



**2011**  
**CPE Catalog**



# **NCACPA 2011 CPE Catalog**

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# **Accounting and Auditing (AA)**



## 15 Things You Need to Know About Fraud for an Uncertain Audit Environment

Mark Morze shows how he committed the ZZZZ Best Carpet Cleaning fraud.

**Field of Study:** AA

**Speaker:** Mark Morze

**Vendor:** The Pros and The Cons LLC

**Hands-On Computer:** NO

**Level:** Advanced

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** 10 years' experience

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

## 2011 Accounting and Auditing Update

This course reviews newly issued accounting principles, including those of the Financial Accounting Standards Board and the Emerging Issues Task Force of the FASB, and the Private Company Financial Reporting Committee. We'll cover the basic concepts of the International Financial Reporting Standards and the activities of the Accounting and Review Services Standards & the Auditing Standards Board.

**Field of Study:** AA

**Speaker:** Bradley Newkirk

**Vendor:** Brad Newkirk

**Hands-On Computer:** NO

**Level:** Update

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Accounting and auditing background

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

## 2011 Annual FASB and AICPA Update

This course is a must to keep you on top of the changes you need to know to be effective. The course authors evaluate and emphasize only those standards that affect the small and medium-sized entity and offer detailed practical guidance and illustrations. Synopses are provided for specialized issues.

**Field of Study:** AA

**Speaker:** Rebecca Lee

**Vendor:** Loscalzo Associates

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** Participants are asked to read the pronouncements before attending the session

**CFP Approved:** NO

**Requisite Knowledge:** Basic audit and accounting course or experience

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** YES

## A&A Update

Are you the type of accountant who is embarrassed because you're not as much of an A&A nerd you know you should be? Do your cool accounting friends make fun of you when you use a FASB reference instead of the codified one? Do you even know what the codification is? Are you nervous that the accounting world is moving too fast for you to keep up? Well, this course is for you. It's 4 relatively fun-packed CPE hours that are sure to keep you ahead of the A&A tidal wave.

**Field of Study:** AA

**Speaker:** Jonathan Kraftchick

**Vendor:** Jonathan Kraftchick

**Hands-On Computer:** NO

**Level:** Update

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Accounting and Auditing Update**

What have the FASB, ASB, ARSC, and other standard-setters been up to lately? What kind of new guidance can we expect in the future? Find out about the new pronouncements on fair value, business combinations, and others. In addition, you'll find out about the International Financial Reporting Standards, independence issues, quality control, and recent changes to compilation and review engagements.

**Field of Study:** AA

**Speaker:** Russ Madray

**Vendor:** The Madray Group

**Hands-On Computer:** NO

**Level:** Update

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Accounting for Deferred Income Taxes**

No other area in accounting is as far-reaching and requires knowledge of as vast a number of topics in financial and tax accounting as accounting for deferred taxes. Traditionally, understanding the complex provisions of ASC 740 (SFAS No. 109) typically fell on the shoulders of accountants in business and industry and their independent auditors. Now it is essential that tax professionals, both in industry and public practice, become active participants in this process. Gain a sound knowledge of the theory of deferred taxes and how this theory can be applied to practical situations. Many practical examples are included to illustrate the theory, and information is presented so you can apply this theory to any situation.

**Field of Study:** AA

**Speaker:** William Murphy

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Significant experience in accounting and financial reporting

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Accounting for Income Taxes—Applying Temporary & Uncertain Tax Positions**

No other area in accounting is as far-reaching or requires knowledge of a vast number of topics in financial and tax accounting, as accounting for deferred taxes. Traditionally, understanding the complex provisions of ASC 740 (FAS 109) typically fell on the shoulders of accountants in business & industry and their independent auditors. Now it is essential that tax professionals, both in industry and public practice become active participants in this process. In addition to applying this complex standard to many common differences between financial accounting and tax compliance, you must now identify uncertain tax positions and apply specific criteria to recognize, measure, and disclose these positions in the financial statements. Gain a sound knowledge of the theory of deferred taxes and how this theory can be applied to practical situations. Many practical examples illustrate the theory, and the information is presented so you can apply this theory to any situation.

**Field of Study:** AA

**Speaker:** Bobby Carmichael

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Significant experience in accounting and financial reporting

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Accounting Services, Compilations, and Reviews—Effective Risk Management**

Most sole practitioners and local CPA firms routinely provide write-up and other accounting services to their clients, as well as compilations and reviews of financial statements. Since these engagements do not involve technical audit standards and issues, many CPAs view them as low risk. They are not. These services can generate a surprising number of significant malpractice claims: one case resulted in a judgment of one million dollars! This course identifies the risks (and proven, risk-mitigating practices) throughout the entire life-cycle of an engagement, from client acceptance to engagement performance and reporting, even withdrawal.

**Field of Study:** AA

**Speaker:** Melissa Critcher

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Experience in accounting services, compilations, and reviews

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Advanced FASB Review—Tackling the Tougher GAAP Issues**

This course is the perfect complement to the AICPA's intermediate-level companion course titled: *FASB Review and Update: Common GAAP Issues Impacting All CPAs*. Written by the same author, this advanced course tackles some of the thornier accounting and disclosure areas, such as derivatives, fair value and business combinations. This is a must-take course for many CPAs who need a refresher for the more complex accounting areas that are typically not handled on a regular basis.

**Field of Study:** AA

**Speaker:** Michael Hamilton

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Advanced

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Experience in application of accounting standards

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Advanced Issues in Compilation, Review, and Accounting Services**

This lively course is a great way to brush up on the current standards and issues in managing compilation, review, and accounting service practices. The scenarios included cover the whole spectrum of practice management, including accounting engagement administration, engagement performance, reporting, and OCBOA issues.

**Field of Study:** AA

**Speaker:** Fred Christensen

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Advanced

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Management of compilation, review, and accounting service engagements

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Advanced Real Estate Accounting, Auditing, and Taxation**

Real estate transactions and assets have some very unique issues. This course considers the special qualities of the real estate industry. How do you record involvement in real estate ventures? How do you handle reporting issues related to sales of real estate with leasebacks? What are some of the taxation issues common to real estate transactions and holdings? If you advise or work for companies with real estate transactions or holdings, this course is for you.

**Field of Study:** AA

**Speaker:** William Murphy

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Advanced

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Experience in real estate accounting

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Advanced Update for Compilation, Review, and Accounting Services**

If you manage a compilation, review, and accounting service practice, this course is an absolute must; it enables a partner to ensure that current year engagements conform to all applicable professional standards. A practice-oriented review of the latest developments, cases, and lively discussion among the experienced participants make this class informative and practical. The material covers the entire spectrum of partner concerns: current professional standards, independence rules, engagement and representation letters, field work, disclosure, reporting, documentation, quality control, engagement administration, specialty engagements and peer review.

**Field of Study:** AA

**Speaker:** Kurt Oestrieher

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Management of a compilation, review, or accounting service practice

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **AICPA Advanced Course—Overview of the AICPA Peer Review Program Standards**

This one-day, advanced course is designed for experienced reviewers who want to heighten their peer review skills. It is an excellent follow-up to the AICPA's training course, How to Conduct a Review Under the AICPA Practice-Monitoring Programs, and includes an up-to-the-minute analysis of the AICPA Peer Review Program Standards effective January 1, 2009. Enhance your ability to conclude and report peer review findings for system, engagement and report reviews while learning about changes to the peer review standards and the risk-based approach to planning a peer review.

**Field of Study:** AA

**Speaker:** Leslie Johnson

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Advanced

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** How to Conduct a Review Under the AICPA Practice-Monitoring Programs or a similar AICPA-approved introductory course, and performance at one review as a team captain

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **AICPA's Advanced Workshop—Practical Guidance for Peer Reviewers**

This eight-hour interactive workshop reinforces and improves reviewers' understanding of various topics including risk assessment and its documentation, monitoring requirements, and difficult reporting issues. It also addresses judgment decisions in reporting on system reviews and performing efficient and effective reviews. The workshop includes interactive exercises and discussions to highlight the selected topics. Participants will be encouraged to share their knowledge and experiences for the class' benefit.

**Field of Study:** AA

**Speaker:** Leslie Johnson

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Advanced

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** AICPA course How to Conduct a Review Under the AICPA Practice-Monitoring Programs

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **AICPA's Controllership—25 Critical Lessons from the Trenches**

Tired of CPE that has no practical application? Put into practice 25 practical tools that will improve your daily job performance in the controllership area. This course focuses on the practical skills required to be a successful controller and to enhance the profitability of any growing company. You will learn how to shift from a reactive to a proactive mode of operation as well as how to avoid the constant crisis techniques common to many private companies. This course also highlights various financial and managerial tools and techniques to improve day-to-day decisions that affect business operations and profitability.

