CHECKPOINT LEARNING®

CPE

FOR TAX & ACCOUNTING PRACTITIONERS

SPRING 2016

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DIRECTORY

SPRING 2016

CERTIFICATE PROGRAMS

LIVE LEARNING

ONLINE LEARNING

SELF-STUDY COURSES

GROUP TRAINING RESOURCES

ABOUT US

Checkpoint Learning® provides continuing professional education (CPE) and training solutions for tax, accounting and finance professionals. From week-long destination conferences and public seminars in nationwide locations, to webinars, interactive online and mobile courses, and self-study courses, professionals can choose from more than 900 titles to design a learning plan. Our mission is to improve the productivity and profitability of accounting, tax and corporate finance professionals by rethinking traditional processes, leveraging cutting-edge technology and providing the most accurate and insightful CPE available.

- Learning opportunities include annual update courses, hot topics and breaking news, in-depth specialty titles and staff level training programs.
- CPE compliance tracking and learning management for individuals and firms.
- Custom curriculum development, training and consulting solutions.
- Certificate programs provide specialized technical expertise in key subject areas.

WHAT'S NEW...

EBIA EMPLOYEE BENEFITS WEBINARS AND SEMINARS NOW AVAILABLE FROM CHECKPOINT LEARNING

EBIA's seminars and webinars cover a variety of employee benefits subjects, including health care reform, cafeteria plans, 401(k) plans, consumer-driven health care, COBRA, HIPAA, ERISA for health and welfare plans and domestic partners.

EBIA public seminars
See page 54.

EBIA webinars
See page 54.

EBIA annual conference
See page 55.

2016 LIVE EVENT SCHEDULES

Go ahead and plan your learning year!

Gear Up conferences and seminars
See pages 7 – 22.

AuditWatch public seminars
See pages 46 – 50.

Webinars through August 2016
See pages 31 – 35.

2016 VIRTUAL CONFERENCES

Checkpoint Learning is offering five virtual conferences this year, starting in May. Each of these web-based events provides top-tier speakers, great session line-ups and the ability to register for a single day or the entire conference.

NEW Employee Benefit Plans Virtual Conference
See page 29.

NEW Not-for-Profit Virtual Conference
See page 29.

2016 Year-End Mega-Conference
See page 30.

LOOK FOR SUBSCRIPTION, EARLY BIRD DISCOUNTS AND QUANTITY SAVINGS OPPORTUNITIES THROUGHOUT THE CATALOG!

PREMIER AND PREMIER PLUS

Look for the green icon for information on what products are included with the Premier Plus and Premier CPE Packages or what discounts apply to select product lines for subscribers. Applies at various levels to Gear Up, AuditWatch, Checkpoint Learning webinars, online courses and downloadable self-study courses. Details: page 25.

EARLY BIRD DISCOUNT

Look for this orange icon for information on what Early Bird offers apply to select product lines. Gear Up and AuditWatch both have Early Bird offers available. Gear Up details: pages 7 – 22. AuditWatch details: pages 46 – 50.

QUANTITY DISCOUNT

Look for the blue icon for information on what quantity discount offers apply to select product lines. Checkpoint Learning webinars and print-based self-study based on PPC Guides both have quantity discount offers available. Details: pages 32 – 35, 45.

Catalog publication April 2016. CPE accreditation information, including NASBA, QAS Self Study, IRS, CFP and CTEC, can be found by product line inside this catalog and in more detail at cl.tr.com.

CONTACT US

General Information and Sales:
cl.tr.com
800.231.1860 (Monday – Friday 8:00 a.m. – 6:00 p.m. CST)

Customer Service and Product Support:
support.rg.tr.com
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CHECKPOINT LEARNING®

CERTIFICATE-GRANTING PROFESSIONAL PROGRAMS

FOR MORE INFORMATION, VISIT **CL.TR.COM/GETCERTIFICATE** OR CALL **800.231.1860**

CERTIFICATE PROGRAMS

A new level of assurance in practical skills training

Tax Fundamentals Certificate Program

Develop a stronger, smarter tax team that understands the concepts behind tax form completion.

Page 5

Forensic Accounting Certificate Program

Increase your practice development and career opportunities related to fraud and forensic accounting.

Page 5

Tax Research Certificate Program

Develop and enhance foundational tax research knowledge to ensure consistency and accuracy every time.

Page 6

Health Care Reform Certificate Program

Increase your client consulting and revenue opportunities related to health care reform legislation.

Page 6

Tax and accounting professionals are required to be knowledgeable about a wide range of very technical topics. If they aren't, it can cost time, money and client confidence. That's why we developed Checkpoint Learning Certificate Programs. Offered in online and webinar blended learning formats, these programs can be completed on your timeline and are a great way to earn CPE and gain specialized technical expertise in key subject areas. Checkpoint Learning Certificate Programs deliver much more than specialized knowledge — they also deliver the peace of mind that comes with knowing that you and your staff have what it takes to handle the complex practice areas.

800.231.1860
cl.tr.com/getcertificate

TAX FUNDAMENTALS CERTIFICATE PROGRAM

Basics to Big Picture: Federal Tax Concepts

Learn what's behind the forms for a stronger, smarter team. A firm grasp on the fundamentals makes for more efficient, effective tax professionals. Recent years have seen last-minute tax legislation focused on new and extended benefits — knowing how these critical changes fit into the big picture is as critical as keeping current with new regulations. Tax practitioners are obligated to provide their clients with the most accurate information and advice in complying with tax reporting requirements — which means every member of your tax preparation team will benefit from having the general knowledge in a broad range of tax topics provided by the Checkpoint Learning Tax Fundamentals Certificate Program™.

Make sure your tax team is as efficient as possible with a foundational understanding of individual, partnership, C Corporation and S Corporation taxation concepts and current issues.

$499 | **40** CPE credits

FORENSIC ACCOUNTING CERTIFICATE PROGRAM

Take a Closer Look at What's Behind the Numbers

In today's business environment, fraud is pervasive — so much that no entity or individual is immune to the threat. The demand has never been higher for forensic accounting professionals with the combination of education, skills and experience needed to detect and deter fraud. We have designed the Checkpoint Learning Forensic Accounting Certificate Program™ to ensure that you are equipped with both education and skills that enable you to act with confidence, certainty and authority when it comes to identifying fraud, supporting litigation and resolving disputes.

Expand your skills and expertise, meet CPE, CFF and CFE continuing education requirements and increase practice development and career opportunities.

$499 | **32** CPE credits

TAX RESEARCH CERTIFICATE PROGRAM

Build a Solid Foundation for Your Tax Research

You know it's vital that your staff is competent in tax research. Unfortunately, tax research proficiency is too often underserved by formal education programs, leaving accountants missing key skills required to perform tax engagements effectively. This program is ideal for anyone wanting to improve their tax research skills and become more efficient. The Checkpoint Learning Tax Research Certificate™ Program helps candidates develop foundational tax research knowledge while earning Continuing Professional Education credit.

Managers:

Increase your staff's level of tax research proficiency and ensure consistency across your team.

Professionals:

Display your expertise to current and prospective employers when you add this certificate to your resume and LinkedIn profile.

$599 | **22** CPE credits

HEALTH CARE REFORM CERTIFICATE PROGRAM

Your Blueprint to the Affordable Care Act

The implementation of the Affordable Care Act has left a lot of questions for tax practitioners.

It's left a lot of questions for clients, too — only they expect you to have all the answers. We have designed the Checkpoint Learning Health Care Reform Certificate Program™ to ensure that you know the ins and outs of the new health care regulations. Candidates will gain a higher level of confidence when it comes to the employer and individual mandates of the Affordable Care Act. The completed certificate program represents competency with legislative updates, reporting requirements, forms and calculations, health insurance marketplaces, net investment income tax and client consulting on both tax and non-tax health care reform issues.

Increase your client consulting and revenue opportunities related to health care reform.

$499 | **27** CPE credits

GEAR UP

SEMINARS, CONFERENCES AND SELF-STUDY COURSES

FOR SCHEDULE, PRICING AND MORE CPE INFORMATION, VISIT **CL.TR.COM/G** OR CALL **800.231.1860**.

Gear Up has more than 45 years experience providing nationwide seminars, destination conferences and self-study courses. Our speakers and authors are leading tax and accounting practitioners who provide insightful application of tax and accounting information.

- Full-day seminar attendees receive continental breakfast, lunch, break refreshments, free parking and comprehensive manual
- Week-long CPE conferences combine work and play, enabling attendees to earn 40 – 48 CPE credits in exciting locations
- Self-study courses are available in print format with optional video and audio presentations
- Manuals for our flagship 1040 and Business Entities courses are now available for free on ProView eReader with qualifying self-study purchase or Gear Up seminar registration at a Thomson Reuters-sponsored event

CPE SPONSORS QAS

CTEC

APPROVED CONTINUING EDUCATION PROVIDER

CFP

All Gear Up courses require a basic knowledge of federal tax laws, and provide the latest updates and comprehensive overviews of each course topic covered. Unless otherwise stated, there are no other prerequisites or advanced preparation required to take courses. Gear Up seminars and conferences are group-live delivery method. Please note: CPE credit amounts based on a 50-minute hour. For more CPE information including detailed course descriptions and learning objectives, visit cl.tr.com/G.

Gear Up is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. Gear Up is approved for group live and QAS self-study delivery methods. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org.

Gear Up's National Registry of CPE Sponsor membership includes Gear Up seminars (hosted directly by Gear Up); Quickfinder/Gear Up standalone self-study courses, and Gear Up self-study programs only.

Gear Up is an approved California Tax Education Council (CTEC) continuing education provider and offers several courses that are eligible for credit for CRTPs. Visit cl.tr.com/G for more CTEC specifics.

Gear Up is an IRS approved continuing education provider, and offers several courses that are eligible for credit for IRS PTIN holders (including Enrolled Agents).

Gear Up is proud to offer courses accepted by the CFP board qualifying for CFP credit! Look for the CFP logo on the following pages. Please note, CFP credit applies only to self-sponsored seminars at the full CPE credit value; it applies to self-study products at half the CPE credit value. CFP®, CERTIFIED FINANCIAL PLANNER®, and the CFP® logo are certification marks owned by the Certified Financial Planner Board of Standards, Inc. These marks are awarded to individuals who successfully complete CFP® Board's initial and ongoing certification requirements.

GEAR UP CONFERENCES

JACKPOT IN LAS VEGAS

Save $50 with Early Bird up to $216 with Premier or up to $360 with Premier Plus! Details below. Early Bird expires May 2, 2016.

MAY 31 – JUNE 4, 2016 | LAS VEGAS, NV
40 CPE CREDITS | $899

Hear from top-notch speakers, network with your peers and earn up to 40 CPE credits while enjoying Las Vegas. Our springtime Jackpot event features a two-day accounting course and an array of sessions that provide time to focus on tax planning, technology, audits and more!

LAS VEGAS MIRAGE

The Mirage has transformed the modern Las Vegas experience, bringing you the best in entertainment, dining, hotel luxury and nightlife. From royal white tigers to a private oasis and an active volcano to The Beatles™ LOVE™, it's all right here at the center of the Strip! Mirage luxury rooms provide AAA Four-Diamond luxury amenities, Sealy® Posturepedic pillow-top beds, LED TVs and iHome™ MP3 player docks to enjoy your own playlist. And our restaurants range from fine dining to casual, with a range of flavors and drinks to satisfy your appetite. Whether it's a flame-grilled steak dinner in an intimate lounge or all-you-can-eat Brazilian BBQ set in a tropical rainforest, there is always accounting for taste. Special room block rates expire April 26, 2016.

Call 800.374.9000 and mention Gear Up for reservations.

JACKPOT CONFERENCE

		Price	Early Bird
Entire Week	Jackpot, 40 CPE	$899	$849

Select from several seminar options to create the week you need. Call us at 800.231.1860 to register your seminar choices.

JACKPOT INDIVIDUAL SEMINARS

		Price	Early Bird
Tuesday	IRAs, Pensions and Other Retirement Resources (8 CPE)	$239	$209
	—or—		
	Practice Management and Development (8 CPE)	$239	$209
Wednesday	Health Care Reform (8 CPE)	$239	$209
	—or—		
	Technology (8 CPE)	$239	$209
Thursday	Estates and Trusts (8 CPE)	$239	$209
Fri - Sat	Accounting (16 CPE)	$399	$359
Optional evening course available for additional cost			
Wed 4:45 p.m.	Ethics for the Tax Professional (2 CPE)	$79	$69

PREMIER & PREMIER PLUS:
Subscription packages include savings up to $372 when you apply your full annual live event discount to a Gear Up Conference. Details: page 25.

EARLY BIRD DISCOUNT:
Save 15% on public seminars! Early Bird prices shown in orange. Expires: July 1, 2016.

2016 GEAR UP CONFERENCES

ROYAL FLUSH IN LAS VEGAS

Save $50 with Early Bird up to $200 with Premier or up to $333 with Premier Plus! Details below.

Early Bird expires July 1, 2016.

NOVEMBER 28 – DECEMBER 3, 2016 | MIRAGE HOTEL | 48 CPE CREDITS | $999

Welcome back to Las Vegas for a week of practical learning led by Gear Up speakers! Plan early and lock in your savings for this wintertime conference. Our flagship event for many years, Royal Flush never fails to draw a record crowd and sell out rooms. Whether you're all about the Vegas getaway or hitting the books before the holidays, Royal Flush will deliver learning and fun.

ROYAL FLUSH CONFERENCE		Price	Early Bird
Entire Week	Royal Flush, 48 CPE	$999	$959
Select from several seminar options to create the week you need. Call us at 800.231.1860 to register your seminar choices.			
ROYAL FLUSH INDIVIDUAL SEMINARS			
Mon - Tues	1040 Individual Tax (16 CPE)	$399	$359
Wednesday	California Tax (5 CPE)	$125	$109
	Technology (4 CPE)	$239	$209
	—or—		
	Practice Management and Development (8 CPE)	$239	$209
Thursday	Estates and Trusts (8 CPE)	$239	$209
Fri - Sat	Accounting (16 CPE)	$399	$359
	—or—		
	Business Entities Two-Day (16 CPE)	$399	$359
Optional courses available for additional cost			
Sunday	IRAs, Pensions and Other Retirement Resources	$239	$209
Mon 4:45 p.m.	Ethics for the Tax Professional (2 CPE)	$79	$69

MAGIC WEEK IN ORLANDO

Save $50 with Early Bird up to $223 with Premier or up to $372 with Premier Plus! Details below.

Early Bird expires July 1, 2016.

DECEMBER 13 – 17, 2016 | 40 CPE CREDITS | $929

Complete your CPE and enjoy some R&R — head to the Disney Yacht Club Resort in sunny Orlando! December is the perfect time to escape for a week of Florida sunshine. Plus, you'll be sitting pretty for year-end CPE requirements while being fully prepared for the upcoming tax season with this week-long learning event.

MAGIC WEEK CONFERENCE		Price	Early Bird
Entire Week	Magic Week, 40 CPE	$929	$879
Select from several seminar options to create the week you need. Call us at 800.231.1860 to register your seminar choices.			
MAGIC WEEK INDIVIDUAL SEMINARS			
Tues - Wed	1040 Individual Tax (16 CPE)	$399	$359
Thursday	Business Entities One-Day (8 CPE)	$239	$209
Friday	IRAs, Pensions and Other Retirement Resources (8 CPE)	$239	$209
Fri - Sat	Accounting Two-Day (16 CPE)	$399	$359
Saturday	Practice Management and Development (8 CPE)	$239	$209
Optional courses available for additional cost			
Mon 8:00 a.m.	Technology 3.0 The Next Step (4 CPE)	$125	$109
Mon 12:45 p.m.	Ethics for Florida CPAs (4 CPE)	$115	$99
Mon 12:45 p.m.	Ethics for the Tax Professional (2 CPE)	$79	$69

PREMIER & PREMIER PLUS:
Subscription packages include savings up to $372 when you apply your full annual live event discount to a Gear Up Conference. Details: page 25.

EARLY BIRD DISCOUNT:
Save 15% on public seminars! Early Bird prices shown in orange. Expires: July 1, 2016.

GEAR UP SEMINARS

ACCOUNTING

Self Study

ACCOUNTING | BASIC

16 CPE CREDITS | LIVE: 2 DAYS, $399* OR $359 EARLY BIRD

8 CPE CREDITS | LIVE: 1 DAY, PRICING: SEE WEBSITE

The 2016 Gear Up accounting course will cover the new requirements and changes to our practices. We all need to understand and know how to practice with the new level of accounting service allowed entitled "the preparation" which can be issued without the need of an accountant's report! SSARS No. 21. effective December 2015, established this major change and many other changes to compilations and reviews. Stay ahead!

- This course covers engagement letters, totally revised management representation letters and the dramatically reconstructed versions of the accountant's report. Other topics include: Coverage of special purpose financial reporting framework (formerly Ocboa)
- Note disclosures: how much detail should there be?
- Practice continuation issues, how to transition ownership of an accounting practice
- Accounting in the construction industry
- Peer review: how should a firm prepare for it?
- Learn about how a peer reviewer evaluates your practice by examining for yourself the peer reviewers' checklist
- Statement on standards for accounting services
- Practice management: value billing versus hourly billing
- GAAP update:
  - Will fair value accounting replace historical cost?
  - When do variable interest entities require financial statement consolidation?
  - What are the new leasing standards, changes in revenue recognition concepts, tests for?
  - Impairment and how does each impact disclosure on ocboa statements?

This course is also available in a one-day version that addresses many of the two-day topics but in lesser depth.

One-Day:
AR Little Rock: July 22
PA Bethlehem: Oct 20
PA Camp Hill: June 6

Two-Day:
FL Orlando: Dec 16 - 17
MN Bloomington: June 1 - 2
NJ Monroe Township: June 16 - 17
NV Las Vegas: June 3 - 4
NV Las Vegas: Dec 2 - 3

Accounting — One-Day

Available October 2016

Format	*CPE*	*Product ID*	*2015 Tax Year*	*2016 Tax Year*
Self-Study CPE Course (print-based manual and exam)	8	16-ME12012	$101	$149

Note: 2016 CPE Credits recommended; 2015 CPE expires Oct. 31, 2016.

Accounting — Two-Day

Available October 2016

Format	*CPE*	*Product ID*	*2015 Tax Year*	*2016 Tax Year*
Self-Study CPE Course (print-based manual and exam)	16	16-ME12022	$164	$239
Reference Manual Only	0	16-M13022	$104	$149

Note: 2016 CPE Credits recommended; 2015 CPE expires Oct. 31, 2016.

FRAUD DETECTION

Self Study Only

AUDITING | BASIC | 4 CPE CREDITS

This course teaches techniques for the detection of fraud, the control of fraud and the implementation of fraud prevention tools for the Main Street client. The subject matter provides practical guidance to help the accountant help "Mom and Pop"-sized clients and midsized clients prevent the misclassification of financial statement transactions and/or the misappropriation of assets by outsiders, by employees — and, perhaps, by management itself. Fraud exists in both the financial and tax worlds, and this course discusses both areas to help the practitioner help the client. The course also covers current and past consumer and financial frauds and fraud schemes, giving guidance and tips for the accountants to pass on to clients. We are practicing accounting in a different world. Learn to what extent the accountant is held responsible for failure to assist the client in the prevention and detection of fraud. In this modern age of technology, the course also focuses on the challenging and evolving potential of fraud committed using information technology via the internet and devices we use.

Meets 4-CPE fraud requirement for California CPA re-certification.

Fraud Detection

Now Available (2015 Only)

Format	*CPE*	*Product ID*	*2015 Tax Year*
Self-Study CPE Course (print-based manual and exam)	4	15-ME12070	$64
Reference Manual Only	0	15-M13070	$52

Note: 2015 CPE expires Oct. 31, 2016.

***Pricing shown for Gear Up-sponsored states (in blue) only.** Some seminars' prices vary by state; see exact pricing on website. Check website for all association-sponsored events (in black); pricing set by associations. All Gear Up self-sponsored seminars begin at 8:00 a.m. unless otherwise noted. Note, CFP credits for self-study are half the amount listed for each title.*

PREMIER & PREMIER PLUS:
Subscription packages include 40% off regular price of self-sponsored Gear Up events (cities/dates in blue)! Combined Gear Up/AuditWatch annual max: 24 hrs Premier, 40 hrs Premier Plus. Details: page 25.

EARLY BIRD DISCOUNT:
Save 15% on public seminars! Early Bird prices shown in orange. Expires: July 1, 2016.

PRACTICE DEVELOPMENT AND MANAGEMENT

Materials Only

BUSINESS MANAGEMENT & ORGANIZATION | BASIC

8 CPE CREDITS | LIVE: 1 DAY, $239 OR $209 EARLY BIRD*

Make more, work less and have fun doing it! We'll teach you the 10 secrets to a successful tax and accounting practice. Learn how to develop relationships with clients and your team so that you can build a firm that has value whether you decide to work or sell it.

