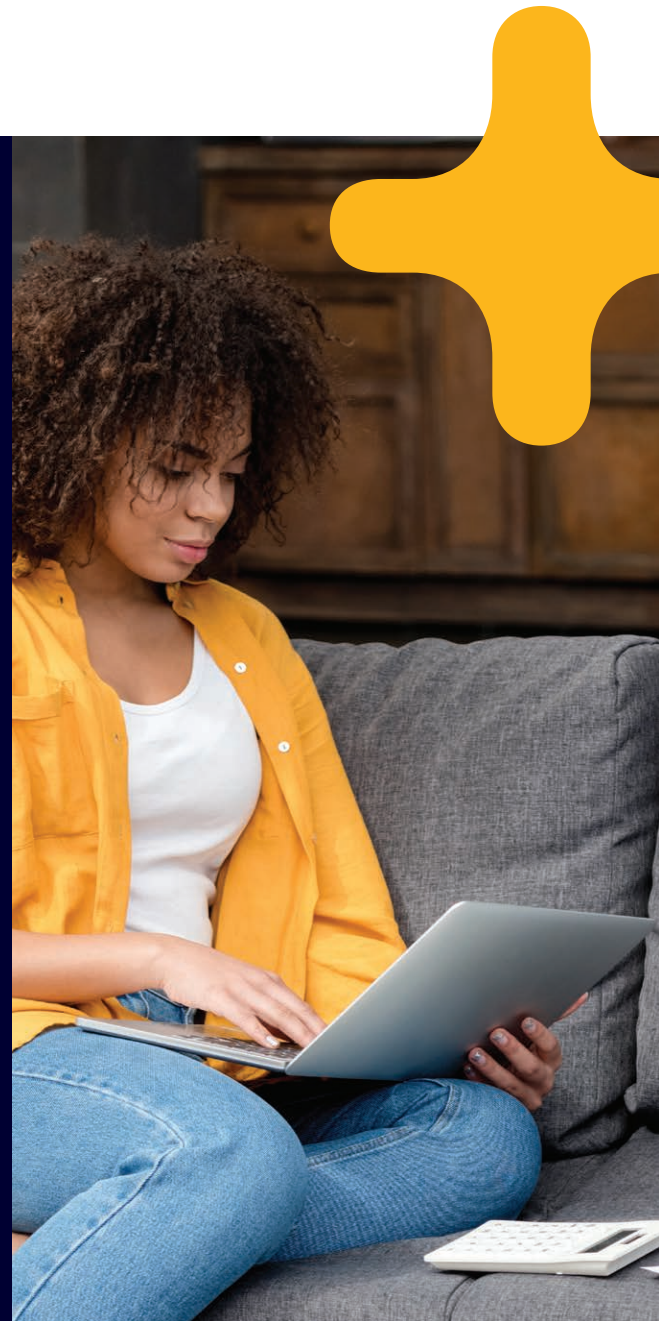
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- Business owners response to Coronavirus (COVID-19)
- The Coronavirus (COVID-19) Impact: What Every CPA Should Know

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Accounting

Course	Description	Credits	
2019 GAAP update	Overview of standards effective for December 31, 2019 year end as well as recently released FASB standards effective in the future..	4.5	NEW
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 & Auditing Update – Q1 2020	Overview of final and proposed ASUs issued by the FASB. Proposals and guidance issued by the AICPA. Final and proposed standards issued by the SEC. Proposals and guidance issued by the PCAOB.	1.5	NEW
Accounting & Auditing Update – Q2 2019	Overview of final and proposed ASUs issued by the FASB. Proposals and guidance issued by the AICPA. Final and proposed standards issued by the SEC. Proposals and guidance issued by the PCAOB.	1.5	
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	
Accounting and Auditing Update – Q3 2019	Overview of final and proposed ASUs issued by the FASB. Proposals and guidance issued by the AICPA. Final and proposed standards issued by the SEC. Proposals and guidance issued by the PCAOB.	1.5	
Accounting and Auditing Update – Q4 2019	Overview of final and proposed ASUs issued by the FASB. Proposals and guidance issued by the AICPA. Final and proposed standards issued by the SEC. Proposals and guidance issued by the PCAOB.	1	
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 for Derivative Financial Instruments & Hedging Activities (ASC 815)	A overview of how to account for hedging and derivatives activities and ensure compliance with the new standard.	2	UPD
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 Stock-Based Compensation	Overview of US GAAP requirements related to accounting for stock-based compensation for both employees and non-employees. Relevant fair value measurement guidance. Accounting for stock plan modifications The impact of recent accounting standard updates.	3	NEW
Accounting for Variable Interest Entities	Overview of US GAAP requirements related to accounting and financial reporting for variable interest entities. Defining variable interest entities and primary beneficiaries. Quantitative and qualitative factors in determining when to consolidate a nonvoting interest entity.	3	NEW

Accounting

	Course	Description	Credits
NEW	Accounting Standards Updates (ASUs) Issued in 2019	Overview of ASUs issued by the FASB in 2019.	1
	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
NEW	Advanced Derivative and Hedge Accounting Concepts	Overview of advanced guidance related to complex derivative and hedge accounting accompanied with illustrative examples.	3
	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
NEW	Annual GAAP Update—July 2019 Part 1	Overview of ASUs issued by FASB. SEC developments and enforcement actions.	2
NEW	Annual GAAP Update—July 2019 Part 2	Overview of SEC developments and enforcement actions. CAOB developments and guidance for leases and revenue recognition.	1.5
	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
NEW	ASUs Effective for 2019 Year-End and Beyond	Overview of ASUs effective for 2019 year-end and beyond.	2
	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
NEW	Building a Persuasive Case	An understanding of the role of persuasion in the accounting profession. The psychological and business motivations of accountants and clients during negotiations and the persuasive principles and tactics available for usage by the accountant during their work. Identification of ethical problems that can arise and their avoidance.	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

Accounting

Course	Description	Credits	
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	
Consolidation of VIEs, Part 1 (ASC 810)	This two-part program will walk participants through real-world examples and case studies and enable them to determine when a company has a variable interest in another entity, to establish that the other entity is a variable interest entity and to identify the criteria used to identify the primary beneficiary.	1	NEW
Consolidation of VIEs, Part 2 (ASC 810)	This two-part program will walk participants through real-world examples and case studies and enable them to determine when a company has a variable interest in another entity, to establish that the other entity is a variable interest entity and to identify the criteria used to identify the primary beneficiary.	2	NEW
Construction Industry Overall Landscape	An overview of the nature of construction contractors and the significant roles they play in the economy and the many facets of the industry, 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. The project management process that governs construction accounting and general management, including the management objective and numerous functions.	2	UPD
Cracking the Codification: U.S. 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	
Deep Dive into Financial Instruments	Examines the background that led to the key accounting standards which provide the foundation for how to accounting for financial instruments, 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	
Equity (ASC 505)	An overview of the definition and scope of elements classified as components of equity as well as general guidance related to equity. Pertinent rights, privileges and terms associated with various securities outstanding. Applicable accounting and reporting requirements for stock dividends and stock splits, treasury stock transactions and spinoff and reverse spinoff transactions. Illustrated examples of how to apply ASC 505, accounting for equity.	2	UPD
Evaluating the Quality of Earnings	Overview of impact of presentation and biased accounting. The related steps in evaluation of financial reporting quality. The quantitative tools to assess earnings quality and controlling earnings management and low-quality financial reporting.	1	NEW

Accounting

Course	Description	Credits
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
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: Derivatives & Hedging	Background on why ASU was issued, changes to presentation and disclosure and simplifications permitted by the new standard.	1.5
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 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 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 Challenges for Corporations - Q1 2020 with Coronavirus (COVID-19) Impact	Highlight challenging areas of financial reporting and accounting. Summarize sensitive areas for financial reporting under SEC rules and regulations. Recognize the impact of new auditing standards issued by the PCAOB. Recognize the AICPA's new nonauthoritative guidance on accounting for and auditing digital assets.	1
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
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
UPD Forensic Accounting	An overview of the definition of forensic accounting, how forensic accounting differs from traditional accounting, the benefits of developing forensic accounting skills and incorporating them into your organization and the tools and techniques that can be used in the detection of fraud.	2
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
NEW GAAP & Audit Issues and Highlights 2018-19	Overview of PCAOB and SEC guidance issued and impacting 2019. Review of major accounting changes impacting 2019. Review of lease accounting, goodwill impairment, business versus asset transactions and non-GAAP financial measures.	1.5
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

Accounting

Course	Description	Credits	
Impairment of Tangibles, Intangibles, and Goodwill	Review of assets subject to impairment testing. Calculation of impairment for definite and indefinite intangibles. Difference between calculation of impairments associated with goodwill versus intangibles other than goodwill. The differences between GAAP and IFRS with respect to the calculation and reporting of impairment losses.	2	NEW
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	
Implementing Revenue Recognition – Lessons Learned	Course provides information on implementation issues identified for topic 606 and lessons learned from issuers.	2	
Implications from the Adoption of the New Leasing Standard	Overview of background, lessee and lessor accounting and implementation issues.	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	
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	
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	
Introduction to Derivatives and Hedge Accounting	Overview of introductory accounting guidance related to derivatives and hedge accounting, with an emphasis on nonpublic entities accompanied with illustrative examples.	3	NEW
Introduction to Financial Reporting Quality	Introduction to financial reporting quality with identification of variations, quality indicators, financial statement comparisons, earnings quality and stock valuation.	1.5	NEW
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	
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	
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	
Liabilities (ASC 400-480)	An overview of the definition and scope of various types of liabilities, the nature, types, valuation, disclosure and recognition of liabilities and the primary considerations for accounting for liabilities. Illustrated examples of how to apply FASB ASC 405-480, accounting for liabilities.	3	UPD

Accounting

Course	Description	Credits
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 Mastering Accounting for Income Taxes (ASC 740)	Overview of foundational knowledge and critical strategies surrounding ASC 740. Identification of intraperiod and interperiod tax allocation. Relevant issues pertaining to accounting for income taxes.	2
Meeting SEC Disclosure Requirements: Compensation Discussion and Analysis	Gain a solid understanding of the many elements and requirements of the Compensation Discussion and Analysis (CD&A) as we explain the required disclosures along with guidance on how to obtain the required information effectively and efficiently. Participants will receive guidance and recommendations that help ensure compliance and minimize the likelihood of receiving comments from the SEC.	1
UPD 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
UPD 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
UPD 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
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
UPD Non-GAAP Financial Measures	An overview of the background and 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
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
Opening a New Chapter: Fresh-Start Accounting and Subsequent Events	Overview of fresh-start accounting (ASC 852) and subsequent events (ASC 855).	1.5

Accounting

Course	Description	Credits
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
PCAOB Inspection Findings	A look into the PCAOB inspection process, scope of inspections and the importance of the process.	1.5
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 for Current Expected Credit Losses (CECL) Model	Understanding the events and background that led to the changes in credit loss reporting. Institutions affected and required adoption timeframe of the new standard. Core provisions of the current expected credit loss standard and amendments and methodology application.	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 the international option for IFRS and SMEs.	3
Quality Control Standards, Part 1	Overview of the applicability and elements of quality control. Basic considerations when reviewing the work of others. Objectives and definitions of quality control standards for nonissuer engagements under QC Section 10 and related requirements.	1
Quality Control Standards, Part 2	Overview of the application of PCAOB's QC Section 20 to an issuer engagement. Review of the system of quality control and policies and procedures. Understanding of the administration of a quality control system.	1
Quality Control Standards, Part 3	Overview of the monitoring process and the contributory inspection procedures for monitoring. Review of internal compliance, possible need for external inspection and usage of peer review in substitution of monitoring.	1
Quality Control Standards, Part 4	Overview of 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 the performance of accounting, auditing and attestation engagements. Review of the Uniform Accountancy Act competency requirements.	1
Quality Control Standards, Part 5	Overview of membership requirements per SEC practice sections. Identification of the types of quality control standards that are included in the SEC practice section requirements of membership.	1