**Field of Study:** AA

**Speaker:** Chris McKittrick

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Experience in financial management of a medium or small company

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Analyzing Financial Statements, Including Techniques for Cash Flow Analysis**

Reexamine traditional analysis techniques to recognize their strengths and limitations when performing financial statement analysis. Take analysis to a new level by incorporating cash flow based measurements. Utilize cases ranging from public companies to small, privately helds to assess profitability and management of resources.

**Field of Study:** AA

**Speaker:** Gregory Clark

**Vendor:** Loscalzo Associates

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Applying the Audit Risk Assessment Standards—A Course for Newer Auditors**

This course is designed primarily to benefit auditors with limited or no experience or knowledge of the AICPA's Audit Risk Assessment Standards. The course reviews the standards and their requirements; provides examples or models demonstrating how the standards are implemented in practice; and tests the participant's comprehension of the standards and how to apply them. The examples and models are based on actual audits of smaller, non-complex entities. More experienced auditors will learn about scaling documentation for such entities and eliminating documentation redundancy.

**Field of Study:** AA

**Speaker:** Ronald Kral

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Applying the PCAOB's Risk Assessment Standards to Smaller Public Entities**

This course is designed primarily to teach practical ways to implement the PCAOB's new risk assessment standards. The course is focused on smaller public entities. It includes models for documenting 1) entity-wide controls; 2) financial statement closing process controls; 3) controls over routine processes for significant accounts; and 4) significant accounts; underlying processes inherent, control and combined risk.

**Field of Study:** AA

**Speaker:** Ronald Kral

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Audit Workshop—Planning and Designing a High-Quality and Profitable Audit**

Correct application of the recent generally accepted auditing standards should result in more effective audits. When designing your audit plan, how and where you decide to spend your time is largely a matter of professional judgment. With an increased focus on minimizing the risk that auditors will fail to detect material misstatement due to either fraud or error in financial (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** AA

**Speaker:** Jennifer Louis

**Vendor:** Surgent McCoy CPE, LLC

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** 3+ years of experience in the area of study is recommended

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** YES

### **Auditing for Internal Fraud**

Do you ever wonder why auditors can't detect more fraud or try to figure out the motives and opportunities of management or employees to perpetrate fraud? Gain the tools to identify fraud schemes and focus on the analytical and substantive tests on the "fraud triangle" when evaluating internal controls. Discover the latest prevention and detection programs implemented by industry leaders.

**Field of Study:** AA

**Speaker:** Glenn Helms

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Experience in accounting and reporting

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Audits in Massive Financial, Legal, Healthcare, & Regulatory Reform**

This course is continuously updated for constantly changing risks to private companies, nonprofits, and government entities.

**Field of Study:** AA

**Speaker:** Gary Zeune

**Vendor:** The Pros and The Cons LLC

**Hands-On Computer:** NO

**Level:** Advanced

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** 10 years as a CPA

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** YES

### **Audits of 401(k) Plans**

401(k) plans have become a popular option for employee benefit plans, so you must have the skills to audit these plans effectively. Every aspect of how to audit a 401(k) plan and prepare financial statements that satisfy ERISA and SEC requirements are covered in this course. Tap into ways to plan and conduct 401(k) audits (...Contact NCACPA's Onsite Coordinator for full course description).

**Field of Study:** AA

**Speaker:** Melissa Critcher

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Audits of 403(b) Plans—A Challenging New Audit Area**

The audit of the 403(b) plan will be a new growth area for the benefit plan auditor. Learn the similarities and differences between the audit of a 403(b) plan in comparison to that more familiar vehicle—the 401(k) plan. Build on what you already know about auditing benefit plans. Gain a background on the tax rules applicable to a 403(b) plan and develop a better understanding (...Contact NCACPA's Onsite Coordinator for full course description).

**Field of Study:** AA

**Speaker:** Melissa Critcher

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Understanding of the audit of an employee benefit plan, the basics of ERISA, etc.; a working knowledge of the audit requirements of a 401(k) plan will be particularly helpful

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** YES

### **Audits of Defined Contribution Pension Plans (Emphasizing 401(k) Plans)**

Learn how to avoid the most common problems and deficiencies found by the DOL. Discover how to

- \* Determine if a plan needs to be audited
- \* Identify unique employee benefit plan audit risks
- \* Perform the right type and amount of audit testing
- \* Draft GAAP and DOL compliant financial statements

**Field of Study:** AA

**Speaker:** Rebecca Lee

**Vendor:** Loscalzo Associates

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Experience in conducting audits of defined contribution plans

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Basic Audit Staff Training—Level I**

Level I focuses on the basic skill sets that new staff need to quickly master in order to "hit the ground running," while not overwhelming them with too much information all at once. This course explains the basics of what new auditors are expected to know and do, including the nature, timing, and extent of common audit procedures. This course will focus on why certain procedures (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** AA

**Speaker:** Jennifer Louis

**Vendor:** Surgent McCoy CPE, LLC

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 16

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Cash and Tax Basis Financial Statements—Alternatives to GAAP and Reporting Requirements**

When there is a request to produce modified tax basis statements with disclosures omitted, are you confident your staff know what to do? They will after taking this course, which explains OCBOA statements as well as how the basis of accounting affects compilation, review, and audit procedures and accountant or auditor reports.

**Field of Study:** AA

**Speaker:** Fred Christensen

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Cash and Tax Basis Financial Statements—Preparation and Reporting**

When there is a request for modified tax basis statements with disclosures omitted, are you confident your staff know what to do? They will after taking this course, which explains OCBOA statements as well as how the basis of accounting affects compilation, review, and audit procedures; financial statements (including notes); and accountant reports. Concisely summarizing (...Contact NCACPA's Onsite Coordinator for full course description).

**Field of Study:** AA

**Speaker:** Kurt Oestriecher

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Common Frauds & Internal Controls for Revenue, Purchasing, & Cash Receipt**

Transactions that occur within an entity's revenue cycle (revenues and cash receipts) and the purchase cycle (purchases and cash disbursements) are common areas for misstatements (both unintentional and fraudulent). While business owners and managers instinctively know that controls are important, they sometimes have a very limited understanding of what controls are effective. (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** AA

**Speaker:** Glenn Helms

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Compilation and Review Engagement Essentials**

Many beginning CPAs are not familiar with two of the local CPA firm's most popular engagements—compilations and reviews of private companies. Shorten staff learning time and increase their earning time by sending them to this hands-on course. First, participants learn what distinguishes a compilation and review from accounting and auditing services. After an overview of the current (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** AA

**Speaker:** Leslie Johnson

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Compilation and Review Essentials—Rules for Local Practitioners**

With the issuance of SSARS 19, the most massive rewrite of SSARS since 1978, you will be required to

- \* Redraft all compilation and review reports
  - \* Rethink the application of independence when performing certain non-attest services
  - \* Obtain engagement letters on all compilation and review engagements
  - \* Meet minimum documentation requirements for both compilations and reviews
- (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** AA

**Speaker:** Carolyn Jeff

**Vendor:** Loscalzo Associates

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Basic familiarity with SSARS

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Compilation, Review, and Accounting Service Update**

If you supervise compilation, review, and accounting service engagements, this course will help you comply with the professional standards applicable to this year's engagements. Review the current year's AICPA Compilation and Review Alert and developments in independence, engagement, and representation letters, field work, disclosure, reporting, documentation, changes in services or in accountants, and specialty engagements.

**Field of Study:** AA

**Speaker:** Joann Cross

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Management of accounting, compilation, and review engagements

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Comprehensive Accounting of Estate and Trust—Fid. Accounting & Tax Issues**

Fiduciary income tax is a complex blend of state accounting rates and the tax law of Subchapter J. Only by understanding this interaction can the practitioner acquire the skills and knowledge to provide income tax planning for an estate or trust and its beneficiaries, sure to be an important skill in practice in the new income tax environment.

**Field of Study:** AA

**Speaker:** Robert Barnhill

**Vendor:** Surgent McCoy CPE, LLC

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Construction Contractors Advanced Issues**

Many contractors have fallen victim to the rough construction economy. Along with the contractors, sureties are seeing record claims being filed on projects. Where does the surety get its information to make the risky decisions for contractors? The CPA. In this magnified environment, the CPA should have a thorough understanding of the construction industry and the professional (...Contact NCACPA's Onsite Coordinator for full course description).

**Field of Study:** AA

**Speaker:** Jeffrey Lieman

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Advanced

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Completion of the AICPA course Construction Contractors—Accounting, Auditing, and Tax, or experience in providing services for construction contractors

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Construction Contractors—Accounting, Auditing, and Tax**

Master the fundamentals of the construction industry! Give your clients efficient, high-quality audit and review services and apply GAAP accounting methods applicable to construction contractors. Understand the intricacies of contractor tax regulations. Topics covered include accounting for long-term construction contracts, applying the audit risk model to a construction (...Contact NCACPA's Onsite Coordinator for full course description).