Also available: Interactive forms CD that will help your office work more effectively and efficiently and a step-by-step reference manual.

FL Orlando: Dec 17
MN Bloomington: June 22
NV Las Vegas: May 31
NV Las Vegas: Nov 30

Practice Development and Management — *Available November 2016*

Format	CPE	Product ID	2015 Tax Year	2016 Tax Year
Manual	0	16-M13060	$67	$89
Interactive Forms CD	0	16-CD060	$74	$99

TECHNOLOGY 3.0: THE NEXT STEP IN MAKING YOUR PRACTICE TECHNOLOGICALLY SAVVY

Self Study

COMPUTER SCIENCE | BASIC

8 CPE CREDITS | LIVE: 1 DAY | $239 OR $209 EARLY BIRD

4 CPE CREDITS | LIVE: HALF DAY | $125 OR $109 EARLY BIRD

Now more than ever, we face serious technology issues in tax and accounting. This course helps the busy practitioner use the best in new technology in their practice. We demonstrate practical real-world solutions to solve practice issues.

- Identity theft and cyber-attacks: recognizing emerging threats and protecting yourself
- Data security: thwarting disasters by protecting your data and your practice
- Windows 10: how and when to switch, tweaks and performance enhancements to make Win 10 the best and most secure operating system ever
- Using the cloud to multiply your efficiency and effectiveness
- BYOD: Using smart phones, tablets and ultra-book in your practice
- Optimizing electronic documents and workpapers in the modern accounting and tax practice
- The newest Apps and utility software that can make life easier in the office
- Security, remote access and backing up data: How to properly set up and maintain your systems
- Floware: Managing daily office activities from your computer

AR Little Rock: Oct 25
MN Bloomington: July 27
NE Lincoln: Sept 16
NV Las Vegas: June 1
FL Orlando: Dec 12 *
NV Las Vegas: Nov 30 *

Technology 3.0 — *Available October 2016*

Format	CPE	Product ID	2015 Tax Year	2016 Tax Year
Self-Study CPE Course (print-based manual and exam)	8	16-ME12040	$101	$149
Reference Manual Only	0	16-M13040	$67	$99

Note: 2016 CPE Credits recommended; 2015 CPE expires Oct. 31, 2016.

CALIFORNIA PROFESSIONAL ETHICS

Self Study

REGULATORY ETHICS | BASIC | FOR: CPA, CTEC

4 CPE CREDITS

This Gear Up course covers the ethical guidance provided by the AICPA and covers the revised Treasury Department Circular 230. Qualifies for CTEC ethics requirement.

The statute states: A licensee renewing a license in an active status shall complete four hours of the 80 hours of continuing education required pursuant to subsection (a) in an ethics course. The course subject matter shall consist of one or more of the following areas: a review of nationally recognized codes of conduct emphasizing how the codes relate to professional responsibilities, case-based instruction focusing on real-life situational learning, ethical dilemmas facing the accounting profession or business ethics, ethical sensitivity and consumer expectations.

California Professional Ethics — *Now Available (2015 Only)*

Format	CPE	Product ID	2015 Tax Year
Self-Study CPE Course (print-based manual and exam)	4	15-ME12018	$64
Reference Manual Only	0	15-M13018	$52

Note: 2015 CPE expires Nov. 30, 2016.

***Pricing shown for Gear Up-sponsored states (in blue) only.** Some seminars' prices vary by state; see exact pricing on website. Check website for all association-sponsored events (in black); pricing set by associations. All Gear Up self-sponsored seminars begin at 8:00 a.m. unless otherwise noted. Note, CFP credits for self-study are half the amount listed for each title.*

PREMIER & PREMIER PLUS:
Subscription packages include 40% off regular price of self-sponsored Gear Up events (cities/dates in blue)! Combined Gear Up/AuditWatch annual max: 24 hrs Premier, 40 hrs Premier Plus. Details: page 25.

EARLY BIRD DISCOUNT:
Save 15% on public seminars! Early Bird prices shown in orange. Expires: July 1, 2016.

ETHICS FOR THE TAX PROFESSIONAL

Self Study

REGULATORY ETHICS | BASIC | CREDITS ONLY APPLY FOR: EA, CTEC
2 CPE CREDITS | LIVE: $79* OR $69 EARLY BIRD

The Office of Professional Responsibility (OPR), headed by Karen Hawkins, has been very busy, ensuring that Circular 230 Practitioners follow rules that prescribe and proscribe our behavior. We will discuss what we can — and must — do to assist our clients while maintaining ethical integrity and complying fully with Circular 230 rules. Learn how to be a zealous advocate while playing by the rules. Join us for a highly interactive discussion on the topic of our professional responsibilities before the IRS. CTEC approved.

In many states, this course qualifies for CPA ethics. Please determine with your local licensing agency if this qualifies in your state. Not applicable in California for CPA requirements.

CA Anaheim: Jan 4, 2017, 4:45 p.m.
CA Anaheim: Nov 21, 4:45 p.m.
CA Burbank: Oct 26, 4:45 p.m.
CA Burbank: Nov 29, 4:45 p.m.
CA San Jose: Dec 12, 4:45 p.m.
FL Orlando: Dec 12, 12:45 p.m.
ID Boise: Nov 3
ID Idaho Falls: Oct 24
MT Billings: Oct 24
NJ Atlantic City: Dec 5
NJ Monroe Township: Dec 12
NJ Pompton Plains: Nov 21
NV Las Vegas: June 1, 4:45 p.m.
NV Las Vegas: Nov 28, 4:45 p.m.
TX Dallas/Irving: Nov 17, 4:45 p.m.
TX Houston: Nov 10, 4:45 p.m.
TX Lubbock: Nov 3, 4:45 p.m.
TX San Antonio: Dec 1, 4:45 p.m.
UT Salt Lake City: Nov 21
WA Auburn: Dec 5
WA Everett: Nov 7
WA Spokane: Dec 12

Ethics for the Tax Professional — *Available December 2016*

Format	CPE	Product ID	2015 Tax Year	2016 Tax Year
Self-Study CPE Course (print-based manual and exam)	2	16-ME12020	$34	$59

Note: 2016 CPE Credits recommended; 2015 CPE expires Nov. 30, 2016.

1040 TAX UPDATE

Self Study

TAXATION | UPDATE | FOR: CPA, EA, CTEC, CFP*, ALL TAX PROS
4 CPE CREDITS

This course is for the busy tax professional who needs to know the essentials of important changes from the previous year, including recent tax law changes, court cases and IRS rulings.

1040 Tax Update — *Now Available (2015 Only)*

Format	CPE	Product ID	2015 Tax Year
Self-Study CPE Course (print-based manual and exam)	4	15-ME12001	$69
Reference Manual Only	0	15-M13001	$52

Note: 2015 CPE expires Dec. 31, 2016.

CALIFORNIA TAX UPDATE

Self Study

TAXATION | UPDATE | FOR: CALIFORNIA CPA, CTEC
5 CPE CREDITS | LIVE: HALF-DAY, $125* OR $109 EARLY BIRD

California has many of the highest tax rates in the country, planning and understanding is becoming more important. Learn how to be more valuable to your clients. We review how the many changes in federal tax law have major impact on California tax returns. In addition, we fully expect California to have several changes. We will cover all changes including the following:

- The impact on taxpayers in California when California law does or does not conform to federal law
- The impact of the court's decision on Proposition 8 and the preparation of tax returns for same-sex marriages and registered domestic partners
- Still more changes on reporting use tax on out of state purchases
- We will also discuss some major sales tax issues
- The impact of failing to extend mortgage forgiveness debt relief and the repercussions to Californians
- Review of the tax rates that apply to high-income taxpayers
- California property tax issues:
- Update on California law with regard to deducting property tax and the impact the hero program may have on current and future law
- Resident or nonresident issues, preparing a California return for a non-resident.
- Should you move out of state prior to selling a business? we cover an in-depth analysis of timing of income
- The ever-important issue of "nexus" — where is business actually being conducted
- Proposition 30 — allocating income to California: planning techniques
- State health exchanges and other impacts of health care reform on California tax returns
- Recognizing income from an out-of-state K-1

CA Anaheim: Jan 6, 2017
CA Burbank: Dec 1
CA Eureka: Nov 2
CA Santa Barbara: Dec 7
NV Las Vegas: Nov 30, 12:45 p.m.

California Tax Update — *Available December 2016*

Format	CPE	Product ID	2015 Tax Year	2016 Tax Year
Self-Study CPE Course (print-based manual and exam)	5	16-ME12005	$64	$99
Reference Manual Only	0	16-M13005	$52	$79

Note: 2016 CPE Credits recommended; 2015 CPE expires Dec. 31, 2016.

***Pricing shown for Gear Up-sponsored states (in blue) only.** Some seminars' prices vary by state; see exact pricing on website. Check website for all association-sponsored events (in black); pricing set by associations. All Gear Up self-sponsored seminars begin at 8:00 a.m. unless otherwise noted. Note, CFP credits for self-study are half the amount listed for each title.*

PREMIER & PREMIER PLUS:

Subscription packages include 40% off regular price of self-sponsored Gear Up events (cities/dates in blue)! Combined Gear Up/AuditWatch annual max: 24 hrs Premier, 40 hrs Premier Plus. Details: page 25.

EARLY BIRD DISCOUNT:

Save 15% on public seminars! Early Bird prices shown in orange. Expires: July 1, 2016.

1040 INDIVIDUAL TAX

Self Study

TAXATION | BASIC | FOR: CPA, EA, CTEC, CFP*, ALL TAX PROS
16 CPE CREDITS | LIVE: 2 DAYS, $369 – $399* OR $329 – $359 EARLY BIRD

This comprehensive course covers key tax issues for completing complicated individual returns. All topics include coverage of new legislation, revenue rulings and procedures, as well as case law to help the busy practitioner keep current. Speakers are all practicing preparers who share practical tips and insights to help you get ready for this tax season. Some of the specific topics for the 1040 seminar include:

- Health care coverage and additional guidance expected in 2016
- Coverage of the Mortgage Relief Act of 2015
- Full coverage of the many extenders and permanent features in the PATH Act
- Continued coverage of the changes in elections and safe harbors in the capitalization regulations
- Updates and case law from late 2015 through 2016

CTEC Members: The Gear Up 1040 self-sponsored seminar does not award CTEC Federal Tax Update credits. A three-hour webinar (no exam) will be held December 19, 2016, which satisfies the three-hour Federal Tax Update CTEC requirement. Purchase any Gear Up self-sponsored 1040 seminar and qualify for the free webinar. Webinar invitations will be distributed via email in November.

AR Little Rock: Dec 8 - 9
AR Rogers: Nov 3 - 4
CA Anaheim: Jan 4 - 5, 2017
CA Anaheim: Nov 21 - 22
CA Burbank: Oct 26 - 27
CA Burbank: Nov 29 - 30
CA Eureka: Oct 31 - Nov 1
CA Fresno: Nov 30 - Dec 1
CA Long Beach: Jan 12 - 13, 2017
CA Ontario: Oct 24 - 25
CA San Diego: Dec 14 - 15
CA San Jose: Dec 12 - 13
CA Santa Barbara: Dec 5 - 6
CT Unicasville: Nov 9 - 10
DE Newark: TBD
FL Ft Lauderdale: Nov 8 - 9
FL Orlando: Dec 13 - 14
FL Tampa: Nov 29 - 30
ID Boise: Nov 3 - 4
ID Idaho Falls: Oct 24 - 25
IL Chicago: Dec 15 - 16
IN Indianapolis: Dec 14 - 15
KS Topeka: Nov 10 - 11
KS Wichita: Dec 1 - 2
LA New Orleans: Dec 8 - 9
MA Marlborough: Dec 15 - 16
MA Peabody: Nov 2 - 3
MD Gaithersburg: Oct 20 - 21
ME Portland: Dec 5 - 6
MI Bath: Nov 21 - 22
MI Novi: Nov 7 - 8
MN Bloomington: Nov 1 - 2
MN Bloomington: Dec 7 - 8
MN Bloomington: Jan 4 - 5, 2017
MN St Cloud: Nov 9 - 10
MO Kansas City: Dec 7 - 8
MO Springfield: Nov 21 - 22
MO St Louis: Oct 31 - Nov 1
MS Jackson: Dec 5 - 6
MT Billings: Oct 24 - 25
NE Lincoln: Nov 3 - 4
NH Manchester: Dec 8 - 9
NJ Atlantic City: Dec 5 - 6
NJ Monroe Township: Nov 9 - 10
NJ Monroe Township: Dec 12 - 13
NJ Monroe Township: Jan 5 - 6
NJ Mt Laurel: TBD
NJ Pompton Plains: Nov 21 - 22
NJ Randolph: Nov 14 - 15
NJ Swedesboro: Nov 30 - Dec 1
NM Albuquerque: Dec 5 - 6
NV Las Vegas: Nov 28 - 29
NY Buffalo: Nov 7 - 8
NY Long Island: Dec 12 - 13
NY Syracuse: Nov 14 - 15
OH Cincinnati: Nov 14 - 15
OH Cleveland: Nov 16 - 17
OH Columbus: Nov 15 - 16
OK Oklahoma City: Oct 19 - 20
OK Tulsa: Oct 25 - 26
OR Lake Oswego: Dec 1 - 2
OR Portland: Oct 31 - Nov 1
PA Altoona: Nov 14 - 15
PA Bethlehem: Nov 1 - 2
PA Camp Hill: Dec 12 - 13
PA Erie: Nov 16 - 17
PA Gettysburg: Oct 31 - Nov 1
PA Pittsburgh: Nov 17 - 18
PA Scranton: Nov 16 - 17
PA Trevose: Nov 29 - 30
RI Warwick: Dec 8 - 9
SC Columbia: Nov 15 - 16
SD Sioux Falls: Nov 10 - 11
TN Knoxville: Nov 10 - 11
TN Memphis: Nov 3 - 4
TX Dallas/Irving: Nov 17 - 18
TX Houston: Nov 10 - 11
TX Lubbock: Nov 3 - 4
TX San Antonio: Dec 1 - 2
UT Salt Lake City: Nov 21 - 22
VA Dulles: Dec 7 - 8
VA Tysons Corner: Nov 3 - 4
VT Burlington: Oct 31 - Nov 1
WA Auburn: Dec 5 - 6
WA Everett: Nov 7 - 8
WA Spokane: Dec 12 - 13
WI Hudson: Dec 5 - 6
WI Waukesha: Nov 7 - 8

1040 Individual Tax — *Available December 2016*

Format	*CPE*	*Product ID*	*2015 Tax Year*	*2016 Tax Year*
Self-Study CPE Course (print-based manual and exam)	16	16-ME12000	$164	$239
Supplemental Audio CD	0	16-AC11000	$64	$89
Supplemental DVD	0	16-VD10000	$112	$159
Reference Manual Only	0	16-M13000	$104	$149
Manual on CD-ROM	0	16-CD002	$112	$149
Manual on CD-ROM (when purchased with self study or seminar)	0	16-CD001	$22	$39
Manual on ProView	0		$112	$149
Manual on ProView (with print CPE course or self-sponsored seminar purchase)	0		FREE	FREE

Note: 2016 CPE Credits recommended; 2015 CPE expires Dec. 31, 2016.

1040 AND BUSINESS ENTITIES PROVIEW EBOOK MANUALS

Now available free with seminar* or self-study purchase! Travel light with this electronic format, accessible on your tablet, smart phone or computer. You can take notes and make highlights as you would with a printed manual, and they will be saved no matter where you next access your ProView manual. Internet service required only to download — after that, use your ProView manual anytime, anywhere. Please call 800.231.1860 to order your copy.

**Thomson Reuters-sponsored seminars only; does not apply to society-sponsored events. See listings in blue throughout the following pages.*

***Pricing shown for Gear Up-sponsored states (in blue) only.** Some seminars' prices vary by state; see exact pricing on website. Check website for all association-sponsored events (in black); pricing set by associations. All Gear Up self-sponsored seminars begin at 8:00 a.m. unless otherwise noted. Note, CFP credits for self-study are half the amount listed for each title.*

PREMIER & PREMIER PLUS:
Subscription packages include 40% off regular price of self-sponsored Gear Up events (cities/dates in blue)! Combined Gear Up/AuditWatch annual max: 24 hrs Premier, 40 hrs Premier Plus. Details: page 25.

EARLY BIRD DISCOUNT:
Save 15% on public seminars! Early Bird prices shown in orange. Expires: July 1, 2016.

BUSINESS ENTITIES

Self Study Only

TAXATION | BASIC | FOR: CPA, EA, CTEC, CFP*, ALL TAX PROS
16 CPE CREDITS | LIVE: 2 DAYS, $369 – $399* OR $329 – $359 EARLY BIRD*
8 CPE CREDITS | LIVE: 1 DAY, $239* OR $209 EARLY BIRD*

Business Tax Update: Covering New Business Tax Law Changes and Trends

- The latest breaking news in tax law, whether from Congress, Treasury or the courts
- Review of extenders and current-year indexed amounts
- Review of changes in law from 2014 to 2015 and beyond
- Capitalization revisited: Capitalization and related change in accounting methods now that the smoke has cleared, including the latest revenue procedures
- ACA provisions that affect both large and small employers, including Medical Reimbursement pickles
- New reporting forms for health care coverage: reporting requirements for Forms 1095-B and 1095-C
- Employee/independent contractor update: responsibilities and reporting requirements
- Employee health coverage: what is reported and what is taxed on the W-2
- Other hot topics

S Corporation Review

- Strengths and weaknesses
- New law including final regulations on shareholder basis in debt
- Elections and late-election penalty relief
- IRS audit issues
- In-depth discussion of shareholder basis, at-risk basis and distributions
- In-depth discussion of the four components of S corp retained earnings
- Qualified S subsidiaries (QSubs) and disregarded entities
- LLCs electing S corp
- Disregarded entities in an S corp
- S corp tax traps, including built-in gain planning
- S corp planning opportunities

Partnership/LLC Review

- Strengths and weaknesses
- When to use a partnership rather than an S corp
- In-depth discussion of partner basis, at-risk basis and distributions
- Special allocations: when they may be used and how they are done
- Disguised sale rules
- Built-in gains
- Capital accounts vs. tax accounts
- Transactions with partners
- Planning opportunities

C Corporation Review

- Strengths and weaknesses with an emphasis on closely-held C corps
- Personal service, holding company and other tax traps
- Consolidated returns
- Passive loss rules in closely held C corps
- Earnings and profits vs. retained earnings
- Dividends
- Planning opportunities

This course is also available in a one-day version that addresses many of the two-day topics but in lesser depth.

One-Day:

AR Little Rock: Sept 23
CA San Diego: Sept 28
FL Orlando: Dec 15
ME Portland: Sept 19
MI Bath: Oct 18
MS Jackson: Sept 27
NJ Atlantic City: Dec 7
NY Long Island: Dec 14
PA Camp Hill: Sept 19
PA Philadelphia: Sept 28
PA Pittsburgh: Oct 19
TN Knoxville: Sept 23
TN Memphis: Sept 30
WA Richland: May 19

Two-Day:

CA Anaheim: Sept 29 - 30
CA Burbank: Oct 18 - 19
CO Denver: Sept 19 - 20
ID Post Falls: Sept 22 - 23
ID Twin Falls: Sept 29 - 30
IL Chicago: Oct 26 - 27
MD Annapolis: Oct 24 - 25
MD Gaithersburg: Sept 19 - 20
MD Pikesville: Sept 28 - 29
MN Bloomington: Sept 28 - 29
MT Billings: Oct 26 - 27
NJ Monroe Township: Oct 24 - 25
NM Albuquerque: Sept 21 - 22
NV Las Vegas: Dec 2 - 3
NY Buffalo: Sept 20
OH Cincinnati: Oct 20 - 21
OH Cleveland: Oct 18 - 19
OH Columbus: Oct 19 - 20
OR Eugene: Sept 20 - 21
OR Lake Oswego: Oct 20 - 21
UT Salt Lake City: Nov 7 - 8
WA Everett: Nov 9 - 10

Business Entities — One-Day

Available November 2016

Format	*CPE*	*Product ID*	*2015 Tax Year*	*2016 Tax Year*
Self-Study CPE Course (print-based manual and exam)	8	16-ME12007	$101	$149
Supplemental Audio CD	0	16-AC11007	$44	$69
Supplemental DVD	0	16-VD10007	$59	$79

Note: 2016 CPE Credits recommended; 2015 CPE expires Oct. 31, 2016.