NEW

NEW

Accounting

	Course	Description	Credits
NEW	Reporting Discontinued Operations and Disclosures of Disposals of Components of an Entity ASU 2014-08	Understand the recent updates to guidance for reporting discontinued operations and disclosing disposals of property, plants and equipment. Explore how and why the definition of discontinued operations was changed. Gain an understanding of how to present financial statements and disclose disposals of property, plants and equipment as required under the updated guidance.	2
NEW	Revenue Recognition - Clarifications to the Standard (ASC 606)	Review of the revenue recognition standard jointly issued by the FASB and IASB. Deep dive into accounting standards updates released since the issuance of the converged standard and clarification on the new guidance.	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: 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
NEW	Revenue Recognition: Where Are We Now?	Overview of the importance of revenue recognition. Avoidance of traps in recognition dealing with delivery of products and services. Familiarity with GAAP revenue recognition requirements including multiple element arrangements.	1.5
	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
UPD	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
UPD	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
UPD	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
UPD	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

Accounting

Course	Description	Credits	
Securities and Exchange Commission Recent Developments and Update - 2019	An overview of the Securities and Exchange Commission is an independent federal government agency that has the responsibility for maintaining orderly capital markets, facilitating capital formation and protecting investors. The Public Company Accounting Oversight Board, (PCAOB), created by the Sarbanes-Oxley Act of 2002, is a non-profit corporation established by Congress to oversee the audits of public companies in order to protect investors and the public interest by promoting informative, accurate and independent audit reports. The PCAOB also oversees the audits of brokers and dealers, including compliance reports filed pursuant to federal securities laws, to promote investor protection. Leadership within the SEC and PCAOB changes often. With these changes come different priorities and diverse approaches to regulation, rule-making and enforcement. This CPE program provides a high-level overview of the some of the key areas of focus by the SEC and PCAOB within the past year and includes several examples of how the SEC is implementing its agenda and ensuring integrity in US capital markets.	2	UPD
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 (ASC 230)	An overview of the statement of cash flows as a required US GAAP financial statement that requires knowledge of ASC 230, the significant but sometimes subtle differences between net income, cash flow, and operating, investing and financing activities. Factors that produce accurate and timely cash statements which provide information crucial to any company's success. The three categories within a statement of cash flows: operating, investing and financing activities. A case study with journal entries and working schedules that provide an opportunity to practice real-world strategies while preparing a statement to completion.	2	UPD
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	
The Coronavirus (COVID-19) Impact: What Every CPA Should Know	Overview of the accounting, reporting and disclosure requirements of financial statements prepared under US GAAP and special purpose frameworks and the possible impacts of COVID-19. Discussion of the importance of internal control considerations during required financial statement reporting during this time. Identify tips for public accounting professionals who must still perform audit, attest and accounting services for reporting requirements of their clients.	2	NEW
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	

Accounting

Course	Description	Credits
UPD Transparency & Accuracy Through Fair Value Measurements (ASC 820)	An overview of how different definitions and guidance in the measurement of fair value contribute to added complexity in generally accepted accounting principles (GAAP) and how practical insight into fair value measurements can help bring transparency and accuracy to an organization's financial statements.	1.5
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
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

Auditing

Course	Description	Credits
NEW 2019 GAAS Update	Overview of changes to the standard auditor's report. Changes to the auditor's report for ERISA audits and recently proposed audit standards.	4
NEW Auditing Cash and Cash Equivalents	Understanding the differences in cash and cash equivalents. Identification of internal control weaknesses. Audit procedures utilized for detection of material misstatement and financial statement presentation and disclosure requirements.	2
NEW Auditing Inventory	Understanding the audit risks associated with inventory and the assessment of those risks. Areas for internal control weaknesses within the inventory cycle. Audit procedures utilized to detect material misstatements associated with inventory and financial statement presentation and disclosure requirements.	1.5
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 Control Risk Assessment Requirements	Learn required audit procedures for assessing internal controls.	2
UPD AICPA Cybersecurity Standards, Part 1	An overview of recent cybersecurity threats and the professional standard-setter response and 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
AICPA Documentation Requirements	Discussion of documentation standard requirements and purposes of proper documentation.	2
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

Auditing

Course	Description	Credits	
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	
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	
Annual Update for Employee Benefit Plans	Coverage of the employee benefit plan landscape and update on the DOL activity. The recent changes that impact employee benefit plan auditing and reporting and future applications. The risk assessment process and ensuring compliance with the standards including the related peer review implications. Specific procedures related to employee benefit plan audit areas. Response to common mistakes in administering and operating employee benefit plans.	2	NEW
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	
Audit and Attestation Update – 2019	Overview of guidance proposed and issued by the AICPA.	3	NEW
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 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

Course	Description	Credits
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
NEW Auditing Employee Benefit Plans – Part 1	Discussion of rules and regulations from the IRS and DOL associated with employee benefit plans. Identification of audit and reporting requirements, risk assessment process and documentation including internal controls. The linkage between the identified risks, assessed risks and detailed audit procedures. The unique attributes of employee benefit plans and the differences between an EBP audit and other financial statement audit engagements.	2
NEW Auditing Employee Benefit Plans – Part 2	Discussion of how to design audit procedures in direct response to assessed risk of material misstatement. The common audit procedures for employee benefit plans engagements. How the auditor should respond when operational and administrative errors are identified. Additional considerations such as maintaining the plan's qualified status, proper financial statement preparation and reporting and common mistakes.	2
Auditing Fair Value	Overview of accounting for fair value, auditing estimates (AU-C 540) and audit strategies.	2
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 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 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
UPD Auditing Revenue Recognition	An overview of GAAP requirements for revenue recognition, important considerations in auditing revenue, PCAOB guidance for transition adjustments, transition disclosures, controls and risk assessment.	2.5
Auditing Typical Investments	Learn the audit risks associated with a typical investment portfolio and how to assess those risks.	2
NEW Auditor Report Preparation	Learn about the basic elements of an unmodified report prepared under GAAS. The types of financial statement opinions. Common report modifications and explanatory language and special reporting considerations. Preparing audit reports under PCAOB auditing standards, Yellow Book and single audit engagements.	3
NEW Common Issues in Auditing Student Financial Assistance	Discussion of the single audit procedures to test compliance regarding student financial aid.	2

Auditing

Course	Description	Credits	
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	
Corruption, Part 1	Learn how and why corruption happens and how to deter and detect it in organizations.	2.5	
Corruption, Part 2	Learn how and why corruption happens and how to deter and detect it in organizations.	2.5	
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	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	
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	
Fraud in the Construction Industry - Part 1	Overview of the nature of fraud in the construction industry. Understand fraud indicators, existence and occurrence in the construction industry. Identify specific characteristics and behaviors of fraud in the construction industry.	1	NEW
Fraud in the Construction Industry - Part 2	Overview of various construction contract risks and construction fraud schemes. Appreciate the relationship between procurement and construction fraud. Identify perpetrator tactics associated with contract bidding.	1	NEW
Fraud in the Construction Industry - Part 3	Review the process of fraud investigation in the construction industry. Identify the documents used to investigate fraud occurrences. Discussion of the types of investigation interviews and the process of collecting and analyzing evidence for a fraud investigation.	1	NEW
Fraud in the Construction Industry - Part 4	Discussion of the impact of prevention and detection controls on combatting fraud in the construction industry. Preventative techniques companies can utilize. Various auditing procedures specific to the construction industry.	1	NEW

Auditing

Course	Description	Credits
Fraud Investigation – Part 1	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
NEW Fraud Investigation – Part 2	Learn the concealment investigation approaches, methods and techniques. Understand the elements of discovery sampling to gather evidence. The importance, value and collection of documentary evidence. Appreciate the techniques and practice of obtaining complex documentary evidence.	1
NEW Fraud Investigation – Part 3	Learn the interrogation plans, procedures and techniques concerning fraud. Identify the elements of crisis stages in fraud. Review witness inquiries and communication techniques as well as detecting deceptive behavior in an interview and the preparation of the fraud report.	1.5
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
NEW Going Concern Uncertainty	Learn the US GAAP requirements regarding going concern. Understand the auditor's responsibility, the audit procedures that need to be implemented and the resulting identification, if applicable, on the audit report. Review the impact of SAS No. 134, SSARs engagements and other important matters.	3
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
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

Auditing

Course	Description	Credits	
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	
Identifying and Communicating Internal Control Matters on an Audit	Discussion of the required communications related to internal control matters noted on a financial statement audit. Additional responsibilities when performing an integrated audit of internal controls. Properly classifying significant deficiencies and material weaknesses and the differences in audit requirements for public and nonpublic entities.	3.5	NEW
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	
Navigating System and Organization Control (SOC) Reports	Overview of the history and background of SOC reporting. The AICPA's determination of the need for SOC reporting. The components of SOC 1, SOC 2 and SOC 3 reports. Determination of the appropriate SOC report for an organization. Review auditing SOC reports.	2	NEW
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	UPD
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	UPD
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	UPD
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	UPD
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	
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	

Auditing

Course	Description	Credits
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
NEW Proposed Changes to Audit Evidence	Overview of changes proposed to the audit evidence standards.	1
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
NEW The 2017 PCAOB Auditor's Report	Understanding of the new auditor's report. Identification and reporting guidelines for critical audit matters (CAM) and Form AP.	2
NEW The Auditor's Responsibilities Relating to Other Information Included in Annual Reports	Review of SAS 137 and audit procedures for annual reports.	1
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 Life Cycle of the Internal Audit	Discussion of the purpose and importance of an internal audit. Steps that are involved in the life cycle of the internal audit. The impact of technology on internal audits and the risks addressed by internal auditors.	1
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
NEW The New Employee Benefit Plan (EBP) Auditor's Report	Review of the changes to the auditor's report for ERISA audits. Discussion of new terminology for EBP audits. The resulting changes to procedures as a result of the new standard.	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
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
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

Behavioral Ethics

Course	Description	Credits
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

Expectations of Corporate Governance and Social Responsibility in Today's World	Overview of agency theory and the role of the artificial person in corporate governance. Application of CSR and ESG. The success in CSR/ESG regarding the role of organized culture. Measurement of CSR/ESC success and recruitment of today's BOD. Identification of impediments to achievement of corporate governance ideals.	1.5	NEW
Maintaining Professional Ethics in a Culture of Oversharing	Understanding implications of oversharing on social media and how to avoid it. Building a positive digital persona, understanding best practices for social media and being in adherence to the AICPA Code of Professional Conduct guidelines.	1.5	NEW

Business Law

Course	Description	Credits
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

Business Management and Organization

Course	Description	Credits
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

Business Management and Organization

Course	Description	Credits
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
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
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
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