**Field of Study:** AA

**Speaker:** Thomas Sheets

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Coping with a Dollar Collapse—Precious Metals and Energy Investing**

Problem—the American dollar, which has been the preeminent world currency since World War II, is under attack almost everywhere. Solution—CPAs must find a way to protect themselves and their clients from a dollar degradation. Smart investors and big hedge funds have been buying gold. The Chinese have been buying gold, oil, and even base metals. This class will focus on precious (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** AA

**Speaker:** Michael McGowan

**Vendor:** Frank Sanitate Associates

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Corp Finance Tune-up—Putting the Right Skills in Your Analytical Toolbox**

Understanding corporate finance is a skill that separates those who will become chief financial officers from those who will always remain accountants. This seminar provides a refresher on corporate finance skills for those who work or aspire to work at a CFO level.

**Field of Study:** AA

**Speaker:** Diane White

**Vendor:** Executive Education Inc.

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** Bring a calculator with financial functions

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Current Practice Issues and Solutions in Audits of Employee Benefit Plans**

Employee benefit plan audits continue to present a myriad of practice issues and risks that practitioners must address. This advanced course will give you the skills to

- \* Identify and address difficult and complex accounting, audit, and financial reporting issues
- \* Stay current on ongoing regulatory initiatives
- \* Effectively document required auditing procedures

**Field of Study:** AA

**Speaker:** Gregory Clark

**Vendor:** Loscalzo Associates

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Experience in conducting audits of employee benefit plans

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Deceptive Revenue Recognition and Other Accounting Techniques—Recognizing the Warning Signs**

Don't join the growing list of accounting professionals in trouble. We will discuss

- \* The accounting "stories" behind over 40 famous financial statement frauds such as Fannie Mae, McAfee, Parmalat, Tyco, Waste Management, and WorldCom
- \* Deceptive accounting practices
- \* The warning signs of problems in areas such as revenue recognition (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** AA

**Speaker:** Gregory Clark

**Vendor:** Loscalzo Associates

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** Basic familiarity with accounting standards

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** YES

### **Detecting Misstatements—Integrating SAS 99 and Risk Assessment Standards**

Taking an integrated audit approach to misstatements—material misstatements arising from fraud (SAS 99) and those arising from errors—is essential to improving overall audit quality and effectiveness. Audit team brainstorming sessions are used for both, and both require documentation. Too often, auditors fail to read the caution signals that require a unique response to the risk (...Contact NCACPA's Onsite Coordinator for full course description).

**Field of Study:** AA

**Speaker:** Glenn Helms

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Experience with performing audits of financial statements

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** YES

### **Disclosure—The Key to Financial Statements**

Keep your professional reputation stellar by making sure your financial statements are up to speed. This course will

- \* Explain and illustrate disclosure requirements
- \* Clear up misconceptions on practice problems such as fair value
- \* Correct disclosure deficiencies most frequently cited by peer reviewers

The manual includes numerous live "bread and butter" (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** AA

**Speaker:** Carolyn Jeff

**Vendor:** Loscalzo Associates

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Participants should be familiar with the accounting issues included in the FASB Codification

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** YES

### **Documentation Techniques for Entry Level Staff**

Prepare workpapers that will minimize review notes and cut down on your time. Through interactive cases, you will learn how to

- \* Perform procedures typically assigned to first-year staff accountants
- \* Document accounting, compilation, review, and audit services
- \* Link identified risks to audit responses

This course is a must to help new staff "hit the ground running."

**Field of Study:** AA

**Speaker:** Lilibeth Hanlon

**Vendor:** Loscalzo Associates

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** Participants should bring a calculator to the session

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Doing More With Less—Lean Accounting and Management**

You can do more with less! Learn to minimize waste and create wealth in your organization through a Lean Accounting and management approach that improves profitability by streamlining operations. Provide customer value through target-costing and eliminate waste through value-stream management. Those in both manufacturing and service industries can benefit from the techniques presented in this course.

**Field of Study:** AA

**Speaker:** John Cox

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Advanced

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Management responsibility in finance, operations, or planning

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Employee Benefit Plans—Audit and Accounting Essentials**

Master the fundamentals of auditing employee benefit plans in accordance with AICPA and EBSA standards and avoid the snafus that are all too often encountered. Explore the accounting and auditing requirements unique to employee benefit plans. This course is designed to give you an understanding of requirements and audit procedures related to defined contribution, defined benefit, (...Contact NCACPA's Onsite Coordinator for full course description).

**Field of Study:** AA

**Speaker:** Melissa Critcher

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Experienced Audit Staff Training—Level II**

Level II prepares new staff for assuming a greater level of responsibility on engagements. Once staff have "gotten their feet wet" by participating on a few engagements, this course will help auditors thoughtfully reflect on their experiences and on how to take basic knowledge to the next level. This course will include many real-life case studies for common audit areas assigned to (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** AA

**Speaker:** Jennifer Louis

**Vendor:** Surgent McCoy CPE, LLC

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 16

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Fair Value Accounting—A Critical Skill for All CPAs**

Fair value accounting is reshaping traditional financial statements! Gain insights into the conceptual and practical reasons for using fair value as the required (or optional) measurement attribute for some new and existing accounting standards. The course covers the conceptual and practical issues that arise when fair value measurement is implemented under existing FASB (...Contact NCACPA's Onsite Coordinator for full course description).

**Field of Study:** AA

**Speaker:** Teresa Thamer

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Experience with financial accounting and reporting

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **FASB Review for Industry—Targeting Recent GAAP Issues**

CPAs in corporate management will benefit from this comprehensive coverage of recent FASB, AcSEC, IASB, and EITF pronouncements. Gain expertise from a high-level approach to financial reporting issues backed by detailed descriptions and examples of the implementation of new standards. Your training will guide you in assessing recent FASB and AICPA (...Contact NCACPA's Onsite Coordinator for full course description).

**Field of Study:** AA

**Speaker:** Bobby Carmichael

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Experience in financial reporting

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **FASB Standards—A Comprehensive Review**

Are you looking for a comprehensive introduction to new financial accounting standards and a refresher on other standards? This broad-ranging course covers FASB statements and interpretations, accounting research bulletins, and APB opinions that apply to all companies. Emphasizing financial statement disclosures in addition to accounting methods, this course also presents (...Contact NCACPA's Onsite Coordinator for full course description).

**Field of Study:** AA

**Speaker:** Richard Townsend

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Experience in application of accounting standards

**Recommended CPE Credit:** 16

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **FASB Update**

Get the most up-to-date information on new accounting guidance from the FASB, including information on fair value, revenue recognition, leases, and more!

**Field of Study:** AA

**Speaker:** Russ Madray

**Vendor:** The Madray Group

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 2

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Financial Forecasting and Management Decisions**

The secret to success is in the planning! With CPAs constantly being asked to plan a company's future, forecasting is an area to demonstrate your special value. This course provides the basic tools necessary to project the balance sheet and statements of income and cash flows. Learn to determine maximum sustainable growth and to predict external funds needed. (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** AA

**Speaker:** Chris McKittrick

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Familiarity with basic financial statements

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Financial Fraud, Forensics, and the CPA**

SAS 99 and the Sarbanes-Oxley Act are now part of everyday life for financial managers and auditors in small and large companies alike. Efforts to grasp and manage the risks of financial reporting fraud and misappropriation continue to evolve, but much uncertainty remains about what works best. This dynamic program provides specific steps to help auditors and accountants fully meet fraud-handling expectations. The “how to” approach helps participants identify fraud exposures and risks and provides practical ideas on how to handle those exposures. Course materials, developed by a nationally known fraud expert, include examples of what can go wrong and how fraud is reflected in the records.

**Field of Study:** AA

**Speaker:** Edgar Gee

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Experience in accounting and reporting

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Financial Statement Analysis—Basis for Management Advice**

More and more, clients will be turning to you for advice on financial performance. Are you ready? This course presents the financial statements as a set of dynamic instruments that can be used for accurate, relevant, and timely financial decisions. Focus on the economic and financial conditions that caused the statements to change and discover how clients can manage liquidity, (...Contact NCACPA’s Onsite Coordinator for full course description).

**Field of Study:** AA

**Speaker:** Scott Shackleton

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Forensic Accounting—Fraudulent Reporting and Concealed Assets**

Supercharge your forensic accounting techniques! Forensic accounting is exploring uncharted territory by examining off-balance-sheet transactions and non-financial performance measures. You are now called upon to detect fraudulent financial reporting and to redesign internal controls to prevent misappropriation of assets. Hidden asset investigations (...Contact NCACPA’s Onsite Coordinator for full course description).

