AuditWatch

And More

Training Solutions for Firms and Organizations

Spring 2014

Health Care Reform: Update on Key Changes for 2014 (pgs. 4-6)

Early Bird discounts inside! Save on AuditWatch public seminars (pg. 14)

Mobile courses now on Checkpoint Learning (pg. 26)

Save time and money with the Premier Plus CPE Package (pg. 31)
Welcome to the spring 2014 Firms and Organizations Training Catalog from Checkpoint Learning. This issue provides an overview of everything learning administrators and decision-makers need to design their teams’ learning plans.

AuditWatch Customers: AuditWatch-only options are available online at cl.thomsonreuters.com/A and in the first section of this catalog (pages 7-18). If you are an individual customer, please take a look at our CPE Catalog for Tax & Accounting Practitioners at cl.thomsonreuters.com for details on Gear Up and all of the other products available to plan and purchase your CPE.

We're excited to introduce mobile courses for the iPad this year—available to you individually or included at no extra cost with the Premier and Premier Plus CPE subscription packages! Customer feedback on Premier Plus subscription package, introduced last year, has been extremely positive—if you haven’t checked it out yet, please take a look at how this all-in-one CPE content and workflow option can save you time and money (page 32).

Health care reform remains a significant concern for most of our customers. You’ll find an informative article on pages 4-5 with key changes for 2014, and see page 6 for webinars and courses available to keep you up to speed on this critical information.

Thank you for giving us the opportunity to be part of your firm's training! I invite you to contact our experts in enterprise training to design a learning program that will advance your team's skills and career paths. Combined with the sophisticated learning administration tools on the Checkpoint Learning online platform, our AuditWatch, PPC, and related product offerings lead the industry in successful learning solutions for organizations and firms.

Sincerely,

Kenneth Koskay
Senior Vice President
Learning Solutions
WHAT’S NEW...

HEALTH CARE REFORM
Health care reform continues to remain a high priority learning area for tax and accounting professionals. Hear from long-time Gear Up speaker and author John Stevko on key changes to plan for this year, and check out the webinars and other learning options available on this topic.
See pages 4-6.

2014 AUDITWATCH PUBLIC SEMINARS
You’ll find a complete schedule for the full year in the pages ahead! AuditWatch public seminars offer an Early Bird discount option, so plan early and save!
See page 14.

WEBINAR CALENDAR
Webinars scheduled through July are displayed on calendar pages to help you plan quick learning or look ahead to our popular full-day webinars in May, June, and July.
See pages 39-41.

MOBILE COURSES
Checkpoint Learning has rolled out new iPad-enabled courses this year! See details and current course list now, and check back online to find more as we continue to roll out more mobile courses throughout 2014!
See page 27.

BISK CPEASY & CPA REVIEW
We’re delighted to extend our suite of learning solutions with the industry leading “DIY” CPE Network learning program, plus an affordable, effective range of test preparation programs from Bisk CPA Review and Bisk CPEasy's unique, monthly audio news update.
CPE Network
See pages 24-25.
Bisk CPA Review
See page 44.
Bisk CPEasy Monthly News Report
See page 45.

Catalog publication April 2014. CPE accreditation information, including NASBA, QAS, IRS, (EA and RTRP) CFP, and CTEC, can be found by product line inside this catalog and in more detail at cl.thomsonreuters.com.

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

PREMIER & PREMIER PLUS
Look for the green icon for information on products included with the Premier Plus and Premier CPE Packages, or discounts that apply to select product lines for subscribers. Applies at various levels to Gear Up, AuditWatch, Webinar, PASS Online and MicroMash, and PPC Self-Study. Details: page 32.

EARLY BIRD SAVINGS
Look for the orange icon for information on Early Bird offers that apply to AuditWatch. Details: pages 7-11, 14.

QUANTITY DISCOUNT
Look for the blue icon for information on what Quantity Discount offers apply to select product lines. Webinars and PPC Self-Study both have Quantity Discount offers available. Details: pages 38-41, 43.

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HEALTH CARE REFORM

Some of the key changes for 2014 you need to understand to help your clients save valuable tax and insurance dollars

Health care reform (also known as Obamacare) is the most significant social change our society has experienced since the advent of Medicare and Medicaid. However, unlike Medicare and Medicaid, accountants find themselves in the middle of health care reform.

One U.S. congressman recently suggested that, since the individual mandate penalty is enforced via the 1040, tax preparers be empowered to enroll people for insurance on the government exchanges. Although his suggestion may not be heeded, it does show that tax professionals are key players in the implementation of health care reform.

This article points out various issues of which tax professionals need to be aware.

The Individual Mandate Penalty kicks in this year. When we prepare returns next busy season, our clients must prove they have adequate insurance or qualify for an exemption. If not, they pay a fine.

The penalty is calculated on a monthly basis and is imposed on the taxpayer and anyone who is a dependent.

Some of the exemptions are granted by the exchanges and will be reported on a soon-to-be-released Form 8965. Other exemptions, such as the Short Coverage Gap, are the responsibility of the tax preparer to determine.

The Premium Assistance Credit (PAC) reduces the amount of insurance premiums for certain people who buy insurance on the government exchange. The only way to obtain the credit is to buy insurance on the exchange.

The amount of the PAC is based on family size and income level. Larger credits go to those with bigger families and lower incomes. Those with income up to 400% of the Federal Poverty Line can qualify for the credit. For 2014, 400% of the Federal Poverty Line for a family of four would be $95,400.

Income for purposes of the PAC is Adjusted Gross Income increased by the foreign earned income exclusion, the amount of any tax exempt interest received or accrued, and non-taxed Social Security benefits. Note that the credit is not based upon assets—it’s important for us to keep this in mind. There could be clients who at first blush we would not think should qualify for the credit since they are asset rich, but who do qualify because their income is low.
The credit can either be taken in its entirety when the return is filed or it can be advanced. The advanced credit is what most people will choose and is based upon projected income.

When the returns are prepared next year, we will perform a “true-up” of the advanced credit. Since the advanced portion is based on projected income, it is possible there will be a difference when comparing the advanced portion to the actual credit.

When doing the “true-up” to the extent your client should have received more PAC, they will then receive a refundable credit for that amount. However, the reverse is true as well: if your client received more of an advance than they should have, they will have to pay back the excess on the 1040.

There is a limit to how much a taxpayer is required to pay back. For those with incomes below 400% of the Federal Poverty Line, the most that must be paid back is $1,250 for a single person and $2,500 for a family. For those with income above 400% of the Federal Poverty Line, all of the excess must be paid back via the 1040.

There is one other limiting factor in obtaining the Premium Assistance Credit. Any employer-provided insurance must be unaffordable. “Unaffordable” means that the employee’s portion of the premiums for self-coverage only must exceed 9.5% of household income.

Because of the unaffordable provision, some small employers are considering whether or not they should drop coverage for their employees. If the employer drops coverage, the employee would not have to worry about the unaffordable issue, and could qualify for the Premium Assistance Credit if their income was low enough.

Old Insurance. In early March, the administration announced that people with health coverage which pre-dates the Affordable Care Act can keep their old insurance for two more years. These plans typically are not as robust as the newer plans but the premiums are lower. Despite the announcement, the person cannot keep the old plan if the state does not go along. So far over 20 states have rejected the idea.

The Large Employer Mandate has been changed. For employers with 100 or more full-time equivalent employees, the mandate starts in 2015, and for those with 50 or more full-time equivalents, the mandate starts in 2016. Large employers must offer coverage to 70% of their workforce in 2015 and to 95% in 2016.

For 2015, those businesses that have between 50-99 employees must sign a statement under perjury that says they did not reduce their workforce below 100 in order to qualify for the delay.

Note: If your client has fewer than 50 full-time equivalent employees, there is no penalty for failing to offer insurance.

Though the employer mandate does not take effect until 2015, the 2014 year is very important. 2014 is used first to determine whether a company is a large employer and second to determine which employees must be covered. There is some flexibility in these measurements. Accountants would be well advised to familiarize themselves with these rules.

The Small Business Health Care Tax Credit is increased to 50% this year and is only available for two years. With limited exceptions, the insurance must be purchased on a government exchange in order to qualify for the credit.

Conclusion. These are some of the key changes for 2014, but there are and will be more. I encourage you to become well acquainted with the details not just for compliance purposes but, more importantly, so that by proper planning you help clients save valuable tax and insurance dollars.

John Stevko, CPA graduated from the University of California at Davis. He began his career with Peat, Marwick, Mitchell & Co. before founding a local firm in Beaverton, Oregon. Specializing in taxation, he now lives and practices in Southwest Washington. John has been with the Gear Up product line of Thomson Reuters Checkpoint Learning for 22 years.
HEALTH CARE REFORM

WEBINARS

Understanding Health Care Reform—How the New Laws Impact Employers and Individual Taxpayers
8 CPE Credits | Taxes
$189 or free with Premier or Premier Plus
April 22, 9:00 AM – 5:00 PM CST
May 13, 9:00 AM – 5:00 PM CST
June 26, 9:00 AM – 5:00 PM CST
July 31, 9:00 AM – 5:00 PM CST

Understand the impact of health care reform on employers and individual taxpayers, and identify ways to help clients avoid the potential taxes and penalties that will be imposed on employers and individuals. This course will provide practitioners with the tools and strategies you need to effectively advise your clients in light of these reforms. Key course topics include final regulations on the 3.8% Medicare tax, real estate and the 3.8% tax, exchanges (marketplaces) and how they work, who qualifies for government assistance, the individual mandate and the employer mandate, insurance issues (buying vs. paying the penalty, reimbursement for insurance, definition of adequate and affordable insurance), and many more.

How Health Care Reform Impacts Your Clients
2 CPE Credits | Taxes | $89 or free with Premier or Premier Plus
April 17, 2:00 PM – 4:00 PM CST
May 8, 10:00 AM – 12:00 PM CST
June 5, 10:00 AM – 12:00 PM CST
July 24, 2:00 PM – 4:00 PM CST

This webinar will provide you with the key provisions related to the Affordable Care Act, implementation issues, and how these new regulations will impact clients from 2014 and beyond. Topics include: healthcare reform, overview of what’s changing, healthcare regulations on the net investment income tax, avoiding the individual mandate penalty, premium assistance credit, employer mandate, small business health options program exchanges, and reimbursing for insurance.

Health Care Reform—The Individual Mandate New!
2 CPE Credits | Taxes | $89 or free with Premier or Premier Plus
June 25 2:00 PM – 4:00 PM CST

This new two-hour webinar will discuss how Health Care Reform will impact individual taxpayers in 2014.

Health Care Reform Issues for Employers New!
2 CPE Credits | Taxes | $89 or free with Premier or Premier Plus
July 17, 2:00 PM – 4:00 PM CST

This new two-hour webinar will focus on key Health Care Reform issues that will impact employers in 2014 and beyond.

ONLINE COURSES

Affordable Care Act: Employer and Individual Mandates
2 CPE Credits | Taxes | Basic | $56 or free with Premier or Premier Plus
The Patient Protection and Affordable Care Act as amended by the Health Care and Education Reconciliation Act of 2012 (together, the Affordable Care Act), requires most individuals to have health insurance coverage by January 1, 2014. In addition, it requires large employers (i.e., generally, those with 50 or more employees) to offer health insurance coverage for their full-time employees and their eligible family members. This course will help you understand the major concepts of health care reform and how to apply these changes.