Communications and Marketing

Course	Description	Credits
Coaching Employees for Better Results	Discover how to better coach and mentor staff to help them achieve their professional goals.	1
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
Creating Effective Presentations	Learn from an expert presenter on how to best prepare and deliver a presentation.	2
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
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
UPD 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
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
UPD Email Communications	This course covers the art of crafting meaningful emails that save time for both the sender and the recipient, avoid embarrassing and potentially costly snafus, and advance business objectives	1.5
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

Communications and Marketing

Course	Description	Credits	
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	
Get Your Emails and Reports Read	Overview of the typical mistakes and complaints regarding emails and reports. Appreciation of the issue of information overload. Review of best practices associated with planning emails and reports.	1.5	NEW
Job Interviewing Skills	Identification of the most effective techniques regarding successful interviewing tactics from the initial first stages to final subsequent follow up. Review of effective resume writing, answering questions intelligently and with purpose.	2	NEW
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 Skills	Exploration of non-traditional traits for effective leadership to become an exceptional leader.	2	
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	
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	
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	
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.	1.5	UPD
Role of the Leader in Talent Development	Engaging course on the critical skills needed by a leader in developing new talent.	1.5	
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	

Communications and Marketing

Course	Description	Credits
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
NEW The Change Bully: Workplace Bullies - What to Do and When to Move On	Overview of identification of bullying behavior. Review of The Change Bully Framework. How to manage and deal with a bully in the workplace environment.	1
The Ultimate Endorsement: Unleash the Power of You	Learn to acquire an executive presence, professional foundation and micro messaging to gain powerful support.	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
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
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

Finance

Course	Description	Credits
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 Today	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 Controllership: 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 Controllership: 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
2019 GASB Update	This course takes you through debt disclosures, fiduciary activities, leases and GASB projects.	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 Single Audit Update	Review the approved methods of procurement, changes happening in single audits and common deficiencies.	2
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
NEW	Federal Government Contracting - Unallowable Costs	Participants will gain a practical and relevant understanding of accounting for unallowable cost under federal government contracts.	2.5
	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
NEW	GASB 84: Fiduciary Activities	Overview of GASB 84 and the decision-making process for identifying fiduciary activities and the related reporting.	1
	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
	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
	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
	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
UPD	Intermediate Governmental Accounting	An overview of the process used to convert fund financial statements to government-wide financial statements while defining the underlying internal control and financial reporting principles that underpin that process.	2.5
	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
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
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
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	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 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 Independence and Quality Control	Overview of 2018 Yellow Book independence rules and 2018 Yellow Book quality control changes.	2
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
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

NEW

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

Regulatory/ethics

Course	Description	Credits
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
NEW Anti-Retaliation: What You Need to Know	Outlines the current climate, events and trends associated with workplace retaliation and its prevention. Identification of the issues regarding disclosure/whistle-blowing (related to CPAs) and model anti-retaliation policies.	1.5
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 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
California Regulatory Review RRS-026-0418	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
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
NEW Creating a Culture of Integrity	Overview of definition of integrity and its importance in the workplace. How to build a culture of integrity and review of incorporation of the five-step process to achievement. Strategies for balancing integrity with business challenges.	2
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

Regulatory/ethics

Course	Description	Credits
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
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 – 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 and Professional Conduct for CPA's in Florida	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
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
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
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
Idaho Ethics	Overview of the AICPA Code of Professional Conduct, the state-specific rules governing professional conduct in Idaho and the processes, procedures and governing bodies responsible for enforcing the rules applicable to those engaged in the practice of public accounting in Idaho.	4.5
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

UPD

NEW

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
NEW Independence Requirements for Auditors	Overview of the requirements for independence in the AICPA's Code of Professional Conduct.	2
UPD Independence Technical Update	An overview of relevant independence rules from various governing organizations. It includes updated content to reflect the revised AICPA Code of Professional Conduct.	1
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
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
NEW Standards for Tennessee CPAs - State-Specific Ethics	Overview of the AICPA Code of Professional Conduct, the state-specific rules governing professional conduct in Tennessee and the processes, procedures and governing bodies responsible for enforcing the rules applicable to those engaged in the practice of public accounting in Tennessee.	2
The Power of Choices: Designed To Satisfy The Ethics Requirements Of §523.130 For The Texas State Board Of Public Accountancy	This course discusses the power of choices and stresses the importance of ethical behavior for certified public accountants. The course covers the Texas Rules of Professional Conduct and is designed to satisfy the ethics requirements of §523.130 for The Texas State Board Of Public Accountancy.	4
NEW The Role of the Whistleblower	Examination of the role of whistleblowing in the workplace. Historic overview of famous cases and their outcomes. Review of the laws in existence for protection of whistleblowing cases and related programs, procedures and concepts.	0.5
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
Virginia Ethics 2020	This course will analyze the AICPA Code of Professional Conduct and how it relates to enforcement cases, identify clarifications to the volunteerism guidelines for CPAs in Virginia, recognize the rules and regulations that guide the profession in the state of Virginia, analyze the difference between professional skepticism and professional judgment, identify different ethical decision-making models, and apply decision-making models to come to informed decisions during ethical dilemmas.	2
NEW Washington State Ethics 2020	Overview of AICPA Code of Professional Conduct, the state-specific rules governing professional conduct in Washington, including the 2020 Washington state ethics requirements and recent legislative changes. Ethical standards addressed by the International Ethics Board for Accountants and IRS Circular 230.	4
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

Information Technology

Course	Description	Credits
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
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

Information Technology

Course	Description	Credits	
California Consumer Privacy Act and What it Means for Accountants	Understanding of the details and requirements of the CCPA for businesses and consumer rights. Identification of companies and clients that are subjected to CCPA. How to be in compliance with CCPA. The economic impact of CCPA on different industries and costs associated with compliance.	2.5	NEW
Data Privacy Regulations and Risk Assessment Frameworks	Appreciating the importance of the impact of technology on privacy. The need for data privacy and data security. The resulting privacy laws and data protection compliance issues. Identification of privacy risk assessment frameworks.	2	NEW
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	
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	
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	The basics of blockchain. Applications of blockchain to virtual currencies. Applications of blockchain to other types of transactions. Investments in blockchain technology. Regulatory responses to the use of blockchain.	1	UPD

Management Services

Course	Description	Credits	
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	
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	
Considering an ESOP	Discover the purposes for which ESOPs can be used along with the benefits and disadvantages of ESOPs.	2	
Developing Business in the Professional Services Industry	Understanding the values and beliefs required to effectively develop new business. Identification of a process and tools for strategic accomplishment. Appreciation of the planned account development (PAD) process. Review of the client discussion process (CDP) and key skills. Review of continual opportunities.	2	NEW
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	
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	

Management Services

Course	Description	Credits
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
NEW Leading Through Emotional Intelligence	Understanding of emotional intelligence and how it is the ability to relate to people, manage difficult situations and influence and inspire others. The reasons that one should develop this skill set and the resulting benefits both professionally and personally. Recognition of triggers for oneself and how to best control your emotions and thus be more influential.	2
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
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
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
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
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
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
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
Sexual Harassment – Creating a Safe and Positive Workplace	– This course meets the New York City and New York state requirements. 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

Management Services

Course	Description	Credits	
Sexual Harassment - Creating a Safe and Positive Workplace (IL)	Review of Title VII of the Civil Rights Act of 1964, the Illinois Human Rights ACT (IHRA) and various case law principles concerning the prohibition and prevention of workplace discrimination, sexual harassment and retaliation in the workplace. Current trends in legislation. Employees' rights and employers' responsibilities under federal and Illinois law. Identification of strategies for preventing workplace discrimination and harassment and creating a safe workplace environment.	2	NEW
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	
Techniques for Project Scope and Time Management	Appreciation and understanding of implementation of established scope and time management techniques to ensure timely completion of critical projects.	2	NEW
Personal Development			
Course	Description	Credits	
Adaptive and Transformative Leadership	Discussion regarding the competencies for adaptive leadership. Identify competencies for transformational leadership. Learn about the elements of a successful culture for growth and innovation.	1	NEW
Fostering a Culture of Ownership	Learn the definitions of responsibility, accountability, entitlement, employee satisfaction, employee engagement, culture and ownership. Define the essential elements of a culture of ownership. Understand how to build a culture of ownership.	1	NEW
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	
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	
Becoming a Manager	Delve into the definition of the manager role. The values and beliefs needed to be a great manager. Identification of new range of skills for managers and the goals, process and skills of delegating and providing feedback effectively. Review examples and recommended action planning process for applying program learning to the job.	2	NEW
Behavioral Interviewing	This course covers types of interviews an employer may conduct and the differentiating value of behavioral interviewing. Course participants will learn about the processes of preparing for and conducting a behavioral interview, as well as using behavioral interviewing to assess experienced and inexperienced candidate skills.	1.5	NEW
Being a Trusted Advisor	Understand the importance of building trust with clients, prospects and internal stakeholders. Appreciate the values and beliefs of being a trusted advisor. Review the critical skills such as listening, partnering flexibility and emotional intelligence. Delve into tactics developing new business such as networking, prospect pursuit and proposals. Learn to achieve a trusted advisor culture in your department.	2	NEW

Personal Development

Course	Description	Credits
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
NEW Critical Thinking - The Key to Success in Any Job	Discussion of what top skills and attributes employers are looking for. Learn what critical thinking is, why it is important and the steps of critical thinking. The development of critical thinking skills in others and yourself.	1
NEW Diagnosing Your Organization	Overview of the nonfinancial organizational diagnosis processes and the reasons to conduct a nonfinancial organizational assessment. Identification of the criteria for selecting the nonfinancial organizational assessment team both internal and external. An overview of popular nonfinancial assessment models and nonfinancial organizational analysis models.	1
Establishing a Successful Mentoring Program	Review the components of successful mentoring programs and best practices.	2
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 Fostering a Culture of Premier Client Experience (CX)	Discussion of the definitions and latest research on best practices in client experiences. Understanding the levels of CX and the components of CX competency. Identification of troubleshooting problems in your CX, traits of top CX-focused leaders and how to accelerate the CX advantage.	2
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 Help Your New Hires Hit the Ground Running	Understanding the importance of onboarding, orientation, assimilation and creating an organizational culture. Showcasing the important research on this topic. Review of the critical need to assimilate new leaders and new team members and specific strategies for the first 90 days.	2
Launching a Winning Team	Learn what a team-based organization is and how a team-based organization differs from a hierarchy.	1
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
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
Performance Management Essentials	Review the elements of the performance management cycle and process for planning the timeline of activities. Learn the dos and don't's of performance management.	1
Power of Positivity	Explore the different forms of positivity and how to apply positivity to your life and career.	2
Problem Solving	Discussion on how to identify real problems, not just the symptoms and how to help analyze the issues.	1
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

Personal Development

Course	Description	Credits	
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	
Talent Management and Succession Planning	Discussion regarding talent management. Defining succession planning. Identification of the four types of critical success factors (CSF). Review of the elements of the nine-box grid.	1.5	NEW
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	UPD
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 Truth About Multitasking	Discover why multitasking has become the norm in the accounting profession. A review of the latest research on the impact of both multitasking and multicomunication on outcomes and workplace performance. Determination of when and when it is not effective. Identification of alternatives to multitasking and multicomunication. Discussion of healthy multitasking tips for times when it is unavoidable.	1	NEW
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	
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	
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	
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	