**Field of Study:** AA

**Speaker:** Glenn Helms

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Experience in accounting and reporting

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Forensic Accounting—Uncovering Schemes and Scams**

Supercharge your forensic accounting techniques with this course! You are now called upon to detect fraudulent financial reporting and to redesign internal controls to prevent misappropriation of assets. Identify common forensic techniques to recognize fraud schemes and scams and sharpen your forensic skills through the use of analytical tools. Learn to follow cash flows, uncover accounting schemes, and much more.

**Field of Study:** AA

**Speaker:** Joann Cross

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Experience in accounting and reporting

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **GAAP Refresher**

Get your arms around those complex GAAP rules most likely to result in financial statement restatements. You will be provided with clear, concise, realistic examples of financial instruments, deferred taxes and uncertain tax positions, leases, derivatives, impairments, and other “troublesome issues.”

**Field of Study:** AA  
**Speaker:** Gregory Clark

**Level:** Basic  
**Advanced Preparation:** Participants should be familiar with the accounting guidance dealing with the topics covered

**Recommended CPE Credit:** 8  
**Qualifies for Ethics:** NO

**Vendor:** Loscalzo Associates  
**Hands-On Computer:** NO

**CFP Approved:** NO  
**Requisite Knowledge:** None

**Qualifies for Yellow Book:** YES

### **Guide to Audits + Compilations + Reviews—What’s New for 2011 Engagements**

Comprehensive analysis to comply with new standards and authoritative literature.

**Field of Study:** AA  
**Speaker:** Gary Zeune  
**Vendor:** The Pros and The Cons LLC  
**Hands-On Computer:** NO

**Level:** Intermediate  
**Advanced Preparation:** None  
**CFP Approved:** NO

**Recommended CPE Credit:** 8  
**Qualifies for Ethics:** NO  
**Qualifies for Yellow Book:** YES

**Requisite Knowledge:** 10 years as an auditor

### **Guide to Fraud Detection and Prevention**

Master white-collar fraudster and former CFO Mark Morze shows you how to detect, deter, understand, and protect against fraud.

**Field of Study:** AA  
**Speaker:** Mark Morze  
**Vendor:** The Pros and The Cons LLC  
**Hands-On Computer:** NO

**Level:** Advanced  
**Advanced Preparation:** None  
**CFP Approved:** NO

**Recommended CPE Credit:** 8  
**Qualifies for Ethics:** NO  
**Qualifies for Yellow Book:** NO

**Requisite Knowledge:** 10 years as a CPA

### **Hands-on Guide to Understanding and Testing Internal Control**

With the issuance of the AICPA risk assessment SASs, auditors have no choice but to better understand internal controls in order to assess the design of controls and determine if they have been implemented. This course will provide the auditors of small to midsize entities with tips, tools, and techniques to efficiently document their understanding of the client’s controls (...Contact NCACPA’s Onsite Coordinator for full course description)

**Field of Study:** AA  
**Speaker:** Marci Thomas  
**Vendor:** Loscalzo Associates  
**Hands-On Computer:** NO

**Level:** Intermediate  
**Advanced Preparation:** None  
**CFP Approved:** NO  
**Requisite Knowledge:** Basic audit course or experience

**Recommended CPE Credit:** 8  
**Qualifies for Ethics:** NO  
**Qualifies for Yellow Book:** YES

### **How to Conduct a Review Under the AICPA Practice-Monitoring Program**

Make the transition from auditor to peer reviewer, and successfully conduct a peer review with the help of this mandatory training course for team and review captains. It features realistic case studies of system peer review circumstances and several examples of engagement selections in an engagement peer review. Learn to effectively plan a peer review, develop an understanding (...Contact NCACPA's Onsite Coordinator for full course description).

**Field of Study:** AA

**Speaker:** Bruce Kingshill

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 16

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **IFRS Essentials with GAAP Comparison—Building a Solid Foundation**

IFRS (International Financial Reporting Standards) is becoming a reality in the United States. Foreign publicly held companies, including those with subsidiaries in the United States, can already file financial statements with the SEC using IFRS. In addition, the SEC is expected to make a decision soon allowing US publicly held companies to also file financial statements using IFRS (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** AA

**Speaker:** Leah Donti

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Completion of AICPA course International versus US Accounting—What in the World Is the Difference or a high-level understanding of the conceptual differences between IFRS and US GAAP

**Recommended CPE Credit:** 16

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **IFRS Update and Review of Complex Topics**

Whether the Securities and Exchange Commission (SEC) will allow or require US public companies to use International Financial Reporting Standards (IFRS) is still unresolved. While the SEC deliberates, the Financial Accounting Standards Board (FASB) and the International Accounting Standards Board (IASB) continue to work together to develop high-quality, compatible accounting (...Contact NCACPA's Onsite Coordinator for full course description).

**Field of Study:** AA

**Speaker:** Joann Cross

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** An understanding of the conceptual differences between IFRS and US GAAP—IUSA and IFRS (see pages AA-40 and AA-37 respectively) meet this prerequisite

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Implementation Guide to the Risk Assessment Standards**

Looking for a course that will help you understand exactly what is required under the risk assessment standards? With these standards, auditors of smaller non-public companies may be overwhelmed with the level of documentation they believe is required to satisfy professional standards. This program will help you understand how to perform and document the most efficient audit (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** AA

**Speaker:** Gregory Clark

**Vendor:** Loscalzo Associates

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** YES

### **Independence—What It Means and When It's Required**

Learn about the sources of guidance for determining CPA independence and how to interpret the guidance. Practitioners and members in industry will benefit from this course's comprehensive guidance on how to apply the independence rules and what options are available.

**Field of Study:** AA

**Speaker:** Russ Madray

**Vendor:** The Madray Group

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 2

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Internal Control Deficiencies—Assessment and Reporting Under SAS 115**

SAS No. 115 places significant responsibilities on the auditors of nonpublic companies to communicate internal control deficiencies identified in an audit. SAS No. 115, combined with the requirements in the recently effective Risk Assessment Standards, will likely increase the quantity and variety of control deficiencies required to be communicated to management and those charged (...Contact NCACPA's Onsite Coordinator for full course description).

**Field of Study:** AA

**Speaker:** Glenn Helms

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Experience with accounting processes and internal control; familiarity with COSO Internal Control framework is helpful

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** YES

### **Internal Control Essentials for Financial Mgrs, Accountants, and Auditors**

Many managers, supervisors, and accountants in business, government, or nonprofits are not able to identify their departmental policies and procedures that function as the primary controls against errors and fraud. Alternately, auditors performing field work may be confused about how to interpret and evaluate management's documentation of accounting processes and controls. (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** AA

**Speaker:** Glenn Helms

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Experience with transaction workflows

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **International versus US Accounting—What in the World Is the Difference?**

In 2002, IASB and FASB agreed to harmonize their agenda and work toward reducing differences between IFRS and US GAAP. FASB is working hard on this goal as recent pronouncements of both the FASB and the IASB are bringing the standards more in line with one another. In addition, the SEC removed the reconciliation requirement for foreign issuers to reconcile their financial (...Contact NCACPA's Onsite Coordinator for full course description).

**Field of Study:** AA

**Speaker:** Teresa Thamer

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Experience in financial reporting

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Introduction to IFRS—Grasping the Big Picture**

In 2002, IASB and FASB agreed to harmonize their agenda and work toward reducing differences between IFRS and US GAAP. FASB is working hard on this goal as recent pronouncements of both the FASB and the IASB are bringing the standards more in line with one another. In addition, the SEC removed the reconciliation requirement for foreign issuers to reconcile their financial (...Contact NCACPA's Onsite Coordinator for full course description).

**Field of Study:** AA

**Speaker:** Thomas Newell

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Experience in financial reporting

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Introduction to the International Financial Reporting Standards**

Increasingly, practitioners and users are being forced to address the requirements and applications associated with International Financial Reporting Standards (IFRS). This program will review IFRS standards with broad applicability having significant differences from US GAAP. Differences will be illustrated with references to applications or disclosures from IFRS (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** AA

**Speaker:** Rebecca Lee

**Vendor:** Loscalzo Associates

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Navigating the New FASB Codification—Research Real-Life Accounting Issues**

Now you can not only get up to speed on the new FASB Online Accounting Codification, but also use the Codification to research and get answers to some of the top accounting issues fielded by the AICPA's Technical Hotline! The Codification—a major restructuring of existing accounting and reporting standards—became authoritative in July 2009. It is essential that professionals, both in industry and public practice, become familiar with using it.