Affordable Care Act: Understanding the New Medicare Taxes
2 CPE Credits | Taxes | Basic | $56 or free with Premier or Premier Plus
This is an online video course that provides a brief overview of changes in the Affordable Care Act for 2013 and a detailed discussion of the .9% additional Medicare Surtax and the 3.8% Net Investment Income Tax Surtax.

Obamacare: The Employer Mandate New!
2 CPE Credits | Taxes | $42 or free with Premier or Premier Plus
Beginning January 1, 2014, all individuals who do not meet certain exemption criteria must have minimum essential health insurance coverage or be subject to a shared responsibility penalty. This course discusses new requirements, minimum essential coverage, and penalties.

Obamacare: The Individual Mandate New!
2 CPE Credits | Taxes | $42 or free with Premier or Premier Plus
Beginning January 1, 2014, all individuals who do not meet certain exemption criteria must have minimum essential health insurance coverage or be subject to a shared responsibility penalty. This course discusses new requirements, minimum essential coverage, and penalties.

LOOK FOR THIS ICON throughout the catalog for products related to health care issues.
AuditWatch serves the audit and accounting profession by providing leading experts to train and consult with firms that offer auditing services. Our integrated curriculum for audit professionals and CPA firms, audit process consulting, and audit technology services, makes AuditWatch the recognized leader in audit productivity.

In addition to providing these trusted services, we have developed a number of new training solutions including Yellow Book University and TaxWatch University. Our training will aid your firm in improving the quality and efficiency of your many engagements—and will increase the knowledge and skills of team members who perform the work.

AUDITWATCH TRAINING—THREE DELIVERY OPTIONS:
- Public Live Seminars
- In-House Seminars
- Customized Training

AUDITWATCH: CONSULTING, DATA SERVICES, AND MULTIPLE TRAINING FORMATS TO MEET YOUR NEEDS!
- Web-Based New Hire Training for Audit Staff
- Audit Titles from Checkpoint Learning Webinars
- AuditWatch Consulting
- AuditWatch Data Technology Services

STAFF TRAINING PROGRAMS—COMPLETE CURRICULUM
- TaxWatch University
- Yellow Book University
- AuditWatch University

To learn more about AuditWatch training options, please visit our website at cl.thomsonreuters.com or call 1-800-231-1860 (for public seminars) or 1-800-775-9866 (for in-house, consulting, or data technology services).

AUDITWATCH CUSTOMERS SAID:

“It was one of the best trainings that I have ever attended! I felt that I learned so much and could really relate to the topics and discussions.”
—H. Lesperance

“Thomson Reuters always sends great instructors and they do a wonderful job of keeping everyone involved and the material engaging.”
—P. Matzek

“Excellent materials, instructor was very good as a teacher as well as a communicator. Best training I've ever been to.”
—L. Henry

“The instructor was great. He involved the group in discussion, kept us interested in what we were doing, and allowed the course to go the direction we as the class wanted it to go.”
—T. Lyons

“The instructor was extremely knowledgeable about the subject matter and brought in real-world examples from his experiences.”
—R. Boyd

“The instructor’s teaching style was very good and helped me retain the information being presented. The group interaction component of the course was very helpful in fully comprehending the material.”
—J. Johnson

“I thought the instructor was very good at identifying the areas that the participants would like to focus on and needed improvement on. I thought the material was perfect for the our current positions at our firms.”
—Ryan T.
AUDITWATCH CONSULTING

AuditWatch has an intense focus on serving the audit and accounting profession by helping firms improve quality and efficiency on audits and reviews. Our integrated development curriculum for assurance professionals and CPA firms, audit and review process consulting, and audit technology services makes AuditWatch the recognized leader in audit productivity.

2014 AUDITWATCH EFFICIENCY INITIATIVE

The 2014 AuditWatch Efficiency Initiative is a change program. It brings you the industry’s best practices and core training needed to improve each and every engagement. AuditWatch will customize a program that meets the objectives and needs of your firm. The customization will be determined based on key considerations of firm management such as firm objectives, firm size and structure, coverage of partners, industries and offices, and timing that meets the firm’s needs. The comprehensive program is delivered by the expert AuditWatch consulting team and employs the following four phases.

2014 AUDITWATCH EFFICIENCY INITIATIVE PHASES:

PHASE 1: DIAGNOSTIC
The program begins with an in-depth analysis to identify the current state of your engagements and to identify opportunities for efficiency and quality improvement. We review engagement files, survey your professionals, interview selected individuals, and work with you to identify the best practices and opportunities for improvement. The result of this phase is a diagnostic, which presents our assessment of the opportunities to improve the quality and efficiency of your audit process and related engagements. The diagnostic and related discussion drives a solution that includes a customized best practices seminar and other activities designed to improve your firm’s assurance services.

PHASE 2: BEST PRACTICES SEMINAR
The Best Practices Seminar is designed for all practitioners and focuses on tips and best practices for completing effective and efficient audits. We tailor the seminar to the specific opportunities at your firm. We apply concepts through critique of your workpapers to illustrate learning points and address questions and concerns by inviting challenges and open discussion. We guide your professionals to a consensus about better ways to plan, perform, and manage an engagement.

PHASE 3: TEAM REENGINEERING WORKSHOPS
This phase takes the concepts discussed in the Best Practices Seminar and puts them into practice. We help you with the implementation of the concepts to achieve real change on real engagements as we conduct highly focused facilitated planning sessions. These sessions are designed to give team members hands-on experience with an actual workpaper binder to:

• Implement key seminar learning points
• Identify opportunities to improve a specific engagement
• Design more effective and efficient audit procedures
• Coordinate an engagement management plan

PHASE 4: IMPLEMENTATION STRATEGY MEETING
In this final phase, we share thoughts and observations of the best practice seminar and team reengineering workshops with your audit department leadership group. The goal is to identify keys to success and to address challenges while developing action plans to keep the assurance improvement efforts on track and in place.

Total recommended CPE credit: 20 credits
Auditing | Overview
(Seminar: 16, Meetings: 4)

CONTINUED RELATIONSHIPS
After the initial program, we are available as a partner in the continued improvement of your assurance engagements. Consultants are available to perform one-year follow-ups, conduct refresher seminars, facilitate planning sessions, and review additional engagements to evaluate progress in your productivity initiatives.

FOR MORE INFORMATION AND SCHEDULING:
Call 1-800-775-9866
AUDITWATCH PRODUCTIVITY LOCATOR

An affordable solution for any size firm, the AuditWatch Productivity Locator provides you with valuable information on how your engagements are being executed. We will review files from four of your assurance engagements and look for opportunities to improve quality, efficiency and consistency. We will communicate our findings to firm management via a face-to-face or web-based meeting. The benefits to a firm include a third-party evaluation of assurance productivity, a roadmap to where to focus improvement efforts, and a list of important productivity concepts to emphasize to your professionals. Conducted by our experienced AuditWatch consultants, this program is designed to aid firm leadership in recognizing, framing, and prioritizing the opportunities for improvement that exist in the firm.

AUDITWATCH PRODUCTIVITY LOCATOR FOR REVIEW ENGAGEMENTS

We will examine two of your review engagement files and look for opportunities to improve quality, efficiency or consistency. This program is conducted by our experienced AuditWatch consultants and is designed to aid review practitioners and firm leadership in recognizing, framing, and prioritizing the opportunities for improvement that exist in review engagements.

NEW! CURRICULUM CONSULTING SERVICES FROM AUDITWATCH

AuditWatch consultants will evaluate your firm’s current learning and development program as well as the firm’s approach to delivering continuing professional education (CPE). AuditWatch will conduct a full diagnostic including conducting firm surveys and interviews, and reviewing firm training objectives and long term goals. We will provide recommendations for the continued improvement of your program to enable your professionals to develop professionally and receive more quality and timely continuing professional education (CPE). After we have gained an understanding of your firm’s learning and development needs and objectives, we will make recommendations to your current program that are aligned with your firm’s strategic business goals and industry standards.
PUBLIC LIVE SEMINARS
We offer open enrollment seminars in major cities across the country. Individuals can register for the desired level of training. Refer to page 14 for the Public Live Seminar Schedule. To register for our public seminars go to cl.thomsonreuters.com/A or call 1-800-231-1860.

IN-HOUSE SEMINARS
Firm-specific seminars are conducted at your facility for the exclusive benefit of your firm. When we deliver firm-specific courses you incur many benefits, including: lower per-participant costs, in-depth discussions of firm-specific issues, and the opportunity to communicate other firm-specific matters and build morale.

CUSTOMIZED TRAINING
Our goal is to enable the success of your firm. The staff development programs we present are based on the typical needs of most of our clients. Each firm is different and may have specific training needs unique to its own company challenges. Our instructors and development team have the experience and depth of knowledge to tailor our programs to meet your staff development needs. Pricing for custom training development varies according to the complexity of the project. The lead time necessary to prepare the training materials depends on a number of variables, including the type of content that needs to be developed and the availability of resources. A development project can take several weeks. If your firm may consider a custom training course, contact AuditWatch as quickly as possible so that we plan accordingly.

MATERIALS ONLY AND CUSTOMIZED WEBINAR OPTIONS
Now Available: Eight 2-hour technical modules from AuditWatch University Level 1 can be purchased as materials-only or as a series of customized webinars for your firm. TaxWatch University Levels 1–4 also now available in a materials-only option. Call 1-800-775-9866 for details.

WEB-BASED NEW HIRE TRAINING “BOOT CAMP” FOR AUDIT STAFF

PUBLIC WEB SEMINAR:
November 13-14
9:00 AM - 5:00 PM CST | $349 per attendee
Call us at 1-800-231-1860 for more information.

IN-HOUSE:
$6,995 for first 10 participants, $295 per person for additional participants (more than 10).
Call us at 1-800-775-9866 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. No expiration. Details: page 32.

EARLY BIRD DISCOUNT:
Save 15% on public seminars! Early Bird prices shown in orange. Expires: May 15, 2014
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 the effectiveness and efficiency of their audit engagements through exercises and case studies on common audit scenarios. It also provides an in-depth look at higher-level audit tasks, such as entity-level controls, identifying and designing tailored responses to fraud risks 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, reviewing staff work and providing timely effective feedback, 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, and recognizing advanced financial reporting issues.

**LEVEL 5: TAKING THE LEAD**

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

*Experience: 5 – 6 years*

In this course participants reach beyond technical expertise to develop critical managerial skills to further their firms’ success. Participants learn results oriented leadership skills to better manage multiple engagements and teams, and leave with specific individual professional development goals that may be integrated with their firm’s performance management model. Course also includes presentation skills, business development and career success strategies.

**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 technical 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.

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**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. No expiration. Details: page 32.

**EARLY BIRD DISCOUNT:**
Save 15% on public seminars! Early Bird prices shown in orange. Expires: May 15, 2014
TAXWATCH UNIVERSITY

TAX STAFF TRAINING FROM AUDITWATCH AND PPC

PPC 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, 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. Topics covered also include time management, engagement management and conducting client interviews.

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 partnership, LLC, corporate, 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 and more advanced corporate and individual issues.

TAXWATCH UNIVERSITY—LEVEL 5
16 CPE CREDITS | TAXATION, PERSONAL DEVELOPMENT, COMMUNICATION | ADVANCED

Experience: 5+ years
This program is designed for seasoned tax professionals who would like to develop skill sets beyond the technical arena. This program focuses on business skills critical for professionals, such as practice development, management, and communication. In addition, the course contains timely technical tax topics and updates as appropriate.

