

CHECKPOINT LEARNING | GEAR UP
THOMSON REUTERS
2395 MIDWAY RD, CARROLLTON, TX 75006
cl.thomsonreuters.com/g
800.231.1860

CMCF035-45

PRSR STD
U.S. POSTAGE
PAID
THOMSON
REUTERS



CHECKPOINT LEARNING®



GEAR UP CONFERENCES

LAS VEGAS: NOV 30 – DEC 5
ORLANDO: DEC 15 – 19



ROYAL FLUSH IN VEGAS
MAGIC WEEK IN ORLANDO



GEAR UP CONFERENCES

DESIGNED WITH YOU IN MIND

ROYAL FLUSH

IN LAS VEGAS

Save up to \$200 with Premier or \$333 with Premier Plus! 



NOVEMBER 30 – DECEMBER 5, 2015 | LAS VEGAS, NV
48 CPE CREDITS | \$999

NEW HOTEL LOCATION – JOIN US AT THE MIRAGE

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

LAS VEGAS MIRAGE

We have upgraded our venue from the Flamingo Hotel to the Mirage Hotel, one of the most noted and respected hotels on the strip. Call **800.374.9000** and mention Gear Up for reservations.

TO REGISTER FOR A GEAR UP CONFERENCE:

visit cl.thomsonreuters.com/g
or call 800.231.1860

- Choose a week of learning that's perfect for you
- Hear the best speakers in the business
- Learn from the most comprehensive course manual available at the conference and throughout the year
- Win valuable prizes at raffles held daily
- Eat delicious breakfasts, lunches and break refreshments
- Keep up with the constantly changing demands of the tax and accounting world
- Equip yourself with the skills to help you offer value-added services

ROYAL FLUSH CONFERENCE

Price

Entire Week	Royal Flush, 48 CPE	\$999
-------------	---------------------	-------

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

ROYAL FLUSH INDIVIDUAL SEMINARS

Sunday <i>Optional</i>	IRS Audits, Appeals & Collections (8 CPE) <i>Only \$99 with week-long registration OR two half-day seminars only \$50 each with week-long registration</i>	\$225
	Fraud Detection (4 CPE) a.m. —and— California Professional Ethics (4 CPE) p.m.	\$115
Mon – Tues	1040 Individual Tax (16 CPE)	\$399
Wednesday <i>You choose!</i>	Estates and Trusts (8 CPE) —or— TWO Half-Day seminars: Technology 3.0 (4 CPE) —and— California Tax Update (5 CPE) 12:45 p.m.	\$115
Thursday	Health Care Reform (8 CPE)	\$115
Friday <i>You choose!</i>	Accounting Two-Day (Day 1 of 2) (16 CPE) —or— Business Entities Two-Day (Day 1 of 2) (16 CPE)	\$225
Saturday <i>You choose!</i>	Accounting Two-Day (Day 2 of 2) —or— Business Entities Two-Day (Day 2 of 2)	\$399
		Included above

OPTIONAL EVENING COURSE

Monday <i>Optional</i>	Ethics for the Tax Professional 4:45 p.m. (2 CPE)	\$69
---------------------------	---	------



"GEAR UP LOCATIONS ARE TERRIFIC! I'VE BEEN AN ACCOUNTANT FOR 39 YEARS AND I REALLY LIKE BEING ABLE TO PLAN VACATION TIME AROUND COMPLETING MY CPE."

—WILLIAM BERRY

MAGIC WEEK IN ORLANDO

Save up to \$211 with Premier or up to \$352 with Premier Plus! 



DECEMBER 15 – 19, 2015 | ORLANDO, FL
40 CPE CREDITS | \$879

COMPLETE YOUR CPE AND ENJOY SOME R&R

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

DISNEY'S YACHT CLUB RESORT

This exciting venue is a lakeside Disney Deluxe Resort featuring lush landscaping and the formal grace of a grand New England yacht club. Special room rate of \$164 per night will be available until November 13, 2015. Call **407.939.4686** and mention Gear Up. Room rate valid for two nights before through two nights after the event.