**Field of Study:** AA  
**Speaker:** Joann Cross  
**Vendor:** AICPA  
**Hands-On Computer:** NO

**Level:** Basic  
**Advanced Preparation:** None  
**CFP Approved:** NO  
**Requisite Knowledge:** Experience in financial reporting

**Recommended CPE Credit:** 4  
**Qualifies for Ethics:** NO  
**Qualifies for Yellow Book:** NO

### **New FASB Developments for Business and Industry**

CPAs in corporate management will benefit from this course covering recent FASB, AcSEC, and EITF pronouncements. Gain expertise from a high-level approach to financial reporting issues backed by detailed descriptions and examples of the implementation of new standards. Your training will guide you in assessing recent FASB and AICPA standards that have a major effect (...Contact NCACPA's Onsite Coordinator for full course description).

**Field of Study:** AA  
**Speaker:** William Murphy  
**Vendor:** AICPA  
**Hands-On Computer:** NO

**Level:** Intermediate  
**Advanced Preparation:** None  
**CFP Approved:** NO  
**Requisite Knowledge:** Experience in financial reporting

**Recommended CPE Credit:** 4  
**Qualifies for Ethics:** NO  
**Qualifies for Yellow Book:** NO

### **Performance Analysis—Identifying Profit Improvement Opportunities**

Discover ways to make your company more profitable. This fast-paced, interactive seminar will teach you how to use operational auditing and performance analysis techniques to identify and implement cost saving opportunities through process reviews. This course will make the experienced financial manager and the professional operational auditor more efficient (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** AA  
**Speaker:** Diane White  
**Vendor:** Executive Education Inc.  
**Hands-On Computer:** NO

**Level:** Intermediate  
**Advanced Preparation:** Bring a calculator  
**CFP Approved:** NO  
**Requisite Knowledge:** None

**Recommended CPE Credit:** 8  
**Qualifies for Ethics:** NO  
**Qualifies for Yellow Book:** NO

### **Preparing and Reporting on OCBOA Financial Statements**

The course covers the whole spectrum of OCBOA financial statements—accounting standards, engagement and representation letters, disclosure, reporting, and engagement administration.

**Field of Study:** AA  
**Speaker:** Russ Madray  
**Vendor:** The Madray Group  
**Hands-On Computer:** NO

**Level:** Basic  
**Advanced Preparation:** None  
**CFP Approved:** NO  
**Requisite Knowledge:** None

**Recommended CPE Credit:** 2  
**Qualifies for Ethics:** NO  
**Qualifies for Yellow Book:** NO

### **Public Company Update—SEC, PCAOB, and Other Developments**

The requirements for public companies, their management, and their auditors are changing rapidly. As these changes continue to unfold over the next several years, how will you—the corporate financial reporting manager or independent auditor—keep up? Attend this course for an update on the latest pronouncements, regulations, and guidance issued by the SEC and PCAOB (...Contact NCACPA's Onsite Coordinator for full course description).

**Field of Study:** AA

**Speaker:** Ronald Kral

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Moderate experience in SEC accounting and reporting

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **QuickBooks 2011 for CPAs—Intermediate & Advanced Features & Functions**

This QuickBooks CPE course is one of the most well-attended technology courses in the country, and for good reason. QuickBooks is the world's most popular accounting package, used by more than 4.3 million businesses today. Whether you are a user yourself, or you are providing advice and services to your clients, isn't it time that you mastered QuickBooks once and for all? (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** AA

**Speaker:** Carlton Collins

**Vendor:** AdvisorCPE

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** A basic familiarity with QuickBooks

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Restaurant Accounting and Controls**

This course will provide you with the newest industry benchmarks and techniques to help your restaurant clients, including PCI, FACTA, and IRS tip reporting tactics.

**Field of Study:** AA

**Speaker:** Ed Hynes

**Vendor:** Restaurant Seminar Institute

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Revenue and Cash Receipts—Common Frauds and Internal Controls**

Revenue and cash receipts are two critical areas that require strong controls to prevent intentional fraud or unintentional misstatements. While there is well-publicized fraud in these areas in larger companies, it also occurs in smaller businesses and nonprofit entities. A sound system of internal controls is needed to help prevent fraud occurrence. (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** AA

**Speaker:** Thomas Newell

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Revenue Recognition—Getting the New Standard Right**

Revenue recognition has been the cause of audit failures and the focus of corporate abuse and fraud for many years. The new standard on revenue recognition, currently expected to be issued in the first half of 2011, is intended to improve the financial reporting of revenues. This course will provide a CPA with the tools to better understand how to work with the new concepts (...Contact NCACPA's Onsite Coordinator for full course description).

**Field of Study:** AA

**Speaker:** Ronald Kral

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Advanced

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Substantial experience in financial accounting and reporting

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **SEC Reporting**

Confidently comply with the latest SEC reporting requirements with this comprehensive course. It clarifies new, difficult, and important reporting and disclosure requirements while giving examples and tips for ensuring compliance. Learn to apply regulations S-X, S-K, and other SEC guidance, prepare or review financial statements and their related disclosures, and more.

**Field of Study:** AA

**Speaker:** Robert Walter

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Ability to prepare standard financial statements and evaluate financial statement disclosures

**Recommended CPE Credit:** 16

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Small Bus. Audits—Practices Including Risk Assessment & Internal Control**

Auditors in today's world are constantly under scrutiny, whether the client is large or small. However, small businesses bring a unique set of issues for the auditor trying to balance risk, effectiveness, and efficiency. Recognize risk in the small business environment and how to effectively and efficiently deal with it from audit planning until the wrap-up. (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** AA

**Speaker:** Melissa Critcher

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Supervisory experience in the audit function

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **SSARS Update**

What has the AICPA's Accounting and Review Services Committee been up to lately? What kinds of changes are ahead for compilations and reviews? Find out about SSARS 19 and how this will affect compilations and reviews in 2011, as well as other changes for compilations and reviews.

**Field of Study:** AA

**Speaker:** Russ Madray

**Vendor:** The Madray Group

**Hands-On Computer:** NO

**Level:** Update

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 2

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### Statement of Cash Flows

Changes are coming to the statement of cash flows! Use this course to review existing statement of cash flows preparation and presentation options and consider how these requirements might change in the not-too-distant future. Careful exploration of the requirements of the Statement of Cash Flows guidance, and related standards will increase your understanding of current (...Learn More)

**Field of Study:** AA

**Speaker:** Michael Hamilton

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Experience with preparing financial statements

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### Tax, Cash, and Modified Cash Basis Financial Statements (OCBOA)

Find some relief from GAAP standards that are costly to implement and incomprehensible to financial statement users. This program will

\* Explore alternatives that permit professional presentations that don't cut corners but are cost efficient

\* Illustrate exactly what is necessary when preparing tax, cash, or modified cash basis financial statements

\* Provide hard to find report (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** AA

**Speaker:** Rebecca Lee

**Vendor:** Loscalzo Associates

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### The Most Interesting A&A Update in the World

Are you the type of accountant who is embarrassed because you're not as much of an A&A nerd you know you should be? Do your cool accounting friends make fun of you when you use a FASB reference instead of the codified one? Do you even know what the codification is? Are you nervous that the accounting world is moving too fast for you to keep up? Well, this course is for you. It's 4 relatively fun-packed CPE hours that are sure to keep you ahead of the A&A tidal wave.

**Field of Study:** AA

**Speaker:** Jonathan Kraftchick

**Vendor:** Jonathan Kraftchick

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### The Nuts and Bolts of Budgeting

This workshop gives accountants and budget managers the tools and valuable information needed to develop more effective and realistic budgets. Everything you wanted to know about budgeting is covered, from accountability to cash-flow planning and performance measures to zero-based budgets.

**Field of Study:** AA

**Speaker:** Vincent Flynn

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** At least some experience in budgeting and planning

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **The Top Ten Fraud Schemes—How to Detect and Prevent Them**

Many costly fraudulent schemes have occurred repeatedly throughout the past several decades. Why do these material and frequently recurring frauds succeed? One reason is that business owners, management, auditors, and employees fail to recognize the red flags that have been associated with these financial statement and misappropriation of asset frauds. (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** AA

**Speaker:** Glenn Helms

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Experience in accounting and reporting

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **The Ultimate Compilation and Review Engagements Course**

This is a challenging, fast-paced course that covers recent changes in SSARS and complete guidance on performing compilation and review engagements. Specific sections include Recent Changes in SSARS, Compilation Engagements, Review Engagements, OCBOA, Personal Financial Statements, and Reporting.