FOR MORE INFORMATION AND SCHEDULING
cl.thomsonreuters.com/A
1-800-231-1860 for public seminars
1-800-775-9866 for in-house and customized training

CUSTOMIZED TRAINING
Our instructors and development team have the experience and depth of knowledge to tailor our programs to meet your staff development needs. If there is a possibility that your firm is considering a custom training course, call 1-800-775-9866 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. No expiration. Details: page 32.

EARLY BIRD DISCOUNT:
Save 15% on public seminars! Early Bird prices shown in orange. Expires: May 15, 2014
YELLOW BOOK UNIVERSITY

With this multi-day series, you can choose to attend just the sessions that are most important to you.

DAY 1: AUDITING NONPROFIT ORGANIZATIONS AND GOVERNMENTAL AGENCIES
8 CPE CREDITS | AUDITING (GOVERNMENTAL) | BASIC

This session focuses on the fundamentals of auditing nonprofit organizations and governmental entities including their unique characteristics. This session is designed to provide practitioners that are new to this practice area an overview of the audit fundamentals and to provide the experienced auditor with a solid refresher.

DAY 2: 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 how to determine major programs. Special attention is given to common single audit deficiencies, best practices, efficient and effective methods to test internal controls and compliance requirements (including sampling techniques), and development of meaningful audit findings.

DAY 3: GOVERNMENTAL AND NONPROFIT UPDATE
8 CPE CREDITS | ACCOUNTING, ACCOUNTING (GOVERNMENTAL), AUDITING, AUDITING (GOVERNMENTAL) | UPDATE

In this session, we update you on recently issued and effective authoritative pronouncements affecting governmental and nonprofit entities; including accounting, auditing, ethics, regulatory, and compliance issues. This session will also address the practical implementation and practice issues related to the most significant new standards.

DAY 4: AUDITING NONPROFIT ORGANIZATIONS AND GOVERNMENTAL AGENCIES-ADVANCED TOPICS
8 CPE CREDITS | ACCOUNTING, ACCOUNTING (GOVERNMENTAL), AUDITING, AUDITING (GOVERNMENTAL) | ADVANCED

This session focuses on advanced audit and accounting issues unique to performing audits of nonprofit organizations and governmental entities. Topics include common practice and implementation issues relating to recent standards and recent risk alerts.

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. No expiration. Details: page 32.

EARLY BIRD DISCOUNT:
Save 15% on public seminars! Early Bird prices shown in orange. Expires: May 15, 2014

SPECIALITY SEMINARS

ACCOUNTING AND AUDITING CLINIC
8 CPE CREDITS | ACCOUNTING, AUDITING | UPDATE

This clinic is a BEST SELLER each year!

This course provides in-depth, hands-on coverage of recent developments in accounting, auditing, and financial reporting. Strong emphasis is placed on the practical application of selected newly issued and/or effective authoritative pronouncements affecting practitioners who serve small and middle-market businesses. The session is designed for a high level of interaction between the instructor and participants.

Call 1-800-775-9866 to schedule.

Also see our data extraction training seminars on page 15.

MAXIMIZING EFFICIENCY WHILE PERFORMING AUDITS WITH PPC’S SMART PRACTICE AIDS
16 CPE CREDITS | AUDITING | INTERMEDIATE

This course combines our two most popular SMART courses (“Best Practices in Utilizing PPC’s SMART Practice Aids: Key Issues in Risk Assessment” and “Evaluating and Testing Internal Controls with PPC’s SMART Practice Aids—Disclosure”) and includes guidance on PPC’s SMART Practice Aids—Disclosure. This two-day course provides practical discussions on best practices for obtaining an understanding of the client and their internal controls, assessing and responding to risks, creating tailored audit programs, and using the disclosure module to efficiently complete the disclosure checklist and utilize disclosure libraries. The course incorporates case studies throughout to allow participants to practice the application of the subjects discussed with the use of the PPC’s SMART Practice Aids modules. The course can be modified to include PPC’s SMART Practice Aids—Fieldwork upon request.

Call 1-800-775-9866 to schedule.

Catalog code: CCADM14
## 2014 AUDITWATCH UNIVERSITY PUBLIC SEMINAR SCHEDULE

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## 2014 TAXWATCH UNIVERSITY PUBLIC SEMINAR SCHEDULE

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## 2014 YELLOW BOOK UNIVERSITY PUBLIC SEMINAR SCHEDULE

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This price per person cost includes course tuition, materials, lunch and snacks.

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**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. No expiration. Details: page 32.

**EARLY BIRD DISCOUNT:**

Save 15% on public seminars! Early Bird prices shown in orange. Expires: May 15, 2014.
AUDITWATCH TECHNOLOGY SOLUTIONS

Power Play is a consulting service that allows you to work with our experienced auditors to perform analyses and testing of your clients’ data using specialized software. We help you design your tests, obtain electronic data from your clients, perform the analyses and send the results back to you in an easy-to-understand format. No more costly software licenses, extensive training or struggling with your clients to get information!

POWER PLAY—INCREASE AUDIT QUALITY AND EFFICIENCY
Today’s audit standards all but mandate the use of data extraction software on our engagements. While some firms have chosen to purchase licenses of these software tools and have all of their users trained to use them, many firms may not have that luxury. AuditWatch’s Power Play allows your firm to outsource your data extraction needs to a qualified expert. We can help you:

• Harness the power of data extraction on your engagements.
• Increase quality and efficiency of your audits, specifically in complying with AU-C Section 240 and other audit standards.
• Eliminate the risk of having your data extraction expertise “walk out the door.”
• Minimize or eliminate expensive software purchases and maintenance fees.

Using Power Play allows your engagement team to focus on other important areas, while your data extraction procedures are being performed by our consultants and returned to you for your reporting. This process allows for maximum efficiency on both ends, all while reducing the amount of time (and money!) your staff spends on each audit area.

WHAT IS DATA EXTRACTION?
Data extraction is a powerful tool that improves the quality of audit evidence with a significant reduction in cost. Data extraction gives you the power to:

• Import your clients’ electronic financial data.
• Perform automated audit tasks, such as selecting samples or scanning populations for potential misstatements.
• Perform audit procedures, such as the review of journal entries required by AU-C Section 240, that are difficult to perform manually.
• Produce reports with the information you need in the format best suited for audit procedures, such as analytical procedures.
• Easily analyze reports provided by your client that were earlier considered “ugly” and “unreadable.”

WE’LL HELP YOU UTILIZE DATA EXTRACTION SOFTWARE TO IMPROVE YOUR PROJECTS!
CALL 1-800-775-9866 TODAY.

A summary report, created by Power Play, that identified journal entries that met specific audit risks of material misstatements.

OUR EXPERIENCED AUDITORS AND SOFTWARE SPECIALISTS WILL HELP YOU HARNESS THE POWER OF DATA EXTRACTION SOFTWARE ON YOUR ENGAGEMENTS!
A TYPICAL POWER PLAY ENGAGEMENT

IDENTIFICATION AND SELECTION OF PROCEDURES
• We can assist engagement teams in recognizing opportunities to utilize data extraction software to improve their projects.
• Teams submit the draft and/or final requests to a secure website that we set up exclusively for your firm’s use. Website tools help the auditor to pick and click procedures or just provide suggestions.
• We provide the engagement team a price quote for the specific services requested. For very common or repetitive requests, we may offer standard pricing options.

OBTAINING DATA
• The engagement team can obtain the data themselves or ask us to assist with this process.
• We can work with almost any data format your client can produce.

DATA PROCESSING
• We perform the procedures you request and generate the results.
• We confer with the engagement team as we perform the procedures to address any surprises or issues that we identify.

REPORTING AND DOCUMENTATION
• For most projects, we prepare a memo that serves as a main part of the team’s documentation.
• For most projects, data files are created with transactions, sample items, analytical procedures, or exceptions that have been created based on the team’s requests.

WE’LL HELP YOU UTILIZE DATA EXTRACTION SOFTWARE TO IMPROVE YOUR PROJECTS!
Visit cl.thomsonreuters.com for additional information about our technology solutions.

IN-HOUSE DATA EXTRACTION SOFTWARE TRAINING

MASTERING THE BASICS OF DATA EXTRACTION SOFTWARE
16 CPE CREDITS | AUDITING, SPECIALIZED KNOWLEDGE AND APPLICATION | BASIC

This hands-on computer course is for new users of data extraction software and those who want to review basic and intermediate software functions. Participants learn to:
• Master the key commands and functions of IDEA software
• Identify numerous applications of the software
• Obtain and import basic and complex data files typically received from clients
• Understand the software’s reporting features and workpaper assistance tools.
• Use software-driven results to make audit conclusions

Seminar Price (up to 10 participants): $5,400, includes instructor fee and course materials for up to 10 participants. Additional Participants: $279 per participant (maximum size of this program is 16 participants). Plus out-of-pocket expenses.
Each participant must bring a computer with the current version of IDEA already loaded and a license key (if applicable).

SPOTTING OPPORTUNITIES TO USE DATA EXTRACTION SOFTWARE
4 CPE CREDITS | AUDITING | OVERVIEW

Ideal for firms seeking to expand their use of data extraction based procedures. This course helps engagement decision-makers recognize situations where their teams can use data extraction to improve quality and efficiency. Participants learn to:
• Assess the cost-benefit of using data extraction software on specific engagements
• Identify basic and creative uses of the software (including the latest innovative applications to help comply with emerging audit standards)
• Interpret, document, and communicate results to clients
• Identify ways to use data extraction software as a marketing tool to prospective clients

Seminar Price: $2,599, includes instructor fee and course materials for up to 10 participants. Additional participants: $129 per participant. Plus out-of-pocket expenses.

Check our website for additional information on our data extraction solutions: cl.thomsonreuters.com
AUDITWATCH AND PPC IN-HOUSE SPEAKERS

Also visit youtube.com/trainingcpe to watch brief video bios from AuditWatch speakers!

**JACQUI ALGER**, CPA has been with AuditWatch since 2002. She was formerly with Ernst & Young. Jacquie graduated from the University of Maryland and holds a MS degree from Mercer University. Jacquie resides in Massachusetts.

**PETE BIEGLER**, CPA, has been with AuditWatch since 2002. He was formerly with Katz, Sapper & Miller and Crowe Chizek. Pete graduated from Ball State University and currently resides in Indiana.

**WENDY HASSIEPEN**, CPA owns a firm in Newark, Delaware specializing in tax consulting and compliance services for individuals and small businesses. Wendy was formerly with KPMG in Philadelphia, PA as well as a local firm in Delaware. She currently resides in Delaware.

**WAYNE KERR**, CPA has been with AuditWatch since 2004. He was formerly with Grant Thornton. Wayne graduated from Brigham Young University and resides in Utah.

**SONYA LANEY**, CPA owns and operates her own accounting and tax practice, where she prepares corporate, personal and estate and gift returns. She currently resides in Florida.

**SUSAN C. LONGO**, CPA is a consultant who previously worked for a national accounting firm, where she received extensive auditing experience with governmental agencies, Fortune 500 companies, and business consulting. She has authored, edited, and instructed courses in accounting, auditing, nonprofits, and governmental entities.