Business Entities — Two-Day

Available November 2016

Format	*CPE*	*Product ID*	*2015 Tax Year*	*2016 Tax Year*
Self-Study CPE Course (print-based manual and exam)	8	16-ME12008	$164	$239
Supplemental Audio CD	0	16-AC11008	$64	$89
Supplemental DVD	0	16-VD10008	$112	$149
Reference Manual Only	0	16-M13008	$104	$149
Manual on CDROM	0	16-CD402	$104	$149
Manual on CDROM (with print CPE course or self-sponsored seminar purchase)	0	16-CD401	$22	$39
Manual on ProView	0		$104	$149
Manual on ProView (with print CPE course or self-sponsored seminar purchase)	0		FREE	FREE

Note: 2016 CPE Credits recommended; 2015 CPE expires Nov. 30, 2016.

***Pricing shown for Gear Up-sponsored states (in blue) only.** Some seminars' prices vary by state; see exact pricing on website. Check website for all association-sponsored events (in black); pricing set by associations. All Gear Up self-sponsored seminars begin at 8:00 a.m. unless otherwise noted. Note, CFP credits for self-study are half the amount listed for each title.*

PREMIER & PREMIER PLUS:
Subscription packages include 40% off regular price of self-sponsored Gear Up events (cities/dates in blue)! Combined Gear Up/AuditWatch annual max: 24 hrs Premier, 40 hrs Premier Plus. Details: page 25.

EARLY BIRD DISCOUNT:
Save 15% on public seminars! Early Bird prices shown in orange. Expires: July 1, 2016.

ESTATES AND TRUSTS

Self Study Only

TAXATION | BASIC | FOR: CPA, EA, CTEC, CFP*, ALL TAX PROS
8 CPE CREDITS | LIVE: 1 DAY, $239 OR $209 EARLY BIRD*

This is a two-pronged course designed to get you started in the practice of estates and trusts as well as a great update for the experienced tax professional covering all major developments since 2011. The morning session covers estate and trust terminology, fiduciary income taxation, trust accounting principles and a comprehensive explanation of income distribution deduction. In the afternoon, Form 706 is examined in detail. The many changes enacted since 2011 are reviewed with particular emphasis on portability (with detailed examples) and coverage of the new consistency reporting requirements. The "What's New" chapter has been completely updated with recent rulings and interesting new cases. Post-mortem elections including alternate valuation date and disclaimers are discussed as these areas are of particular interest to the tax preparer.

CA Anaheim/Brea: Sept 23
CO Denver: Sept 21
KS Topeka: Oct 21
MD College Park: Dec 9
MN Bloomington: July 28
NJ Monroe Township: Sept 19
NV Las Vegas: June 2
NV Las Vegas: Dec 1
PA Scranton: Oct 26

Estates and Trusts — *Available November 2016*

Format	CPE	Product ID	2015 Tax Year	2016 Tax Year
Self-Study CPE Course (print-based manual and exam)	8	16-ME12099	$101	$149
Supplemental Audio CD	0	16-AC11099	$44	$69
Supplemental DVD	0	16-VD10099	$59	$79
Reference Manual Only	0	16-M13099	$67	$99
Manual on CD-ROM	0	16-CD309	$67	$99
Manual on CD-ROM (with print CPE course or self-sponsored seminar purchase)	0	16-CD308	$19	$29

Note: 2016 CPE Credits recommended; 2015 CPE expires Nov. 30, 2016.

FARM AND RANCH TAX UPDATE

Self Study Only

TAXATION | 8 CPE CREDITS | UPDATE FOR: CPA, EA, CTEC, ALL TAX PROS

Farm taxation has a multitude of unique tax issues that create a particular level of difficulty for practitioners who tackle Schedule F. This course reviews the newest tax issues impacting farmers and ranchers, including the newest tax legislation, ACA, recent court cases and new IRS interpretations. Keep your firm up to date to help ensure the accurate completion of your farm tax engagements. This course covers those annual pesky problems that farmers and ranchers present such as safe harbor vehicle usage, farm depreciation and line-by-line coverage in the manual of Schedule F.

Prereq: Experience in farm and ranch taxation.

Farm and Ranch Tax Update — *Now Available (2015 Only)*

Format	CPE	Product ID	2015 Tax Year
Self-Study CPE Course (print-based manual and exam)	8	15-ME12027	$101
Reference Manual Only	0	15-M13027	$67

Note: 2015 CPE expires Dec. 31, 2016.

FEDERAL TAX UPDATE

Self Study Only

TAXATION | BASIC
8 CPE CREDITS | LIVE: 1 DAY, PRICING: SEE WEBSITE

The Federal Tax Update course covers the latest developments affecting individuals, corporations, pass-through entities and estates and trusts. Written by practitioners for practitioners, it is designed to provide you with practical, working knowledge of the latest tax law changes. Learn how to apply the newest code, regulations and tax court cases in your practice.

This course will enable you to effectively and confidently complete tax planning, compliance and consultation engagements.

MI Bath: Sept 19
MI Novi: Sept 20
UT Salt Lake City: Dec 5

Federal Tax Update — *Now Available (2015 Only)*

Format	CPE	Product ID	2015 Tax Year
Self-Study CPE Course Materials (print-based)	0	15-ME12081	$64
Optional Grading Fee	16		$89

Note: 2015 CPE expires Nov. 30, 2016.

***Pricing shown for Gear Up-sponsored states (in blue) only.** Some seminars' prices vary by state; see exact pricing on website. Check website for all association-sponsored events (in black); pricing set by associations. All Gear Up self-sponsored seminars begin at 8:00 a.m. unless otherwise noted. Note, CFP credits for self-study are half the amount listed for each title.*

PREMIER & PREMIER PLUS:

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EARLY BIRD DISCOUNT:

Save 15% on public seminars! Early Bird prices shown in orange. Expires: July 1, 2016.

HEALTH CARE REFORM

Self Study

TAXATION | BASIC | FOR: CPA, EA, CTEC, CFP*, ALL TAX PROS
8 CPE CREDITS | LIVE: 1 DAY, $239 OR $209 EARLY BIRD*

This course provides comprehensive coverage of Health Care Reform issues that affect individuals, small businesses and large businesses. This practical course includes examples, reporting requirements, planning strategies and a review of actual forms. Topics include:

- Latest changes
- Small employer insurance issues
- Avoiding the $100 per day fine
- 2% S shareholder insurance
- Exchanges
- Individual Mandate
- Exemptions from Mandate
- Premium Assistance Credit
- Employer Mandate
- Reporting Requirements
- Insurance Discrimination
- Key Net Investment Income Tax tips

NV Las Vegas: June 1

Health Care Reform *Now Available (2015 Only)*

Format	*CPE*	*Product ID*	*2015 Tax Year*
Self-Study CPE Course (print-based manual and exam)	8	15-ME12088	$172

Note: 2015 CPE expires Aug. 31, 2016.

IRS AUDITS, APPEALS AND COLLECTIONS: SUCCESSFUL STRATEGIES

Self Study Only

TAXATION | BASIC | FOR: CPA, EA, CTEC, ALL TAX PROS
8 CPE CREDITS

Understanding how to navigate the IRS can save the practitioner time, meaning a more effective and profitable representation of your client before the IRS. Notices are at an all-time high as the IRS tries to encourage compliance from taxpayers. Knowing how to effectively communicate with the IRS, presenting your response in a manner that the IRS expects and understanding IRS timelines have increased in importance.

Do you know what to do when you find your client faced with the inability to pay the amount the IRS is demanding? Walk through the pathway of the notice response and what to do about that levy and resolution with the IRS, delayed payment plans, installments or the Offer in Compromise. The IRS has become faceless and nameless. This course will work through proven strategies to help your client find confidence and comfort in the process.

IRS Audits, Appeals and Collections *Now Available (2015 Only)*

Format	*CPE*	*Product ID*	*2015 Tax Year*
Self-Study CPE Course (print-based manual and exam)	8	15-ME12055	$101
Reference Manual Only	0	15-M13055	$67

Note: 2015 CPE expires Aug. 31, 2016.

IRAs, PENSIONS AND OTHER RETIREMENT RESOURCES

Self Study

TAXATION | BASIC | FOR: CPA
8 CPE CREDITS | LIVE: 1 DAY, $239 OR $209 EARLY BIRD*

This course will cover the detailed and unique requirements of various types of retirement savings and other resources that are used in retirement planning. Coverage includes funding requirements to avoid disqualification during the working years and distribution options and opportunities during the retirement years. Know the best options for saving and distributing from retirement resources including social security.

FL Orlando: Dec 16
NV Las Vegas: May 31
NV Las Vegas: Nov 27
PA Trevose: June 8

IRAs, Pensions and Other Retirement Resources
Available November 2016

Format	*CPE*	*Product ID*	*2016 Tax Year*
Self-Study CPE Course (print-based manual and exam)	8	16-ME12029	$149
Reference Manual Only	0	16-M13029	$99

Note: 2016 CPE Credits recommended.

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PREMIER & PREMIER PLUS:
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EARLY BIRD DISCOUNT:
Save 15% on public seminars! Early Bird prices shown in orange. Expires: July 1, 2016.

2016 GEAR UP SEMINAR SCHEDULE

States in blue boxes highlight locations with Thomson Reuters-hosted Gear Up seminars, prices as shown. These seminars begin at 8:00 a.m. unless otherwise noted. Non-shaded listings represent locations where Gear Up seminars are hosted by associations. Contact the host listed under each state for pricing and registration information.

ARKANSAS

The following dates in Arkansas are co-hosted by our partner association. For more information or to register, call 501.305.9110 or go to arksocietyofaccountants.com.

1040 INDIVIDUAL TAX
Little Rock, Dec 8 – 9
Rogers, Nov 3 – 4

ACCOUNTING ONE–DAY
Little Rock, July 22

BUSINESS ENTITIES ONE–DAY
Little Rock, Sept 23

TECHNOLOGY 3.0
Little Rock, Oct 25

CALIFORNIA

For more information or to register, call 800.231.1860.
2 CPE—$79 or ***$69 Early Bird***
5 CPE—$125 or ***$109 Early Bird***
8 CPE—$239 or ***$209 Early Bird***
16 CPE—$399 or ***$359 Early Bird***

STATE SPECIAL: Save 15% when you purchase two or Save 25% when you purchase three or more courses at the same time! Breakfast and lunch included with registration price.

1040 INDIVIDUAL TAX
Anaheim, Nov 21 – 22
Anaheim, Jan 4 – 5, 2017
Burbank, Oct 26 – 27
Burbank, Nov 29 – 30
Eureka, Oct 31 – Nov 1
Fresno, Nov 30 – Dec 1
Long Beach, Jan 12 – 13, 2017
Ontario, Oct 24 – 25

(CONT.) **1040 INDIVIDUAL TAX**
San Diego, Dec 14 – 15
San Jose, Dec 12 – 13
Santa Barbara, Dec 5 – 6

BUSINESS ENTITIES ONE–DAY
San Diego, Sept 28

BUSINESS ENTITIES TWO–DAY
Anaheim, Sept 29 – 30
Burbank, Oct 18 – 19

CALIFORNIA TAX UPDATE
Anaheim, Jan 6, 2017
Burbank, Dec 1
Eureka, Nov 2
Santa Barbara, Dec 7

ESTATES AND TRUSTS
Anaheim/Brea, Sept 23

ETHICS FOR THE TAX PROFESSIONAL
Anaheim, Nov 21
Anaheim, Jan 4, 2017
Burbank, Oct 26
Burbank, Nov 29
San Jose, Dec 12

COLORADO

For more information or to register, call 800.231.1860.
8 CPE $239 or ***$209 Early Bird***
16 CPE—$399 or ***$359 Early Bird***

STATE SPECIAL: Save 15% when you purchase both Colorado seminars at the same time! Breakfast and lunch included with registration price.

BUSINESS ENTITIES TWO–DAY
Denver, Sept 19 – 20

ESTATES AND TRUSTS
Denver, Sept 21

CONNECTICUT

The following dates in Connecticut are co-hosted by our partner association. For more information or to register, call 800.966.6679, ext. 1310 or visit nsacct.org.

1040 INDIVIDUAL TAX
Uncasville, Nov 9 - 10

DELAWARE

The following dates in Delaware are co-hosted by our partner association. For more information or to register, call 800.535.3006.

1040 INDIVIDUAL TAX
Newark, TBD

FLORIDA

*(*Part of Magic Week; see page 9 for information.)*
For more information or to register, call 800.231.1860.
2 CPE—$79 or ***$69 Early Bird***
4 CPE—$125 or ***$109 Early Bird***
8 CPE—$239 or ***$209 Early Bird***
16 CPE—$399 or ***$359 Early Bird***

STATE SPECIAL: Save 15% when you purchase two or Save 25% when you purchase three or more courses at the same time! (Does not apply to seminars offered as part of a Gear Up Conference) Breakfast and lunch included with registration price.

1040 INDIVIDUAL TAX
Ft Lauderdale, Nov 8 – 9
*Orlando, Dec 13 – 14
Tampa, Nov 29 – 30

ACCOUNTING TWO–DAY
*Orlando, Dec 16 – 17

PREMIER & PREMIER PLUS:
Subscription packages include 40% off regular price of self-sponsored Gear Up events (cities/dates in blue)! Combined Gear Up/AuditWatch annual max: 24 hrs Premier, 40 hrs Premier Plus. Details: page 25.

EARLY BIRD DISCOUNT:
Save 15% on public seminars! Early Bird prices shown in orange. Expires: July 1, 2016.

FLORIDA (CONT.)

BUSINESS ENTITIES ONE–DAY
*Orlando, Dec 15

ETHICS FOR FLORIDA CPAS
*Orlando, Dec 12, 12:45 p.m.

ETHICS FOR THE TAX PROFESSIONAL
*Orlando, Dec 12, 12:45 p.m.

IRAS, PENSIONS AND OTHER RETIREMENT RESOURCES
*Orlando, Dec 16

PRACTICE DEVELOPMENT AND MANAGEMENT
*Orlando, Dec 17

TECHNOLOGY 3.0 HALF-DAY
*Orlando, Dec 12

IDAHO

The following dates in Idaho are co-hosted by our partner association. For more information or to register, call 888.866.2160

1040 INDIVIDUAL TAX
Boise, Nov 3 – 4
Idaho Falls, Oct 24 – 25

BUSINESS ENTITIES TWO–DAY
Post Falls, Sept 22 – 23
Twin Falls, Sept 29 – 30

ETHICS FOR THE TAX PROFESSIONAL
Boise, Nov 3
Idaho Falls, Oct 24

ILLINOIS

For more information or to register, call 800.231.1860.

16 CPE—$399 or ***$359 Early Bird***

STATE SPECIAL: Save 15% when you purchase both Illinois semiars at the same time! Breakfast and lunch included with registration price.

1040 INDIVIDUAL TAX
Chicago, Dec 15 – 16

BUSINESS ENTITIES TWO–DAY
Chicago, Oct 26 – 27

INDIANA

For more information or to register, call 800.231.1860.

16 CPE—$399 or ***$359 Early Bird***

Breakfast and lunch included with registration price.

1040 INDIVIDUAL TAX
Indianapolis, Dec 14 – 15

KANSAS

The following dates in Kansas are co-hosted by our partner association. For more information or to register, call 785.827.7225.

1040 INDIVIDUAL TAX
Topeka, Nov 10 – 11
Wichita, Dec 1 – 2

ESTATES AND TRUSTS
Topeka, Oct 21

LOUISIANA

The following dates in Louisiana are co-hosted by our partner association. For more information or to register, call 800.847.6276.

1040 INDIVIDUAL TAX
New Orleans, Dec 8 – 9

MAINE

The following dates in Maine are co-hosted by our partner association. For more information or to register, call 207.892.2234 or visit www.ourmapa.org.

1040 INDIVIDUAL TAX
Portland, Dec 5 – 6

BUSINESS ENTITIES ONE–DAY
Portland, Sept 19

MARYLAND

For more information or to register, call 800.231.1860.

8 CPE—$239 or ***$209 Early Bird***

16 CPE—$369 or ***$329 Early Bird***

STATE SPECIAL: Save 15% when you purchase two or Save 25% when you purchase three or more courses at the same time! Breakfast and lunch included with registration price.

1040 INDIVIDUAL TAX
Gaithersburg, Oct 20 – 21

BUSINESS ENTITIES TWO–DAY
Annapolis, Oct 24 – 25
Gaithersburg, Sept 19 – 20
Pikesville, Sept 28 – 29

ESTATES AND TRUSTS
College Park, Dec 9

MASSACHUSETTS

For more information or to register, call 800.231.1860.

16 CPE—$399 or ***$359 Early Bird***

Breakfast and lunch included with registration price.

1040 INDIVIDUAL TAX
Marlborough, Dec 15 – 16
Peabody, Nov 2 – 3

PREMIER & PREMIER PLUS:
Subscription packages include 40% off regular price of self-sponsored Gear Up events (cities/dates in blue)! Combined Gear Up/AuditWatch annual max: 24 hrs Premier, 40 hrs Premier Plus. Details: page 25.

EARLY BIRD DISCOUNT:
Save 15% on public seminars! Early Bird prices shown in orange. Expires: July 1, 2016.

MICHIGAN

The following dates in Michigan are co-hosted by our partner association. For more information or to register, call 517.641.7505 or visit iaam.net.

1040 INDIVIDUAL TAX
Bath, Nov 21 – 22
Novi, Nov 7 – 8

BUSINESS ENTITIES ONE–DAY
Bath, Oct 18

FEDERAL TAX UPDATE
Bath, Sep 19
Novi, Sep 20

MINNESOTA

The following dates in Minnesota are co-hosted by our partner association. For more information or to register, call 651.290.6289 or visit mapa-mn.com.

1040 INDIVIDUAL TAX
Bloomington, Nov 1 – 2
Bloomington, Dec 7 – 8
Bloomington, Jan 4 – 5, 2017
St Cloud, Nov 9 – 10

ACCOUNTING TWO–DAY
Bloomington, Jun 1 – 2

BUSINESS ENTITIES TWO–DAY
Bloomington, Sep 28 – 29

ESTATES AND TRUSTS
Bloomington, Jul 28

TECHNOLOGY 3.0
Bloomington, Jul 27

PRACTICE MANAGEMENT AND DEVELOPMENT
Bloomington, June 22

MISSISSIPPI

The following dates in Mississippi are co-hosted by our partner association. For more information or to register, call 601.835.3396.

1040 INDIVIDUAL TAX
Jackson, Dec 5 – 6

BUSINESS ENTITIES ONE–DAY
Jackson, Sept 27

MISSOURI

For more information or to register, call 800.231.1860.
16 CPE—$369 or ***$329 Early Bird***
Breakfast and lunch included with registration price.

1040 INDIVIDUAL TAX
Kansas City, Dec 7 – 8
Springfield, Nov 21 – 22
St Louis, Oct 31 – Nov 1

MONTANA

The following dates in Montana are co-hosted by our partner association. For more information or to register, call 406.656.1643.

1040 INDIVIDUAL TAX
Billings, Oct 24 – 25

BUSINESS ENTITIES TWO–DAY
Billings, Oct 26 – 27

ETHICS FOR THE TAX PROFESSIONAL
Billings, Oct 24

NEBRASKA

The following dates in Nebraska are co-hosted by our partner association. For more information or to register, call 402.764.2314 or visit nebsia.com.

1040 INDIVIDUAL TAX
Lincoln, Nov 3 – 4

TECHNOLOGY 3.0
Lincoln, Sept 16

NEVADA

***Part of Jackpot; see page 8 for information.*
**Part of Royal Flush; see page 9 for information.*
For more information or to register, call 800.231.1860.
2 CPE—$79 or ***$69 Early Bird***
4 and 5 CPE—$125 or ***$109 Early Bird***
8 CPE—$239 or ***$209 Early Bird***
16 CPE—$399 or ***$359 Early Bird***
Breakfast and lunch included with registration price.

1040 INDIVIDUAL TAX
*Las Vegas, Nov 28 – 29

ACCOUNTING TWO–DAY
*Las Vegas, June 3 – 4
*Las Vegas, Dec 2 – 3

BUSINESS ENTITIES TWO–DAY
*Las Vegas, Dec 2 – 3

CALIFORNIA TAX UPDATE
*Las Vegas, Nov 30, 12:45 p.m.

ESTATES AND TRUSTS
*Las Vegas, June 2
*Las Vegas, Dec 1

ETHICS FOR THE TAX PROFESSIONAL
*Las Vegas, June 1, 4:45 p.m.
*Las Vegas, Nov 28, 4:45 p.m.