**Field of Study:** AA

**Speaker:** Russ Madray

**Vendor:** The Madray Group

**Hands-On Computer:** NO

**Level:** Update

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Uncertainty in Income Taxes—A Must Know for Tax CPAs and Accountants/Auditors**

The uncertain tax position provisions of ASC 740 (FIN 48) add major new tax documentation and disclosure requirements on a scale unseen since passage of the Sarbanes-Oxley Act in 2002. Due to an outpouring of requests for an extension, the FASB deferred the effective date for nonpublic entities that had not previously implemented the guidance to fiscal years beginning after December 15, 2008. These provisions significantly modify the accounting and disclosures relating to uncertainties in income taxes covered by ASC 740 (FAS 109), Accounting for Income Taxes. Unlike previous FASB requirements, this Interpretation likely will now require an unprecedented involvement of tax professionals in calculating, recording, and/or reviewing tax provisions. FASB prescribes a recognition threshold and measurement attribute for the financial statement recognition and measurement of a tax position taken or expected to be taken in a tax return. Guidance also is provided on derecognition, classification, interest and penalties, accounting in interim periods, disclosure, and transition. These concepts are reinforced with real-world case studies and examples throughout the course.

**Field of Study:** AA

**Speaker:** Edgar Gee

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Knowledge of FASB ASC 740 (previously FAS 109, Accounting for Income Taxes)

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Upcoming Peer Review—Is Your Firm Ready?**

What does it take to have an effective quality control system that leads you to a clean, unmodified peer review report? Find out how to prepare for your next review and what can be done on a daily basis to create a strong quality control environment for your firm. Identify the most common significant deficiencies that peer reviews uncover and what you can do to prevent them from (...Contact NCACPA's Onsite Coordinator for full course description).

**Field of Study:** AA

**Speaker:** Bruce Kingshill

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Experience in providing audit, compilation, and review services

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **What CPAs Need to Know about Wall Street Today**

If CPAs are going to assist their clients, their firms, and themselves with Wall Street investing, they must understand (1) asset allocation, (2) money manager evaluation, (3) Wall Street firms, and (4) major macroeconomics issues today. This intermediate level class of 8 CE Hours is NOT a typical CNBC/Wall Street, majority-view investment class. The emphasis here will be on (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** AA

**Speaker:** Michael McGowan

**Vendor:** Frank Sanitate Associates

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

# **Consulting Services (CS)**



**Managing Legal Costs—Use Your Lawyers Efficiently**

Does your company seem to spend more time and money than necessary on legal issues? Do legal issues seem to take too long to resolve? Are cash flows related to legal costs and liabilities unpredictable? Does the amount your company spends on legal fees seem to increase every year? (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** CS**Speaker:** David Daly**Vendor:** Executive Education Inc.**Hands-On Computer:** NO**Level:** Intermediate**Advanced Preparation:** None**CFP Approved:** NO**Requisite Knowledge:** None**Recommended CPE Credit:** 8**Qualifies for Ethics:** NO**Qualifies for Yellow Book:** NO



# **Employee Benefits (EB)**



### **401(k) and Other Employee Benefit Plan Risks and Pitfalls**

Learn how to properly plan your benefit plan audit engagement and improve overall efficiency. Find out how to avoid common pitfalls in planning and detailed audit procedures. Auditors will benefit from the guidance provided in this course through real-world examples and techniques that can be utilized in various audit engagements.

**Field of Study:** EB

**Speaker:** Melissa Critcher

**Vendor:** Melissa Critcher

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Basic understanding of auditing defined contribution and defined benefit plans

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Back to the Future**

This presentation will start with a historical perspective of reform through past presidencies and examine passage of the Patient Protection and Affordable Care Act (PPACA) in 2010. Participants will gain a better understanding of the basis and status of the legislative and judicial challenges facing the law. The presentation will include an examination of provisions that have taken effect since PPACA's enactment, as well as those slated to take effect in 2011. Impending major changes to PPACA for 2012 and beyond will also be reviewed. Participants will take away specific action items to help employers prepare for reform. The presentation will conclude by identifying and addressing some possible unintended consequences of reform, and a Q & A session.

**Field of Study:** EB

**Speaker:** Ellen Tucker

**Vendor:** Hill Chesson & Woody

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO



**Estate  
and  
Financial Planning  
(EFP)**



### **Basic Pension Profit Sharing and Compliance**

Gain a general understanding of the retirement plans available, basic tax requirements, eligibility, vesting, limitations on benefits and contributions, and more.

**Field of Study:** EFP

**Speaker:** Rick Tuggle

**Vendor:** Rick Tuggle

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Building a Successful Retirement in Spite of No Time, Money, or Planning**

Many CPAs and their clients spend more time planning a vacation than they do planning how they'll live out the retirement decades of their lives. This class looks at what retirement "success" might look like for you. Is it mere idleness? Projects? Futzing in the garden or basement? Playing with the grandkids? Part-time work? Volunteering at the local homeless shelter? Sewing? (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** EFP

**Speaker:** Michael McGowan

**Vendor:** Frank Sanitate Associates

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Choosing the Best Retirement Plans for Small Businesses**

Small businesses face increasing demands for retirement benefits for rank-and-file employees as well as newly enhanced opportunities for their principals. Unfortunately, they don't have Fortune 500 budgets to design, implement, and administer their plan. With the income tax changes arising in 2011 affecting businesses and individuals, retirement plans offer unique opportunities (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** EFP

**Speaker:** Susan Smith

**Vendor:** Surgent McCoy CPE, LLC

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Determining How Much Money You Need to Retire—Tax Ideas & Money Management**

The purpose of this course is to give CPAs the tools and knowledge required to help their clients implement tax-effective investment and portfolio strategies for successful wealth accumulation and real after-tax retirement income maintenance. The course discusses a host of specific investment tax planning and money management issues and topics, both before and after retirement, (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** EFP

**Speaker:** David Hultstrom

**Vendor:** Surgent McCoy CPE, LLC

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** YES

**Requisite Knowledge:** 3+ years of experience in the area of study is recommended

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Estate and Succession Planning for the Business Owner**

This course will cover valuation and discounting, use of non-voting interests, planning for retirement plan distributions, GRATs and family sales, buy-sell agreements, and using insurance in succession planning.

**Field of Study:** EFP

**Speaker:** Brad Jacobs

**Vendor:** Brad Jacobs

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Estate Planning in the Next Decade**

This course will provide an overview of the estate and gift tax system, testamentary planning, lifetime giving, charitable planning, generation-skipping planning, life insurance, and any new developments.

**Field of Study:** EFP

**Speaker:** Brad Jacobs

**Vendor:** Brad Jacobs

**Hands-On Computer:** NO

**Level:** Update

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Estate Planning Under the 2010 Tax Relief Act—New Opportunities & Considerations**

The course will focus on the new estate, gift, and generation-skipping tax rules enacted under the 2010 Tax Relief Act. This will include discussions of planning considerations that may significantly reduce tax exposure through lifetime gifts and testamentary planning. The course will also look at issues and choices that remain for estates and gifts under prior law. (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** EFP

**Speaker:** Brad Jacobs

**Vendor:** Brad Jacobs

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** General knowledge of estate tax law

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Intermediate Pension Profit Sharing and Other Benefit Issues**

It's a jungle out there right now in the pension field. Cut through the underbrush with this timely update on qualified retirement plans and other employee benefit matters.

**Field of Study:** EFP

**Speaker:** Rick Tuggle

**Vendor:** Rick Tuggle

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Basic knowledge of retirement plans

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **The Best Income Tax, Estate Tax, and Financial Planning Ideas of 2011**

Income and transfer tax rate changes have turned pre-2011 strategies on their head, and clients will require extensive planning and reconsideration of appropriate tax strategies. CPAs must be prepared for one of the most complex years in recent history. The purpose of the course is to explore practical tax-planning ideas that practitioners can use to assist clients with their needs (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** EFP

**Speaker:** David Hultstrom

**Vendor:** Surgent McCoy CPE, LLC

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** YES

**Requisite Knowledge:** Basic course in individual income tax, Social Security, and estate planning

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Understanding Social Security and Planning Effectively**

As the baby boomer generation approaches retirement, financial and tax planners can expect increased demand for strategies that dovetail Social Security with other retirement objectives. This course provides tax and financial planning professionals with both the background information on the Social Security system and the strategies clients will need in dealing with it.

**Field of Study:** EFP

**Speaker:** Michael Quigley

**Vendor:** Surgent McCoy CPE, LLC

**Hands-On Computer:** NO

**Level:** Update

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO



# **Ethics**

## **(ET)**



### **2011 Professional Ethics and Conduct**

This course examines the CPA's role in the modern economy, standards of ethical conduct for management accountants, the four basic concepts of ethics in accounting, and the AICPA's rules on independence. Also highlighted are the ten most common violations of North Carolina statutes and rules for CPAs. The course also examines current problems with earnings management in financial statements.