**TROY MANNING**, CPA has over 20 years of diverse experience in the government and the not-for-profit sectors. She was formerly a partner at a regional public accounting firm. Troy graduated from Florida International University and has her Master of Accounting from Nova University.

**CHRIS MARTIN**, CPA has been with AuditWatch since 2003. He was formerly with Arthur Andersen. Chris graduated from Florida State University and currently resides in California.

**SUNISH MEHTA**, CPA has over 16 years of experience in assurance and advisory services having worked at Ernst & Young LLP, PricewaterhouseCoopers LLP and IBM Global Business Services. He is a graduate from California State University, Northridge.

**NATE MOHR**, CPA has been with AuditWatch since 2004. He was formerly an audit manager with Deloitte. Nate currently resides in Michigan.

**MARIAM MORRIS**, CPA joined AuditWatch in 2009. She runs her own firm where she provides accounting, tax, attest, and consulting services. She was formerly with Coopers & Lybrand. Mariam graduated from Old Dominion with a master’s in taxation and resides in Texas.

**SHAWN O’BRIEN**, CPA joined AuditWatch in 2005. He was formerly with Deloitte. Shawn graduated from Duquesne University and resides in Pennsylvania.
TIM O’BRIEN, CPA has over 40 years of tax experience. He currently works as a tax consultant to small- and medium-sized businesses. He was formerly with Arthur Andersen. Tim currently resides in Virginia.

JENNIFER PICKLES joined AuditWatch in 2007. She was formerly with KPMG. Jennifer graduated from California State University, Northridge and resides in Arizona.

JOHN STEVKO, CPA graduated from the University of California at Davis. He began his career with Peat, Marwick, Mitchell & Co. before founding a local firm in Beaverton, Oregon specializing in taxation. He now lives and practices in Southwest Washington.

ROBERT “CHRIS” PROVINCE, CPA specializes in taxation of high net worth individuals and closely held businesses. Chris formerly served as a tax partner and senior tax member for several local, regional, and national CPA firms. Chris currently lives in Texas.

ERICKA RACCA, CPA, CIA joined AuditWatch in 2007. She was formerly with Deloitte. Ericka graduated from Assumption College and resides in Massachusetts.

JEX VARNER, CPA joined AuditWatch in 2006. He was formerly at Grant Thornton where he was National Director of Technical Development. Jex graduated from Brigham Young University and resides in Utah.

JULIE WIESE, CPA has been with AuditWatch since 2001. She was formerly with Deloitte. Julie graduated from the University of Illinois and currently resides in Illinois.

LAURIE A. STILLWELL, CPA operates her own practice in Saratoga Springs, specializing in working with small businesses, professional practices, and their owners. Laurie began her career at Price Waterhouse and worked with several local and regional accounting firms. Laurie currently lives in New York.

Meet AuditWatch speakers and consultants via brief video bios on our YouTube channel at: youtube.com/trainingcpe
PPC IN-HOUSE TRAINING
ON-SITE CUSTOMIZED TRAINING

WE COME TO YOU—A COST-EFFECTIVE, CONVENIENT WAY TO EARN CPE!
PPC offers in-house seminars on over 50 accounting and auditing, management, staff training, tax, and Yellow Book topics.
• Custom-tailored to meet your needs: Choose an existing course or customize your own seminar with two- and four-hour modules.
• Highly rated instructors: Our instructors are experienced trainers and consistently receive the highest ratings for their presentations.
• Current, relevant course content: Course content is continually revised with input from instructors and past participants.
• Affordable pricing: For approximately $15 per credit hour, your organization can have highly rated customized training from the industry’s leading publisher.
• Multiple options: Order our in-house seminars with our instructor, order a “materials only” format and provide your own instructor.

ONE FULL-DAY, EIGHT CPE CREDITS:
Classes cost as little as $2,999 (plus instructor’s travel costs) per day for the first 10 participants and $105 per person thereafter. We offer a 5% discount for groups of 50 or more! For larger groups, call for pricing.

PER DAY COSTS IF YOU CHOOSE TO PROVIDE YOUR OWN INSTRUCTOR:
At least one instructor manual must be purchased at a cost of $350 and at least five participant manuals at $105 each when a PPC instructor is not provided. Instructor and participant manuals are not sold separately. Note: For some best-selling programs we offer DVD instructional tools to assist you in your presentation!

CPE CUSTOM-TAILORED FOR YOUR ORGANIZATION’S NEEDS!
Choose a course from more than 50 existing topics in:
• Accounting & Auditing
• Management
• Staff Training
• Taxation
• Yellow Book

Or, build your own training day from a selection of two- and four-hour course modules. See below.

For more information and help determining which course and option is right for your organization, call 1-800-387-1120.

Your firm or company is the CPE Sponsor for any In-House presentation. Please contact your state board for any questions about specific state sponsor requirements. For more detailed product descriptions including course prerequisites, consult the PPC In-House Planner available online at cl.thomsonreuters.com/H.

Customized, cost-effective training allows you to train your staff the way you want them to be trained!

BUILD A TRAINING DAY UNIQUE TO YOUR ORGANIZATION’S NEEDS!
Choose these course modules to custom design a CPE seminar that meets the specific needs of your organization! For more information, call Barbara Marino at 1-800-387-1120.

Intermediate Level (4 credits):
• Advanced Topics in Auditing Nonprofit Organizations
• Fraud in Nonprofit Organizations
• Fraud in Governmental Units
• HUD Audits
• Advanced Topics in Auditing Governmental Entities

Update Level (4 credits):
• Current Developments in Accounting and Auditing
• FASB Update
• Governmental Accounting and Auditing Update
• Nonprofit Accounting and Auditing Update

Basic Level (2 credits):
• Professional Ethics for Accountants
• Audit Sampling
• Key Issues in Compilation and Review Engagements

For complete descriptions of these modules, visit cl.thomsonreuters.com/H and download our In-House CPE Planner.

TAXWATCH UNIVERSITY:
TAX STAFF TRAINING PRESENTED BY PPC AND AUDITWATCH
PPC and AuditWatch have teamed up to offer multiple levels of core tax staff training to your firm, available through public seminars or in-house training. This integrated curriculum for tax professionals begins with an entry-level course on individual taxation regulations, followed by courses on corporate tax issues, partnerships, and other special entities.

See page 12 for details.
We will bring you up-to-date on all the changes and give you the essential planning tools to navigate changes as well as provide a comprehensive review of Form 1040 complexities. Updated for recent tax legislation and discussion of expected future changes, along with many important topics that impact your clients, including health care reform and other hot topics. New cases and rulings on important topics are included.

Some days it seems as if the accounting profession is changing faster than a CPA can keep up. If you are a practitioner who struggles to keep updated with all the changes in the profession, this course is for you. It provides in-depth, hands-on coverage of recent developments in accounting, auditing, and financial reporting. The course focuses on the practical application of selected newly issued and/or effective authoritative pronouncements affecting practitioners who serve small- and middle-market businesses. There is a high level of interaction between the instructor and participants. You’ll come away from the course with practical ways to apply new standards. **Best Seller! Call today to bring this popular course to your firm! 1-800-387-1120.**

**ANALYTICAL PROCEDURES**
**PROF | 8 CPE CREDITS | AUDITING | INTERMEDIATE**

Analytical procedures are powerful tools in planning and performing audit and review engagements. In many cases they can provide greater assurance and are more efficient than tests of details. This course helps accountants take full advantage of the power of analytical procedures by providing guidance on how to develop and apply appropriate and effective analytical procedures in GAAS audits and SSARS reviews.

**AUDITS OF EMPLOYEE BENEFIT PLANS USING THE PPC AUDIT APPROACH**
**GBPf | 8 CPE CREDITS | AUDITING | INTERMEDIATE**

Designed for accountants in public practice and industry that want to increase their effectiveness in auditing employee benefit plans, this course provides an in-depth review of ERISA regulations and focuses on an efficient compliance audit methodology for those rules. Regulators are concerned about compliance with DOL and IRS regulations—not just traditional financial statement reporting. Therefore, auditors need to focus on two issues: 1) what constitutes noncompliance and how noncompliance might occur, and 2) what the auditor is required to test to determine if there is noncompliance. This course explains how to audit employee benefit plans in compliance with DOL and the AICPA Audit and Accounting Guide: Employee Benefit Plans. Discussion will focus on common deficiencies in examining contributions, distributions, participant data, investments, and prohibited transactions.

**BEST PRACTICES IN UTILIZING PPC’S SMART PRACTICE AIDS: KEY ISSUES IN RISK ASSESSMENT**
**GRSF | 8 CPE CREDITS | AUDITING | INTERMEDIATE**

This course provides best practices for using PPC’s SMART Practice Aids—Risk Assessment to efficiently complete and document risk assessment procedures. The course blends practical discussions on best practices for performing risk assessment procedures with how to use the PPC software to its fullest. The course focuses on obtaining and documenting an understanding of the entity (including internal controls), identifying, assessing and documenting risks, and creating tailored audit programs. The course can be modified to include PPC’s SMART Practice Aids—Fieldwork upon request.

**BUSINESS ENTITIES TAX UPDATE**
**BETF | 8 CPE CREDITS | TAXATION | UPDATE**

Find out what you need to know about all of the latest federal tax law changes, court decisions, and IRS pronouncements related to partnerships, LLCs, and C and S corporations. Identify ways to integrate the latest tax laws changes into your planning and compliance engagements and provide more value-added services to your clients. This seminar will help participants effectively prepare quality corporate returns, maximize efficiency, and avoid tax practice liability problems.

**EFFECTIVE HUD AUDITS**
**HUdf | 8 CPE CREDITS | AUDITING | INTERMEDIATE**

This seminar provides the guidance on audits of for-profit and nonprofit multifamily projects that receive financial assistance from HUD. It covers recent revisions to the HUD Consolidated Audit Guide and the latest regulations from HUD, as well as any changes required by current AICPA projects.

**EVALUATING AND TESTING INTERNAL CONTROLS**
**ICCf | 8 CPE CREDITS | AUDITING | INTERMEDIATE**

Do you feel that your approach to obtaining an understanding of your client’s internal controls is not as efficient or effective as it could be? This course is designed to help auditors increase their efficiency and effectiveness by applying a top-down, risk-based approach to internal controls. The course includes interactive case studies designed to practice the various steps of a top-down, risk-based approach. The course also addresses when it makes sense to test controls, how to perform and evaluate those tests and how the testing affects your substantive audit procedures.

**NEED HELP CHOOSING THE RIGHT COURSE FOR YOUR ORGANIZATION?** Call Barbara Marino at 1-800-387-1120.
## EVALUATING AND TESTING INTERNAL CONTROLS
**WITH PPC’S SMART PRACTICE AIDS—INTERNAL CONTROLS**

**ICAF | 8 CPE CREDITS | AUDITING | INTERMEDIATE**

Utilizing PPC’s SMART Practice Aids—Internal Control software, the course includes interactive case studies designed to practice the various steps of a top-down, risk-based approach. The course also addresses when it makes sense to test controls, how to perform and evaluate those tests and how the testing affects substantive audit procedures. The course can be modified to include PPC’s SMART Practice Aids—Fieldwork upon request.

## FINANCIAL REPORTING AND DISCLOSURES FOR SMALL BUSINESSES

**FRDF | 8 CPE CREDITS | ACCOUNTING | BASIC**

This course provides an overview of standards related to financial statements and financial statement disclosures. This course discusses the statements of financial position, statement of operations, statement of comprehensive income, statement of cash flows, statement of stockholders’ equity, and notes, under both GAAP and Special Purpose Framework bases of accounting.