MAGIC WEEK CONFERENCE

Price

Entire Week	Magic Week, 40 CPE	\$879
-------------	--------------------	-------

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

OPTIONAL PRE-SEMINARS

Monday (a.m.)	Technology 3.0 (4 CPE)	\$115
<i>Optional</i>		
Monday (p.m.)	Ethics for Florida CPAs (4 CPE) 12:45 p.m.	\$115
<i>Optional</i>	—or—	
<i>You choose!</i>	Ethics for the Tax Professional (2 CPE) 12:45 p.m.	\$69

MAGIC WEEK INDIVIDUAL SEMINARS

Tues – Wed	1040 Individual Tax Two-Day (16 CPE)	\$399
Thursday	Business Entities One-Day (8 CPE)	\$225
Friday	Accounting Two-Day (Day 1 of 2) (16 CPE)	\$399
<i>You choose!</i>	—or—	
	IRS Audits, Appeals & Collections (8 CPE)	\$225
Saturday	Accounting Two-Day (Day 2 of 2)	Included above
<i>You choose!</i>	—or—	
	Health Care Reform (8 CPE)	\$225

"I'VE BEEN A CPA FOR OVER 20 YEARS AND I LIKE GEAR UP SEMINARS BECAUSE I CAN COUNT ON THE INFORMATION BEING CURRENT AND KEEPING ME UPDATED ON TAX CHANGES."

—JOHN COFFEY, CPA

GEAR UP CONFERENCE SEMINARS

1040 Individual Tax: This comprehensive course covers key tax issues for completing complicated individual returns. All topics include coverage of new legislation, revenue rulings and procedures, as well as case law to help the busy practitioner keep current. Speakers are all practicing preparers who share practical tips and insights to help you get ready for this tax season. Topics include new tax rates for higher income taxpayers, return of the phase-out of itemized deductions and exemptions, new Medicare taxes and health care insurance penalties, updated Form 1099 information, good news on AMT and transfer taxes and much more.

Accounting: Not since 1978 when the AICPA promulgated the Statements on Standards for Accounting and Review Services (SSARS) has there occurred such a radical change to the way accountants prepare and present financial statements. The reason: SSARS No. 21. This course will cover the new engagement letters, totally revised management representation letters and the dramatically reconstructed versions of the accountant's report.

Business Entities: This seminar provides practical advice for tax practitioners serving small business clients including regulations affecting all taxpayers that acquire, produce or improve property; informational reporting and Form 1099-K; worker reclassification audits; recent and proposed changes to S shareholder basis and more.

California Professional Ethics: The requirements of the California Board of Accountancy state that the course subject matter will discuss: A review of nationally recognized codes of conduct emphasizing how the codes relate to professional responsibilities, case-based instruction focusing on real-life situational learning, ethical dilemmas facing the accounting profession and business ethics, ethical sensitivity and consumer expectations. In this fast-paced four-hour course, we cover the ethical rules of taxation, including those delineated in Circular 230. Qualifies for CTEC ethics requirement.

California Tax Update: We review how the many changes in federal tax law have major impact on California tax returns, and the impact of California law conformity or nonconformity to federal law. In addition, we fully expect California to have several changes of its own. We will cover all changes including: Proposition 8 and tax returns for same-sex marriages and registered domestic partners, reporting use tax, mortgage forgiveness debt relief, high-income tax rates, California property tax issues, state residence impact on sale of business, the ever-important issue of "Nexus," Proposition 30, and state health exchanges and other impacts of health care reform on California tax returns.

Estates and Trusts: This course covers topics including fiduciary accounting, deductions, income in respect of a decedent, income distribution deduction, changes to estate tax, Forms 1041 and 706, portability vs. the use of A-B trusts and post-mortem elections including alternative valuation and disclaimers.

Ethics for Florida CPAs: Meets the CPE ethics requirements for the Florida State Board of Public Accountancy. Speakers address the major aspects and recent changes related to the Rules of Professional Conduct as they affect the CPA in public practice and in industry.

Ethics for the Tax Professional: The Office of Professional Responsibility (OPR), headed by Karen Hawkins, has been very busy, ensuring that Circular 230 Practitioners follow rules that prescribe and proscribe our behavior. We will discuss what we can — and must — do to assist our clients while maintaining ethical integrity and complying fully with Circular 230 rules. Learn how to be a zealous advocate while playing by the rules. Join us for a highly interactive discussion on the topic of our professional responsibilities before the IRS. CTEC approved. (Not applicable in California for CPA requirements.)