**Field of Study:** ET

**Speaker:** See Speakers & Bios below

**Vendor:** NCACPA

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 2

**Qualifies for Ethics:** YES

**Qualifies for Yellow Book:** YES

### **NC Accountancy Law—Ethics, Principles, and Professional Responsibilities**

This 8-hour course not only enables you to experience a practical application of the NC Rules and Statutes but also provides specific guidance on how to handle many of the ethical dilemmas faced by CPAs. We'll examine the rules and statutes in the context of daily applications faced by the practitioner through specific cases, along with covering ethical dilemmas you will face.

**Field of Study:** ET

**Speaker:** Cal Christian

**Vendor:** NCACPA

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** YES

**Qualifies for Yellow Book:** YES

### **2011 Professional Ethics & Conduct Speakers**

#### **Cal Christian, CPA, PhD**

Cal Christian is a registered CPA in the states of North Carolina and Mississippi. Cal has over 10 years of experience in both the public accounting profession with the former international accounting firm of Ernst & Whinney and in industry with LDDS (the predecessor to WorldCom) and the Mississippi law firm of Holcomb, Dunbar. Cal is currently an associate professor of accounting at East Carolina University and has taught both auditing and advanced accounting. Cal is the ECU College of Business Teaching Fellow and was previously awarded the ECU Scholar Teacher Award. He frequently speaks for NCACPA and the AICPA and has received the distinction of Outstanding Discussion Leader (non-authors), Outstanding Chapter Speaker, and Outstanding Conference Speaker.

Cal has his BA from the University of Mississippi and his PhD from Florida State University.

#### **Melissa Critcher**

Melissa Critcher is a licensed CPA in the state of North Carolina whose firm specializes in employee benefit plan audits and consulting. Her experience and background provide auditors with the tools necessary to complete an audit more efficiently and effectively while ensuring compliance with the rules and regulations of ERISA and the Department of Labor. Plan administrators can also benefit from the techniques and information provided through the consulting services offered through Melissa's firm.

Prior to opening her own firm, Melissa was a senior audit manager with Greer and Walker, LLP, in Charlotte, NC. Prior to her career with Greer & Walker, Melissa was employed with Williams Overman

Pierce in Raleigh, NC, from 2001–2002 and with a Winston-Salem firm from 1997 until 2001, where she concentrated on developing her expertise in auditing and assurance services.

Melissa is a member of the AICPA and NCACPA. She has been very active within NCACPA, serving in previous roles as treasurer and vice president–elect for the Northwest Piedmont chapter, president of the Triangle chapter, and in other officer positions with the Charlotte chapter, as well as volunteering for the Continuing Professional Education and Accounting and Attestation committees through NCACPA.

Melissa has served as a discussion leader for NCACPA for more than seven years, focusing primarily on employee benefit plans. Melissa also conducts seminars through the AICPA on topics such as employee benefit plans, small business auditing and accounting update, audit documentation and review, and risk. Melissa graduated from Appalachian State University in 1993 with a Bachelor of Science degree in business administration with a specialization in accounting.

### **Jonathan Kraftchick**

Jonathan Kraftchick, CPA, is the manager of training and development at Cherry, Bekaert & Holland in their Raleigh office, where he is responsible for implementing and evaluating the firm’s training strategies through course development and delivery. He attended the University of Georgia, studying theater before setting off to become an actor in 1998. Realizing that waiting tables and begging for tips was not the career path he anticipated, he transferred to the University of North Carolina at Chapel Hill and received a BA in economics before continuing on to their master’s of accounting program, graduating in 2001. Since that time, he has spent most of his time conducting audit and consulting engagements for a wide variety of companies and industries throughout the southeast.

He currently oversees the firm’s audit training efforts and is a frequent speaker on audit and accounting topics. His articles have been featured in numerous publications on training issues within public accounting firms as well as several technical topics. In 2009, he was named Georgia Southern’s Executive-in-Residence and Elon University’s Business Professional of the Year. He has also served as an adjunct professor at Elon University in their accounting department. Current professional memberships include AICPA and NCACPA.

### **Joanne Rockness, CPA, PhD**

Joanne Rockness, CPA, PhD, is the Cameron Professor of Accountancy at the Cameron School of Business, University of North Carolina at Wilmington. She has received numerous teaching awards including the Distinguished Teaching Professorship at UNCW, the Chancellor’s Teaching Excellence Award at UNCW, membership in the Academy of Outstanding Teachers at NCSU, and the 1996–1997 NCACPA Outstanding Accounting Educator of the Year.

Joanne is active in publishing and professional service. Her writings on ethics, accounting education, independence, financial reporting, social responsibility, and accountants’ liability have appeared in various academic and professional publications. She chaired the American Accounting Association’s committee on Professionalism and Ethics, has been a member of the NCACPA Board of Directors, and has served on several AAA and NCACPA committees.

Her PhD in business administration is from the University of North Carolina at Chapel Hill. Her undergraduate and master’s degrees are from Western Michigan University.

# **Government/ Non-Profit (GO/NP)**



### Accounting and Reporting Practices of Not-for-Profit Organizations

Not-for-profit accounting can be extremely complex, and if you are to be successful, your knowledge and skills must be superior. Learn from real-world financial statements, cases, and problems faced by CPAs with not-for-profit clients and by executives of not-for-profit organizations. With this course, you will develop a working knowledge of presentation requirements (...Contact NCACPA's Onsite Coordinator for full course description).

<b>Field of Study:</b> GO/NP	<b>Level:</b> Intermediate	<b>Recommended CPE Credit:</b> 8
<b>Speaker:</b> Rebeka Mazzone	<b>Advanced Preparation:</b> None	<b>Qualifies for Ethics:</b> NO
<b>Vendor:</b> AICPA	<b>CFP Approved:</b> NO	<b>Qualifies for Yellow Book:</b> YES
<b>Hands-On Computer:</b> NO	<b>Requisite Knowledge:</b> Experience in nonprofit environment	

### Advanced Auditing of HUD-Assisted Projects

Written by well-known CPAs Max Hunt and Peter Bell, this course offers insights into compliance pitfalls for HUD-assisted housing owners and managers. Learn to recognize and apply the latest changes in the federally assisted housing industry and efficiently plan, perform, and report a HUD-assisted engagement. The course includes coverage of the Consolidated Audit Guide for Audits (...Contact NCACPA's Onsite Coordinator for full course description).

<b>Field of Study:</b> GO/NP	<b>Level:</b> Advanced	<b>Recommended CPE Credit:</b> 8
<b>Speaker:</b> Chuck Hicks	<b>Advanced Preparation:</b> None	<b>Qualifies for Ethics:</b> NO
<b>Vendor:</b> AICPA	<b>CFP Approved:</b> NO	<b>Qualifies for Yellow Book:</b> YES
<b>Hands-On Computer:</b> NO	<b>Requisite Knowledge:</b> Completion of the AICPA course, Audits of HUD-Assisted Projects, or equivalent knowledge	

### Analytical Procedures for Nonprofit Organizations

If an organization isn't efficient, it isn't going to succeed. With this course, learn how to measure a nonprofit organization's strength and efficiency as well as its effectiveness of mission accomplishment. Receive guidance in the application and interpretation of analytical procedures to a nonprofit organization's financial statements. Learn to use analytical procedures (...Contact NCACPA's Onsite Coordinator for full course description).

<b>Field of Study:</b> GO/NP	<b>Level:</b> Intermediate	<b>Recommended CPE Credit:</b> 8
<b>Speaker:</b> Rebeka Mazzone	<b>Advanced Preparation:</b> None	<b>Qualifies for Ethics:</b> NO
<b>Vendor:</b> AICPA	<b>CFP Approved:</b> NO	<b>Qualifies for Yellow Book:</b> YES
<b>Hands-On Computer:</b> NO	<b>Requisite Knowledge:</b> Experience in management of, or accounting and reporting for, exempt organizations	

### Annual Update for State and Local Governments and Not-For-Profits

Catch up on the latest developments in accounting and auditing for state and local governments and not-for-profits in a power-packed four-hour session. You will review recent activities of the OMB, GAO, AICPA, GASB, and FASB, and also get a feel for significant projects that these organizations are working on for the future.

<b>Field of Study:</b> GO/NP	<b>Level:</b> Intermediate	<b>Recommended CPE Credit:</b> 4
<b>Speaker:</b> Lynda Dennis	<b>Advanced Preparation:</b> None	<b>Qualifies for Ethics:</b> NO
<b>Vendor:</b> AICPA	<b>CFP Approved:</b> NO	<b>Qualifies for Yellow Book:</b> YES
<b>Hands-On Computer:</b> NO	<b>Requisite Knowledge:</b> Basic knowledge and experience in governmental and not-for-profit accounting and auditing	

### **Applying A-133 to Nonprofit and Governmental Organizations**

Does Circular A-133 have you running in circles? Become more efficient and effective at planning and performing audits in accordance with the requirements of Circular A-133 and the Single Audit Act Amendments. If you are involved in A-133 audits of governmental entities or nonprofit organizations, this highly rated course is an absolute must-have.