## PPC’S FEDERAL TAX UPDATE

**PTUF | 8 CPE CREDITS | TAXATION | UPDATE**

This seminar offers practical insights into the ever-changing world of federal taxation. PPC’s Federal Tax Update covers the latest developments affecting individuals, partnerships, C corporations, S corporations, and estates and trusts, and is designed to keep you up-to-date in this dynamic environment. This best selling seminar also features tax planning tips as well as numerous practice aids such as real life examples, worksheets, elections and checklists. Includes expanded coverage of Healthcare Reform.

**Best Seller! Call today to bring this popular course to your firm! 1-800-387-1120.**

## PERFORMING EFFICIENT AUDITS OF NONPUBLIC COMPANIES USING THE PPC AUDIT APPROACH

**GRNF | 8 CPE CREDITS | AUDITING | INTERMEDIATE**

This course provides practical guidance to conduct efficient and effective audits of small businesses using PPC’s Guide to Audits of Nonpublic Companies. The course highlights the latest implementation guidance from standard setters and best practices on the current PPC practice aids. Major topics include: risk assessment, formulating the audit strategy, audit planning, evaluating and testing internal controls, designing and performing further audit procedures, audit sampling, and audit documentation.

**Best Seller! Call today to bring this popular course to your firm! 1-800-387-1120.**

## PERFORMING COMPILED AND REVIEW ENGAGEMENTS

**CRIF | 8 CPE CREDITS | AUDITING | INTERMEDIATE**

This course outlines the requirements for compilation and review engagements, performing them more effectively, and responding to special situations. The course integrates the most recent SSARS standards with revised PPC practice aids. The materials discuss common deficiencies noted in compilation and review engagements.

## SAMPLING: WHERE, WHEN AND HOW

**SAMF | 8 CPE CREDITS | AUDITING | BASIC**

This course explains the use of sampling in an audit. The course is focused on the PPC approach to audit sampling—in both substantive tests and tests of controls—and incorporates PPC practice aids. It provides a solid understanding of basic and more advanced sampling topics, while staying focused on practical issues and efficiency considerations. Participants will learn how to recognize situations where sampling is and is not likely to be an effective and efficient audit procedure, perform non-statistical substantive samples on a variety of account types, project errors and conclude on the sample population, determine sample sizes for control testing on large and small population sizes, and utilize the PPC forms and methodology.

Catalog code: CCADM14
PPC IN-HOUSE COURSE MODULES

BUILD A DAY OF TRAINING UNIQUE TO YOUR FIRM’S NEEDS

ADVANCED TOPICS IN AUDITING

GOVERNMENTAL ENTITIES

AUGFS | 4 CPE CREDITS | ACCOUNTING (GOVERNMENTAL), AUDITING (GOVERNMENTAL) | ADVANCED

This session focuses on advanced accounting and auditing issues unique to performing audits of governmental entities. Topics include common practice and implementation issues relating to recent standards and recent risk alerts. The workshop style presentation includes exercises, examples, and group discussion. This course includes discussion of advanced practice issues appropriate for experienced auditors. Guidance is provided for using PPC forms and practice aids in performing governmental organization audits.

ADVANCED TOPICS IN AUDITING

NONPROFIT ORGANIZATIONS

AUNFS | 4 CPE CREDITS | ACCOUNTING, AUDITING | ADVANCED

This module focuses on advanced accounting and auditing issues unique to performing audits of nonprofit organizations. Topics include common practice and implementation issues relating to recent standards and recent risk alerts.

AUDIT SAMPLING

ASMF | 2 CPE CREDITS | AUDITING | BASIC

This module provides a high level overview of the use of audit sampling in an audit. It provides tips for the most efficient and effective approach to audit sampling and is based on the PPC audit sampling practice aids. Course features include: overview and tips for using PPC practice aids, sample planning and evaluation for substantive tests, and sample planning and evaluation for tests of controls.

CURRENT DEVELOPMENTS IN ACCOUNTING AND AUDITING

AAMF | 4 CPE CREDITS | ACCOUNTING, AUDITING | UPDATE

The accounting profession continues to evolve as standard setting bodies evaluate new standards and re-evaluate old ones. This module focuses on recent pronouncements from standard setting bodies, including the AICPA and FASB, that affect the preparation of financial statements and the conduct of audits. Emphasis is placed on knowledge and awareness of the new standards and pronouncements.
**FASB UPDATE**

**FAMF | 4 CPE CREDITS | ACCOUNTING | UPDATE**

This course is vital for accountants in the industry who need to brush up on recent accounting pronouncements that affect financial reporting. The latest accounting standards updates, exposure drafts and guidance will be discussed.

**FINANCIAL STATEMENT DISCLOSURES**

**FSMF | 4 CPE CREDITS | ACCOUNTING | BASIC**

Authoritative pronouncements mandate many types of disclosures but do not mandate the manner of presentation. Some disclosures are best presented in separate notes rather than in the basic financial statements. This module examines the requirements, form, and style of required financial statement disclosures. Discussion also includes common problems in preparing frequent disclosures, common problems in preparing general disclosures and the disclosure checklist.

**FRAUD IN GOVERNMENTAL UNITS AND NONPROFIT ORGANIZATIONS**

**FGMF | 2 CPE CREDITS | AUDITING (GOVERNMENTAL) | INTERMEDIATE**

This module explains what makes governmental units and nonprofit organizations vulnerable to fraud. It identifies the unique fraud schemes and scams often perpetrated against these entities and discusses fraud detection techniques and anti-fraud programs. Upon completion of this module, participants will be able to effectively apply specialized fraud detection and prevention techniques applicable to governmental units and nonprofit organizations.

**GOVERNMENTAL ACCOUNTING AND AUDITING UPDATE**

**GVMF | 4 CPE CREDITS | ACCOUNTING (GOVERNMENTAL), AUDITING (GOVERNMENTAL) | UPDATE**

This update will focus on recent pronouncements that affect the financial accounting and auditing for governmental units. Emphasis will be on practical application of the new standards and pronouncements. Course features include: accounting standards affecting governmental organizations, new auditing standards and new OMB requirements.

**KEY ISSUES IN COMPILATION AND REVIEW ENGAGEMENTS**

**CRMF | 2 CPE CREDITS | ACCOUNTING | BASIC**

This module addresses some of the key issues involved in conducting compilation and review engagements. Upon completion of this module participants will be able to identify and effectively address key issues that affect the conduct of compilation and review engagements.

**NONPROFIT ACCOUNTING AND AUDITING UPDATE**

**NPMF | 4 CPE CREDITS | ACCOUNTING, AUDITING | UPDATE**

This update will focus on recent pronouncements that affect the financial accounting and auditing for nonprofit organizations. Emphasis will be on practical application of the new standards and pronouncements. Discussion will also include new GAO and OMB requirements.

**PROFESSIONAL ETHICS FOR ACCOUNTANTS—SELECTED TOPICS**

**ETMF | 2 CPE CREDITS | REGULATORY ETHICS, BEHAVIORAL ETHICS | BASIC**

This module is designed to enhance your understanding of morality and ethics, ethical principles, and the moral decision-making process. The criteria for ethical decision-making will be discussed along with the framework for making moral decisions. Discussion will also include quality control requirements and a review of the AICPA Code of Professional Ethics.
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In today’s tumultuous financial climate, you can’t afford to leave your clients unprotected. That’s why it pays to invest in CPE Network—a 90-minute video news-style format subscription featuring in-depth interviews with today’s foremost industry experts delivering timely updates. You’ll receive a new issue 11 times per year or quarterly, depending on your choice of report(s). Subscriptions allow for up to 25 users.*

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• Full transcript, discussion questions and supplemental materials with each issue

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Bisk CPEasy 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. 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.
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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; John L. Norman, Jr., JD – former National Director of Taxation with Pannell Kerr Forster (PKF) and nationally known author and tax attorney in private practice in Washington, D.C.

CPE NETWORK ACCOUNTING & AUDITING REPORT

33 CPE CREDITS | ACCOUNTING & AUDITING | UPDATE | $899

Recent accounting scandals have placed companies and individuals under the microscope of intense scrutiny for compliance. 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

CPE NETWORK GOVERNMENTAL & NONPROFIT ACCOUNTING REPORT

24 CPE CREDITS | ACCOUNTING & AUDITING (GOVERNMENTAL) | UPDATE | $899

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 governmental and nonprofit changes as they occur.

Experts include: Betty A. Pendergrass, CPA, CGFM, Governmental Management Advisory Services; Jennifer F. Louis, CPA – President of Training Services at Emergent Solutions Group, LLC

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90 CPE CREDITS Included | $1,725

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Catalog code: CCADM14
Checkpoint Learning provides CPE compliance tracking, learning management, curriculum development and much more. Learners can purchase and complete courses directly from Checkpoint Learning, either individually or as part of a subscription package. Course bundles can be assembled at an administrative level so that only the courses your firm requires for each staff level or each learner are purchased and assigned. Checkpoint Learning's combination of learning management tools and expert course content will help your team excel and work efficiently.

- Upgraded, interactive online courses from MicroMash and PASS Online link seamlessly to the Checkpoint research and guidance platform
- CPE tracking and compliance monitoring for every state board of accountancy requirement, as well as more than 20 professional designations
- CPE certificate storage and automated integration of CPE records with our CPE compliance engine
- Learning plans to help meet training and career advancement goals for each employee
- Personalized learning dashboard with all CPE records and courses in one place for each learner

- Flexible pricing—purchase only what your team needs
- Checkpoint Learning Competency Model includes a database of competencies for four career levels across five areas of technical specialty
- Corporate curriculum that meets the CPE needs of corporate accountants with over 130 courses in 15 subject areas
- ONESOURCE© Integration feature that allows dual users to search for CPE courses, view their in-progress online courses, and view the status report manager

Checkpoint Learning provides CPE compliance tracking, learning management, curriculum development and much more. Learners can purchase and complete courses directly from Checkpoint Learning, either individually or as part of a subscription package. Course bundles can be assembled at an administrative level so that only the courses your firm requires for each staff level or each learner are purchased and assigned. Checkpoint Learning's combination of learning management tools and expert course content will help your team excel and work efficiently.

Redesigned interface offers a fresh look, cleaner navigation and has been optimized for tablet view!

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INTRODUCING
CHECKPOINT LEARNING FOR MOBILE DEVICES

From airport lines to long train rides, we all wait. Why not make the most of your “in-between” minutes? Checkpoint Learning has just released a selection of online courses for use on the iPad. Now you have the freedom to access purchased courses on any device—desktop, laptop or iPad—providing a seamless and convenient learning experience. The course will save your progress from whichever device was last used.

- More than 70 key titles currently available, with others rolling out throughout 2014
- Touch and swipe functionality
- Search our library of mobile courses and purchase directly from your mobile device
- Access and complete courses on the go

Checkpoint Learning mobile courses are also available in many of our annual subscription packages at no additional cost.

NEW
Look for the symbol next to courses currently available on your iPad in the Checkpoint Learning Online Courses section (pages 33-37). More titles published to mobile format every week!

Start and stop courses as needed and resume from any device.