Fraud Detection: This fast-paced course is a forum for the discussion and implementation of techniques for the detection of fraud, the control of fraud and the implementation of fraud prevention tools for the Main Street client. The subject matter provides practical guidance to help the accountant help "mom and pop"-sized clients and mid-sized clients prevent the misclassification of financial statement transactions and/or the misappropriation of assets by outsiders, by employees — and, perhaps, by management itself. Fraud exists in both the financial and tax worlds, and this course discusses both areas to help the practitioner help the client.

(See reverse for more course descriptions.)

2016 CONFERENCES

JACKPOT WEEK

IN LAS VEGAS

MAY 31 – JUNE 4, 2016 | THE MIRAGE



CITRUS WEEK

IN ORLANDO

JUNE 2016



WINDY CITY WEEK

IN CHICAGO

JULY 2016



GEAR UP CONFERENCE SEMINARS *(continued from inside panel)*

Health Care Reform: This eight-hour course provides comprehensive coverage of the Affordable Care Act otherwise known as Obamacare. We will examine what this new law means to you and your clients. You will be provided with information that will enable you to proactively serve your clients and attract new business.

IRS Audits, Appeals and Collections: As staffing at the IRS becomes more stressed, understanding how to navigate the IRS can save the practitioner time, meaning a more effective and profitable representation of your client before the IRS. Audits have become more difficult with the increasing reliance on correspondence exams. Notices are at an all-time high as the IRS tries to encourage compliance from taxpayers. Knowing how to effectively communicate with the IRS, presenting your response in a manner that the IRS expects and understanding IRS timelines has grown in importance. The IRS continues to present opportunities to taxpayers who have fallen out of compliance with programs such as the EXPANDED Streamlined Installment Program, offering more taxpayers the opportunity to voluntarily reclassify workers (VCSP) as employees with a much lower cost, removing liens from taxpayer credit records and expanded tolerances for the Offer in Compromise Program. With almost 40 years of experience each, the speakers have fought the battles with the IRS and want to help arm you to fight yours effectively as well.

Technology 3.0: Where does a practitioner go to understand the complexities of working with technology in the practice? We will study the real world issues of dealing with the adaption of technology to solve practice issues.

CHECKPOINT LEARNING® SUBSCRIPTIONS

PREMIER PACKAGE

*Hundreds of online courses and webinars for only \$309**

The Premier CPE Package provides an unprecedented range of learning options at significant savings! Includes:

- **ONLINE AND DOWNLOAD COURSES.** Unlimited access to Checkpoint Learning interactive online/mobile courses and downloadable self-study courses with online grading. This includes more than 460 titles, totaling 2,500+ CPE credits!
- **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 IRS EA and CFP.
- **LIVE SEMINARS AND CONFERENCES.** Annual discounts on 24 hours total per subscription year: 40% off Gear Up self-sponsored seminars and conferences and 25% off AuditWatch!

PREMIER PLUS PACKAGE

*Longer webinars, deeper discounts, more features for \$449**

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 above, PLUS:

- **WEBINARS.** Unlimited access to ALL webinars including popular full-day webinars!
- **New! YEAR-END WEB-BASED CONFERENCE.** Premier Plus Subscribers attend the Checkpoint Learning® Year-End Mega-Conference, a \$399 value, at NO COST! Two-day web-based CPE event; see website for dates and details.
- **COMPETENCY MODEL.** A comprehensive model for assessing, improving and connecting your CPE to tax and accounting specialties, skills and career levels.
- **LIVE SEMINARS AND CONFERENCES.** Now save on up to 40 hours annually per subscription from our popular seminar and conference lines (save 40% on Gear Up self-sponsored, 25% on AuditWatch).

* Per-user annual pricing applies to firms with under 50 seats; contact us for price quote if your firm has more than 50 users. Premier and Premier Plus discounts do not combine with Early Bird or other discount offers; call 800.231.1860 for details. Gear Up states with self-sponsored seminars currently include: AZ, CA, CO, FL, GA, IL, IN, IA, MA, MD, MO, NV, NM, NY, ND, OK, OR, VT and VA.