HEALTH CARE REFORM
*Las Vegas, June 1

IRAS, PENSIONS AND OTHER RETIREMENT RESOURCES
*Las Vegas, May 31
*Las Vegas, Nov 27

PRACTICE DEVELOPMENT AND MANAGEMENT
*Las Vegas, May 31
*Las Vegas, Nov 30

TECHNOLOGY 3.0
*Las Vegas, June 1

TECHNOLOGY 3.0 HALF-DAY
*Las Vegas, Nov 30

PREMIER & PREMIER PLUS:
Subscription packages include 40% off regular price of self-sponsored Gear Up events (cities/dates in blue)! Combined Gear Up/AuditWatch annual max: 24 hrs Premier, 40 hrs Premier Plus. Details: page 25.

EARLY BIRD DISCOUNT:
Save 15% on public seminars! Early Bird prices shown in orange. Expires: July 1, 2016.

NEW HAMPSHIRE

The following dates in New Hampshire are co-hosted by our partner association. For more information or to register, call 603.778.0822 or visit nhtap.org.

1040 INDIVIDUAL TAX
Manchester, Dec 8 – 9

NEW JERSEY

The following dates in New Jersey are co-hosted by our partner association. For more information or to register, call 800.535.3006.

1040 INDIVIDUAL TAX
Atlantic City, Dec 5 – 6
Monroe Township, Nov 9 – 10
Monroe Township, Dec 12 – 13
Monroe Township, Jan 5 – 6, 2017
Mt Laurel, TBD
Pompton Plains, Nov 21 – 22
Randolph, Nov 14 – 15
Swedesboro, Nov 30 – Dec 1

ACCOUNTING TWO–DAY
Monroe Township, Jun 16 – 17

BUSINESS ENTITIES ONE–DAY
Atlantic City, Dec 7

BUSINESS ENTITIES TWO–DAY
Monroe Township, Oct 24 – 25

ESTATES AND TRUSTS
Monroe Township, Sept 19

ETHICS FOR THE TAX PROFESSIONAL
Atlantic City, Dec 5
Monroe Township, Dec 12
Pompton Plains, Nov 21

NEW MEXICO

For more information or to register, call 800.231.1860.

16 CPE—$369 or ***$329 Early Bird***

STATE SPECIAL: Save 15% when you purchase both New Mexico seminars at the same time! Breakfast and lunch included with registration price.

1040 INDIVIDUAL TAX
Albuquerque, Dec 5 – 6

BUSINESS ENTITIES TWO–DAY
Albuquerque, Sept 21 – 22

NEW YORK

For more information or to register, call 800.231.1860.

8 CPE—$239 or ***$209 Early Bird***
16 CPE—$399 or ***$359 Early Bird***

STATE SPECIAL: Save 15% when you purchase two Long Island or Syracuse seminars at the same time! Breakfast and lunch included with registration price.

1040 INDIVIDUAL TAX
Long Island, Dec 12 – 13
Syracuse, Nov 14 – 15

BUSINESS ENTITIES ONE-DAY
Long Island, Dec 14

NEW YORK

The following dates in New York are co-hosted by our partner association. For more information or to register, call 716.832.7853.

1040 INDIVIDUAL TAX
Buffalo, Nov 7 – 8

BUSINESS ENTITIES ONE–DAY
Buffalo, Sept 20

OHIO

The following dates in Ohio are co-hosted by our partner association. For more information or to register, call 800.686.2727.

1040 INDIVIDUAL TAX
Cincinnati, Nov 14 – 15
Cleveland, Nov 16 – 17
Columbus, Nov 15 – 16

BUSINESS ENTITIES TWO-DAY
Cincinnati, Oct 20 – 21
Cleveland, Oct 18 – 19
Columbus, Oct 19 – 20

OKLAHOMA

For more information or to register, call 800.231.1860.

16 CPE—$369 or ***$329 Early Bird***

Breakfast and lunch included with registration price.

1040 INDIVIDUAL TAX
Oklahoma City, Oct 19 – 20
Tulsa, Oct 25 – 26

OREGON

For more information or to register, call 800.231.1860.

16 CPE—$369 or ***$329 Early Bird***

STATE SPECIAL: Save 15% when you purchase both Oregon seminars at the same time! Breakfast and lunch included with registration price.

1040 INDIVIDUAL TAX
Lake Oswego, Dec 1 – 2
Portland , Oct 31 – Nov 1

BUSINESS ENTITIES TWO–DAY
Eugene, Sept 20 – 21
Lake Oswego, Oct 20 – 21

PREMIER & PREMIER PLUS:
Subscription packages include 40% off regular price of self-sponsored Gear Up events (cities/dates in blue)! Combined Gear Up/AuditWatch annual max: 24 hrs Premier, 40 hrs Premier Plus. Details: page 25.

EARLY BIRD DISCOUNT:
Save 15% on public seminars! Early Bird prices shown in orange. Expires: July 1, 2016.

PENNSYLVANIA

The following dates in Pennsylvania are co-hosted by our partner association. For more information or to register, visit pstap.org or call 800.270.3352.

1040 INDIVIDUAL TAX

Altoona, Nov 14 – 15

Bethlehem, Nov 1 – 2

Camp Hill, Dec 12 – 13

Erie, Nov 16 – 17

Gettysburg, Oct 31 – Nov 1

Pittsburgh, Nov 17 – 18

Scranton, Nov 16 – 17

Trevose, Nov 29 – 30

ACCOUNTING ONE–DAY

Bethlehem/Breinigsville, Oct 20

Camp Hill, Jun 6

BUSINESS ENTITIES ONE–DAY

Camp Hill, Sept 19

Philadelphia, Sept 28

Pittsburgh, Oct 19

ESTATES AND TRUSTS

Scranton, Oct 26

IRAs, PENSIONS AND OTHER RETIREMENT RESOURCES

Trevose, June 8

RHODE ISLAND

The following dates in Rhode Island are co-hosted by our partner association. For more information or to register, call 401-461-1887.

1040 INDIVIDUAL TAX

Warwick, Dec 8 – 9

SOUTH CAROLINA

The following dates in South Carolina are co-hosted by our partner association. For more information or to register, call 803.540.7521.

1040 INDIVIDUAL TAX

Columbia, Nov 15 – 16

SOUTH DAKOTA

The following dates in South Dakota are co-hosted by our partner association. For more information or to register, call 877.674.1996.

1040 INDIVIDUAL TAX

Sioux Falls, Nov 10 – 11

TENNESSEE

The following dates in Tennessee are co-hosted by our partner association. For more information or to register, call 888.308.1468.

1040 INDIVIDUAL TAX

Knoxville, Nov 10 – 11

Memphis, Nov 3 – 4

BUSINESS ENTITIES ONE–DAY

Knoxville, Sept 23

Memphis, Sept 30

TEXAS

For more information or to register, call 800.231.1860.

2 CPE—$79 or ***$69 Early Bird***

16 CPE—$399 or ***$359 Early Bird***

STATE SPECIAL: Save 15% when you purchase two Texas seminars at the same time! Breakfast and lunch included with registration price.

1040 INDIVIDUAL TAX

Dallas/Irving, Nov 17 – 18

Houston, Nov 10 – 11

Lubbock, Nov 3 – 4

San Antonio, Dec 1 – 2

ETHICS FOR THE TAX PROFESSIONAL

Dallas/Irving, Nov 17, 4:45 p.m.

Houston, Nov 10, 4:45 p.m.

Lubbock, Nov 3

San Antonio, Dec 1, 4:45 p.m.

UTAH

The following dates in Utah are co-hosted by our partner association. For more information or to register, call 800.323.3879 or 801.571.8549.

1040 INDIVIDUAL TAX

Salt Lake City, Nov 21 – 22

BUSINESS ENTITIES TWO–DAY

Salt Lake City, Nov 7 – 8

ETHICS FOR THE TAX PROFESSIONAL

Salt Lake City, Nov 21

FEDERAL TAX UPDATE

Salt Lake City, Dec 5

VERMONT

For more information or to register, call 800.231.1860.

8 CPE—$225 or ***$195 Early Bird***

16 CPE—$399 or ***$359 Early Bird***

Breakfast and lunch included with registration price.

1040 INDIVIDUAL TAX

Burlington, Oct 31 – Nov 1

VIRGINIA

For more information or to register, call 800.231.1860.

16 CPE—$399 or ***$359 Early Bird***

Breakfast and lunch included with registration price.

1040 INDIVIDUAL TAX

Dulles, Dec 7 – 8

Tysons Corner, Nov 3 – 4

PREMIER & PREMIER PLUS:
Subscription packages include 40% off regular price of self-sponsored Gear Up events (cities/dates in blue)! Combined Gear Up/AuditWatch annual max: 24 hrs Premier, 40 hrs Premier Plus. Details: page 25.

EARLY BIRD DISCOUNT:
Save 15% on public seminars! Early Bird prices shown in orange. Expires: July 1, 2016.

WASHINGTON

The following dates in Washington are co-hosted by our partner association. For more information or to register, call 800.733.6286 or visit waa.org.

1040 INDIVIDUAL TAX

Auburn, Dec 5 – 6

Everett, Nov 7 – 8

Spokane, Dec 12 – 13

BUSINESS ENTITIES ONE-DAY

Richland, May 19

BUSINESS ENTITIES TWO–DAY

Everett, Nov 9 – 10

ETHICS FOR THE TAX PROFESSIONAL

Auburn, Dec 5

Everett, Nov 7

Spokane, Dec 12

WISCONSIN

The following dates in Wisconsin are co-hosted by our partner association. For more information or to register, call 715.425.0482

1040 INDIVIDUAL TAX

Hudson, Dec 5 – 6

Waukesha, Nov 7 – 8

GEAR UP SEMINAR POLICY

Gear Up Seminar Registration: Please call the number listed for each seminar to get specific transfer, cancellation and auxiliary aids information. The following information on registration, transfers and cancellations applies only to Gear Up seminars sponsored directly by Gear Up in the states of California, Colorado, Florida, Illinois, Indiana, Maryland, Massachusetts, Missouri, Nevada, New Mexico, New York, Oklahoma, Oregon, Texas, Vermont and Virginia.

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EARLY BIRD DISCOUNT:
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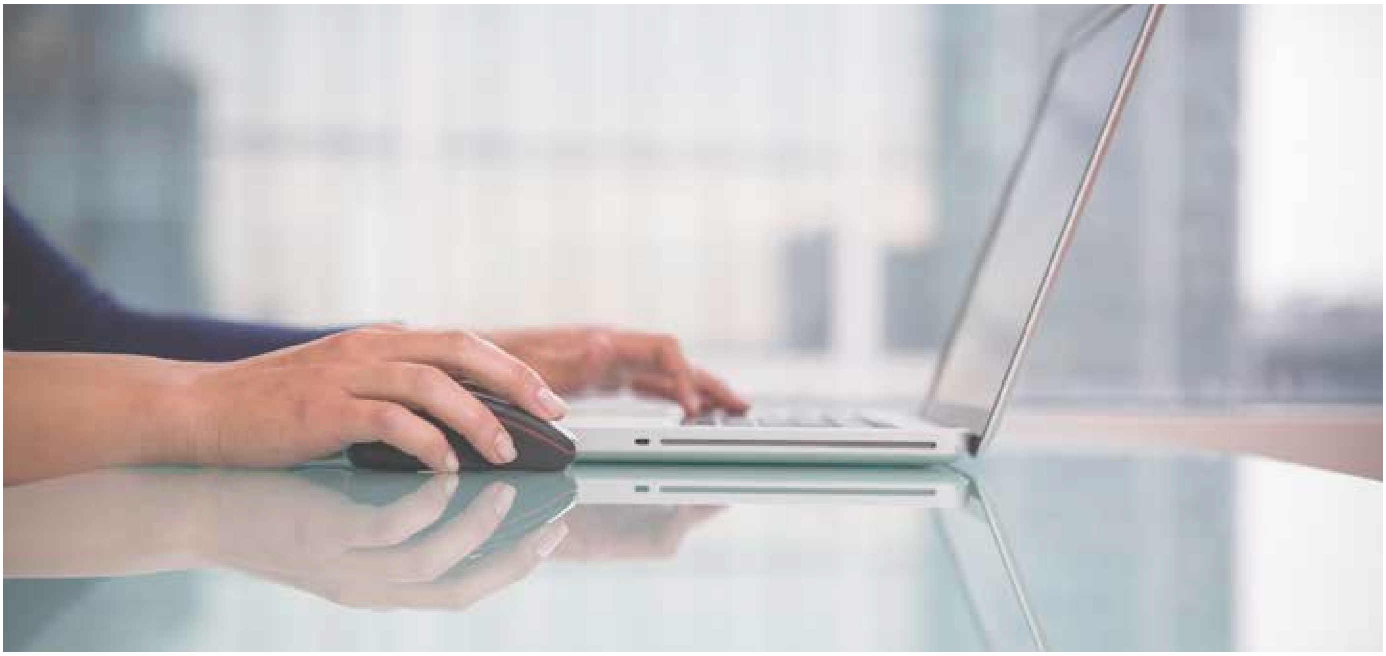
FOR MORE INFORMATION, CALL **800.231.1860**.



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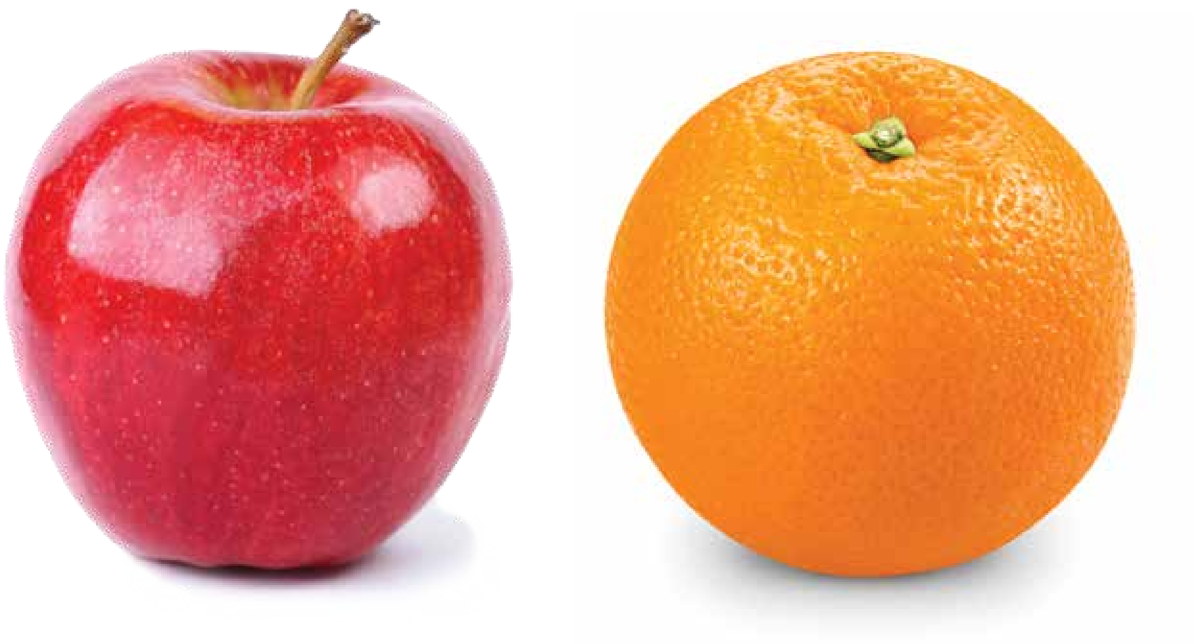

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– Andrew Pavloff, CPA
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Most virtual conferences are presented on LearnLive™; the Year-End Mega-Conference is presented on WebEx™. Both platforms allow you to view expert content and interact with the speakers.

Log on to the audio broadcast site to hear the presentation through your computer.

REVENUE FROM CONTRACTS WITH CUSTOMERS VIRTUAL CONFERENCE

Revenue from Contracts with Customers (ASU 2014-09) is the most significant change to financial reporting standards in recent years. This virtual conference provides an in-depth explanation of this new revenue recognition standard, complete with examples and implementation guidance. Conference sessions will also include discussion of the likely impact of this new standard on industries, income taxes and audits.

Conference Objectives: This conference will help you identify and apply changes to financial reporting and related services from the FASB's new standard on revenue from contracts with customers.

Who Should Attend? Accountants, auditors and others who need to understand the impact of new revenue recognition standards on financial reporting

Sessions

- Applying the Five-Step Model for Revenue Recognition
- Recognizing Other Key Provisions of the New Standard
- Analyzing New Presentation and Disclosure Requirements
- Implementation Issues: Not-For-Profit Entities
- Implementation Issues: Construction Companies
- Implementation Issues: Other Industry Considerations
- Tax implications of ASU 2014-09
- Auditing implications of ASU 2014-09
- Panel Discussion of Key Issues and Q&A

Conference Speakers:
Paul Munter, CPA; Wayne Kerr, CPA; Susan Longo, CPA; Laurie Stillwell, CPA

Schedule

May 10 and 11 / 10:00 am – 4:00 pm CST

November 29 and 30 / 10:00 am – 4:00 pm CST

Pricing

Price per participant/per conference: $379
$199 for Checkpoint Learning Premier or
Premier Plus subscribers!

CPE Information

Level: Intermediate
Prerequisites: Knowledge of Accounting and Auditing
CPE Credits: 12
Field of Study: Accounting and Auditing, Tax

Platform: Presented on LearnLive

KEY ISSUES IN INTERNATIONAL TAXATION VIRTUAL CONFERENCE

The steady increase in economic globalization has been leading the business world into cross-border transactions that have become a significant part of their regular business activities. Not surprisingly, these transactions often generate a host of international tax issues that tend to attract the scrutiny and penalty-wielding power of the IRS. This two-day web-based International Tax Conference is designed to provide useful information and practical guidance in key areas to help practitioners of all sizes conquer the challenges of tax accounting and reporting in the international business arena.

Conference Objectives: This conference will provide you with the latest updates and analysis on key issues in international taxation affecting small and medium sized CPA firms.

Who Should Attend? Experienced managers, directors, partners — specifically those who deal with international tax matters

Sessions

- Latest Developments in International Tax
- Tax Compliance: 1040 NR
- Structuring IP Transactions
- Mexican and Canadian Tax Issues/Reform
- Structuring Strategies for Inbound Investing
- FATCA and Withholding Taxes
- Latest Developments in International Tax — Outbound
- Structuring Strategies for Outbound Investing
- Foreign Tax Credits
- Foreign Bank Accounts
- Expatriation
- Transfer Pricing

Conference Speakers: Speakers for this event will include Conference Chairman Jay Darby, CPA, JD and other nationally recognized experts.

Schedule
May 24 and 25 / 9:00 a.m. – 5:00 p.m. CST

Pricing

Price per participant/per conference: $379
$199 for Checkpoint Learning Premier or
Premier Plus subscribers!

CPE Information

Level: Update
Prerequisites: Knowledge of Tax
CPE Credits: 16
Field of Study: Tax

Platform: Presented on LearnLive

PREMIER AND PREMIER PLUS PACKAGES:
$199 special pricing per virtual conference/per attendee for Premier and Premier Plus subscribers. Call 800.231.1860 to receive special pricing. Details: page 25.

AUDIT PRODUCTIVITY VIRTUAL CONFERENCE

Improving productivity is always a challenge. Whether it's pressure from competitors and clients or changes to accounting rules and accounting staff, it's easy to see why firms often struggle to achieve optimal audit quality and efficiency. Join us for a conference designed to give you the knowledge, techniques and tips to perform your engagements in the most effective and efficient manner.

Conference Objectives: This conference will provide you with the latest updates and techniques to help ensure that your firm is performing audits effectively and efficiently.

Who Should Attend? Seniors, managers, directors, partners and anyone with influence on an engagement's planning and execution.

Sessions

- Common Audit Productivity Issues
- Reviews, Compilations and Special Purpose Frameworks
- Staying Out of Trouble — Significant new accounting issues, common audit deficiencies and current findings related to fraud
- Building a Better Audit Plan
- Key Issues in Client and Project Management
- Spotting Opportunities to Use Data Extraction Software
- Getting the Most Out of Internal Controls
- Documentation Tips and Pitfalls
- Improving Performance Through Effective Supervision
- Panel Discussion — Answers to your questions and valuable best practice takeaways

Conference Speakers: AuditWatch Consultants Pete Bieghler, CPA, Wayne Kerr, CPA, Shawn O'Brien, CPA, Ericka Racca CPA and other nationally recognized experts.

Schedule
June 7 and 8 / 10:00 a.m. – 4:00 p.m. CST
September 7 and 8 / 10:00 a.m. – 4:00 p.m. CST

Pricing
Price per participant/per conference: $379.
$199 for Checkpoint Learning Premier or Premier Plus subscribers!