Specialized knowledge

Course	Description	Credits
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
NEW Business Owners' Response to Coronavirus (COVID-19)	Understand a high-level overview of the COVID-19 pandemic. Review the variety of government resources and solutions for businesses and individuals through the CARES Act and the Small Business Administration. Learn how certain employment acts may affect employers during their response to COVID-19. Discuss the tax relief and incentives offered to individuals and businesses under the CARES Act.	2
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
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
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
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: Valuing Intangibles: Part 1	Course provides an introduction to intangibles and its impact on financial statements.	2
Business Valuation: Valuing Intangibles: Part 2	Course covers valuation techniques for brands and customer relations, purchase price allocations, goodwill and impairments.	1.5
NEW Canada's COVID-19 Economic Response Plan	Overview of the COVID-19 pandemic and its specific impacts on Canada. Recognize how Canada's COVID-19 economic response plan supports individuals, businesses and industries.	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
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
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

Specialized knowledge

Course	Description	Credits	
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	
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	
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	
Net Neutrality	Overview of the definition and history of net neutrality. Discussion of legal actions involving Comcast and Verizon. Understanding the Federal Communications Commission rulemaking on net neutrality.	1.5	NEW
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	
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	UPD
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	
2018 Reviewing Tax Returns for Accuracy and Efficiency	Walkthrough of the role of the reviewer in the tax return preparation process.	1.5	
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 (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	
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	

Taxes

Course	Description	Credits
NEW An Introduction to Charitable Conservation Contributions	An overview of the what, why and who of charitable conservation contributions. Key criteria and terms for claiming this deduction. Conservation easements including syndicated conservation easements. Documentation and relevant forms to support the deduction.	1.5
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
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
NEW Base Erosion and Anti-Abuse Tax	An overview of background and policy methodology, computations and filing requirements.	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
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

Taxes

Course	Description	Credits	
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	
Corporate and Pass-Through Entity Taxation	An overview of fundamental differences between the corporate or partnership entity for doing business and how this impacts tax return preparation for 2019 returns. Reporting of K-1 items for pass-through entities for 2019 tax returns.	2	NEW
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 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 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	An overview of cancellation of debt income (CODI). Tax code, related regulations, IRS rulings and case law and how they have shaped this increasingly complex area of tax law. Critical terms and concepts and a valuable historical view that puts the issue in perspective today.	1.5	NEW
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	An overview of the reasons for offering energy efficiency federal tax credits, credits that are available for individuals and credits that are available for businesses. Examples of completed tax forms.	1	UPD
Estate and Gift Taxes - Part 1	An overview of the estate and gift tax system with comparison between current tax law and anticipated future law changes, also the complex and constantly changing rules that govern estate and gift taxes.	1	UPD
Estate and Gift Taxes - Part 2	An overview of the tax systems that govern the transfer of wealth at death and the estate and gift tax system.	1	UPD

Taxes

Course	Description	Credits
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
NEW Ethics Checklist for Tax Practitioners	An overview 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. The standards imposed on tax return positions and the penalties imposed by the Code and Regulations on taxpayers and tax return preparers.	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
NEW Federal Tax Implications for the Trucking Industry	This course will be an overview of tax issues important to the trucking industry including applicable deductions, entity type considerations, excise tax, fuel tax, and heavy highway vehicle use tax.	1.5
NEW Federal Tax Update - Q1 2020	This course will be an overview of the SECURE Act, extends legislation, the final Opportunity Zone regulations, new court cases, and new IRS announcements and rulings.	2
NEW Federal Tax Update - Q4 2019	This course will review tax issues important to the fourth quarter of 2019 including the reviewing the inclusion of state refunds, examination of opportunity zones, coverage of new court cases, review of the final regulations of Section 199A, and review of other IRS announcements and rulings.	2.5
UPD Federal Taxation of Bitcoin & Virtual Currencies	Overview of the digital currency bitcoin and the federal taxation treatment of transactions using bitcoin.	1
UPD Foreign Account Tax Compliance Act (FATCA)	Understand the background and technical requirements of the Foreign Account Tax Compliance Act.	1.5
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
NEW Foreign Tax Credit and Foreign-Source Dividend Received Deduction	This course will be an overview of the worldwide tax system vs. the territorial tax system, foreign tax credit, and foreign-source dividend received deduction.	3

Taxes

Course	Description	Credits
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
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
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
Global Intangible Low-Taxed Income (GILTI) Rules	This cover will cover the background and policy of these provisions, methodology and computations, and filing requirements.	2
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
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 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

NEW

Taxes

	Course	Description	Credits
UPD	Individual Taxation and Preparation Strategies – Part 1	An overview of new issues in individual taxation, understanding individual taxation and the best strategies to comply with the ever-changing tax laws used in preparing Form 1040.	2.5
UPD	Individual Taxation and Preparation Strategies – Part 2	An overview of rules for determining adjustments in arriving at adjusted gross income, rules for determining itemized deductions and the related limitations, calculation of income tax and tax credits, recent revisions to Form 1040 and best practices for staying in compliance.	2.5
UPD	Individual Taxes – Income & Deductions (2019 Returns)	An overview of calculating total income, calculating adjusted gross income, calculating the standard deduction and itemized deductions. Calculating tax.	3
NEW	Individual Taxes – Itemized Deductions (Impact of Tax Cuts and Jobs Act)	This course will be an overview of the form 1040 framework, income and exclusions, adjustments to arrive at AGI, deductions from AGI, and total tax and credits.	3
UPD	IRA Mastery	An overview of IRAs in general, traditional IRAs, Roth IRAs, a comparison of traditional IRAs and Roth IRAs and inherited IRAs.	2
NEW	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
	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
	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
NEW	Key Coverage of the CARES Act and the Families First Coronavirus Response Act	Key coverage of the detailed issues related to the Coronavirus Aid, Relief, and Economic Security Act (CARES) Act provisions and respond to them. Recognize the application process of Paycheck Protection Program (PPP) loans. Identify the provisions and application process of Economic Injury Disaster Loans offered by US Small Business Administration (SBA). Review of the detailed issues related to the Families First Coronavirus Response Act.	3
	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
NEW	Maximizing Higher Education Tax Credits	An overview of the higher education industry overall, including ways students pay for higher education, the process for calculating and claiming the American Opportunity Credit and the Lifetime Learning Credit. Strategies for maximizing the amount of each credit. Relevant other issues in higher education, including the tax treatment of scholarships and grants, relevant deductions and tax-advantaged savings accounts.	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 State Tax Developments	Identify key provisions of the 2017 Tax Cuts and Jobs Act and the impact of the Supreme Court's decision in South Dakota v. Wayfair. Recognize how some high-tax states are responding to the 2017 Tax Cuts and Jobs Act and Wayfair changes. Apply state and local tax planning strategies to individuals affected by key provisions of the 2017 Tax Cuts and Jobs Act. Identify issues to watch this year, including new excise taxes and tax implications of state-level marijuana laws. Understand the tax incentives offered by opportunity zones under the TCJA and state responses to opportunity zones. Appreciate the effect of the legalization of marijuana on state tax revenues.	1.5
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
Opportunity Zones	An overview of creation of opportunity zones, the types of gains eligible for deferral through investment in an opportunity fund, holding period of qualified opportunity fund investment to recognize reduction in deferred gain and qualification and definition of a qualified opportunity fund and the related compliance testing.	2
Organization for Economic Co-operation and Development (OECD) Base Erosion and Profit Shifting (BEPS) Initiative	An 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
Overview of the Federal Tax System	An overview of individual income tax, corporate income tax, estate, gift and generation skipping transfer taxes, social insurance taxes and major excise taxes.	3.5
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

UPD

NEW

NEW

NEW

Taxes

Course	Description	Credits
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 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 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
NEW Preparing Form 1040 for Tax Year 2019	An overview of filing considerations, income inclusions and exclusions, adjusted gross income and taxable income, standard deduction and itemized deductions, computing credits and total tax.	3
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 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
NEW Preparing Texas Franchise Tax Returns for Businesses	An overview of the Texas tax structure. Calculating taxable Texas revenue and total franchise tax. Calculating the Texas apportionment factor. How to accurately prepare Texas franchise tax forms. How to use Texas tax instructions to accurately prepare franchise tax returns. The filing requirements for different taxes due and which forms to use when filing a franchise tax return in Texas.	1,5
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
NEW Quarterly Estimates for Individual	An overview of the requirements for making estimated tax payments, methods and resources available for computing estimated tax payments and special issues which may arise when making estimated tax payments.	2
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

Taxes

Course	Description	Credits	
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	
Reporting Book-Tax Differences—Understanding Schedules M-1 and M-3	An overview of why differences exist, book-tax differences, schedules M-1 and M-3 and the effect of reporting timing differences.	1	NEW
Retirement Planning – Options and Tax Implications	An overview of reasons to save for retirement, retirement account options and how to withdraw. Basics of social security.	2	NEW
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	
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 Corporations - Formation and Termination, Part 3: Revocation, Termination, Reorganization and Special Topics	Explore the fundamental differences in the ways S corporations can be terminated and understand the tax implications when entities cease to be an S corporation or when they terminate by voluntary revocation. Participants also will explore the regulations governing redemptions, liquidations and reorganizations.	1.5	NEW
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	
Section 351: An Overview	An overview of property exchanges (the general rules), Section 351 (the basic requirements), receipt of money or other property, assumption of liabilities, other special rules and considerations, basis and holding period computations and filing and record keeping requirements.	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	

Taxes

Course	Description	Credits
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 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
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
NEW State Tax Update (August 2019): How States Are Responding to the Tax Cuts and Jobs Act, the Wayfair Decision and Other Hot Topics	An overview of the impact of the Supreme Court's 2018 decision in South Dakota v. Wayfair. Key provisions of the 2017 Tax Cuts and Jobs Act with state and local tax implications. 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. Recent issues in state-level taxation, hot topics and areas that practitioners should continue to monitor.	1.5
NEW State Tax Update Q4 2019	An overview of the 2020 Further Consolidated Appropriations Act and the 2017 Tax Cuts and Jobs Act, state conformity, the Supreme Court decision South Dakota v. Wayfair, marketplace facilitator laws, economic nexus, the impact of marijuana legalization on state tax revenues and market-based sourcing.	2
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
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 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
NEW Tax Implications for Farming: Farm Income and Expenses	This two-part course intends to provide an overview of the federal tax implications for the business of farming that includes cultivating, operating or managing a farm for profit. In Part 1, various issues with respect to farm income and expenses are discussed, together with special rules of estimated tax for farmers. Part 2 of the course focuses on farm assets. Topics covered include basis of farm assets, depreciation, depletion, amortization, disposition of farm properties, installment sales and involuntary conversion of farm properties.	3
NEW Tax Implications for Members of the Clergy and Religious Workers	This course reviews the history, purpose and common tax issues for taxation or nontaxation of clergy income. Understanding the employment tax laws for clergy. Identification of allowable expenses, deductions and credits for members of the clergy.	2