The new Checkpoint Learning course interface allows for greater ease in searching for courses. Select “iPad” under “Media Format” on the “Find a CPE Course” search page.
Check your training needs and begin building a learning plan that's right for you!

Checkpoint Learning is the most comprehensive mandatory continuing education compliance management system available—and specifically designed for accounting and financial professionals.

REQUESTED TOOLS—NOW PART OF CHECKPOINT LEARNING

Checkpoint Learning integrates the best of the many tools and features first seen in Reqwired to manage all facets of learning for accounting and financial professionals. The Reqwired tools within Checkpoint Learning provide a comprehensive learning management and CPE tracking experience, incorporating:

- Compliance management, including complete tracking of state-to-state regulations and requirements
- Guidance for administering in-house learning
- Customizable, individual learning paths for employees, and tools to measure course completion

In short, our learning management system (LMS) includes the most comprehensive mandatory continuing education compliance management system ever created. Checkpoint Learning was developed with accounting firms in mind; thus, implementation is immediate and effortless.

COMPLETE CPE TRACKING AND COMPLIANCE MANAGEMENT

Checkpoint Learning manages continuing education compliance, including:

- Determining compliance periods and managing simultaneous compliance periods
- Tracking all credit categories, including prorated credit requirements
- Enforcing limits on CPE format types
- Calculating carryover credit
- Managing adjustments for reporting period extensions
- Tracking special requirements for new licensees
- Giving Firm Administrators full view of the compliance status of Firm Professionals
- Sending reminders of CPE compliance status by email

In addition, our staff ensures the accuracy of Checkpoint Learning through monthly rule updates that are automatically integrated into the tracking system. Checkpoint Learning’s tracking system is programmed with the CPE rules for individuals of every state in the United States (plus Puerto Rico). We track requirements for all jurisdictions shown in the box at right, plus more than a dozen additional specialty tax and accounting affiliations.

Your firm can even create an in-firm CPE requirement to track minimum education requirements established by firm management or mandated by peer review standards. Checkpoint Learning also maintains complete and updated rule summaries for every regulator it tracks on its resource page so that administrators can easily answer employees’ questions about continuing education compliance. Learning administrators are provided with an administrative view into all firm personnel records so that CPE compliance can be quickly confirmed. Checkpoint Learning can be configured to send employees regular email reminders informing them of their continuing education status.

Contact us today to discuss your training needs and begin building a learning plan that’s right for you!

PREMIER & PREMIER PLUS:
Subscription packages include CPE Tracking account for each learner (university and learning plan features available as add-on modules). No expiration. Details: page 32.

*As of the time of this printing, continuing education for IRS RTRPs is strictly voluntary.

See bottom of page for details.
MANAGING YOUR IN-HOUSE SEMINARS

Required learning management tools, within the Checkpoint Learning platform, guide firms through the process of offering and administering in-house learning opportunities. While robust enough for any type of learning event, our learning management system (LMS) is uniquely suited for CPE-accredited courses. Employees will value the simplicity of searching, registering for and, where applicable, launching classes through the intuitive learner interface. Administrators will value the time-saving tools for each aspect of in-house education.

SELF-SERVICE COURSE REGISTRATION

Learners can browse the university course calendar and register for courses, or register for courses directly from email invitations. Registrants receive email confirmation with downloadable appointments that are ready for import into personal calendar software like Outlook and Lotus Notes.

Other features include:
- Registration caps and waitlists
- Preformatted and customizable sign-in sheets
- Post-course evaluations
- Electronic attendance certificates
- Name tags and name tents
- Course material storage

BEYOND CPE COMPLIANCE

Professional development is more than counting CPE credits. Leading firms design specific learning paths to give employees the tools necessary for success in each phase of their careers. Our learning path module provides firms the framework to:
- Set clear learning expectations for their employees
- Analyze firm-wide progress with professional development goals

LEARNING PLAN TEMPLATES

Checkpoint Learning’s LMS allows firms to design various learning plans to match levels within the organization and/or competencies they want employees to achieve. Professional development managers can assign one or more path templates to each employee, indicating target dates for course completion and whether particular learning is mandatory or optional. Firms can further use this system to:
- Customize learning plans for individuals
- Generate firm-wide reports to measure the degree to which employees are meeting learning expectations

SPECIAL FEATURES

COACH ACCOUNTS

Checkpoint Learning can provide team leaders with direct access to their team members’ CPE information, learning plans, and course registrations. A team leader, a.k.a. "coach," can receive email updates on his/her team’s CPE compliance progress, adjust a team member’s training plan as needed, and receive email notifications when team members register for courses. Coach accounts are a great way to empower team leaders to actively supervise their teams’ learning.

Call or visit us online to learn more about Checkpoint Learning, powered by Reqwired tools, today!

1-800-231-1860 | cl.thomsonreuters.com
A competency model is a descriptive tool that displays the skills needed to perform a specific role in a job, organization, or profession. It prepares people for success by understanding what proficiencies are needed to not just complete the job but excel!

The Checkpoint Learning Competency Model provides: a database for four career levels—staff, senior, manager, and director—across five areas of technical specialty and 14 non-technical categories, a self-assessment that allows managers to review and add comments, report-writing capabilities, and customizing capabilities to add competencies and categories as well as map proprietary courses and just-in-time activities. The Checkpoint Learning Competency Model provides the foundation for setting learning goals and plans, discussing performance management issues, and planning career strategies.

**TECHNICAL SPECIALTIES:**
- Corporate accounting
- External audit
- Financial management
- Internal audit
- Tax

**NON-TECHNICAL CATEGORIES:**
- Business analysis and interpretation
- Client service
- Communication
- Ethics
- Industry and global perspective
- Leadership
- Legal and regulatory
- Management
- Problem solving and decision making
- Professional development
- Research
- Risk analysis
- Technology
- Internal audit
- Tax

**ADDITIONAL FEATURES:**
- Learners can view or print competencies in their own specialty area or other areas or categories.
- Suggestions and examples are available for users who need assistance writing competencies.
- An easy-to-use self-assessment allows learners to quickly measure their own strengths and areas in need of further development.
- Competencies are linked to Thomson Reuters courses and learning activities.

**BENEFITS:**
- Professionals can track competencies throughout their careers.
- Users have a new and consistent way of assessing tax, accounting, and audit professionals across their office or practice area.
- The Competency Model provides a common language for partners and their extended management team to use in talking about the firm’s capabilities and the quality of their work.
- The Competency Model improves the firm’s quality control processes by linking areas requiring quality improvement to specific competencies.

**PRICING AND SUBSCRIPTIONS:**

The new Competency Model toolset has several annual subscription options. For a quote or more information including additional options and variables, call our sales team at 1-800-231-1860.

- Competency Model: $25
- Competency Model Module with related course package of 120 courses: $189
- Included with Premier Plus CPE Package

**PREMIER PLUS:**
Premier Plus subscription package includes Competency Model access. No expiration. Details: page 32.
CHECKPOINT LEARNING
CPE SUBSCRIPTION PACKAGES
INCREASE LEARNING OPTIONS AND SAVE MONEY!

CPE Subscription Packages from Checkpoint Learning provide outstanding offerings and flexibility—at considerable savings! See next page for details of what each of our three package options include.

- CPE tracking and compliance monitoring automatically keeps track of what individual learners have done and still need to do to stay compliant
- One low subscription price covers all of the CPE for the year in a variety of formats
- Online self-study courses offer your firm's members quality CPE from right where they are, whenever they're ready
- More than 40 state-specific ethics courses
- Self-study based on PPC Guides provides instant results with online grading on the trusted content your firm relies on daily

- Webinars provide up-to-the-minute information on industry hot topics
- Choose the learning format that best enables your team members to learn particular topics
- Live seminars taught by renowned experts are available at a significant discount
- Conferences at resort locations provide opportunities to network while learning...and a significant savings on registration
- New: Mobile courses! Select courses are available with iPad-enabled mobile versions; access these at no extra cost with applicable subscription packages

"I really like my Checkpoint Learning subscription! Checkpoint Learning lets me know conveniently in one place how close I am to meeting my CPE requirements for multiple licenses. There is a great variety of course topics, delivery methods and hours offered per course. Video and audio clips, diagrams and questions reinforce learning. The annual subscription price is very affordable and the quality of the courses is very high."
—James O. (Joe) Bailey, CPA, EA

“Being in public accounting, it is difficult to find the time to attend many live seminars, therefore I use self-study formats whenever possible. Checkpoint Learning by far is the best. I no longer have to track what courses I have taken and when I took them. It is all done for me through Checkpoint Learning. If I need to access my course completion certificates, all I need to do is sign on to my online account and there it is under the Activity History tab. Convenient and easy to use.”
—Teresa Kerbe
If you haven’t subscribed to a Checkpoint Learning CPE Package, we invite you to take a look at how this industry-changing approach to learning can save you time and money and help keep you at the top of your game with the knowledge and skills you need to serve your clients.

**PREMIER PACKAGE**

*Hundreds of online courses and webinars, all for $299*  
The Premier CPE Package provides an unprecedented range of learning options at significant savings! Includes:

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  **New:** Mobile courses! All titles with iPad-enabled mobile versions are included with your Premier or Premier Plus subscription.

- **WEBINARS.** Unlimited one- to four-hour webinars (approx. 360 annual events), plus discounts on select full-day webinars

- **LEARNING MANAGEMENT.** Online CPE tracking and compliance monitoring for every state board of accountancy requirement, and more than 20 professional designations, including EA, RTRP** and CFP

- **LIVE SEMINARS & CONFERENCES.** Annual discounts on 24 hours total per subscription year: 40% off Gear Up self-sponsored seminars and conferences and 25% off AuditWatch!

Live event discount (Premier Plus and Premier) does not combine with Early Bird or other discount offers; call 1-800-231-1860 for details. States with Thomson Reuters-sponsored Gear Up seminars currently include: AZ, CA, CO, FL, GA, IL, IA, MA, ND, OK, OR, VT, and VA. Discount does not apply to Gear Up seminars hosted by state societies (which manage their own pricing and registration).

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We’ve taken the popular Premier CPE Package and added even more in response to customer feedback! Choose Premier or Premier Plus and receive great value for the low annual subscription cost with either option. The Premier Plus CPE Package includes all of the learning options listed at left, PLUS:

- **WEBINARS.** Unlimited access to ALL webinars including popular full-day webinars!

- **COMPETENCY MODEL.** A comprehensive model for assessing, improving, and connecting your CPE to tax & accounting specialties, skills, and career levels. See pg. 30.

- **LIVE SEMINARS & CONFERENCES.** Now save on up to 40 hours annually per subscription from our popular seminar and conferences lines (save 40% on Gear Up self-sponsored; 25% on AuditWatch).

**ALSO AVAILABLE:**

**COMPLIANCE CPE PACKAGE** ($179*). Pair power with affordability! This package was designed specifically for individuals looking to meet their CPE requirements in a cost-effective way. The Compliance CPE Package provides firms (and individual practitioners) with the essential Checkpoint Learning components plus CPE tracking and compliance monitoring, and 250+ online courses (1,500+ CPE credits).

**PROFESSIONAL CPE PACKAGE** ($219*). Selection plus affordability! This package was designed for those looking to meet CPE requirements cost-effectively but with a wide selection of online courses. The Professional CPE Package provides firms (and individual practitioners) with the essential Checkpoint Learning components plus CPE tracking and compliance monitoring, and 310+ online courses (1,700+ CPE credits) including full library of ethics training.