CPE Information
Level: Intermediate
Prerequisites: Knowledge of Auditing CPE
Credits: 16
Field of Study: Auditing

Platform: Presented on LearnLive

BIG ISSUES FOR SMALL CLIENTS VIRTUAL CONFERENCE
SMALL AND PRIVATE COMPANY AUDITING AND FINANCIAL REPORTING

Staying up-do-date with new standards, risk alerts and best practices is challenging enough, but having to sift through all of the information out there to find the few nuggets that actually matter for your clients can sometimes seem impossible. This virtual conference is designed to block out the noise and focus on just the issues most likely to be important to practitioners serving smaller, private companies.

Conference Objectives: This conference will help you identify and apply technical GAAP updates, auditing considerations and practice tips for serving your small, private-company clients.

Who Should Attend? Accountants in public practice providing audit, review, compilation or accounting services for small, private companies.

Sessions

- Recognizing the Issues Unique to Small, Private-Company Engagements
- The New Private Company Financial Reporting Options
- Tips for Implementing SSARS 21 and Launching Your Financial Statement Preparation Service
- Independence and Small Business Assurance Services
- Panel Discussion: Top Small Business Financial Reporting Issues
- What You Need to Know about Internal Controls in Very Small Company Audits
- Critiquing and Improving Employee Benefit Plan Audits: A Demonstration with Workpaper Examples
- Avoiding Common Problems with Financial Statement Disclosures
- So Near and Yet So Far: What Small Businesses Should Be Doing To Get Ready for the New Revenue Recognition Standard

Conference Speakers: Wayne Kerr, CPA; Susan Longo, CPA; Chris Martin, CPA; Jacqueline Songer, CPA

Schedule
June 28 and 29 / 10:00 a.m. – 4:00 p.m. CST

Pricing
Price per participant/per conference: $379
$199 for Checkpoint Learning Premier or Premier Plus subscribers!

CPE Information
Level: Intermediate
Prerequisites: Knowledge of Accounting and Auditing
CPE Credits: 12
Field of Study: Accounting and Auditing

Platform: Presented on LearnLive

PREMIER AND PREMIER PLUS PACKAGES:
$199 special pricing per virtual conference/per attendee for Premier and Premier Plus subscribers. Call 800.231.1860 to receive special pricing. Details: page 25.

SEE BOTTOM OF PAGE FOR DETAILS.

NEW: EMPLOYEE BENEFIT PLANS VIRTUAL CONFERENCE

Employee benefit plans present different challenges for both accountants and financial statement auditors. Whether because of the compliance-driven procedures, regulatory oversight or nature of the financial statements themselves, accountants and auditors recognize that involvement in these plans requires specialized knowledge, experience, and a unique audit approach. This virtual conference focuses on those issues critical to accounting for, auditing and consulting with clients regarding employee benefit plans including Q&A and panel discussions to address your questions and provide opportunities for sharing of best practices.

Conference Objectives: This conference will help you identify and address the financial reporting, auditing, compliance and consulting issues unique to employee benefit plans.

Who Should Attend? Accountants, auditors and others with responsibilities related to employee benefit plans.

Sessions

- Accounting and Auditing Update: EBP Focused
- Regulatory Update
- Fundamentals of Health and Welfare Plans
- Form 5500: Pitfalls and Practice Tips
- Addressing DOL Concerns and Enhancing Audit Quality
- Key Efficiency Considerations in Performing EBP Audits
- SOC 1 Reports: How Should You Really Be Using These?
- Top Ten EBP Consulting Opportunities: How You Could Be Helping Your Clients
- Panel Discussion of Key Issues and Q&A

Conference Speakers: Shawn O'Brien, CPA; Susan Longo, CPA, Ali Haffner, Esq.

Schedule

August 16 and 17, 2016 / 10:00 a.m. – 4:00 p.m. CST
September 13 and 14, 2016 / 10:00 a.m. – 4:00 p.m. CST

Pricing

Price per participant/per conference: $379
$199 for Checkpoint Learning Premier or Premier Plus subscribers

CPE Information

Level: Intermediate
Prerequisites: Knowledge of Employee Benefit Plan Accounting and Auditing
CPE Credits: 12
Field of Study: Accounting and Auditing

Platform: Presented on LearnLive

NEW: NOT-FOR-PROFIT VIRTUAL CONFERENCE

Not-for-profit entities present unique challenges to practitioners in many different areas, including financial reporting, auditing, compliance and fraud. This virtual conference provides an in-depth look at some of the most important issues in serving this diverse, and sometimes complicated, market segment; focusing on practical guidance, practice tips, introductions to new issues and solutions to old ones. This virtual conference will also include Q&A and panel discussions to address your questions and provide opportunities for sharing of best practices.

Conference Objectives: This conference will help you identify and address the financial reporting, auditing, compliance and fraud issues unique to not-for-profit entities.

Who Should Attend? Accountants, auditors and others with responsibilities related to not-for-profit financial reporting or auditing.

Sessions

- NPO Financial Reporting Changes: A Roadmap
- Understanding, Detecting and Preventing Fraud in NPOs
- Performing High Quality Single Audits
- Form 990: Pitfalls and Practice Tips
- Avoiding Common Audit Deficiencies and Enhancing Audit Quality
- Planning Ahead: Understanding the Impact of Revenue Recognition and Other Significant New Standards on NPOs
- Audit Primer: Key Issues Related To NPO Internal Controls, Analytical Procedures and Sampling
- Panel Discussion of Key Issues and Q&A

Conference Speakers: Troy Manning, CPA; Susan Longo, CPA; AuditWatch Team

Schedule

October 25 and 26, 2016 / 10:00 a.m. – 4:00 p.m. CST
December 6 and 7, 2016 / 10:00 a.m. – 4:00 p.m. CST

Pricing

Price per participant/per conference: $379
$199 for Checkpoint Learning Premier or Premier Plus subscribers

CPE Information

Level: Intermediate
Prerequisites: Knowledge of Not-For-Profit Accounting and Auditing
CPE Credits: 12
Field of Study: Accounting and Auditing, Yellow Book

Platform: Presented on LearnLive

PREMIER AND PREMIER PLUS PACKAGES:
$199 special pricing per virtual conference/per attendee for Premier and Premier Plus subscribers. Call 800.231.1860 to receive special pricing. Details: page 25.

2016 YEAR-END MEGA-CONFERENCE FOR PRACTITIONERS

This year's year-end mega-conference pulls together a variety of topics in accounting, auditing, tax and practice management for a truly interdisciplinary experience. Presented over two days, this conference conveniently groups the sessions into those with an accounting and auditing focus and those with a tax focus — so you can attend the whole conference or just the day that is most relevant to you.

Conference Objectives: This conference will help you to identify and apply technical issues, practice management skills and practice tips to your practice areas.

Who Should Attend? Accounting, auditing and tax professionals.

Sessions

Day 1

- Accounting Update
- Compilation and Review Update
- Challenging Assumptions: Using Real-World Examples to Critique and Improve Audits
- Excel Graphics

Day 2

- Federal Tax Year End Round Up - What You Need to Know Now Before Busy Season
- Recent Changes in the Most Commonly Used Tax Forms
- IRS Examination Issues – What's Hot and Being Scrutinized
- Tax Practice Ethics and Quality Control

Conference Speakers: AuditWatch Consultants, TaxWatch Instructors and other nationally recognized experts

Schedule

November 21 and 22 / 9:00 a.m. – 5:00 p.m. CST

December 15 and 16 / 9:00 a.m. – 5:00 p.m. CST

Pricing

Price per participant/per conference: $219 per day or $399 for both days
Checkpoint Learning Premier Subscribers: $119 per day or $219 for both days
Checkpoint Learning Premier Plus Subscribers: FREE!

CPE Information

Level: Intermediate
Prerequisites: Knowledge of Tax, Accounting and Auditing
CPE Credits: 8 credits per day or 16 hours for total event
Field of Study: Tax, Accounting and Auditing, Computer Science

Platform: Presented on WebEx™

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WEBINARS

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MAY 2016 — SCHEDULED WEBINARS *More information and up-to-date schedule: cl.tr.com*

Mon	Tues	Wed	Thu	Fri
Times shown are Central Standard (CST)	**3** 10 a.m.: Schedule C and Sole Proprietorships: Still the Most Popular Way to Do Business **(2 hrs)** 12 p.m.: Excel Analysis Tools **(2 hrs)** 2 p.m.: Introduction to Accounting for Deferred Income Taxes **(2 hrs)**	**4** 9 a.m.: IRAs, Pensions and 401(k)s: Planning for Retirement and Beyond **(8hrs)** 2 p.m.: Delegating for Results **(2hrs)**	**5** 9 a.m.: Compilations, Reviews and Preparations: Comprehensive Guidance Including Implementation of the New SSARS 21 Standards **(8hrs)** 12 p.m.: Quarterly Sales and Use Tax Update for Controllers and Financial Managers **(2hrs)**	**6** 10 a.m.: Tax Planning with Real Margin Tax Rates **(2hrs)** 12 p.m.: A CPA's Independence: Compliance with the Professional Code of Conduct and Practical Considerations **(2hrs)**
9	**10** 9 a.m.: Performing Efficient Audits of Employee Benefit Plans **(8hrs)** 12 p.m.: Perfecting Analytical Procedures **(2hrs)**	**11** 10 a.m.: Monthly Accounting Alert **(1hr)** 11 a.m.: Monthly Corporate Tax Update **(1hr)** 12 p.m.: Health Care Reform Issues for Employers **(2hrs)** 2 p.m.: Issues in Preparing a Statement of Cash Flows **(2hrs)**	**12** 2 p.m.: Revenue from Contracts with Customers: Understanding the Tax impact of ASU 2014-09 **(1hr)**	**13** 9 a.m.: Federal Tax Update **(8hrs)** 10 a.m.: Planning for Education Expenses: So Many Deductions and Expenses **(2hrs)**
16	**17** 10 a.m.: Understanding and Evaluating Internal Controls **(2hrs)** 12 p.m.: Quarterly SEC and PCAOB Update: Q2 2016 **(1hr)** 2 p.m.: Tax Fraud and Identity Theft **(2hrs)**	**18** 10 a.m.: How to Sell an S Corporation **(2hrs)** 2 p.m.: Windows 10 Preview **(2hrs)**	**19** 9 a.m.: Accounting and Auditing Update **(8hrs)** 12 p.m.: Strategies for Developing High Performing Teams **(2hrs)**	**20** 10 a.m.: SMART Tools: Risk Assessment **(2hrs)** 12 p.m.: Audit Quality: What the Regulators Want to See **(2hrs)**
23	**24** 10 a.m.: Fixed Asset Additions and Dispositions: Key 2016 Elections **(2hrs)** 12 p.m.: Monthly Tax Alert **(2hrs)**	**25** 9 a.m.: Introduction to Audits of Nonprofit and Governmental Entities **(8hrs)** 2 p.m.: IRS Enforcement Actions **(2hrs)**	**26** 10 a.m.: Risk Management for Financial Professionals **(2hrs)** 12 p.m.: Understanding the FASB's New Standard on Leases **(2hrs)** 2 p.m.: Real Estate from A to Z **(2hrs)**	**27** 10 a.m.: Quarterly Yellow Book Update: Q2 2016 **(2hrs)** 12 p.m.: Common Practice Problems in Preparing Nonprofit Organization Financial Statements **(2hrs)**
30	**31** 12 p.m.: Casualty and Theft Losses **(2hrs)** 2 p.m.: Retirement Investment Strategies **(2hrs)**			

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JUNE 2016 — SCHEDULED WEBINARS *More information and up-to-date schedule: cl.tr.com*

Mon	Tues	Wed	Thu	Fri
Times shown are Central Standard (CST)		**1** 9 a.m.: Audit Sampling: Effective and Efficient Sampling in Tests of Details and Tests of Controls **(8hrs)** 12 p.m.: Partnership/LLCs: Advanced Topics **(2hrs)**	**2** 10 a.m.: Introduction to Fiduciary Taxation **(2hrs)** 12 p.m.: Introduction to Business Combinations and Consolidations **(2hrs)** 2 p.m.: Home Ownership from A to Z **(2hrs)**	**3** 10 a.m.: Innocent Spouse Relief: The Complicated Path to a Simple Solution **(2hrs)** 12 p.m.: Professional Ethics in Practice: Recent Changes for CPA's **(2hrs)**
6	**7** 10 a.m.: IRAs: The Complexities and Benefits **(2hrs)** 12 p.m.: Health Care Reform: The Individual Mandate **(2hrs)**	**8** 10 a.m.: Initial Audit Engagements **(2hrs)** 12 p.m.: Excel: Big Data Tools **(2hrs)** 2 p.m.: Coaching to Develop Competencies and Improve Performance **(2hrs)**	**9** 10 a.m.: Accounting for Income Taxes: Practice Issues and Common Pitfalls **(2hrs)** 12 p.m.: Exceeding Expectations Every Time: Mastering the Exceptional Service Technique **(2hrs)** 2 p.m.: Employee vs. Independent Contractor: Expect More Scrutiny **(2hrs)**	**10** 9 a.m.: Federal Tax Update **(8hrs)** 12 p.m.: Monthly Accounting Alert **(1hr)** 1 p.m.: Monthly Corporate Tax Update **(1hr)**
13	**14** 10 a.m.: Excel Best Practices **(2hrs)** 12 p.m.: Tax Practice Ethics and Quality Control **(2hrs)**	**15** 10 a.m.: Debt Basis: Limits and Opportunities for S Corporations and Partnerships **(2hrs)** 12 p.m.: Quarterly SEC and PCAOB Update: Q2 2016 **(1hr)**	**16** 9 a.m.: S Corporations: From Formation to Liquidation **(8hrs)** 2 p.m.: Revenue from Contracts with Customers: An Overview **(2hrs)**	**17** 9 a.m.: Accounting and Auditing Update **(8hrs)** 10 a.m.: Quarterly Yellow Book Update: Q2 2016 **(2hrs)** 12 p.m.: Key Considerations in Auditing Revenue **(2hrs)**
20	**21** 9 a.m.: Estates and Trusts **(8 hrs)** 12 p.m.: Revenue from Contracts with Customers: Understanding the Impact on Construction Contractors **(2hrs)**	**22** 10 a.m.: Fixed Asset Additions and Dispositions: Key 2016 Elections **(2hrs)** 12 p.m.: Overview of Recent and Proposed Changes to the Accounting for Financial Instruments **(2hrs)**	**23** 9 a.m.: Understanding Health Care Reform: How the New Laws Impact Employers and Individual Taxpayers **(8hrs)** 12 p.m.: Internal Controls for Nonprofits **(2hrs)** 2pm: Inventory Observations: Requirements, Approaches and Practice Tips **(2hrs)**	**24** 9 a.m.: Government and Nonprofit Update **(8hrs)** 10 a.m.: SMART Tools: Internal Controls **(2hrs)** 2 p.m.: Implementing SSARS 21: The New Compilation, Review and Preparation Standards **(2hrs)**
27	**28** 10 a.m.: Monthly Tax Alert **(2hrs)** 12 p.m.: M&A Overview: The Acquisition Process and the Role of Accounting Professionals **(2hrs)**	**29** 10 a.m.: Cloud Computing Made Easy for CPAs **(2hrs)**	**30** 9 a.m.: Fraud Detection: Fraud in the Preparation of Financial Statements and Tax Returns **(8hrs)** 12 p.m.: Budgeting and Forecasting for Financial Professionals **(2hrs)** 2 p.m.: Introduction to Accounting for Deferred Income Taxes **(2hrs)**	

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JULY 2016 — SCHEDULED WEBINARS

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Mon	Tues	Wed	Thu	Fri
Times shown are Central Standard (CST)				**1** 12 p.m.: A CPA's Independence: Compliance with the Professional Code of Conduct and Practical Considerations **(2hrs)**
4	**5** 12 p.m.: Quarterly Yellow Book Update Q3 2016 **(2hrs)** 2 p.m.: Uniform Guidance for Performing Single Audits **(2hrs)**	**6** 10 a.m.: How to Sell an S Corporation **(2hrs)** 12 p.m.: Excel Analysis Tools **(2hrs)** 2 p.m.: Auditors' Reports **(2hrs)**	**7** 9 a.m.: Financial Reporting and Disclosures for Small Businesses **(8hrs)** 12 p.m.: Key Issues Related to Forms 1099 and 1098 **(2hrs)**	**8** 10 a.m.: New Data Security Regulations for Tax Preparers **(2hrs)** 12 p.m.: M&A Overview: The Corporate Divestiture Process and the Role of Accounting Professionals **(2hrs)**
11	**12** 9 a.m.: Performing Effective and Efficient Single Audits **(8hrs)** 12 p.m.: Tax Fraud and Identity Theft **(2hrs)**	**13** 9 a.m.: Federal Tax Update **(8hrs)** 12 p.m.: Quarterly SEC and PCAOB Update: Q3 2016 **(1hr)** 2 p.m.: Negotiating 101: Considerations for Daily Negotiations We Face in Business **(2hrs)**	**14** 10 a.m.: Transactions with Partners (Members): Guaranteed Payments, SE Tax, Retirement and UPE **(2hrs)** 12 p.m.: Monthly Accounting Alert **(1hr)** 1 p.m.: Monthly Corporate Tax Update **(1hr)** 2 p.m.: Audit Quality: What the Regulators Want to See **(2hrs)**	**15** 10 a.m.: Operational Finance for Accounting Professionals: The Express Version **(2hrs)** 12 p.m.: AMT Update **(2hrs)**
18	**19** 10 a.m.: Common Practice Problems in Preparing Nonprofit Organization Financial Statements **(2hrs)** 12 p.m.: Windows 10 Preview **(2hrs)** 2 p.m.: Cracking the Code: Efficient and Thorough Tax Research Techniques **(2hrs)**	**20** 9 a.m.: Accounting and Auditing Update **(8hrs)** 12 p.m.: Farm Tax Update **(2hrs)** 2 p.m.: Capital Gain or Ordinary Income **(2hrs)**	**21** 9 a.m.: Compilations, Reviews and Preparations Including the New SSARS 21 Standards **(8hrs)** 2 p.m.: Understanding the FASB's New Standard on Leases **(2hrs)**	**22** 10 a.m.: Identifying and Correcting the Most Common Audit Inefficiencies **(2hrs)** 12 p.m.: SMART Tools: Risk Assessment **(2hrs)**
25	**26** 12 p.m.: Monthly Tax Alert **(2hrs)** 2 p.m.: Strategic Leadership in the Public Accounting Environment: Four Tools Every Leader in Public Accounting Must Have **(2hrs)**	**27** 12 p.m.: Nontraditional Engagements: Pro Forma, Forecasts and Projections **(2hrs)** 2 p.m.: Understanding the Forms and Calculations for Health Care **(1hr)**	**28** 9 a.m.: Partnerships and LLC(s): From Formation to Liquidation **(8hrs)** 12 p.m.: Life Insurance, Disability and Long-Term Care Insurance in 2016 **(2hrs)**	**29** 10 a.m.: Advanced Topics in Financial Statement Preparation **(2hrs)**

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AUGUST 2016 — SCHEDULED WEBINARS *More information and up-to-date schedule: cl.tr.com*

Mon	Tues	Wed	Thu	Fri
1 Times shown are Central Standard (CST)	**2** 9 a.m.: Understanding Health Care Reform: How the New Laws Impact Employers and Individual Taxpayers **(8hrs)** 12 p.m.: Revenue from Contracts with Customers: Impact on Construction Contractors **(2hrs)** 2 p.m.: Quarterly Yellow Book Update: Q3 2016 **(2hrs)**	**3** 10 a.m.: Data Security and Privacy **(2hrs)** 12 p.m.: Partnerships/LLCs: Section 754 Election and Basis Adjustments **(2hrs)**	**4** 12 p.m.: How to Handle IRS Audits and Appeals **(2hrs)**	**5** 10 a.m.: Delegating for Results **(2hrs)** 12 p.m.: Professional Ethics in Practice: Recent Changes for CPAs **(2hrs)**
8	**9** 10 a.m.: Innocent Spouse Relief: The Complicated Path to a Simple Solution **(2hrs)** 12 p.m.: Internet of Things for Accountants **(2hrs)** 2 p.m.: Understanding and Evaluating Internal Controls **(2hrs)**	**10** 9 a.m.: Federal Tax Update **(8hrs)** 12 p.m.: Overview of Recent and Proposed Changes to the Accounting for Financial Instruments **(2hrs)**	**11** 9 a.m.: Accounting and Auditing Update **(8hrs)** 2 p.m.: Health Care Reform Issues for Employers **(2hrs)**	**12** 10 a.m.: Revenue from Contracts with Customers: An Overview **(2hrs)** 12 p.m.: Key Considerations in Auditing Revenue **(2hrs)**
15	**16** 9 a.m.: Business Entity Tax Update **(8hrs)** 12 p.m.: Quarterly SEC and PCAOB Update: Q3 2016 **(1hr)**	**17** 10 a.m.: Adjustments to Income: So Many of Them and Always Better than Itemized Deductions **(2hrs)**	**18** 9 a.m.: Fundamental Audit Strategies **(8hrs)** 2 p.m.: M&A Overview: The Acquisition Process and the Role of Accounting Professionals **(2hrs)**	**19** 10 a.m.: Fair Value Accounting Rules **(2hrs)** 12 p.m.: Monthly Accounting Alert **(1hr)** 1 p.m.: Monthly Corporate Tax Update **(1hr)**
22	**23** 9 a.m.: Everything You Wanted to Know About Generally Accepted Government Auditing Standards (GAGAS) for Financial Audits **(8hrs)** 12 p.m.: Excel: Big Data Tools **(2hrs)**	**24** 10 a.m.: Ethics for Tax Professionals **(2hrs)** 12 p.m.: Fixed Asset Additions and Dispositions: Key 2016 Elections **(2hrs)**	**25** 10 a.m.: Monthly Tax Alert **(2hrs)**	**26** 10 a.m.: Wrapping Up Engagements: Efficiency Techniques That Work **(2hrs)** 12 p.m.: SMART Tools: Internal Controls **(2hrs)**
29	**30** 12 p.m.: Tax Credits for Personal and Business: Available by the Dozen **(2hrs)**	**31** 12 p.m.: Tax Planning with Real Margin Tax Rates **(2hrs)** 2 p.m.: Strategies for Developing High-Performing Teams **(2hrs)**		