Taxes

Course	Description	Credits	
Tax implications for Members of the US Armed Forces	An overview of the market for tax advice services for members of the US armed forces, how taxable income for members of the US armed forces is determined, what adjustments to taxable income are available for members of the US armed forces, determination and treatment of combat pay for tax purposes, the special provisions for real estate transactions for income tax purposes for members of the US armed forces, and the special provisions for filing income tax returns and paying income taxes for members of the US armed forces.	1	NEW
Tax Implications for the Oil and Gas Industry	An overview of issues related to the major phases of oil and gas taxation including asset acquisition, exploration and development, production, disposition of assets and special issues.	1.5	NEW
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 of Divorce	An overview of filing statuses and dependency issues, alimony, retirement benefit allocations and others. Applicable professional standards in divorce engagements.	2	NEW
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	
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 with Other Countries - The Fundamentals	Through discussion, diagrams and examples, participants will gain a fundamental understanding of the policies and provisions included in US income tax treaties.	2	NEW
Taxation Implications for Controlled Foreign Corporations	With in-depth discussion augmented by detailed, relevant and practical charts and tables, participants will define what it means to be a controlled foreign corporation (CFC) and gain a solid working knowledge of shareholder taxation in the often-challenging CFC environment. Topics to be addressed include an overview of CFC-related issues and the nuances of previously taxed income.	2	UPD
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	
The At Risk and Passive Activity Loss Rules – How They Impact You	For decades, so-called "at risk" Rules (ARR) and passive activity loss (PAL) legislation have sought to prevent the spread of tax shelters. ARR limits an investor's deductible losses to the amount he or she has at risk, while PAL has attempted to take the motivation out of mass-marketed tax shelters. Each brings layers of complexities that pose serious challenges to financial professionals today.	2	NEW
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	

Taxes

	Course	Description	Credits
NEW	The Taxation of Corporate Liquidations	An overview of the basics on corporate taxation and the identification of a corporate liquidation, the US federal income tax consequences of a taxable and nontaxable liquidation, the requirements of a Section 332 liquidation, deemed and de facto liquidations. The reporting requirements relevant to liquidations.	1.5
UPD	The Transition Tax-Section 965 and Final Treasury Regulations	An overview of Worldwide tax system vs. territorial tax system, Section 965 and the final Treasury Department regulations. Filing requirements for the transition tax.	2
	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
NEW	Understanding Federal Excise Taxes	An overview of various types of federal excise taxes, required forms for reporting excise taxes and credits, frequency and methods used to pay and report federal excise taxes and consequences of nonpayment or failure to report excise taxes.	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
NEW	Understanding the "Other" Taxes: Consumption, Retail, Value Added and Destination-Based	Through discussion, diagrams and examples, participants will gain a 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
NEW	Understanding the Foreign Tax Credit Rules and Calculations	An 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
NEW	Understanding the New Excess Business Loss Limitation	An overview of the new excess business loss limitation enacted by the Tax Cuts and Jobs Act and to whom it applies, how the excess business loss interacts with other loss limitation provisions and how to calculate the business loss using Form 461.	2
	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
NEW	Utilizing Enrolled Agents in Your Firm	An overview of requirements, licensing and process to obtain the enrolled agent designation. Examples of work an enrolled agent may do within a firm setting.	1
	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
NEW	Working in the Legal Marijuana Industry - Taxation Updates and Other Tips	An overview of the current status of the legal marijuana industry, legislative updates affecting the legal marijuana industry, technology use in the legal marijuana industry, accounting and tax issues in the legal marijuana industry and advocacy and network opportunities for CPA firms.	1

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
Fraud in the Construction Industry – Parts 1, 2, 3 and 4
Identity Theft Today
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

Government Solutions

2019 NFP Accounting and Auditing Update
Federal Government Contract – Unallowable Costs
GASB 84: Fiduciary Activities
Yellow Book Independence and Quality Control

Industry niches

Construction Industry – Overall Landscape
Construction Industry – Revenue Recognition: ASC 606 Analysis for the Construction/Real Estate Industry
Construction Industry – Advanced Topics
Developing Business in the Professional Service Industry
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 for Health Care Entities
Revenue Recognition: ASC 606 Analysis for the Construction/Real Estate Industry
Revenue Recognition: ASC 606 Analysis for the Life Sciences Industry
Revenue Recognition: Technology Industry
The New Employee Benefit Plan (EBP) Auditor's Report

Leadership/professional development

Adaptive and Transformative Leadership
Becoming a Highly Effective Performer
Becoming a Manager
Being a Trusted Advisor
Coaching Employees for Better Results
Creating a Culture of Integrity
Creating Effective Presentations
Developing Powerful Business Acumen
Diagnosing Your Organization
Effective Business Communication
Emotional Intelligence
Executive Leadership Tools and Tactics, Parts 1 and 2
Executive Presence
Fostering a Culture of Ownership
Fostering a Culture of Premier Client Experience
Help Your New Hires Hit The Ground Running
Leadership Skills
Leading Through Emotional Intelligence
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
Talent Management and Succession Planning
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
Recent AICPA and PCAOB Activity
Quality Control Standards – Parts 1, 2, 3, 4 and 5
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 include:

- More than 1,000+ 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](https://www.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.

GASB Update

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

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 on 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

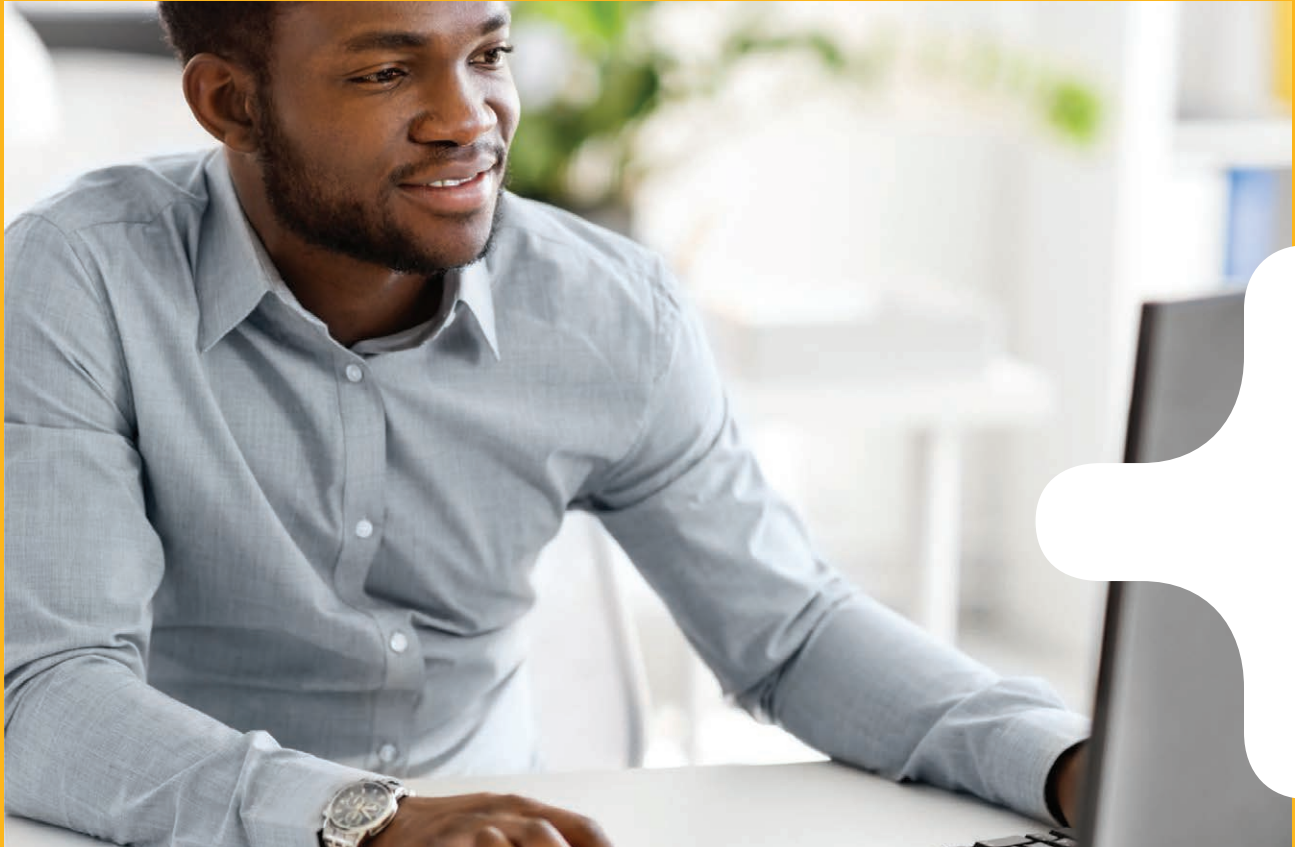
Yellow Book 2018 Revision

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



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Course titles are subject to change and new titles are added with developments in accounting, tax, and the broader market.

June 2020

SUN	MON	TUE	WED	THUR	FRI	SAT
	1	2	3	4	5	6
	<ul style="list-style-type: none"> ● Business Owners' Response to Coronavirus (COVID-19) 9 AM CDT 2 credits ● 2020 GASB Update 9 AM CDT 2 credits ● No Easy Choices: Decision-Making Under Stress 12 PM CDT 2 credits ● The COVID-19 Impact on Leases 2 PM CDT 2 credits ● Pass Through Entity Update Q1 2020 with Coronavirus (COVID-19) Implications 7 PM CDT 2 credits 	<ul style="list-style-type: none"> ● Coronavirus (COVID-19): Lessons from this Unprecedented Tax Season 9 AM CDT 2 credits ● State Tax Update with Coronavirus (COVID-19) Implications- Q1 2020 12 PM CDT 2 credits ● Individual Taxes - Itemized Deductions (2019 Returns) 2 PM CDT 3 credits ● Leading Through Emotional Intelligence 7 PM CDT 2 credits 	<ul style="list-style-type: none"> ● Federal Tax Update-June 2020 9 AM CDT 2 credits ● SEC Quarterly Update with Coronavirus (COVID-19) Implications 12 PM CDT 1 credit ● Accounting and Auditing Update-Q1 2020 2 PM CDT 2 credits ● 2019 Single Audit Update 7 PM CDT 1.5 credits 	<ul style="list-style-type: none"> ● Pass Through Entity Update Q1 2020 with Coronavirus (COVID-19) Implications 9 AM CDT 2 credits ● It's Worse Than You Thought: A Leadership Mindset to Flourish in Tough Times 12 PM CDT 2 credits ● Coronavirus (COVID-19) Tax Impact Update: Where Are We Now? 12 PM CDT 1 credit ● 2020 Professional Ethics Update 2 PM CDT 2 credits ● Asset Misappropriation Schemes 7 PM CDT 1.5 credits 	<ul style="list-style-type: none"> ● Leading Federal Tax Business Update 9 AM CDT 2 credits ● Independence Technical Update 10 AM CDT 1 credit ● Yellow Book Performance Audits (Updated for Government Auditing Standards 2018 Revision) 2 PM CDT 3 credits ● Strategic Thinking 7 PM CDT 1 credit 	<ul style="list-style-type: none"> ● 2019 GAAP Update 9 AM CDT 4 credits
7	8	9	10	11	12	13
<ul style="list-style-type: none"> ● Accounting and Auditing Update-Q1 2020 2 PM CDT 2 credits 	<ul style="list-style-type: none"> ● Impairment of Tangibles, Intangibles and Goodwill 9 AM CDT 2 credits ● Managing a Virtual Team 12 PM CDT 2 credits ● Individual Taxes - Itemized Deductions (2019 Returns) 2 PM CDT 3 credits ● State Tax Update with Coronavirus (COVID-19) Implications- Q1 2020 7 PM CDT 2 credits 	<ul style="list-style-type: none"> ● Coronavirus (COVID-19) Impact: What Every CPA Should Know 9 AM CDT 2 credits ● Evaluating the Quality of Earnings 12 PM CDT 1 credit ● Stimulating Innovative Thinking in Your Teams 2 PM CDT 1 credit ● Independence Technical Update 7 PM CDT 1 credit 	<ul style="list-style-type: none"> ● 2019 GAAP Update 9 AM CDT 4 credits ● Accounting and Auditing Update-Q1 2020 12 PM CDT 2 credits ● 2020 GASB Update 2 PM CDT 2 credits ● Revenue Recognition: Where Are We Now? 7 PM CDT 3.5 credits 	<ul style="list-style-type: none"> ● Motivating Remote Workers 9 AM CDT 1 credit ● Fostering a Culture of Ownership 12 PM CDT 1 credit ● Federal Tax Update 2 PM CDT 4 credits ● Stress Management at Work 7 PM CDT 1.5 credits 	<ul style="list-style-type: none"> ● Individual Taxes - Itemized Deductions (2019 Returns) 9 AM CDT 3 credits ● Evaluating the Quality of Earnings 12 PM CDT 1 credit ● Change Management 2 PM CDT 1 credit ● Introduction to Bookkeeping 7 PM CDT 1.5 credits 	<ul style="list-style-type: none"> ● Ethics, Integrity and the AICPA Code of Conduct 9 AM CDT 4 credits