*Per-user annual pricing applies to firms with under 50 seats; contact us for price quote if your firm has more than 50 users.

Learn why thousands of customers have purchased Checkpoint Learning subscription packages in the past 12 months!
CHECKPOINT LEARNING ONLINE COURSES

Stay on top of industry trends, new legislation, and regulatory changes with a current and relevant selection of courses.

The Checkpoint Learning Online Course library includes more than 350 interactive online courses available exclusively on the Checkpoint Learning platform. Our curriculum combines the latest in computer technology with advanced coursework for the serious training you need. You’ll always find new titles and updated information on accounting, taxation, ethics, specialized knowledge and applications, professional and personal development, and more!

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• Over 350 courses—more than 1,840 credits of CPE training!
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• Courses are available online or can be downloaded
• Always remembers your place—you never have to complete a course in one sitting
• Automatic course grading and instant certificate of completion

ONLINE COURSE CONTENT

• Courses meet the CPE requirements for CPAs in all 50 states
• Qualified sponsor of CPE for Enrolled Agents
• More than 50 ethics courses meet mandatory CPA ethics requirements
• Course content is written by long-time MicroMash and PASS Online authors
• Nearly 40 courses fulfill the CE requirement for the CFP™ certification
• Our authors have developed customized training and CPE courses for corporations, public accounting firms, and government agencies
• Over two decades of experience as a technology-based CPE provider through legacy brands MicroMash and PASS Online.

Instant access to today’s most important CPE titles—online or downloadable!

On the following pages, you will find a selection of our online course titles relevant to practicing tax and accounting professionals like you. For course descriptions and complete CPE information, visit cl.thomsonreuters.com. Also available: customized course development and topics such as auditing relevant to large firms. See website for information on custom and other group learning solutions.

“I have taken three online classes so far, one MicroMash and two PASS Online. They have both been beneficial. Each has its own style, both of which have been enjoyable.” —Pamela L. Grant, CPA

“Just finished [the PASS Online course, North Carolina Accountancy Law Course - Ethics, Principles, and Professional Responsibilities]. Best experience EVER with CPE!” —Tonya Mangum

“My PASS Online ethics course on Checkpoint Learning was user-friendly and fun, and I would highly recommend it!” —Matt Shonsey

MicroMash and PASS Online are 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. 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.

MicroMash and PASS Online are IRS approved continuing education providers, and offer several courses that are eligible for RTRP (Registered Tax Return Preparer) and/or EA (Enrolled Agent) CE credit. Please note, taking continuing education courses is strictly voluntary for RTRPs at this time.

For all taxation and other applicable subjects, PASS Online courses have been accepted by the CFP Board.

PREMIER & PREMIER PLUS PACKAGES:
Subscription packages include UNLIMITED access to all online and mobile courses. No expiration. Details: page 32.
2013 FASB Update

7 CPE Credits | Accounting
This course provides a thorough, accurate update on FASB Accounting Standards Updates issued since the initial FASB Accounting Standards Codification established in 2009. It includes discussion of certain non-SEC Accounting Standards Updates (ASU) issued through ASU 2013-11.

ACCOUNTING
2013 FASB Update
Accountant’s Overview of Financial Management
Accounting and Auditing Real Estate Transactions
Accounting and Financial Reporting Developments
Accounting Changes and Error Corrections
Accounting for Derivatives and Hedging Activities
Accounting for Income Taxes
Accounting for Investments in Debt and Equity Securities
Accounting for Leases
Accounting for Leases: What’s Changing
Accounting for Liabilities
Accounting for Pensions
Accounting for Share-Based Compensation
Accounting for Uncertainty in Income Taxes—FASB ASC: 740-10
Accounting Overview for Tax Professionals
Activity-Based Costing (ABC)
Analysis of the Corporate Annual Report
Analyzing the Financing Options of a Company
ASC: Codification of Standards
Balance Sheet and GAAP Reporting
Budgeting, Planning and Financial Forecasting
Business Combinations, Goodwill, and Other Intangible Assets
Cash Flows (FASB ASC 230)
Compilation Engagements
Comprehensive Income
Credit and Collections Management
Current Developments—Accounting and Financial Reporting
Current Developments Influencing the Accounting Profession: Series 1

ACCOUNTING, GOVERNMENTAL
GASB 34: Basic Financial Statements for State and Local Governments
GASB Statement No. 54: Fund Balance Reporting and Governmental Fund Accounting
Government Accounting Principles

ADMINISTRATIVE PRACTICE
A Complete Guide to Investing
CPA Practice Management: Billing, Collecting, and Managing Cash Flows
Personal Financial Planning

AUDITING
Audit Sampling
Auditing Developments
Auditor’s Response to Fraud: Risk Assessment
Auditors and Those Charged with Governance: SAS 114
Clarified Standards and Statements
Clarity Project: Significant Changes to Auditing Standards
Compilation and Review
Compilation and Review Update: SSARS 19 Implementation
Computer Fraud: Detection and Deterrence
The Effects of the Clarity Project on Group Audits and the Audit Opinion
Employee Benefit Plans II: Auditing Considerations
Forensic Accounting
Fraud I: Prevention
Fraud II: Detection
Fraud III: Auditing
Improving Analytical Procedures

Improving Analytical Procedures
2 CPE Credits | Auditing
This course discusses and evaluates the use of analytical procedures throughout audits. The focus of the course is on the substantive analytics, the analytics that you do in the course of responding to risks, and the analytics that are completed in the course of auditing areas.

Information Technology Auditing
Internal Control and Fraud Detection
Internal Controls for Auditors and Managers: Evaluation
Introduction to Audits of Inventory
NEW!
Mobile courses identified by symbol next to each title that is currently available with your iPad. See details on page 27.
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
Meetings that Matter
Moral Leadership and Character Development
REGULATORY ETHICS
2014 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
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 Rhode Island CPAs
Ethics for South Carolina CPAs
Ethics for Tennessee CPAs - 2 Hours
Ethics for Vermont CPAs
Ethics for Virginia CPAs
Ethics for Washington CPAs
Ethics for West Virginia CPAs
Ethics for Wyoming CPAs
Independence—An Overview for Attest Firms
Independence and Attest Firms
Independence for CPAs—An Overview
Independence, Integrity, and Objectivity
Oklahoma 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 Hawaii CPAs
SPECIALIZED KNOWLEDGE AND
APPLICATIONS
Cloud Computing: Doing Business in the Cloud
CPA’s Role in Mediation
Introduction to Business Valuation and Use of
Comparables
Introduction to Investment Companies
Introduction to the Food and Beverage Industry
Introduction to Securities Broker/Dealers
Introduction to the Health Care Industry
Introduction to the Media Industry
Introduction to the Pharmaceutical Industry
Microsoft Excel 2013: Useful Functions
for CPAs
Negotiating Skills for CPAs
Not-for-Profit Accounting
Social Media to Market Your Business
Storage Strategy in the Cloud
Storing and Synchronizing Data in the Cloud
Coming Soon!
Valuation Methods: Statement on Standards
for Valuation Services No. 1
Valuation Methods: The Normalization of
Earnings
Valuation Methods: The Income Approach
Valuation Methods: The Adjusted Net Assets
Method
Valuation Methods: The Excess Earnings
(Treasury) Method
TAXES
2013 Corporate Tax Update
2013 Individual Tax Update
2013 Individual Tax Update: Overview of Tax,
Gross Income, and Deductions
2013 Individual Tax Update: Sales and
Exchanges, Tax Credits, Withholding, and
AMT
2013 Individual Tax Overview
2013 Specialized Tax Update
49 Ways to Reduce Taxes for Individuals and
Make Them Clients for Life
Affordable Care Act: Employer and
Individual Mandates
Affordable Care Act: Understanding
the New Medicare Taxes
Alternative Minimum Tax
Asset Protection—Tax and Financial Aspects
C Corporations: Income Tax Reporting
C Corporations: Overview of Corporate Income
Tax
C Corporations: Tax Depreciation and
Amortization
Capitalization of Tangible Assets
Regulations
Capital Gains and Losses
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
Consolidated Tax Returns: Intercompany
Transactions
Corporate Net Operating Losses
Corporate Tax Update
Corporate Taxation
Depreciation: Modified ACRS
Employee Benefit Plans: Introduction
Entity Comparisons
Estate Planning for the Small and Midsized
Estate
Estate Planning II: The Large Estate
Estates and Trusts
Family Tax Planning
Federal Estate Taxation

PREMIER & PREMIER PLUS PACKAGES:
Subscription packages include UNLIMITED access to all online and mobile courses. No expiration. Details: page 32.
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 Education Costs
Fundamentals of International Tax I: Subpart F and CFCs
Fundamentals of International Tax II: Foreign Tax Credit and the FPHCo
Gross Receipts and Lease Use Tax:
Delaware—Getting Started
Human Resource Management:
Tax Implications
Individual Income Tax: Depreciation
Individual Income Tax: Above-the-Line Deductions
Individual Income Tax: Capital Gains, Pass-Through Income and Other Income
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 I
International Taxation: Outbound Transactions
IRAs: Contributions
IRAs: Distributions
IRAs: Transfers and Conversions
LIFO Inventory Method
LLCs and LLPs: Rules for Limited Liability Entities
Multistate Taxation
Net Investment Income Tax
Obamacare: The Employer Mandate
Obamacare: The Individual Mandate
Oil and Gas Taxation
Partnership Taxation
Partnership Taxation: Advanced
Partnership Taxation: Fundamentals
Passive Losses
Purchasing and Selling a Business
Real Estate Financing and Investment

Obamacare: The Employer Mandate
New!
2 CPE Credits | Taxes
The Patient Protection and Affordable Care Act as amended by the Health Care and Education Reconciliation Act of 2010 (together the Affordable Care Act), contains many provisions that affect employers and employer-sponsored health plans. This course provides an overview of the employer mandate and provides information on applicable large employers that may be subject to penalties if they do not offer affordable health insurance to full-time employees (and their dependents).

Obamacare: The Individual Mandate
New!
2 CPE Credits | Taxes
Beginning January 1, 2014, all individuals who do not meet certain exemption criteria must have minimum essential health insurance coverage or be subject to a shared responsibility penalty. This course discusses new requirements, minimum essential coverage, and penalties.