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ACCOUNTING

2015 FASB Update
A New Era for Top-Line Reporting: Preparing for the New Revenue Recognition Guidance *New!*
Accounting and Auditing Real Estate Transactions
Accounting Changes and Error Corrections
Accounting for Business Combinations *New!*
Accounting for Derivatives and Hedging Activities
Accounting for Farms and Ranches
Accounting for Income Taxes
Accounting for Investments in Debt and Equity Securities
Accounting for Investments: Equity Method Including Consolidations
Accounting for Leases
Accounting for Liabilities
Accounting for Pensions
Accounting for Share-Based Compensation
Accounting for Stock-Based Compensation *New!*
Accounting for Uncertainty in Income Taxes: FASB ASC 740-10
Accounting Overview for Tax Professionals
Accounting Update *New!*
Accounts Payable: Worst Practices, Better Alternatives and Internal Control Issues: External *New!*
Accounts Payable: Worst Practices, Better Alternatives and Internal Control Issues: Internal *New!*
Activity-Based Costing (ABC)
Advanced Forensic Accounting *New!*
An Overview of the Impact of IFRS Convergence on Private Entities *New!*
Analysis of the Corporate Annual Report
Asset Impairment *New!*
ASU 2013-02 Comprehensive Income Reclassification Reporting *New!*
ASU 2013-03 Nonpublic Financial Instrument Disclosures *New!*
ASU 2013-07 Liquidation Basis of Accounting *New!*
Balance Sheet and GAAP Reporting
Bar and Restaurant Financial Statement Presentation Including Measurement and Disclosure Issues
Best Practices for an Effective and Efficient Employee Travel, Entertainment and Expense Reimbursement Function *New!*
Business Combinations, Goodwill and Other Intangible Assets

Best Practices for an Effective and Efficient Employee Travel, Entertainment, and Expense Reimbursement Function *New!*

2 CPE Credits | Accounting

This course is designed to make you aware of some of the more common worst practices in travel and entertainment expense reimbursement process. The course will not only explain why these practices have made the "worst" list, but we will also give you options for better practices for your organization. In addition, the course also provides additional insights into the issues that plague the expense reimbursement process.

Calculating and Accounting for Sales and Use Tax Liability *New!*
Cash Flow Statements *New!*
Cash Flows (FASB ASC 230)
Comprehensive Income
Current Developments: Accounting and Financial Reporting
Decision-Making Framework for Private Companies *New!*
Defining a Public Business Entity *New!*
Discontinued Operations *New!*
Earnings per Share (Topic 260)
Employee Benefit Plans I: Accounting Principles
Fair Value Measurement: An Introduction to Fair Value Measurements and Disclosures (FASB ASC 820)
Financial Management Overview
Financial Management: Budgeting and Forecasting *New!*
Financial Reporting for Private Companies *New!*
Financial Statement Analysis Techniques *New!*
Financial Statement Disclosure: Common Issues
Forensic Accounting *New!*
GAAP Guide: Advanced Topics
GAAP Guide: Income Statement and Financial Analysis
GAAP Guide: The Balance Sheet
GAAP Reporting: Revenue and Expenses
IFRS and a Comparison with U.S. GAAP
Implementation Guide for FRF for SMEs *New!*
Indefinite-Lived Intangible Assets Impairment *New!*
International Financial Reporting Standards (IFRS) Update
Introduction to Bank Auditing and Accounting: I
Introduction to Bank Auditing and Accounting: II
Introduction to International Financial Reporting Standards
Introduction to SEC Reporting
Lease Accounting *New!*
Managing an Accounting Department
Non-GAAP Financial Measures
Preparing and Reporting on Personal Financial Statements *New!*
Preparing Personal Financial Statements
Real Estate Financing and Investment
Revenue Recognition: Fundamentals
Revenue Recognition: Rules and Standards
Review of Other Comprehensive Bases of Accounting *New!*
Sarbanes-Oxley: Benefiting From Compliance *New!*
SEC Initial Public Offerings (IPOs): An Introduction

Structuring Intellectual Property Transactions *New!*

4 CPE Credits | Accounting

This course will examine many of the popular tax-planning strategies used in connection with IP, including U.S. multi-state as well as international strategies. It covers how to acquire or create IP within the optimal jurisdiction and how to compare and contrast the advantages of U.S. tax incentives to create IP, such as Code Section 41 and 174, to the advantages of exploiting successful IP from a low-tax jurisdiction. The course will also examine how to set up and structure IP holding subsidiaries so that they work both for successful and unsuccessful IP ventures (the latter focusing on how to take U.S. losses for investments in a foreign subsidiary).

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SEC Reporting and Registration Requirements and Accountant Comfort Letters
SEC Reporting *New!*
SEC Reporting: Preparing Management's Discussion and Analysis
Segment Accounting and Reporting
SSARS 21: Comprehensive Analysis of the Compilation and Review Standards
Sustainability Accounting and Reporting
Terrorist Activity: Track It Using Forensic Accounting *New!*
The Ins and Outs of Processing Payroll *New!*
Uncommon Reporting Items, Statement of Cash Flows and Tax Basis Financial Statements
Understanding and Analyzing Financial Statements

Terrorist Activity: Track It Using Forensic Accounting *New!*

3 CPE Credits | Accounting

This course discusses the emotional topic of terrorism and how forensic accounting is being used to combat it. It outlines various characteristics and skills of both the forensic accountant and the terrorist as well as how they match their strengths against the other's weaknesses. The program uncovers the vulnerable points in society that terrorists exploit as well as uncovers the terrorists' own vulnerable points that forensic accountants can access. The program also identifies various accounting and investigation tools used to gather evidence against organizations that fund terrorists.

ACCOUNTING, GOVERNMENTAL

Accounting for Governmental Assets and Liabilities *New!*
Activity Based Budgeting *New!*
Activity Based Costing *New!*
GASB 34 Basic Financial Statements for State and Local Governments
GASB 70 Nonexchange Financial Guarantees *New!*
GASB Concepts Statement 6 *New!*
GASB Employer and Pension Plan Implementation *New!*
GASB Pension Standards Overview *New!*
GASB Statement No. 54: Fund Balance Reporting and Governmental Fund
Government Accounting Principles
Governmental Financial Reporting *New!*
Governmental Special Purpose Reporting *New!*
How Proposed GASB Changes May Affect Other Postemployment Benefits' Accounting and Reporting *New!*
Internal Audit 101: Building the Internal Audit Function Coming soon!
Internal Audit and Cyberrisk Introduction *Coming soon!*
Internal Control Over Governmental Financial Reporting *New!*
Local Government Budgeting: A Practical Approach for Fiscal Management New!
OPEB Plans *New!*
Overview of Governmental Accounting New!
Performance Management Systems and Budgeting *New!*
Specialized Accounting of Governmental Entities *New!*
State and Local Governmental Performance Management *New!*
The Effects of GAO's Focus on Auditors' Independence *New!*
Trends in Governmental Accounting *New!*

ADMINISTRATIVE PRACTICE

A Complete Guide to Investing
Personal Financial Planning

AUDITING

Advanced Fraud Techniques *New!*
Analytical Fraud Detection
Analytical Procedures *New!*
Application of COSO for Smaller Companies *New!*
Audit Documentation and Workpaper Review *New!*
Audit Sampling *New!*
Audit Workpapers: Fieldwork Basics *Coming soon!*
Auditing Developments
Auditor's Response to Fraud Risk Assessment
Best Practice Electronic Payment Fraud Avoidance Program *Coming soon!*
Clarification and Recodification for Reviews, Compilations, and Engagements to Prepare Financial Statements *New!*
Compilation and Review
Compilation and Review Guide: Preparation *New!*
Compilation and Review Guide: Reviews *New!*
Compilations: An Overview *New!*
Computer Fraud: Detection and Deterrence
Continuous and Paperless Auditing *New!*
COSO 2013
Employee Benefit Plans II: Auditing Considerations
Forensic Accounting: An Overview
Fraud 101: A Basic Prevention Guide for Small Businesses *New!*
Fraud 101: Occupational Frauds Against Organizations *New!*
Fraud 101: Fraudulent Financial Reporting *New!*
Fraud 101: Misappropriations *New!*
Fraud Auditing and Investigation
Fraud I: Prevention
Fraud in Smaller Entity Engagements *New!*
Fraud: Who Commits It and Why Does It Occur?
GAAS Guide: Audit Programs *New!*
GAAS Guide: Evidence and Procedures *New!*
GAAS Guide: Internal Control *New!*
GAAS Guide: Planning *New!*
GAAS Guide: Reporting *New!*
GAAS Gu Financial Reporting
PCAOB Audits: Gathering Evidence and Completing the Audit
PCAOB Audits: Internal Control Stage
PCAOB Audits: Planning and Risk Assessment Stage
PCOAB Auditing Standards: Communications with Audit Committees
PCOAB Auditing Standards: Risk and Materiality During Planning and Performing an Audit
PCOAB Auditing Standards: Supervision, Evidence, Supplemental Information and Evaluation of Results
Practice Issues: Compilation and Review Update
Preparing for a System Review *Coming soon!*
Preparing for an Engagement Review *New!*
Risk Assessment: Planning of a Financial Statement Audit
SAS 99: Consideration of Fraud in a Financial Statement Audit
The Detection and Prevention of Fraud in Financial Statements
The Fraud of Identity Theft
Updated COSO Framework *New!*
Using Audit Sampling for Evidence *New!*

AUDITING, GOVERNMENTAL

AICPA Guidance for Pension Audits *New!*
Audits of State and Local Governments

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Audits of States, Local Governments and Nonprofit Organizations
GAO Standards: Yellow Book
Grants Management *New!*
Internal Control and Fraud in Governmental and Nonprofit Entities *New!*
OMB Circular A-133: The Single Audit
OMB Single Audit Guidance *New!*
Single Audits of Governmental Entities *New!*
Yellow Book and Single Audit Deficiencies *New!*

Yellow Book and Single Audit Deficiencies ***New!***

4 CPE Credits | Auditing (Governmental)

This program discusses the significant issues in Yellow Book financial statement audit engagements, including deficiencies in audit procedures performed, the auditor's reporting, and financial statement and compliance deficiencies that can lead to modified opinions. You will learn how to avoid the common deficiencies and mistakes found in Yellow Book and single audit engagements.

BEHAVIORAL ETHICS

CPAs in Trouble: Ethical Considerations *New!*
The Strength Behind Board of Directors: Accountability and Oversight *New!*

BUSINESS LAW

Avoiding Post-Retirement Insolvency
Bankruptcy Law
Business Law for Accountants: Contracts *New!*
Foreclosure Law
Harassment: Response, Prevention and Protection

BUSINESS MANAGEMENT AND ORGANIZATION

Advising and Consulting to the Small Business
Benchmarking Strategies: A Tool for Profit Improvement
Cash Flow: Managing the Lifeblood of the Organization
Financial Statement Analysis for Profit Improvement
How to Write a Business Plan
I Am Supposed to Supervise These People
Management Accounting: Tools for Making More Effective Business and Operating Decisions
Payroll Outsourcing New!
Project Management Essentials for the CPA
Quality Control for CPA Firms
Striving for Outstanding Customer Service: The Road to Growth *New!*
Techniques of Financial Analysis, Modeling, and Forecasting

COMMUNICATIONS

Powerful Presentations: How to Build and Deliver

COMPUTER SCIENCE

Cyber Security to Protect Your Company and Your Clients
Getting Started with Windows 8
Is Microsoft Office 365 Right for Your Business *New!*
QuickBooks Pro 2013
QuickBooks Pro 2014
Quickbooks Pro 2015: Middle Game *Coming soon!*
Quickbooks Pro 2016: Setting Up *Coming soon!*
The Internet of Things and Its Impact on Business *New!*

FINANCE

101 Financial Solutions: Diagnosis and Remedy
An Introduction to myRAs
Capital Budgeting
Capital Budgeting and Management
Financing Options for Business

MANAGEMENT ADVISORY SERVICES

21st Century Standards and Practice for Boards of Directors New!
A Practical Guide to Mergers, Acquisitions and Divestitures
Analyzing Financial Statements for Profit Improvement *New!*
Analyzing Today's Business Operations *New!*
Analyzing Today's Business Operations: Analyzing the Accounting Function *New!*
Analyzing Today's Business Operations: Cost Reduction Analysis *New!*
Analyzing Today's Business Operations: Customer Service and Cash Conversion *New!*
Analyzing Today's Business Operations: Operating and Internal Controls *New!*
Analyzing Today's Business Operations: Operational Reporting Considerations *New!*
Analyzing Today's Business Operations: Organizational Structure and the Role of Management *New!*
Analyzing Today's Business Operations: Setting Up For Success *New!*
Analyzing Today's Business Operations: The Sales Function *New!*
Building Effective Planning and Budgeting Strategies *New!*
Corporate Controllership *New!*
Corporate Financial Management *New!*
Cost Management: Accounting and Control
Enterprise Risk Management *New!*
How to Become the Best: Lessons to Learn from Great Companies *New!*
How to Start a Business
Key Concepts for Effective Project Management *New!*
Managerial Cost Accounting for Decision Making *New!*
Managing Your Clients and CPA Services
Performing the Operational Review for Results *New!*
Strategic Management *New!*
Total Cash Management
Winning the Cash Conversion Game: Operating on Other People's Money *New!*

PERSONAL DEVELOPMENT

Bottom-Line Leadership
Delegating to Financial Employees
Effective Writing for Accountants
Essential Coaching Skills
Influencing People in Organizations: The Leadership Imperative Overview and Basic Concepts
Introverts and Extroverts at Work
Meetings that Matter
Moral Leadership and Character Development
Retirement Planning for Expatriates to Central Americans

PERSONNEL/HR

Managing a Virtual Team

REGULATORY ETHICS

2016 Ethics for Virginia CPAs *Coming soon!*
2016 Ethics for Washington CPAs
2016 Personal and Professional Ethics for North Carolina CPAs
California Rules and Regulations
Colorado Rules and Regulations
CPAs and Independence
Ethics for Alaska CPAs
Ethics for Arkansas CPAs
Ethics for Attest Firms
Ethics for Attest Firms and Tax Professionals
Ethics for California CPAs

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Ethics for Certified Financial Planner™ Certificants
Ethics for Colorado CPAs
Ethics for Connecticut CPAs
Ethics for CPAs
Ethics for CPAs and Tax Professionals
Ethics for Delaware CPAs
Ethics for District of Columbia CPAs
Ethics for Enrolled Agents
Ethics for Georgia CPAs
Ethics for Guam CPAs
Ethics for Idaho CPAS
Ethics for Illinois CPAs
Ethics for Indiana CPAs
Ethics for Iowa CPAs
Ethics for Kansas CPAs
Ethics for Kentucky CPAs
Ethics for Maine CPAs
Ethics for Maryland CPAs
Ethics for Massachusetts CPAs
Ethics for Michigan CPAs: Part I
Ethics for Michigan CPAs: Part II
Ethics for Minnesota CPAs
Ethics for Mississippi CPAs
Ethics for Missouri CPAs: Part I
Ethics for Missouri CPAs: Part II
Ethics for Montana CPAs
Ethics for Nebraska CPAs
Ethics for Nevada CPAs
Ethics for New Hampshire CPAs
Ethics for New Mexico CPAs
Ethics for New York CPAs
Ethics for New York Tax Professionals
Ethics for Ohio CPAs
Ethics for Oklahoma CPAs
Ethics for Oregon CPAs
Ethics for Pennsylvania CPAs
Ethics for Puerto Rico CPAs
Ethics for Rhode Island CPAs
Ethics for South Carolina CPAs
Ethics for Tax Professionals
Ethics for Tennessee CPAs
Ethics for Vermont CPAs
Ethics for West Virginia CPAs
Ethics for Wyoming CPAs
Ethics in Tax Practice: Florida *New!*
Independence: An Overview for Attest Firms
Independence and Attest Firms
Independence for CPAs: An Overview
Independence Requirements for CPAs *New!*
Independence, Integrity and Objectivity
Oregon Rules and Regulations
Personal and Professional Ethics for Florida CPAs
Personal and Professional Ethics for Louisiana CPAs
Personal and Professional Ethics for Texas CPAs
Personal and Professional Ethics for Texas CPAs (Video)
Professional Ethics for Arizona CPAs
Professional Ethics for Arizona CPAs (2 hrs.)
Professional Ethics for Hawaii CPAs

SOCIAL ENVIRONMENT OF BUSINESS

Branding Yourself and Your Firm Using LinkedIn

SPECIALIZED KNOWLEDGE AND APPLICATIONS

9 Must-Have Skills for Every CFO
Accounting Apps for Your Business
Accounting for Banks and Other Financial Institutions *New!*
Audits of 401(k) Plans *New!*
Building a Millennial Accounting Office *Coming soon!*
Client Acquisition and Retention *Coming soon!*
Cloud Computing: Doing Business in the Cloud
Construction Contractors: Real-World Guide to Accounting and Auditing *New!*
CPA Services in Divorce and Family Law *New!*
CPAs' Guide to Privacy Law Compliance and Data Protection *New!*
CPAs with Clients in the Legal Marijuana Industry *Coming soon!*
CPAs' Role in Mediation
Cryptocurrency: The Standard for Economic Exchange of the Future? *New!*
Data Privacy and Encryption *New!*
Eldercare: Surviving Retirement and the Costs of Aging *New!*
Fraud Prevention for Physicians *New!*
Getting Started with Microsoft Excel 2007
Getting Started with Microsoft Excel 2010
Getting Started with PowerPoint 2010 with Lots of Tips and Tricks
Introduction to Business Valuation and Use of Comparables
Introduction to Investment Companies
Introduction to Litigation Services *New!*
Introduction to Securities Broker/Dealers
Introduction to the Food and Beverage Industry
Introduction to the Health Care Industry
Introduction to the Media Industry
Introduction to the Pharmaceutical Industry
Lost Profit Damage Calculation *New!*
Managing What People Say About Your CPA Firm *Coming soon!*
Managing your Personnel and Partners *Coming soon!*
Microsoft Access 2010: Introduction to Access 2010 with Lots of Tips and Tricks
Microsoft Access 2013: Introduction to Access 2013
Microsoft Excel 2007: Creating and Formatting Charts with Lots of Tips and Tricks
Microsoft Excel 2007: Moving, Copying and Filling Cells with Lots of Tips and Tricks
Microsoft Excel 2007: Useful Functions for CPAs with Lots of Tips and Tricks
Microsoft Excel 2007: Working with Formulas and Functions with Lots of Tips and Tricks
Microsoft Excel 2010: Creating and Formatting Charts with Lots of Tips and Tricks
Microsoft Excel 2010: Working with Formulas and Functions with Lots of Tips and Tricks
Microsoft Excel 2013: Creating and Formatting Charts
Microsoft Excel 2013: Getting Started with Excel
Microsoft Excel 2013: Getting Started with Excel Using a Touchscreen
Microsoft Excel 2013: Getting Started with PivotTables and PivotCharts
Microsoft Excel 2013: Useful Functions for CPAs
Microsoft Excel 2013: Working with Data Ranges and Tables
Microsoft Excel 2013: Working with Formulas and Functions
Microsoft Excel 2016: Creating and Formatting Charts *Coming soon!*
Microsoft Excel 2016: Getting Started *New!*
Microsoft Excel 2016: Working with Formulas and Functions *Coming soon!*
Microsoft PowerPoint 2007: Getting Started With PowerPoint 2007 with Lots of Tips and Tricks
Microsoft PowerPoint 2013: Getting Started with PowerPoint
Microsoft Word 2007: Getting Started with Word 2007 with Lots of Tips and Tricks
Microsoft Word 2010: Getting Started with Word with Lots of Tips and Tricks
Microsoft Word 2013: Getting Started with Word 2013
Negotiating Skills for CPAs
Not-for-Profit Accounting

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Not-for-Profit Accounting and Reporting Made Simple *New!*
Programmatic Investments *New!*
Public Speaking for Accountants *Coming soon!*
QuickBooks Pro 2015: Opening Moves *New!*
Real Estate Taxation: Acquisition and Operations *New!*
Real Estate Taxation: Dispositions *New!*
Smaller Companies Access to Capital: The SEC's New Rules *Coming soon!*
Spreadsheet Best Practices: Roadmap to Reduced Risk
Storage Strategy in the Cloud
Technology Add-Ons to Increase Productivity
The Basics of Health Care Accounting and Auditing *New!*
Uniform Prudent Management of Institutional Funds Act *New!*
Utilization and Performance of Health Care Accounting and Auditing *New!*
Valuation Methods: The Normalization of Earnings
What Happens When Baby Boomers Retire
Writing Strong Emails, Texts, Tweets and Other Short Business Communications *Coming soon!*
XBRL: The Present and Future of Business Reporting *New!*

1040NR Nonresident Alien *New!*

2 CPE Credits | Taxes

This course describes the taxation and basic concepts of United States nonresident alien individuals and how it differs from that of a resident alien. The course covers the IRS Form 1040NR requirements, tests used to determine the nonresident or resident alien classification (commonly referred to as the green card test and the substantial presence test), and withholding requirements on payments made to nonresident aliens and other taxes, special rules and exclusions for nonresident aliens.