- Accounting
- Auditing
- Behavioral Ethics
- Business Law
- Business Management and Organization
- Communications and Marketing
- Computer Software & Application
- Economics
- Finance
- Government
- Regulatory/ethics
- Information Technology
- Management Services
- Personal Development
- Specialized knowledge
- Taxes

June 2020

SUN	MON	TUE	WED	THUR	FRI	SAT
14	15	16	17	18	19	20
<ul style="list-style-type: none"> ● Pass Through Entity Update Q1 2020 with Coronavirus (COVID-19) Implications 2 PM CDT 2 credits 	<ul style="list-style-type: none"> ● Federal Tax Update 9 AM CDT 8 credits ● Overview of Practical Project Management for any Effort 12 PM CDT 1 credit ● Independence Technical Update 2 PM CDT 1 credit ● Introduction to Bookkeeping 7 PM CDT 1.5 credits 	<ul style="list-style-type: none"> ● 2019 GAAP Update 9 AM CDT 4 credits ● Navigating the Overlap of Employer Provisions from COVID-19 Legislation 9 AM CDT 2 credits ● Pass Through Entity Update Q1 2020 with Coronavirus (COVID-19) Implications 12 PM CDT 2 credits ● 2019 Not-For-Profit Accounting & Auditing Update 2 PM CDT 1.5 credits ● Evaluating the Quality of Earnings 7 PM CDT 1 credit 	<ul style="list-style-type: none"> ● Tax Reform and Multinational Entities 9 AM CDT 3 credits ● Effective Business Communication 12 PM CDT 1 credit ● Accounting and Auditing Update-Q1 2020 2 PM CDT 2 credits ● Managing a Virtual Team 7 PM CDT 2 credits 	<ul style="list-style-type: none"> ● Mastering Accounting for Income Taxes (ASC 740) 9 AM CDT 1 credit ● Lessons Learned Working From Home 9 AM CDT 1 credit ● Coronavirus (COVID-19): Reducing Income Taxes for Small Businesses 12 PM CDT 2 credits ● Excel: Text Functions 2 PM CDT 2 credits ● Strategic Thinking 7 PM CDT 1 credit 	<ul style="list-style-type: none"> ● 2020 Professional Ethics Update 9 AM CDT 2 credits ● Collaborating to Build Your Personal and Professional Networks 12 PM CDT 1 credit ● Business Owners Response to Coronavirus (COVID-19) 2 PM CDT 2 credits ● Excel: Introduction to Excel Formulas and Charting 7 PM CDT 2 credits 	<ul style="list-style-type: none"> ● 2020 GASB Update 9 AM CDT 2 credits
21	22	23	24	25	26	27
<ul style="list-style-type: none"> ● Individual Taxes - Itemized Deductions (2019 Returns) 2 PM CDT 3 credits 	<ul style="list-style-type: none"> ● Seeking Millennials and Generation Z 9 AM CDT 1 credit ● Stimulating Innovative Thinking in Your Teams 12 PM CDT 1 credit ● Stress Management at Work 2 PM CDT 1.5 credits ● 2019 Single Audit Update 7 PM CDT 1.5 credits 	<ul style="list-style-type: none"> ● 2019 GAAP Update 9 AM CDT 4 credits ● Drafting Audit Reports Under SAS No. 134 and PCAOB 12 PM CDT 3 credits ● State Tax Update with Coronavirus (COVID-19) Implications- Q1 2020 2 PM CDT 2 credits ● 2019 Single Audit Update 7 PM CDT 1.5 credits 	<ul style="list-style-type: none"> ● Stress Management at Work 9 AM CDT 1.5 credits ● Leading Through Emotional Intelligence 12 PM CDT 2 credits ● Accounting and Auditing Update-Q1 2020 2 PM CDT 2 credits ● Asset Misappropriation Schemes 7 PM CDT 1.5 credits 	<ul style="list-style-type: none"> ● Pass Through Entity Update Q1 2020 with Coronavirus (COVID-19) Implications 9 AM CDT 2 credits ● Problem Solving 12 PM CDT 1 credit ● Excel: LOOKUP, CHOOSE, INDEX, MATCH, XLOOKUP and SWITCH Functions 2 PM CDT 2 credits ● Accounting and Auditing Update-Q1 2020 7 PM CDT 2 credits 	<ul style="list-style-type: none"> ● Fundamentals of International Tax (Updated for Tax Reform Provisions) 9 AM CDT 4 credits ● 2020 Yellow Book and Single Audit Update 12 PM CDT 2 credits ● 2020 Professional Ethics Update 2 PM CDT 2 credits ● Excel: Introduction to Excel Formulas and Charting 7 PM CDT 2 credits 	<ul style="list-style-type: none"> ● Federal Tax Update 9 AM CDT 8 credits

- Accounting ● Auditing ● Behavioral Ethics ● Business Law ● Business Management and Organization ● Communications and Marketing
- Computer Software & Application ● Economics ● Finance ● Government ● Regulatory/ethics ● Information Technology ● Management Services
- Personal Development ● Specialized knowledge ● Taxes

June 2020

SUN	MON	TUE	WED	THUR	FRI	SAT
28	29	30				
<ul style="list-style-type: none"> ● Ethics, Integrity and the AICPA Code of Conduct 2 PM CDT 4 credits 	<ul style="list-style-type: none"> ● Drafting Audit Reports Under SAS No. 134 and PCAOB 9 AM CDT 3 credits ● 2020 Professional Ethics Update 12 PM CDT 2 credits ● Federal Tax Update 2 PM CDT 4 credits ● Revenue Recognition: Where Are We Now? 7 PM CDT 3.5 credits 	<ul style="list-style-type: none"> ● Email Communications 9 AM CDT 1 credit ● Ethical Foundations 12 PM CDT 1 credit ● Individual Taxes - Itemized Deductions (2019 Returns) 2 PM CDT 3 credits ● State Tax Update with Coronavirus (COVID-19) Implications- Q1 2020 7 PM CDT 2 credits 				

- Accounting
 ● Auditing
 ● Behavioral Ethics
 ● Business Law
 ● Business Management and Organization
 ● Communications and Marketing
 ● Computer Software & Application
 ● Economics
 ● Finance
 ● Government
 ● Regulatory/ethics
 ● Information Technology
 ● Management Services
 ● Personal Development
 ● Specialized knowledge
 ● Taxes

July 2020

SUN	MON	TUE	WED	THUR	FRI	SAT
			1	2	3	4
			<ul style="list-style-type: none"> ● Accounting and Auditing Update-Q2 2020 9 AM CDT 2 credits ● Considering an ESOP 12 PM CDT 2 credits ● Excel: Text Functions 2 PM CDT 2 credits ● Ethical Foundations 7 PM CDT 1 credit 	<ul style="list-style-type: none"> ● Collaborating to Build Your Personal and Professional Networks 9 AM CDT 1 credit ● State Tax Update with Coronavirus (COVID-19) Implications-Q2 2020 12 PM CDT 2 credits ● Excel: Making Sense of Data 2 PM CDT 2 credits ● Accounting and Auditing Update-Q2 2020 7 PM CDT 2 credits 	July 4 Holiday - No Webcasts	July 4 Holiday - No Webcasts
5	6	7	8	9	10	11
<ul style="list-style-type: none"> ● State Tax Update with Coronavirus (COVID-19) Implications-Q2 2020 2 PM CDT 2 credits 	<ul style="list-style-type: none"> ● Federal Tax Update 9 AM CDT 8 credits ● Collaborating to Build Your Personal and Professional Networks 12 PM CDT 1 credit ● Financial Statement Fraud 2 PM CDT 2 credits ● 2020 Yellow Book and Single Audit Update 7 PM CDT 2 credits 	<ul style="list-style-type: none"> ● Annual Tax Update For Individuals 9 AM CDT 4 credits ● Seeking Millennials and Generation Z 12 PM CDT 1 credit ● Stimulating Innovative Thinking in Your Teams 2 PM CDT 1 credit ● Stress Management at Work 7 PM CDT 1.5 credits 	<ul style="list-style-type: none"> ● The Fraud Interview 9 AM CDT 1 credit ● Myths and Realities of Working From Home 12 PM CDT 1 credit ● Tax Reform and Multinational Entities 2 PM CDT 3 credits ● Change Management 7 PM CDT 1 credit 	<ul style="list-style-type: none"> ● Statement of Cash Flows (ASC 230) 9 AM CDT 2 credits ● Ethical Foundations 12 PM CDT 1 credit ● Individual Taxes - Itemized Deductions (2019 Returns) 2 PM CDT 3 credits ● Financial Statement Fraud 7 PM CDT 2 credits 	<ul style="list-style-type: none"> ● Accounting and Auditing Update-Q2 2020 9 AM CDT 2 credits ● Strategic Thinking 12 PM CDT 1 credit ● Pass-Through Entity Tax Update Q2 2020 with Coronavirus (COVID-19) Implications 2 PM CDT 2 credits ● Excel: LOOKUP, CHOOSE, INDEX, MATCH, XLOOKUP and SWITCH Functions 7 PM CDT 2 credits 	<ul style="list-style-type: none"> ● Federal Tax Update 9 AM CDT 8 credits

- Accounting
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- Economics
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- Information Technology
- Management Services
- Personal Development
- Specialized knowledge
- Taxes