Real Estate Investment Trusts
Coming Soon!
Real Estate Taxation for Owners and Operators: Major Topics
Repairs or Capitalize?
Coming Soon!
Representing Taxpayers Before the IRS
Research Credit
Residential Real Estate
Retirement Income Taxation
S Corporations
S Corporations: Large Clients I
S Corporations: Large Clients III
Sales and Use Tax: California—Getting Started
Sales and Use Tax: Florida—Getting Started
Sales and Use Tax: Georgia—Getting Started
Sales and Use Tax: Illinois—Getting Started
Sales and Use Tax: Michigan—Getting Started
Sales and Use Tax: New Jersey—Getting Started
Sales and Use Tax: New York—Getting Started
Sales and Use Tax: New York—Preparing for a State Audit and Appeal
Sales and Use Tax: Preparing for a State Audit and Appeal—Arizona
Sales and Use Tax: Preparing for a State Audit and Appeal—California
Sales and Use Tax: Preparing for a State Audit and Appeal—Florida
Sales and Use Tax: Preparing for a State Audit and Appeal—Illinois
Sales and Use Tax: Preparing for a State Audit and Appeal—New Jersey
Sales and Use Tax: Texas—Getting Started
Sales and Use Tax: Texas—Preparing for a State Audit and Appeal
Sales and Use Tax: Washington—Getting Started
Small Business Schedule C and F Expenses
Social Security and Medicare Benefits: An Overview
State and Local Taxes
Subchapter C: Fundamentals of Corporate Taxation
Tangible Property Regulations: What to Do Now and What to Do Next
Tax Accounting Methods and Periods
Tax Issues for Divorced Individuals and Blended Families
Tax Planning for Retirement Wealth
Tax Planning for Young Families
Tax Practice and Procedure: Fundamentals—Tax Resolution and Solving IRS Issues
Tax Research and RIA Checkpoint
Tax Research II: Court Interpretations and Citator Tax Research: Tax Law and Treasury Interpretations
Tax Research: Case Analysis
Tax Strategies for Clients during their Golden Years
Tax Update: New Capitalization Regulations
Tax Update: American Taxpayer Relief Act of 2012
The Supreme Court Redefines Spouse: Tax and Other Implications!
The Ultimate Guide to Retirement Planning
Transaction Privilege and Use Tax: Arizona—Getting Started
Transfer Pricing: An Introduction
Travel, Entertainment, Gift, and Transportation Expenses
Understanding Schedules M-1 and M-2 on Forms 1120 and 1120S
Uniform Capitalization Rules

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WEBINAR COURSE INFORMATION:
Level: Update
Advanced Prep: None
Visit cl.thomsonreuters.com for start times and more CPE information including course descriptions, learning objectives and course prerequisites.

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• Time: Most webinars begin at either 10:00 AM or 2:00 PM CST.
• Register: Visit website to register.
• Registration closes at 5:00 PM CST the day before the scheduled webinar.
• CPE delivery mode: Group internet-based.
• Platform: Webinars are presented on WebEx™, an internet-based tool through which you can view expert content. As you watch, you can hear and interact with the speaker via teleconference.

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Checkpoint Learning Webinar Supplements include a variety of tools such as practice aids, checklists, and archived webinar recordings typically related to specific Checkpoint Learning Webinars. Each is designed to help increase productivity, answer frequently asked questions on complex topics, or provide valuable tools or resources for your firm.

The following five webinar supplements are now available:
• Accounting Standards Checklist (8 pages) WSPT3
• Audit Engagement Productivity Evaluation Form (4 pages) WSPT1
• Yellow Book Engagement Productivity Evaluation Form (4 pages) WSPT4
• Healthcare Reform: Frequently Asked Questions (9 pages) WSPT2
• Healthcare Reform: Archived Recording of 2-Hour Webinar WSPT5

Plus, coming soon in 2014:
• Healthcare Reform: Quick Reference Charts. Two charts will be available—Employer Shared Responsibility, and Individual Mandate. These easy-to-follow guides cover to whom regulations apply, what they mean, and the cost of noncompliance.
• Single Audit Reforms: A Planning Checklist. Highlights the impact of significant changes to the scope and strategy of your audits.
• Key Considerations in Designing the Audit Strategy: A Quick Reference Guide. Contains tips and best practices for designing an effective and efficient audit strategy, organized by audit area from planning through wrap up.
• The New Revenue Recognition Rules: An Audit Planning Guide. Contains a checklist of considerations and client information to use in advising clients on the impact of the FASB’s new revenue recognition rules and to more effectively plan your audit.

For more information, please call us at 1-800-231-1860.
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<tr>
<td>1</td>
<td>10am: Business Combinations and Consolidations (2hrs)</td>
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<td>9am: Fundamental Audit Strategies (Auditing Cash, Fixed Assets, Accounts Payable, Revenue, Expenses, etc.) (8hrs)</td>
<td>10am: FACTA: Strategies for Coping With This Complicated New Law (2hrs)</td>
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<td>10am: What is Effect of the Uniform Prudent Management of Institutional Funds Act (UPMIFA) on GAAP (2hrs)</td>
<td>9am: S-Corporations—From Formation to Liquidation (8hrs)</td>
<td>10am: Leveraging Social Media to Increase Firm Profits (2hrs)</td>
<td>12pm: Real Estate from A to Z (2hrs)</td>
<td>10am: Opportunities and Challenges of a Multigenerational Workplace (2hrs)</td>
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<td>12</td>
<td>9am: Understanding Health Care Reform—How the New Laws Impact Employers and Individual Taxpayers (8hrs)</td>
<td>12pm: Monthly Corporate Tax Update (1hr)</td>
<td>1pm: Monthly Accounting Alert Update (1hr)</td>
<td>9am: Accounting &amp; Auditing Update (8hrs)</td>
<td>10am: Casualty and Theft Losses (2hrs)</td>
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<td>10am: Total Payroll Management (2hrs)</td>
<td>9am: Performing Efficient Audits of Employee Benefit Plans (8hrs)</td>
<td>12pm: Cracking the Code: Advanced Tax Research (2hrs)</td>
<td>9am: Accountants Guide to Information Technology (A-Z Course) (8hrs)</td>
<td>10am: Overseas Voluntary Disclosure Initiative (OVDI) (2hrs)</td>
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Please note that nearly all tax titles are eligible for RTRP and EA credit. Visit cl.thomsonreuters.com for more detailed information regarding RTRP and EA credit.
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<td>10am: Special Tax Issues for Senior Citizen Clients (2hrs)</td>
<td>12pm: Payroll and 1099 Compliance Issues (2hrs)</td>
<td>12pm: Analytical Procedures for Nonprofits (2hrs)</td>
<td>12pm: Using a Like-Kind (1031) Exchange to Reduce Taxes—Real Estate and Beyond (2hrs)</td>
<td>10am: Operational Finance for Accounting Professionals (2hrs)</td>
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<td>2pm: Assisting with the Defined Contribution Retirement Plan Recommendation (2hrs)</td>
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<td>10am: Loss Limitations—PALS and AT-Risk Basis (2hrs)</td>
<td>12pm: How Healthcare Reform Impacts Your Clients (2hrs)</td>
<td>12pm: Using a Like-Kind (1031) Exchange to Reduce Taxes—Real Estate and Beyond (2hrs)</td>
<td>10am: How Healthcare Reform Impacts Your Clients (2hrs)</td>
<td>10am: Auditing Estimates and Fair Value (2hrs)</td>
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<td>2pm: How to Run an Efficient Tax Office (2hrs)</td>
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<td>2pm: Revenue Recognition—Current Issues and Future Considerations (2hrs)</td>
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<td>9am: Operational Finance for Accounting Professionals (2hrs)</td>
<td>10am: Budgeting and Forecasting for Financial Professionals (2hrs)</td>
<td>10am: Budgeting and Forecasting for Financial Professionals (2hrs)</td>
<td>10am: Government and Nonprofit Update (8hrs)</td>
<td>10am: Supreme Court Cases on Taxation You Should Know About (2hrs)</td>
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<td>12pm: Perfecting Analytical Procedures (2hrs)</td>
<td>12pm: Monthly Corporate Tax Update (1hr)</td>
<td>1pm: Monthly Accounting Alert (1hr)</td>
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<td>12pm: Transfer Pricing: A Review of General Principles and Latest Developments (2hrs)</td>
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<td>9am: Financial Performance Measurement and Analysis (8hrs)</td>
<td>10am: Income That is Taxed at Zero or Close to it (2hrs)</td>
<td>12pm: Partnership/LLCs—Sales, Liquidations and Retirement (2hrs)</td>
<td>10am: Understanding Health Care Reform—How the New Laws Impact Employers and Individual Taxpayers (8hrs)</td>
<td>10am: Delegating for Results (2hrs)</td>
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<td>12pm: Charitable Contributions: Not Nearly as Simple as it May Sound (2hrs)</td>
<td>12pm: Partnerships/LLCs—Sales, Liquidations and Retirement (2hrs)</td>
<td>2pm: Health Care Reform—The Individual Mandate (2hrs)</td>
<td>10am: Wrapping Up Engagements: Efficiency Techniques That Work (2hrs)</td>
<td>12pm: Leading Effective Web-based Meetings (2hrs)</td>
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<td>2pm: Structuring Intellectual Property Transactions (2hrs)</td>
<td>2pm: Health Care Reform—The Individual Mandate (2hrs)</td>
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# JULY 2014—SCHEDULED WEBINARS

More information and up-to-date schedule: cl.thomsonreuters.com

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| 1         | 9am: Performing Effective and Efficient Audit Procedures (8hrs)  
           12pm: Business Combinations and Consolidations (2hrs) | 10am: Communicating Effectively with the IRS (2hrs)  
           12pm: Going Concern and Impairment Issues (2hrs)  
           2pm: Total Cash Management (2hrs) | 10am: Data Privacy and Encryption (2hrs) | 4 |
| 7         | 10am: Facebook for Accountants (2hrs)  
           12pm: Advanced Topics in Financial Statement Preparation (2hrs)  
           2pm: Professional Ethics for Accountants—A Comprehensive Update (2hrs) | 10am: Ethics for Tax Professionals (2hrs)  
           12pm: Polish Your Presentation Skills: Best Practices of Dynamic Presenters (2hrs)  
           2pm: Special Purpose Framework: Compilation and Review (2hrs) | 9am: Compilation and Review Insights—Timely Advice for Improving Quality and Efficiency (8hrs)  
           12pm: Recognizing the Considerations Specific to Governmental Entities Included in the Clarified Auditing Standards (2hrs) | 11 |
| 14        | 12pm: Real Estate Rentals—Real Estate Professionals, Re-characterization, and the 3.8% NIL Tax (2hrs)  
           2pm: Adjustments to Income (2hrs) | 12pm: Monthly Accounting Alert (1hr)  
           1pm: Monthly Corporate Tax Update (1hr)  
           2pm: Proposed Changes in Accounting for Leases and Other Significant Proposals (2hrs) | 9am: Accounting and Auditing Update (8hrs)  
           2pm: Health Care Reform Issues for Employers (2hrs) | 18 |
| 21        | 10am: Taxation of Mergers and Acquisitions (2hrs)  
           12pm: Tax Credits for Personal and Business (2hrs)  
           2pm: Employee vs. Independent Contractor: Expect More Scrutiny (2hrs) | 10am: The Documents Matter: How the Law of Backdating and Rescission Limits the Ability to Shape Tax Results (2hrs)  
           12pm: Cracking the Code: Advanced Tax Research (2hrs)  
           2pm: Auditing Estimates and Fair Value (2hrs) | 10am: The Nuts and Bolts—Deferred Outflow of Resources and a Deferred Inflow of Resources (2hrs)  
           12pm: Conquer the Challenges of Identifying the Financial Reporting Entity—CASB Statement No. 61 (2hrs)  
           2pm: How Healthcare Reform Impacts Your Clients (2hrs) | 25 |
| 28        | 10am: Advanced Googling for Accountants (2hrs)  
           12pm: Generally Accepted Government Auditing Standards for Financial Audits (2hrs)  
           2pm: A Single Audit Case Study (2hrs) | 10am: Monthly Tax Alert (2hrs)  
           12pm: Related Parties—Transactions Between Businesses and Their Owners (and Beyond) (2hrs) | 9am: Understanding Health Care Reform—How the New Laws Impact Employers and Individual Taxpayers (8hrs)  
           12pm: Planning for Education Expenses (2hrs) | 31 |

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