TAXES

1040NR Nonresident Alien *New!*
2015 Corporate Tax Update
2015 Individual Tax Overview
2015 Individual Tax Update
2015 Specialized Tax Update
49 More Ways to Reduce Taxes for Individuals *Coming soon!*
49 Tax-Cutting Moves for Small Businesses and Their Owners
49 Ways to Reduce Taxes for Individuals and Make Them Clients for Life
Alternative Minimum Tax
An Overview of Abusive Tax Trusts
Asset Protection: Tax and Financial Aspects
Benefits and Disadvantages of Health Savings Accounts
C Corp Schedule M-3 2014 1120
C Corp Schedule M-3 2014 Simulation
C Corporations: Income Tax Reporting
C Corporations: Overview of Corp. Income Tax
C Corporations: Tax Depreciation and Amortization
Capital Gains and Losses
Capitalization of Tangible Assets Regulations
Changing Accounting Methods
Choosing the Right Entity and Getting Cash Out of It
Claiming Medical Expenses for Baby Boomers
Commercial Bank Taxation and Regulatory Issues: Introduction
Community Property Taxation
Consolidated Tax Returns: Advanced Topics
Consolidated Tax Returns: Introduction
Corporate Organization and Operations *New!*
Corporate Reorganizations, Divisions and Liquidations New!
Corporate Tax Update
Corporate Taxation
Dealing with Foreign Bank Account Problems *Coming soon!*
Depreciation: Modified ACRS
Employee Benefit Plans: Introduction
Employment Tax Audits
Entity Comparisons
Estate Planning for the Small and Midsized Estate
Estates and Trusts
Executive Compensation *New!*
Federal Gift Tax (and the GST Tax)
Fiduciary Income Distribution and Beneficiary Taxation
Fiduciary Law and Accounting Mechanics
Fiduciary Taxation Introduction
Financial Planning for Higher Educ. Costs
Form 1040: A Practical Guide *New!*
Form 1040: Adjustments to Income *New!*
Form 1040: Basic Principles and General Filing Requirements *New!*
Form 1040: Business Income *New!*
Form 1040: Deductions From Adjusted Gross Income *New!*
Form 1040: Gains and Losses From Sale of Property *New!*
Form 1040: Gross Income *New!*
Form 1040: Income and Other Taxes *New!*
Form 1040: Other Income *New!*
Form 1040: Penalties and Other Issues *New!*
Form 1040: Rental and Pass-Through Income *New!*
Form 1040: Tax Credits *New!*
Form 1040: Tax Payments *New!*
Form 1041: A Practical Guide *New!*
Form 1065: A Practical Guide *New!*
Form 1065: Balance Sheet and Reconciliation *New!*
Form 1065: Deductions and Credits *New!*
Form 1065: Distributions *New!*
Form 1065: General Filing Considerations *New!*
Form 1065: Income and Cost of Goods Sold *New!*
Form 1065: Partner's Capital Accounts and Share of Income or Loss *New!*
Form 1065: Partnership Classification and Definitions *New!*
Form 1065: Partnership Loss Limitations *New!*
Form 1065: Partnership Terminations and Transfers *New!*
Form 1065: Self-Employment Tax and State Tax Issues *New!*
Form 1120: A Practical Guide *New!*
Form 1120: Balance Sheet and Other Schedules *New!*
Form 1120: Cost of Goods Sold *New!*
Form 1120: Deductions *New!*
Form 1120: Depreciation *New!*
Form 1120: Filing Requirements for Corporations *New!*
Form 1120: Gross Income *New!*
Form 1120: Information Items *New!*
Form 1120: Personal Service Corporations *New!*
Form 1120: Taxes and Credits *New!*
Form 1120S: A Practical Guide *New!*
Form 1120S: Balance Sheets, Schedules M-1, M-2 and M-3 *New!*
Form 1120S: Cost of Goods Sold *New!*
Form 1120S: Deductions *New!*
Form 1120S: Distributions *New!*
Form 1120S: Income *New!*
Form 1120S: Pro Rata Share Items *New!*
Form 1120S: Requirements and Qualifications *New!*
Form 1120S: Tax Compliance Issues *New!*

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Form 1120S: Taxes and Payments *New!*
Form 990: A Practical Guide *New!*
Form 990-PF: A Practical Guide *New!*
Fundamentals of International Tax I: Subpart F and CFCs
Fundamentals of International Tax II: Foreign Tax Credit and the FPHCo

Health Care Tax Tips *New!*

2 CPE Credits | Taxes

This course explains the newest tax tips as they pertain to health care coverage, reporting and penalties. The latest tips for the employer mandate, the individual mandate, HSAs and e-filing returns have been condensed to provide a brief explanation of each.

Health Care Tax Tips *New!*
Hottest Tax Topics for 2016 *Coming soon!*
Individual Income Tax: Above-the-Line Deductions
Individual Income Tax: Capital Gains, Pass-Through Income and Other Income
Individual Income Tax: Depreciation
Individual Income Tax: Earned Income
Individual Income Tax: Itemized Deductions
Individual Income Tax: Overview
Individual Income Tax: Schedule C, E and F Expenses
Individual Income Tax: Taxes, Credits and Penalties
Individual Tax Planning for Your Client's Well-Being
Interest Deduction Rules
International Taxation: Foreign Account Tax Compliance Act (FATCA)
International Taxation: Foreign Investment in U.S. Real Estate
International Taxation: Inbound Transactions
International Taxation: Outbound Transactions
Introduction to International Taxation *New!*
Introduction to Partnerships and LLCs
Introduction to the Tax Increase Prevention Act of 2014
Introduction to U.S. Canada Cross-Border Tax Issues *Coming soon!*
IRAs: Contributions
IRAs: Distributions
LLCs and LLPs: Rules for Limited Liability Entities
Mastering IRC Section 401(k) Plans *New!*
Maximizing Deductions for College Bound Families
Multistate Taxation
Net Investment Income Tax
Obamacare: Employer Mandate
Obamacare: Individual Mandate
Oil and Gas Taxation: Depreciation and Depletion
Oil and Gas Taxation: Operations, Unit of Property and Development
Oil and Gas Taxation: Subleases, Sales, Production Payments and Sharing Arrangements
Overview of Federal Income Taxation *New!*
Overview of the PATH Act of 2015 *New!*
Partnership Taxation: Advanced
Partnership Taxation: Fundamentals
Partnerships and LLCS: Large Clients
Partnerships: Large Clients
Passive Losses
Practical Asset Protection Strategies for Older Clients: Estate and Income Tax Planning *New!*
Practical Asset Protection Strategies for Older Clients: Health Care, Disability and Competency *New!*
Practical Asset Protection Strategies for Older Clients: Income Security and Legal Protections *New!*
Purchasing and Selling a Business
Qualified Domestic Production Deduction: A Practical Guide *New!*
Real Estate Investment Trusts: Thorough Overview
Real Estate Investment Trusts: A Deeper Dive
Real Estate Taxation: Acquiring and Operating Rental Houses
Real Estate Taxation: Acquiring Apartments, Office Buildings, and Shopping Centers
Real Estate Taxation: Financing Real Property Purchases and Holding Raw Land
Real Estate Taxation: Limitations on Deducting Losses
Real Estate Taxation: Sales and Other Dispositions
Repairs or Capitalize?
Representing Taxpayers Before the IRS
Residential Real Estate: Income and Expenses
Residential Real Estate: Installment Sales
Residential Real Estate: Passive Activity and At-Risk Rules
Retirement Income Taxation
S Corporations
S Corporations: Pass-Through Items and Basis Adjustments
Servicing Your Closely Held Business Clients *New!*
Small Business Exception for Accounting Method Changes Related to Repair Regulations *New!*
Small Business Schedule C and F Expenses
State and Local Taxes
Structuring, Accounting and Taxation of Intellectual Property Transactions *Coming soon!*
Subchapter C: Distributions and Redemptions
Subchapter C: Fundamentals of Corporate Taxation
Subchapter C: Large Clients III
Tangible Property Regulations: What to Do Now and What to Do Next
Tax Accounting Methods and Periods
Tax Considerations for Members of the Clergy
Tax Incentives for Paying and/or Saving for College Expenses *New!*
Tax Planning for Retirement Wealth
Tax Practice and Procedure Fundamentals: Tax Resolution and Solving IRS Issues
Tax Refund Fraud Perpetrated by Identity Theft
Tax Research Using an Online Platform
Tax Research: Case Analysis
Tax Research: Court Interpretations and Citator
Tax Research: Tax Law and Treasury Interpretations
Tax Strategies for Clients During their Golden Years
Tax Strategies for Middle-Income Households
Tax Strategies for Nontraditional Couples
The ABLE Act: Achieving a Better Life Experience Act of 2014
The Affordable Care Act: A Practical Guide *New!*
The Ultimate Guide to Retirement Planning
Transfer Pricing Fundamentals
Understanding ACA Regulations and Form 1095-C *New!*
Understanding Pension and Profit-Sharing Plans *New!*
Understanding Schedules M-1 and M-2 on Forms 1120 and 1120S
Uniform Capitalization Rules
Value-Added Tax (VAT): A Global View

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CTEC

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- Audits of Employee Benefit Plans
- Audits of Financial Institutions ‡
- Audits of Local Governments*
- Audits of Nonprofit Organizations*
- Audits of Nonpublic Companies
- Business Valuations ‡
- Cash, Tax and Other Bases of Accounting ‡
- Compilation and Review Engagements
- Construction Contractors
- GAAP
- Homeowners' Associations
- HUD Audits*
- Nonprofit GAAP* ‡
- PPC's 1040 Deskbook
- PPC's 1041 Deskbook ‡
- PPC's 1065 Deskbook ‡
- PPC's 1120S Deskbook ‡
- PPC's 990 Deskbook ‡
- Preparing Financial Statements
- Preparing Governmental Financial Statements*
- Preparing Nonprofit Financial Statements* ‡
- Quality Control
- Single Audits*
- Write-Up Services ‡

** Eligible for Yellow Book CPE ‡ Electronic format only*

QUICKFINDER SELF-STUDY COURSES

1040 INCOME TAX PREPARATION

DT1TG15 | 10 CPE | BASIC | $99
FOR: ALL TAX PROFESSIONALS INCLUDING CPA, EA, CTEC, CFP*

Based on the guidance found in the popular PPC Tax Deskbook Series, this course focuses on the preparation of individual tax returns and utilizes a key issue approach in covering such topics as: filing status, exemptions, income and adjustments, personal deductions, tax calculations and tax planning opportunities.

*CFP credits for self-study are half the amount listed.

ETHICS FOR TAX PROFESSIONALS

DERTG15 | 2 CPE | BASIC | $39
FOR: ALL TAX PROFESSIONALS INCLUDING CPA, EA, CTEC

Understand rules and regulations governing the tax profession and the practical application of these rules in the daily operation of tax professionals' businesses. Covers IRS and AICPA requirements and standards. Meets two-hour ethics requirement for EAs.

The above courses and all PPC Guide-related self-study courses are available as downloadable PDFs at cl.tr.com.

RIA® FEDERAL TAX REVIEW SELF-STUDY COURSE

RELY ON RIA'S MUST-HAVE FEDERAL TAX REVIEW

The RIA Federal Tax Review 2016 CPE course is comprised of three parts: Individual Taxes (8 credits), Business Taxes (10 credits) and Special Situations (9 credits). A general refresher in federal taxation, this course will reinforce basic tax law interpretations and keep you up-to-date on the most important changes for both the 2015 and 2016 tax years. *Grading fee of $99 for each module with discounts available if you complete two or all three modules — see website for details.*

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- Also available: materials only and customized webinar options

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KNOWLEDGE AND SKILLS

AuditWatch University (AWU) is an integrated development curriculum that provides your firm with the knowledge and skills to advance your professional staff. Starting with Basic Staff Training and culminating with management-level courses, AuditWatch University offers seven progressive levels of training. Seminars are offered in over 15 locations nationwide and are also available on an in-house basis.

LEVEL 1: BASIC STAFF TRAINING

32 CPE CREDITS | AUDITING, ACCOUNTING, COMMUNICATION | BASIC

Experience: 0 – 4 months
This session helps new auditors get off to a great start by introducing them to the auditing field, basic audit responsibilities and keys to becoming a successful professional in public accounting. The course includes case studies in common audit areas typically completed by staff accountants and provides an overview of how each area fits into the big picture.

LEVEL 2: EXPERIENCED STAFF TRAINING

24 CPE CREDITS | AUDITING, ACCOUNTING | INTERMEDIATE

Experience: 5 – 21 months
This session introduces auditors to the complete audit process and plan. It focuses on ways for staff and senior accountants to significantly participate in the risk assessment procedures, including efforts surrounding internal controls. In addition, significant time is spent on performance of further audit procedures including tests of details such as sampling, auditing estimates and analytical procedures. Finally, the course includes discussions of select technical accounting, auditing, documentation and business skills.

LEVEL 3: BEGINNING IN-CHARGE TRAINING

24 CPE CREDITS | AUDITING, COMMUNICATION | INTERMEDIATE

Experience: 21 – 36 months
This session prepares auditors to take in-field responsibility for an audit engagement. It mixes discussion with case studies to provide an in-depth look at designing and completing the key steps in an audit, including completing the risk assessment procedures and making appropriate risk assessments. We include case study work on understanding, evaluating and verifying a client's activity level controls within key business cycles. This session also includes modules on key business skills, including managing an engagement, supervising individuals and reviewing files.

LEVEL 4: EXPERIENCED IN-CHARGE TRAINING

24 CPE CREDITS | AUDITING, ACCOUNTING | INTERMEDIATE

Experience: 3 – 4 years
This course moves experienced auditors beyond the basics, building upon experiences with leading engagements and providing insights and best practices on supervising, motivating and evaluating team members. The course challenges experienced auditors to improve their audits through more in-depth consideration of advanced topics related to audit planning, designing audit programs, considering different audit approaches and evaluating audit results. It also provides an in-depth look at higher-level audit tasks, such as evaluating management review controls, identifying and designing tailored responses to fraud risks, auditing revenue transactions and designing tests of controls.

LEVEL 4.5: BEYOND IN-CHARGE — TAKING THE NEXT STEP

2 DAYS | 16 CPE CREDITS | AUDITING, COMMUNICATION, PERSONAL DEVELOPMENT, ACCOUNTING | INTERMEDIATE

Experience: 4 – 5 years
This course prepares experienced auditors to take the next step in their development as engagement and firm leaders. Building on the concepts introduced in Level 4: Experienced In-Charge Training, the course challenges auditors to champion the audit process by developing efficient audit plans, managing the audit process, working with clients, dealing with complex accounting and audit issues and wrapping up engagements. Course material also addresses key issues in performing review and compilation engagements, using special purpose frameworks, dealing with group audits and designing better audit sampling tests.

PREMIER & PREMIER PLUS:
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Save 10% on AuditWatch, TaxWatch and Yellow Book University public seminars! Early Bird prices shown in orange. Expires: June 15, 2016.

SEE BOTTOM OF PAGE FOR DETAILS.

LEVEL 5: TAKING THE LEAD

24 CPE CREDITS | PERSONAL DEVELOPMENT, COMMUNICATION, ACCOUNTING, AUDITING | ADVANCED

Experience: 5 – 6 years
In this course, participants enhance and reach beyond technical expertise to develop critical managerial skills to further their firm's success. In the professional development area, participants learn results oriented leadership skills to better manage multiple engagements and teams. The course also includes presentation skills, advanced communication and negotiation, business development and career success strategies. In the technical expertise area, participants become more familiar with advanced audit issues and learn tips for reviewing audit work, developing the audit strategy and reporting.

LEVEL 6: DEVELOPING THE EXECUTIVE WITHIN

16 CPE CREDITS | PERSONAL DEVELOPMENT, ACCOUNTING, AUDITING | ADVANCED

Experience: 6+ years
This course develops individuals who consistently interact and manage at the executive level. By learning and applying a variety of methods, participants enhance their effectiveness as emerging executives. Participants also explore how to increase their business development and managerial contributions to their firms through higher level performance. By analyzing the concept of executive presence, participants discover why it is such a critical component of business success and career advancement.

AUDITWATCH UNIVERSITY PUBLIC SEMINAR SCHEDULE

Seminar City	Level 1: Basic Staff	Level 2: Experienced Staff	Level 3: Beginning In-Charge	Level 4: Experienced In-Charge	Level 4.5: Taking the Next Step	Level 5: Moving Beyond In-Charge	Level 6: Developing the Executive Within
	4 Days ($1,292) $1,163 Early Bird*	**3 Days ($989)** $890 Early Bird*	**3 Days ($989)** $890 Early Bird*	**3 Days ($989)** $890 Early Bird*	**2 Days ($659)** $593 Early Bird*	**3 Days ($989)** $890 Early Bird*	**2 Days ($659)** $593 Early Bird*
Atlanta	9/20 – 23	10/4 - 6	8/17 - 19	8/23 - 25	8/15 - 16		
Boston		5/10 - 12	5/17 - 19	5/24 - 26		6/1 - 3	
Chicago-A		6/1 - 3	6/21 - 23	6/28 - 30			
Chicago-B	11/1 – 4	9/7 - 9	10/19 - 21	11/15 - 17	11/10 - 11	8/30 - 9/1	11/8 - 9
Cleveland	11/8 – 11	8/16 - 18	10/4 - 6	10/19 - 21	10/26 - 27		
Dallas/Fort Worth Area	12/13 - 16	7/12 - 14	7/26 - 28	8/10 - 12	8/8 - 9	9/13-15	
Denver		8/30 - 9/1	9/7 - 9	11/29 - 12/1			
Houston		11/1 - 3	11/29 - 12/1	10/19 - 21			
Las Vegas		10/25 - 27	9/20 - 22	9/27 - 29	9/7 - 8	11/8 - 10	
Los Angeles	10/25 – 28	10/19 - 21	9/27 - 29	10/4 - 6	10/10 - 11	11/29 - 12/1	
Nashville		8/2 - 4	9/13 - 15	9/21 - 23	9/19 - 20		
New York City		11/29 - 12/1	11/15 - 17	11/1 - 3		12/6 - 8	
Philadelphia		9/20 - 22	9/27 - 29	8/30 - 9/1			
Portland		9/13 - 15	10/25 - 27				
Salt Lake City			8/23 - 25	11/15 - 17			
San Francisco-A		6/28 - 30	7/12 - 14	7/26 - 28	10/4 - 5		
San Francisco-B	11/15 – 18	9/27 - 29	10/19 - 21	11/8 - 10		11/1 - 3	10/6 - 7
Rockville-A	9/13 – 16	10/4 - 6	10/25 - 27	12/6 - 8		12/13 - 15	
Rockville-B	1/10 – 13 (2017)						
Washington DC		7/19 - 21	8/9 - 11	7/12 - 14			

This price per person cost includes course tuition, materials, lunch and snacks. Visit cl.tr.com/a, or call 800.231.1860 for public seminars or 800.775.9866 for in-house and customized training.