July 2020

SUN	MON	TUE	WED	THUR	FRI	SAT
12	13	14	15	16	17	18
<ul style="list-style-type: none"> ● SEC Quarterly Update-Q2 2020 2 PM CDT 2 credits 	<ul style="list-style-type: none"> ● Impairment of Tangibles, Intangibles and Goodwill 9 AM CDT 2 credits ● State Tax Update with Coronavirus (COVID-19) Implications-Q2 2020 12 PM CDT 2 credits ● Excel: Become an IF Statement Guru 2 PM CDT 2 credits ● 2020 Professional Ethics Update 7 PM CDT 2 credits 	<ul style="list-style-type: none"> ● Federal Tax Update 9 AM CDT 8 credits ● Impairment of Tangibles, Intangibles and Goodwill 12 PM CDT 2 credits ● Cybersecurity Preparedness for CPAs 2 PM CDT 3 credits ● Accounting and Auditing Update-Q2 2020 7 PM CDT 2 credits 	<ul style="list-style-type: none"> ● Federal Tax Update-July 2020 9 AM CDT 2 credits ● Collaborating to Build Your Personal and Professional Networks 12 PM CDT 1 credit ● GASB Conceptual Framework: Disclosures 2 PM CDT 1 credit ● Introduction to Financing an Entity Using Equity Instruments 7 PM CDT 3 credits 	<ul style="list-style-type: none"> ● Audit and Attestation Update 9 AM CDT 4 credits ● Pass-Through Entity Tax Update Q2 2020 with Coronavirus (COVID-19) Implications 12 PM CDT 2 credits ● Problem Solving 2 PM CDT 1 credit ● Lessons Learned Working From Home 7 PM CDT 1 credit 	<ul style="list-style-type: none"> ● Annual Tax Update For Individuals 9 AM CDT 4 credits ● Developing Ideal Working Relationships 12 PM CDT 1 credit ● A Guide Through Common Audit Deficiencies 2 PM CDT 2 credits ● Revenue Recognition: Where Are We Now? 7 PM CDT 3.5 credits 	<ul style="list-style-type: none"> ● Annual Tax Update For Individuals 9 AM CDT 4 credits
19	20	21	22	23	24	25
<ul style="list-style-type: none"> ● Revenue Recognition: Where Are We Now? 2 PM CDT 3.5 credits 	<ul style="list-style-type: none"> ● Forensic Accounting 9 AM CDT 2 credits ● Pass-Through Entity Tax Update Q2 2020 with Coronavirus (COVID-19) Implications 12 PM CDT 2 credits ● Change Management 2 PM CDT 1 credit ● Excel: Become an IF Statement Guru 7 PM CDT 2 credits 	<ul style="list-style-type: none"> ● Accounting and Auditing Update-Q2 2020 9 AM CDT 2 credits ● Stimulating Innovative Thinking in Your Teams 12 PM CDT 1 credit ● Cybersecurity Preparedness for CPAs 2 PM CDT 3 credits ● State Tax Update with Coronavirus (COVID-19) Implications- Q2 2020 7 PM CDT 2 credits 	<ul style="list-style-type: none"> ● Leading Federal Tax Business Update-Q2 2020 9 AM CDT 2 credits ● Revenue Recognition: Where Are We Now? 12 PM CDT 3.5 credits ● Developing Ideal Working Relationships 2 PM CDT 1 credit ● Federal Tax Update-July 2020 7 PM CDT 2 credits 	<ul style="list-style-type: none"> ● Federal Tax Update 9 AM CDT 8 credits ● Stress Management at Work 12 PM CDT 2 credits ● Cybersecurity Preparedness for CPAs 2 PM CDT 3 credits ● Accounting and Auditing Update-Q2 2020 7 PM CDT 2 credits 	<ul style="list-style-type: none"> ● Audit and Attestation Update 9 AM CDT 4 credits ● Excel: Become an IF Statement Guru 12 PM CDT 2 credits ● 2020 GAAS Update 2 PM CDT 4 credits ● 2020 Professional Ethics Update 7 PM CDT 2 credits 	<ul style="list-style-type: none"> ● Federal Tax Update 9 AM CDT 8 credits

- Accounting
 ● Auditing
 ● Behavioral Ethics
 ● Business Law
 ● Business Management and Organization
 ● Communications and Marketing
 ● Computer Software & Application
 ● Economics
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 ● Government
 ● Regulatory/ethics
 ● Information Technology
 ● Management Services
 ● Personal Development
 ● Specialized knowledge
 ● Taxes

July 2020

SUN	MON	TUE	WED	THUR	FRI	SAT
26	27	28	29	30	31	
<ul style="list-style-type: none"> ● Mastering Accounting for Income Taxes (ASC 740) 2 PM CDT 1 credit 	<ul style="list-style-type: none"> ● Audit and Attestation Update 9 AM CDT 4 credits ● Federal Tax Update-July 2020 12 PM CDT 2 credits ● Excel: Awesome Tricks to Use Conditional Counts, Sums and Averages 2 PM CDT 2 credits ● Stimulating Innovative Thinking in Your Teams 7 PM CDT 1 credit 	<ul style="list-style-type: none"> ● 2020 GAAP Update 9 AM CDT 4 credits ● Pass-Through Entity Tax Update Q2 2020 with Coronavirus (COVID-19) Implications 12 PM CDT 2 credits ● Developing Ideal Working Relationships 2 PM CDT 1 credit ● Drafting Audit Reports Under SAS No. 134 and PCAOB 7 PM CDT 3 credits 	<ul style="list-style-type: none"> ● Audit and Attestation Update 9 AM CDT 4 credits ● Excel: Become an IF Statement Guru 12 PM CDT 2 credits ● Leading Federal Tax Business Update-Q2 2020 2 PM CDT 2 credits ● Federal Tax Update-July 2020 7 PM CDT 2 credits 	<ul style="list-style-type: none"> ● Cybersecurity Preparedness for CPAs 9 AM CDT 3 credits ● Data and Analytics Overview 12 PM CDT 1.5 credits ● State Tax Update with Coronavirus (COVID-19) Implications-Q2 2020 2 PM CDT 2 credits ● Leadership and Balance in Turbulent Times 7 PM CDT 2 credits 	<ul style="list-style-type: none"> ● Audit and Attestation Update 9 AM CDT 4 credits ● 2020 Yellow Book and Single Audit Update 12 PM CDT 2 credits ● Leading Federal Tax Business Update-Q2 2020 2 PM CDT 2 credits ● Revenue Recognition: Where Are We Now? 7 PM CDT 3.5 credits 	

- Accounting
 ● Auditing
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 ● Regulatory/ethics
 ● Information Technology
 ● Management Services
 ● Personal Development
 ● Specialized knowledge
 ● Taxes

August 2020

SUN	MON	TUE	WED	THUR	FRI	SAT
						1
						<ul style="list-style-type: none"> ● 2020 GAAP Update 9 AM CDT 4 credits
2	3	4	5	6	7	8
<ul style="list-style-type: none"> ● Accounting and Auditing Update-Q2 2020 2 PM CDT 2 credits 	<ul style="list-style-type: none"> ● 2020 Social Security and Medicare Tax Update 9 AM CDT 2 credits ● Excel: LOOKUP, CHOOSE, INDEX, MATCH, XLOOKUP and SWITCH Functions 12 PM CDT 2 credits ● Pass-through Entity Tax Update Q2 2020 with Coronavirus (COVID-19) Implications 2 PM CDT 2 credits ● 2020 Professional Ethics Update 7 PM CDT 2 credits 	<ul style="list-style-type: none"> ● Sexual Harassment-Creating a Safe and Positive Workplace (Staff Version) 9 AM CDT 2 credits ● Accounting and Auditing Update - Q2 2020 12 PM CDT 2 credits ● Cybersecurity Preparedness for CPAs 2 PM CDT 3 credits ● State Tax Update with Coronavirus (COVID-19) Implications-Q2 2020 7 PM CDT 2 credits 	<ul style="list-style-type: none"> ● 2020 Audit Update 9 AM CDT 4 credits ● Statement of Cash Flows (ASC 230) 12 PM CDT 2 credits ● Excel: Unlock the power of pivot tables 2 PM CDT 2 credits ● A guide Through Common Audit Deficiencies 7 PM CDT 2 credits 	<ul style="list-style-type: none"> ● Federal Tax Update 9 AM CDT 8 credits ● Excel: Text Functions 12 PM CDT 2 credits ● Revenue Recognition: Where Are We Now? 2 PM CDT 3 credits ● Going Concern Uncertainty 7 PM CDT 2.5 credits 	<ul style="list-style-type: none"> ● Federal Tax Update - August 2020 9 AM CDT 2 credits ● Leading vs. Managing: What to Do When and with Whom 12 PM CDT 1 credit ● Financial Statement Fraud 2 PM CDT 2 credits ● Strategic Thinking 7 PM CDT 1 credit 	<ul style="list-style-type: none"> ● Federal Tax Update 9 AM CDT 8 credits
9	10	11	12	13	14	15
<ul style="list-style-type: none"> ● Mastering Accounting for Income Taxes (ASC 740) 2 PM CDT 2 credits 	<ul style="list-style-type: none"> ● 2020 Audit Update 9 AM CDT 4 credits ● Getting "UP!" Supercharging Your Energy 12 PM CDT 2 credits ● Cybersecurity Preparedness for CPAs 2 PM CDT 3 credits ● 2020 Social Security and Medicare Tax Update 7 PM CDT 2 credits 	<ul style="list-style-type: none"> ● Controllership and IT Management 9 AM CDT 2 credits ● Data and Analytics Overview 12 PM CDT 1.5 credits ● Excel: Range Names and Excel Tables 2 PM CDT 2 credits ● Pass-through Entity Tax Update Q2 2020 with Coronavirus (COVID-19) Implications 7 PM CDT 2 credits 	<ul style="list-style-type: none"> ● Federal Tax Update 9 AM CDT 4 credits ● Your Go-To Guide to S Corporations 12 PM CDT 2 credits ● 2020 Yellow Book and Single Audit Update 2 PM CDT 2 credits ● Accounting and Auditing Update - Q2 2020 7 PM CDT 2 credits 	<ul style="list-style-type: none"> ● 2020 Tax Update For Individuals 9 AM CDT 4 credits ● Sexual Harassment-Creating a Safe and Positive Workplace (Staff Version) 12 PM CDT 2 credits ● Excel: Date and Time Functions, Data Validation, and Circular References 2 PM CDT 2 credits ● The Fraud Interview 7 PM CDT 1 credit 	<ul style="list-style-type: none"> ● 2020 Audit Update 9 AM CDT 4 credits ● Excel: Unlock the Power of Pivot Tables 12 PM CDT 2 credits ● Cybersecurity Preparedness for CPAs 2 PM CDT 3 credits ● Leading vs. Managing: What to Do When and with Whom 7 PM CDT 1 credit 	<ul style="list-style-type: none"> ● 2020 GASB Update 9 AM CDT 2 credits

- Accounting ● Auditing ● Behavioral Ethics ● Business Law ● Business Management and Organization ● Communications and Marketing
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August 2020