PREMIER & PREMIER PLUS:
Subscription packages include 25% off regular price of AuditWatch public seminars! Combined Gear Up/AuditWatch annual max: 24 hrs Premier, 40 hrs Premier Plus. Details: page 25.

EARLY BIRD DISCOUNT:
Save 10% on AuditWatch, TaxWatch and Yellow Book University public seminars! Early Bird prices shown in orange. Expires: June 15, 2016.

TAXWATCH UNIVERSITY

TAX STAFF TRAINING

Checkpoint Learning In-House training and AuditWatch now offer multiple levels of core tax staff training to your firm. The progressive training begins with an entry-level course focused on common topics likely to be encountered in the first year. This is followed by courses that provide greater depth on corporate tax issues, partnerships, LLCs and other special entities. This integrated curriculum is available through public seminars or in-house training.

TAXWATCH UNIVERSITY — LEVEL 1

24 CPE CREDITS | TAXATION | BASIC

Experience: 0 – 1 year
This practical, hands-on program is designed for tax professionals primarily in their first year. This course provides learning opportunities surrounding common individual and corporate tax topics that they may encounter. The course is designed to provide information on the tax rules and to challenge the participants to complete case studies and exercises where they apply the rules and complete actual tax forms.

TAXWATCH UNIVERSITY — LEVEL 2

24 CPE CREDITS | TAXATION | INTERMEDIATE

Experience: 1 – 2 years
This practical, hands-on program is designed for tax professionals in their first or second year. This course provides learning opportunities on intermediate corporate, individual and other entity type tax topics. The course is designed both to provide information on the tax rules and to challenge the participants to complete case studies and exercises where they apply the rules and complete tax forms.

TAXWATCH UNIVERSITY — LEVEL 3

24 CPE CREDITS | TAXATION | INTERMEDIATE

Experience: 2 – 3 years
This program is designed for tax professionals with multiple years' experience. This course provides learning opportunities on intermediate to advanced issues dealing with pass thru entities including S corporations, partnerships and LLCs and individual topics. The course is designed to provide information on the tax rules and includes challenging case studies and exercises where they apply the rules and complete actual tax forms.

TAXWATCH UNIVERSITY — LEVEL 4

24 CPE CREDITS | TAXATION | ADVANCED

Experience: 3 – 4 years
This program is designed to advance a tax professional into more complex taxation issues. The program includes sessions on tax planning and saving strategies related to individuals and corporations. It also continues to provide training on technical tax issues mainly related to pass-through entities including partnerships and LLCs and more advanced corporate and individual issues.

FOR MORE INFORMATION AND SCHEDULING

cl.tr.com/a
800.231.1860 for public seminars
800.775.9866 for in-house and customized training

TAXWATCH UNIVERSITY PUBLIC SEMINAR SCHEDULE

Seminar City	Level 1	Level 2	Level 3	Level 4
	3 Days ($989) $890 Early Bird*	3 Days ($989) $890 Early Bird*	3 Days ($989) $890 Early Bird*	3 Days ($989) $890 Early Bird*
Atlanta		6/28 – 30	7/27 - 29	7/20 - 22
Chicago	7/19 - 21	7/26 – 28	8/2 - 4	8/9 - 11
Dallas/Fort Worth Area	12/6 - 8	11/29 – 12/1	1/4 - 6 (2017)	1/10 - 12 (2017)
Los Angeles		6/28 – 30	6/21 - 23	7/12 - 14
San Francisco	11/1 - 3	12/6 - 8	12/13 - 15	1/4 - 6 (2017)
Washington DC		12/13 - 15	10/19 - 21	11/29 - 12/1

This price per person cost includes course tuition, materials, lunch and snacks. Visit cl.tr.com/a, or call 800.231.1860 for public seminars or 800.775.9866 for in-house and customized training.

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EARLY BIRD DISCOUNT:
Save 10% on AuditWatch, TaxWatch and Yellow Book University public seminars! Early Bird prices shown in orange. Expires: June 15, 2016.

YELLOW BOOK UNIVERSITY

PERFORMING EFFICIENT AND EFFECTIVE SINGLE AUDITS

8 CPE CREDITS | AUDITING (GOVERNMENTAL) | BASIC

In this session, you will learn the key responsibilities of the auditor including changes to single audit requirements of 2 CFR Part 200. Auditor responsibilities are addressed which include the determination of major programs, design of effective methods to test controls over compliance and compliance applicable to major programs, considerations for audit sampling and requirements for reporting. Special attention is given to common single audit deficiencies, best practices, and tips to ease the transition to 2 CFR Part 200.

GOVERNMENTAL AND NONPROFIT UPDATE

8 CPE CREDITS | ACCOUNTING, ACCOUNTING (GOVERNMENTAL), AUDITING, AUDITING (GOVERNMENTAL) | UPDATE

In this session, you will learn the recently issued authoritative pronouncements affecting governmental and nonprofit entities – including accounting, compliance and auditing. This session also address risks and practical implementation and practice issues that relate to these specialized industries.

YELLOW BOOK UNIVERSITY PUBLIC SEMINAR SCHEDULE

Seminar City	Performing Efficient Single Audits	Government/ Nonprofit Update
	1 Day ($329) $296 Early Bird*	1 Day ($329) $296 Early Bird*
Chicago	6/1	6/2
Dallas/Fort Worth Area	6/7	6/8
Los Angeles	6/28	6/29
San Francisco	6/21	6/22
Washington DC	6/14	6/15

This price per person cost includes course tuition, materials, lunch and snacks. Visit cl.tr.com/a, or call 800.231.1860 for public seminars or 800.775.9866 for in-house and customized training.

WEB-BASED NEW HIRE TRAINING "BOOT CAMP" FOR AUDIT STAFF

16 CPE CREDITS | ACCOUNTING, AUDITING | BASIC

We have taken our popular AuditWatch University Level 1: Basic Staff Training course and redesigned it to be delivered via the web. In this course, we will use WebEx, a web-based interactive learning platform, to lead participants through the key information they need to succeed as new staff auditors. The course is led by an AuditWatch instructor and combines lecture, interactive exercises and discussion. Topics include role of the staff accountant and scope of services, workpaper documentation and audit procedures, introduction to the audit plan and an in-depth review of the most common audit areas assigned to new staff, such as cash, accounts receivable, accounts payable, inventory and more!

PUBLIC WEB SEMINAR:

November 10 – 11

9:00 a.m. – 5:00 p.m. CST | $379 per attendee

Call us at 800.231.1860 for more information.

IN-HOUSE:

$6,995 for first 10 participants, $295 per person for additional participants.

Call us at 800.775.9866 for more information.

PREMIER & PREMIER PLUS:

Subscription packages include 25% off regular price of AuditWatch public seminars! Combined Gear Up/AuditWatch annual max: 24 hrs Premier, 40 hrs Premier Plus. Details: page 25.

EARLY BIRD DISCOUNT:

Save 10% on AuditWatch, TaxWatch and Yellow Book University public seminars! Early Bird prices shown in orange. Expires: June 15, 2016.

CPE NETWORK

TIMELY NEWS AND IN-DEPTH ANALYSIS

FOR MORE INFORMATION, VISIT **CPEASY.COM/CPENETWORK** OR CALL **800.231.1860**

Group-study videos deliver timely news and in-depth analysis for better risk management, plus group-live credits.

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- Each program issue includes a DVD, full transcript, group discussion questions and suggested answers, supplemental reference material and a cumulative index and quiz

MONTHLY VIDEO SUBSCRIPTIONS

CPE NETWORK TAX REPORT

33 CPE CREDITS | TAXES | UPDATE | $929

Prepare your staff to meet the challenges of today's rapidly changing tax laws and regulations. Each issue of this monthly report features top experts discussing today's important taxation issues for individuals, estates and trusts, corporations and pass-through entities. Approved for CFP® continuing education (CE) credits!

Experts include: E. Lynn Nichols, CPA — nationally known tax author and an advisor to CPA firms across the country; Richard Bartholomew, JD, CPA, Director of Tax Services Girardot, Strauch & Co.; Don Paul Cochran, JD, CPA, CFP; Edward K. Zollars, CPA, Partner, Thomas, Zollars & Lynch, Ltd.; and Robert "Chris" Province, CPA.

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33 CPE CREDITS	$929		
33 CPE CREDITS		Included	$929

ONE-YEAR SUBSCRIPTION (11 ISSUES)

CPE NETWORK GOVERNMENTAL AND NONPROFIT ACCOUNTING REPORT

24 CPE CREDITS | ACCOUNTING & AUDITING (GOVERNMENTAL) | UPDATE | $729

A must-view for firms looking to stay ahead of the competition, this essential report will establish a quality standard for your company. Your subscription will keep your staff abreast of important GAO (Yellow Book), OMB and other governmental and nonprofit issues relevant in the current financial operating environment.

Experts include: Betty A. Pendergrass, CPA, CGFM, Governmental Management Advisory Services

CREDITS			
24 CPE CREDITS	$729		
24 CPE CREDITS		Included	$729

ONE-YEAR SUBSCRIPTION (4 ISSUES)

CPE NETWORK ACCOUNTING AND AUDITING REPORT

33 CPE CREDITS | ACCOUNTING & AUDITING | UPDATE | $929

Recent economic bubbles and crunches have caused regulators to scrutinize both financial statements and the standards used in preparing them. This popular subscription features high-quality group training that equips your entire team with the knowledge to handle any fiscal or financial crisis.

Experts include: J. Russell Madray, CPA, CIA, CMA, CFM/President of The Madray Group

CREDITS			
33 CPE CREDITS	$929		
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CPE NETWORK ACCOUNTING AND AUDITING AND GOVERNMENTAL AND NONPROFIT ACCOUNTING REPORTS

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CREDITS			
57 CPE CREDITS	$1,239		
57 CPE CREDITS		Included	$1,239

ACCOUNTING & AUDITING (11 ISSUES)
GOVERNMENTAL & NONPROFIT ACCOUNTING (4 ISSUES)

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CREDITS			
66 CPE CREDITS	$1,269		
66 CPE CREDITS		Included	$1,269

TAX AND ACCOUNTING & AUDITING (11 ISSUES)

CPE NETWORK TAX, ACCOUNTING AND AUDITING AND GOVERNMENTAL AND NONPROFIT ACCOUNTING REPORTS

SAVE $828

CREDITS			
90 CPE CREDITS	$1,759		
90 CPE CREDITS		Included	$1,759

TAX & ACCOUNTING & AUDITING (11 ISSUES)
GOVERNMENTAL & NONPROFIT ACCOUNTING (4 ISSUES)

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Now available through Checkpoint Learning, EBIA's seminars and webinars cover a variety of employee benefits subjects, including health care reform, cafeteria plans, 401(k) plans, consumer-driven health care, COBRA, HIPAA, ERISA for health and welfare plans and domestic partners.

Our seminars and webinars are designed for benefits professionals, including human resource and benefits managers, plan sponsors, TPAs, insurance professionals, attorneys, benefits consultants, government officials and accountants.

EBIA SEMINARS

EBIA's intermediate-level seminars are the country's best!

2016 SEMINAR TOPICS

Cafeteria Plans

Coverage includes all aspects of cafeteria plan design and administration, including elections, nondiscrimination, dependent care assistance programs and health flexible spending arrangements.

ERISA Compliance for Health and Welfare Plans

Topics include plan documentation, employee disclosures, fiduciary responsibilities, third-party administration, claims and appeals processes, and reporting obligations.

HSAs, HRAs and Consumer-Driven Health Care

Covers the legal rules and design challenges of implementing Health Reimbursement Arrangements (HRAs), workplace Health Savings Accounts (HSAs) and wellness programs.

Health Care Reform

Guides you through health care reform's plan design, plan administration and reporting requirements. We'll cover the legal rules and practical challenges faced by employers.

HIPAA Privacy and Security

Focuses on legal rules and best practices for health plans and business associates, including use and disclosure rules, business associate contracts, breach notification and the brand-new Phase II audit protocol.

COBRA Compliance for Group Health Plans

Guides you through COBRA's applicability, notices, elections and extensions, and premium calculation — and highlighting special issues for health FSAs and HRAs.

2016 SEMINAR DATES AND LOCATIONS

Portland, OR: April 19 - 22
Dallas, TX: May 3 - 6
Minneapolis, MN: May 17 - 20
Chicago, IL: June 7 - 10
Baltimore, MD/DC Area: September 27 - 30

PRICING

Full-Day Seminars $399

Half-Day Seminars $199

Attend all 4 days for $1439

10% discount on additional registrations from the same firm in same order

Register: cl.tr.com/AttendEBIA or 800.950.1216

EBIA WEBINARS

EBIA webinars bring the latest employee benefits information to your conference room! EBIA attorneys and other subject matter experts will provide leading edge analysis on a variety of pertinent topics. Our live webinars are presented on WebEx and include question and answer sessions in each event. After the live webinar, you will have access to the recording, viewable as many times as you wish for 60 days.

If you missed a live webinar, choose the recorded version. Your recorded webinar will be available within 48 hours of your purchase and is viewable as many times as you wish for 60 days.

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WEBINAR DETAILS

All EBIA webinars take place 12:00 - 2:00 p.m. CST

Online registration ends midnight CST the day before the webinar or call 800.950.1216 to register up through one hour prior to start time.

2 CPE Credits each (live webinars only)

Platform: WebEx™

PRICING

$279 per webinar

EBIA WEBINAR SUITE ANNUAL SUBSCRIPTION

Company-wide unlimited access to EBIA live and recorded webinars! It's a great way to keep up with employee benefits developments, including guidance on health care reform.

A cost-effective solution for employee benefits training.

2016 WEBINAR SCHEDULE

- April 28: Form 5500 for Health and Welfare Plans: Preparation and Filing
- May 12: Cafeteria Plan Nondiscrimination Rules: Design and Testing Fundamentals
- May 25: Health FSA and DCAP Nondiscrimination Rules: Design and Testing Fundamentals
- June 16: It's Almost Open Enrollment: Do You Know Where Your SBC Is?
- June 24: 401(k) Fundamentals: Concepts and Conversations for Auditors, Consultants, and Others
- June 29: Group Health Plans Quarterly Update
- July 21: Common Mistakes and How to Fix Them: 401(k) Plans
- July 29: Health and Welfare Plan Fundamentals: Concepts and Conversations for Auditors, Consultants, and Others
- Aug 11: Common Mistakes and How to Fix Them: Cafeteria Plans, Health FSAs, and DCAPs
- Aug 17: Audit Issues for Health and Welfare and 401(k) Plans
- Sept 15: Bundled vs. Unbundled Plans: Health Care Reform Implications
- Sept 21: Group Health Plans Quarterly Update
- Oct 19: Workplace Fringe Benefits
- Oct 27: Required Notices for Group Health Plans: Update Your Inventory Before 2017
- Nov 10: Form 1094/1095 Reporting
- Nov 16: HIPAA Enforcement
- Dec 7: DOL Audits of Group Health Plans: Prepare and Respond Effectively
- Dec 15: Group Health Plans Year-End Update

Register: cl.tr.com/AttendEBIA or 800.950.1216

EBIA ANNUAL CONFERENCE

ADVANCED CAFETERIA PLANS AND BENEFITS CONFERENCE IN SEATTLE

JULY 13 – 15, 2016 | BELL HARBOR INTERNATIONAL CONFERENCE CENTER | 20 CPE CREDITS | $1,280

A panel of leading attorneys at our annual summer conference will address advanced compliance issues for employer health, cafeteria, and account-based plans. The conference focuses not only on cafeteria plan compliance but also a broad variety of advanced compliance issues, including health care reform, HIPAA privacy and other developing areas of health and welfare compliance. Don't miss this information-packed conference.

Sessions

- Health Care Reform in 2016: Where Are We Now?
- Highlights of Recent Legislative, Regulatory, and Judicial Developments
- Health FSAs: Grace Periods, Carryovers, and Key Compliance Challenges
- Plan Governance and ERISA Fiduciary Issues
- Wellness Programs Part I: Regulatory and Judicial Update
- Wellness Programs Part II: Q&A Panel on Wellness Design & Administration
- HRAs: Integration and Key Compliance Challenges
- Workplace HSA Programs
- Q&A Panel: Cafeteria Plan Expenses, Election Changes, and Nondiscrimination
- Code Section 4980H Compliance Strategies
- Trending Now: Telemedicine, On-Site Clinics, and More
- HIPAA Privacy & Security Update
- Form 1094/1095 Reporting: Lessons Learned from 2015 Filings
- Spousal Coverage Issues in Plan Design and Administration
- Preventing and Correcting Disclosure Mistakes

Conference Location:

Bell Harbor International Conference Center
2211 Alaskan Way, Pier 66
Seattle, WA 98121
206.441.6666

CPE Information

Level: Advanced
Prerequisites: Knowledge of cafeteria plans and health and welfare benefits
CPE Credits: 20
Field of Study: Specialized Industry

Pricing

First Registrant: $1,280
Additional Registrants in the same order: $1,190 each

Register: 800.950.1216

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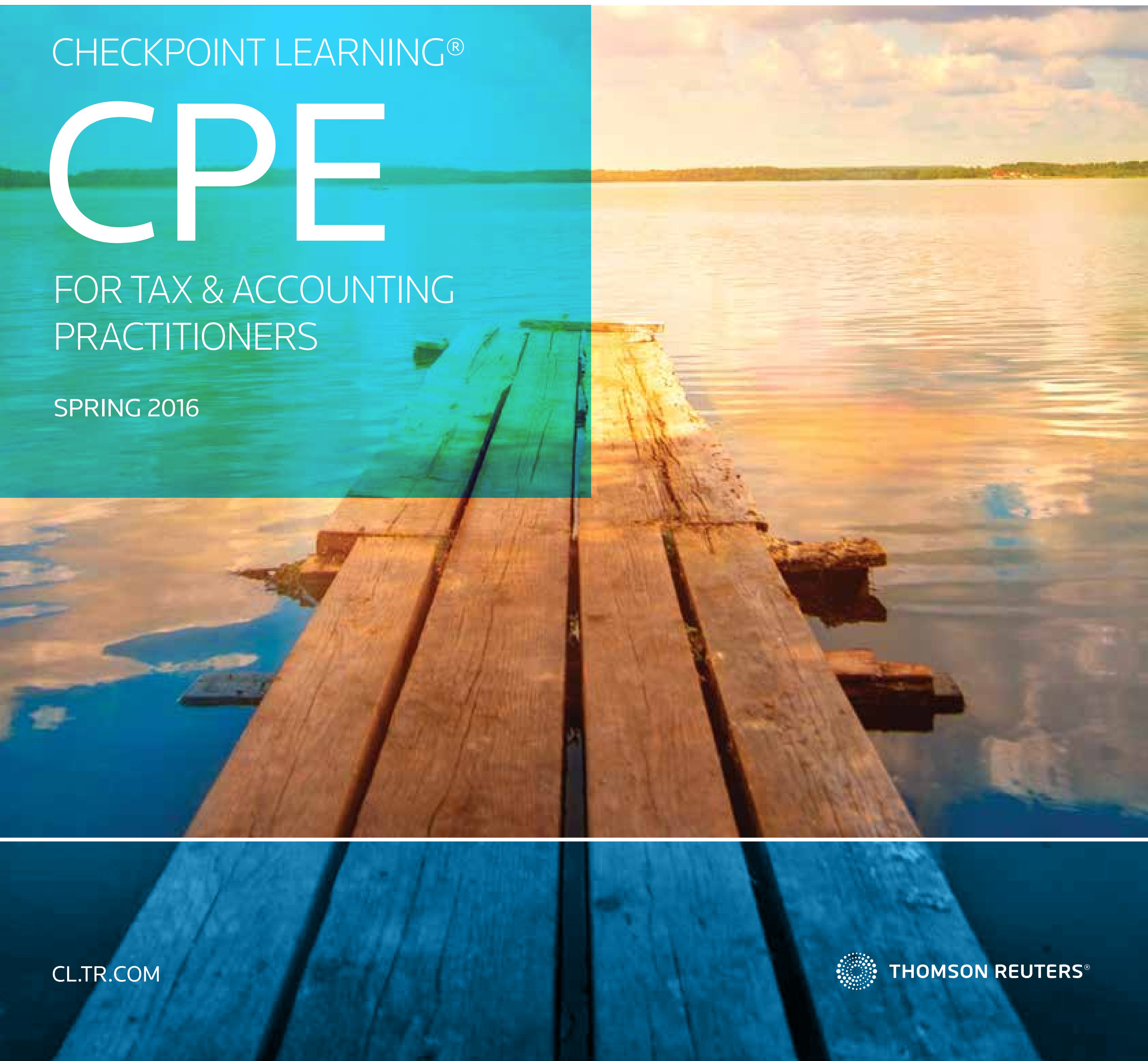
CPE

FOR TAX & ACCOUNTING PRACTITIONERS

SPRING 2016



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