SUN	MON	TUE	WED	THUR	FRI	SAT
16	17	18	19	20	21	22
<ul style="list-style-type: none"> ● 2020 Tax Update For Individuals 2 PM CDT 4 credits 	<ul style="list-style-type: none"> ● Federal Tax Update 9 AM CDT 8 credits ● Excel: Introduction to Excel Formulas and Charting 12 PM CDT 2 credits ● 2020 Professional Ethics Update 2 PM CDT 2 credits ● A Guide Through Common Audit Deficiencies 7 PM CDT 2 credits 	<ul style="list-style-type: none"> ● Audit Quality: How to Prevent Audit Failure 9 AM CDT 2 credits ● Getting "UP!" Supercharging Your Energy 12 PM CDT 2 credits ● Global Telework - The Future of Work Is Here 2 PM CDT 1 credit ● Pass-through Entity Tax Update Q2 2020 with Coronavirus (COVID-19) Implications 7 PM CDT 2 credits 	<ul style="list-style-type: none"> ● 2020 Audit Update 9 AM CDT 4 credits ● Controllership and IT Management 12 PM CDT 2 credits ● State Tax Update with Coronavirus (COVID-19) Implications-Q2 2020 2 PM CDT 2 credits ● Your Go-To Guide to S Corporations 7 PM CDT 2 credits 	<ul style="list-style-type: none"> ● Accounting and Auditing Update - Q2 2020 9 AM CDT 2 credits ● Excel: Date and Time Functions, Data Validation, and Circular References 12 PM CDT 2 credits ● Federal Tax Update 2 PM CDT 4 credits ● GASB Conceptual Framework: Disclosures 7 PM CDT 1 credit 	<ul style="list-style-type: none"> ● 2020 GAAP Update 9 AM CDT 4 credits ● 2020 Yellow Book and Single Audit Update 12 PM CDT 2 credits ● Stress Management at Work 2 PM CDT 1.5 credits ● SEC Quarterly Update-Q2 2020 7 PM CDT 2 credits 	<ul style="list-style-type: none"> ● 2020 GAAP Update 9 AM CDT 4 credits
23	24	25	26	27	28	29
<ul style="list-style-type: none"> ● Accounting and Auditing Update - Q2 2020 2 PM CDT 2 credits 	<ul style="list-style-type: none"> ● 2020 GASB Update 9 AM CDT 2 credits ● Power of Positivity 12 PM CDT 2 credits ● Outbound Transactions 2 PM CDT 3 credits ● Considering an ESOP 7 PM CDT 2 credits 	<ul style="list-style-type: none"> ● Accounting and Auditing Update - Q2 2020 9 AM CDT 2 credits ● Global Telework - The Future of Work Is Here 12 PM CDT 1 credit ● Pass-through Entity Tax Update Q2 2020 with Coronavirus (COVID-19) Implications 2 PM CDT 2 credits ● Leading Through Emotional Intelligence 7 PM CDT 2 credits 	<ul style="list-style-type: none"> ● 2020 Audit Update 9 AM CDT 4 credits ● Collaborating to Build Your Personal and Professional Networks 12 PM CDT 1 credit ● 2020 GAAP Update 2 PM CDT 4 credits ● State Tax Update with Coronavirus (COVID-19) Implications-Q2 2020 7 PM CDT 2 credits 	<ul style="list-style-type: none"> ● 2020 Tax Update For Individuals 9 AM CDT 4 credits ● Excel: Awesome Tricks to Use Conditional Counts, Sums and Averages 12 PM CDT 2 credits ● The Life Cycle of the Internal Audit 2 PM CDT 1 credit ● Independence Technical Update 7 PM CDT 1 credit 	<ul style="list-style-type: none"> ● Deep Dive: Financial Instruments 9 AM CDT 2 credits ● Developing Ideal Working Relationships 12 PM CDT 1 credit ● Introduction to Financing an Entity Using Equity Instruments 2 PM CDT 3 credits ● 2020 Professional Ethics Update 7 PM CDT 2 credits 	<ul style="list-style-type: none"> ● Federal Tax Update 9 AM CDT 4 credits

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August 2020

SUN	MON	TUE	WED	THUR	FRI	SAT
30	31					
<ul style="list-style-type: none"> ● Revenue Recognition: Where Are We Now? 2 PM CDT 3 credits 	<ul style="list-style-type: none"> ● 2020 GAAP Update 9 AM CDT 4 credits ● Excel: Become an IF Statement Guru 12 PM CDT 2 credits ● State Tax Update with Coronavirus (COVID-19) Implications-Q2 2020 2 PM CDT 2 credits ● GASB Conceptual Framework: Disclosures 7 PM CDT 1 credit 					

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Certificate programs



Whether you're looking to expand your expertise or deep dive into a specific area of focus, Becker has you covered. The Becker certificate programs grant you access to course content needed to help you reach peak proficiency, give your resume a boost and earn some CPE credits. Check out these unique certificate programs – exclusively offered by Becker.

Visit [becker.com/cpe/catalog](https://www.becker.com/cpe/catalog) to view all of the certificates available.

Microsoft® Excel Certificate Series

Becker's exclusive Microsoft® Excel Certificate programs give you hands-on, scenario-focused lessons that will help accounting professionals of all skill levels. Designed by Excel guru Dr. Wayne Winston, these certificates align with his recently released book "Microsoft® Excel 2019 Data Analytics and Business Modeling" and are the industry's only Excel certificates that awards CPE credit. They include a series of lessons that helps you use Excel to ask the right questions and get actionable answers.

Microsoft® Excel Fundamentals Certificate

Price: \$279

Microsoft® Excel skills in VLOOKUP, pivot tables, INDEX and other critical functions have become an essential part of an accountant's daily tasks. With Becker's 12-course series you'll get a thorough overview of all the fundamental aspects of Excel as well as practical ways to effectively and efficiently leverage Excel.

Total credits: 22.5

Individual Tax Consulting and Return Preparation Certificate

Price: \$279

Be a stand-out with your tax clients. This 8-course series is designed to specifically help you prepare individual tax returns and best utilize the tax return process to provide valuable consultative advice to your clients. You will learn not only what is new in tax but will be armed with solutions for approaching clients and understanding their specific issues. Upon completion, participants will have at their disposal the necessary and most pertinent information to discuss with clients as well as physical references for how items are reported on the applicable tax forms.

Total credits: 16.5

Microsoft® Excel Data Analytics Certificate

Price: \$149

This 6-course series is designed to give you a deeper understanding of the more advanced Excel functions, learn how to visualize data like a pro, and learn how to master statistical concepts that will help you convert data into useful information. Due to content overlap, learners who have already purchased the Fundamentals Certificate Program should purchase the Combination program instead.

Total credits: 14

Microsoft® Excel Fundamentals + Data Analytics Combination Package

Price: \$329

If your organization has a need for training in both fundamentals and data analytics, choose this combined package which includes the entire Fundamentals Certificate plus the two additional courses from the Data Analytics Certificate. Students who complete this package will receive a certificate and 28 hours of CPE credit.

Total credits: 28

Artificial Intelligence for Financial Services

Price: \$350

Becker partnered with Northeastern University, a thought leader in artificial intelligence, to create Artificial Intelligence for Financial Services. This certificate is an on demand course consisting of four modules that take a deep dive into the changing technological landscape of the financial services industry. Designed and taught by AI experts, this program will provide 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.

Total credits: 11.5

Course delivery options



Course delivery options

Continuing Professional Education courses from Becker are designed to keep accounting and finance professionals on top of today's critical business issues. Our flexible formats fit busy schedules and preferred learning styles.

Live in-house training

Becker's live in-house training provides efficient and effective learning across a range of subjects – a powerful and productive tool for firms and corporations of all sizes.

- Simultaneous face-to-face learning for multiple team members
- Instant feedback from instructors
- Content tailored to fit your needs: the timing, topics and course of your choosing
- Experienced, expert speakers

Applicable categories:

- Accounting
- Audit
- 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)

Participants 11–50 @ \$125 each

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.

Content licensing

DIY in-house training

There are more than 600+ courses available in Becker's online library that you can license for your in-house training needs.

Many of our online two-hour CPE courses include a detailed PowerPoint® deck that can be tailored for in-house training presentations by your instructor for several hours of live content.

Licensing fees include unlimited use of instructional materials for one year (with a minimum purchase of six credits). Materials come complete with reference to all research materials.

Price per CPE credit hour

6-9 credits	\$1,100
10-19 credits*	\$900
20+ credits*	\$600

Add-on options include:

Content customization

Teaching staff to present licensed course material

** To receive special pricing per credit hour, all hours must be licensed at the same time.*



Custom course development and webinar service

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.

Take our delivery platform and the expertise of our instructors to facilitate live or online training in one or multiple locations – with content that can be tailored to customize messaging to a specific group or audience.

Pricing

Pricing for course development and special services is based on complexity and volume of work. For pricing requests, Becker will meet with your organization to determine what's required and prepare a scoping document with quote for your review.

Webinar to online course conversion

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.

This service includes:

- Multiple instructional design options
- Pilot testing, quiz and exam questions
- All compliance requirements necessary to meet the National State Board of Accountancy CPE requirements



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.



Heather Luttrell, CPA

Heather is a Certified Public Accountant in the states of Tennessee and Georgia with 17 years of experience in corporate income tax. She began her career with PwC in Atlanta, GA where she practiced income tax accounting and compliance for clients in a variety of industries and served as an instructor for national ASC 740 associate series training. Heather served as Tax Director for public companies including Regal Entertainment Group and most recently, Scripps Networks Interactive. She holds a Bachelors degree in Business Administration and Masters of Accountancy from the University of Tennessee.



Chris Province, CPA

Chris Province is an award-winning seminar leader who has authored many CPE courses. He is currently an instructor and author for Thomson Reuters including TaxWatch University, Gear-Up and PPC, teaching both live courses and online courses. Chris has served as a member of the national AICPA S-Corporation Technical Resource Panel and as a member of the Qualifications Committee for the California Board of Accountancy. He is currently a member of the AICPA and the California Society of Certified Public Accountants.



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.



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 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.



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.



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.



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.



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.



Kelly Richmond Pope, CPA, PhD

Kelly Richmond Pope is an associate professor at DePaul University in Chicago where she teaches financial, managerial and forensic accounting. In 2018, Pope became a TED speaker with her impactful and timely TED Talk entitled “How whistle-blowers shape history.” Her research has been published in the Behavioral Research in Accounting, Auditing: A Journal of Theory & Practice, Journal of Business Ethics, The CPA Journal and WebCPA. She has a PhD in accounting from Virginia Tech University and is a licensed CPA.



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.



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.

**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.



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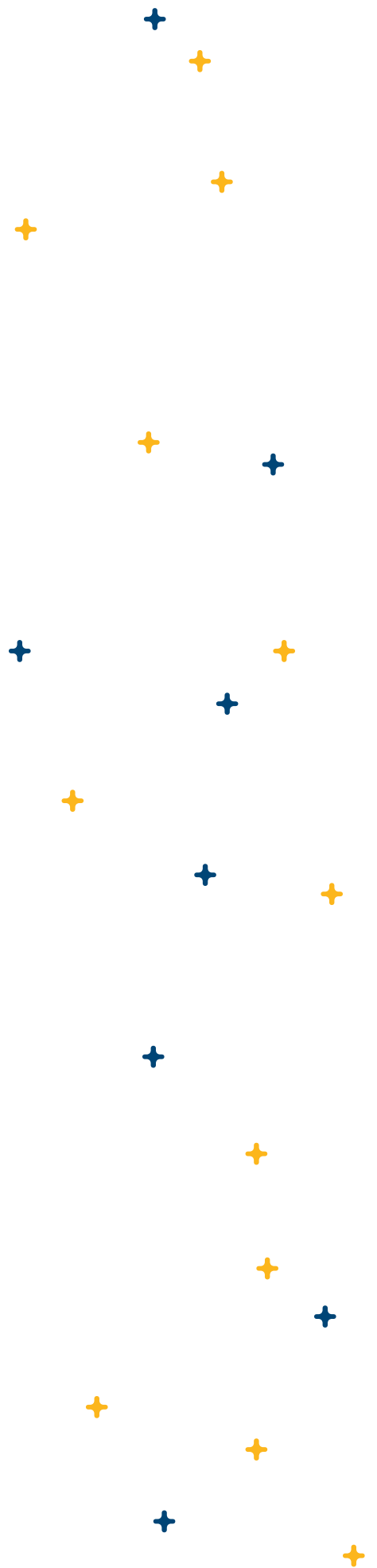
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