**Field of Study:** GO/NP

**Speaker:** Chuck Hicks

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Background of not-for-profit or governmental accounting and auditing recommended

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** YES

### **Audits of School Districts—Basic**

Learn about specialized state laws and audit compliance issues, special areas of concern and focus, and special reporting requirements that make school district audits unique.

**Field of Study:** GO/NP

**Speaker:** Kerry Crutchfield

**Vendor:** Kerry Crutchfield

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** YES

### **Compliance and Internal Control Testing Under Circular OMB A-133**

For CPAs who audit governmental and not-for-profit organizations that receive federal and state funds, this session reviews prior single audit circulars and the new A-133 Circular, highlighting significant changes.

**Field of Study:** GO/NP

**Speaker:** Chuck Hicks

**Vendor:** Chuck Hicks

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** YES

### **Compliance Auditing—School Districts**

Receive a thorough explanation of the audit work required under the compliance supplements for Child Nutrition and Title I and Title IV-B Handicapped programs, major programs within school district audits.

**Field of Study:** GO/NP

**Speaker:** Kerry Crutchfield

**Vendor:** Kerry Crutchfield

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** YES

### **Cost Allocation in Nonprofits—Who Gets It?**

How do you account for the sharing of costs across functions in the nonprofit environment? This course will teach you the art of proper cost allocation in the nonprofit environment. Nonprofits are confounded and confronted with cost allocation problems for GAAP reporting, IRS reporting, and federal reporting. How nonprofits solve these problems has a significant effect (...Contact NCACPA's Onsite Coordinator for full course description).

**Field of Study:** GO/NP

**Speaker:** James Lindell

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Experience with nonprofit organizations

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** YES

### **Form 990—AICPA's Answer to Unlocking the Tax Complexities**

The IRS crackdown on nonprofits is continuing—are you ready? New legal traps for the organization and its officers and directors created by the excess benefit rules make this course a must! Find out how to deal with the very tricky 990 problems that will confront your clients. With the more complex Form 990, not only are CPAs required to perform numerical computations, (...Contact NCACPA's Onsite Coordinator for full course description).

**Field of Study:** GO/NP

**Speaker:** Thomas Sheets

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** YES

### **Form 990—Moving Beyond the Basics**

Once you have learned the basics of completing the Form 990, learn about more advanced issues relating to the form, as well as identifying and solving solutions to increasingly complex nonprofit tax issues. Learn how the latest issues and tax law changes will affect your nonprofit clients. Get the latest on avoiding unrelated business income, (...Contact NCACPA's Onsite Coordinator for full course description).

**Field of Study:** GO/NP

**Speaker:** Chuck Borek

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Advanced

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Basic knowledge of nonprofit taxation or completion of the AICPA course Form 990—AICPA's Answer to Unlocking the Tax Complexities

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** YES

### **Foundations in Governmental Accounting**

Are you just starting to work in the governmental arena? Have you worked in the governmental arena for years but need a refresher to keep up with changes? If so, this is the course for you. This course features the foundational tenets of governmental accounting and reporting in today's environment. Learn more than the buzzwords—learn the underlying concepts and how they are applied.

**Field of Study:** GO/NP

**Speaker:** Greg Allison

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** YES

### **Frequent Frauds Found in Governments**

What are some of the common frauds that occur in governmental organizations, and how could they have been avoided? Through an informative case study approach, this course illustrates common frauds that make headlines and damage the reputations of governments. Rather than speaking generically about fraud, this course analyzes several common frauds that occur in the governmental sector.

**Field of Study:** GO/NP

**Speaker:** Sheldon Langsam

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Knowledge of government sector

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** YES

### **Frequent Frauds Found in Governments and Not-For-Profits**

What common frauds occur in governments and not-for-profits, and how could they have been avoided? Through an informative case study approach, this course illustrates common frauds that make headlines and damage the reputations of government and not-for-profit organizations.

**Field of Study:** GO/NP

**Speaker:** Chuck Hicks

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Knowledge of government and not-for-profit sectors

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** YES

### **Frequent Frauds Found in Not-for-Profits**

What are some of the common frauds that occur in not-for-profit organizations, and how could they have been avoided? Through an informative case study approach, this course illustrates common frauds that make headlines and damage the reputations of not-for-profit organizations. Rather than speaking generically about fraud, this course analyzes several common frauds that occur in the not-for-profit sector.

**Field of Study:** GO/NP

**Speaker:** Fred Christensen

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Knowledge of not-for-profit sector

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** YES

### **Governmental Accounting and Reporting—Putting It All Together**

Puzzled by governmental accounting and reporting? This course will show you how all the pieces fit together in a sensible, real-world manner. This course provides practical guidance regarding the accounting and reporting issues for state and local governments. We will also examine how to prepare the financial statements at the fund level and convert them to government-wide (...Contact NCACPA's Onsite Coordinator for full course description).

**Field of Study:** GO/NP

**Speaker:** Greg Allison

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Completion of the basic level AICPA course Foundations in Governmental Accounting, or prior experience with governmental accounting and reporting

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** YES

### **Governmental and Nonprofit Annual Update**

Change is inevitable and at times overwhelming if you are unprepared. Ensure you are current in governmental and nonprofit accounting and auditing. This time-tested update course is designed to prepare you for the latest accounting and auditing developments affecting governments and nonprofits.

**Field of Study:** GO/NP

**Speaker:** Chuck Hicks

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Basic knowledge and experience in governmental and nonprofit accounting and auditing

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** YES

### **Guide to Fraud and Abuse in Government and Nonprofits**

Auditors are at greater risk if they miss fraud and abuse in government and nonprofits than in corporations.

**Field of Study:** GO/NP

**Speaker:** Gary Zeune

**Vendor:** The Pros and The Cons LLC

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** 10 years as a CPA

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** YES

### **Nonprofit Accounting and Auditing**

When flying in stormy weather, it's nice to know the pilot has practical hands-on experience in operating in that environment. Professionals working for or with nonprofits also need this same type of experience to successfully operate in the nonprofit environment. This course provides just that on how to navigate some of the key issues in nonprofit accounting and auditing.

**Field of Study:** GO/NP

**Speaker:** Lynda Dennis

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Experience in the not-for-profit environment

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** YES

### **Nonprofit Accounting and Auditing—Practical Hands-on Exercises**

When flying in stormy weather, it's nice to know the pilot has practical hands-on experience in operating in that environment. Professionals working for or with nonprofits also need this same type of experience to successfully operate in the nonprofit environment. This course provides just that on how to navigate some of the key issues in nonprofit accounting and auditing.

**Field of Study:** GO/NP

**Speaker:** Sheldon Langsam

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Experience in the not-for-profit environment

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** YES

### **Not-for-Profit Auditing Made Easy**

Audits of not-for-profit organizations can be challenging. Not-for-profits have their own specific accounting principles, giving rise to different audit issues. Many small to midsize not-for-profits lack sophisticated accounting personnel, causing challenges in the auditor's understanding of internal controls and assessment of risk. In addition, the integration of a financial (...Contact NCACPA's Onsite Coordinator for full course description)

<b>Field of Study:</b> GO/NP	<b>Level:</b> Intermediate	<b>Recommended CPE Credit:</b> 8
<b>Speaker:</b> Marci Thomas	<b>Advanced Preparation:</b> None	<b>Qualifies for Ethics:</b> NO
<b>Vendor:</b> Loscalzo Associates	<b>CFP Approved:</b> NO	<b>Qualifies for Yellow Book:</b> YES
<b>Hands-On Computer:</b> NO	<b>Requisite Knowledge:</b> Basic audit course or experience	

### **Not-for-Profit Industry Update and Major Accounting and Disclosure Issues**

Not-for-profits are under more intense scrutiny than ever before from regulators to donors. In this environment, not-for-profit executives and their auditors must focus on the transparency in financial reporting. This program provides a 2010 update of the issues at the forefront of industry to assist the auditor in assessing risk. It also includes consideration of the major (...Contact NCACPA's Onsite Coordinator for full course description)

<b>Field of Study:</b> GO/NP	<b>Level:</b> Intermediate	<b>Recommended CPE Credit:</b> 8
<b>Speaker:</b> Marci Thomas	<b>Advanced Preparation:</b> None	<b>Qualifies for Ethics:</b> NO
<b>Vendor:</b> Loscalzo Associates	<b>CFP Approved:</b> NO	<b>Qualifies for Yellow Book:</b> YES
<b>Hands-On Computer:</b> NO	<b>Requisite Knowledge:</b> Basic familiarity with not-for-profit accounting and auditing	

### **Right the First Time—Cases in Not-For-Profit Accounting and Auditing**

Papers print corrections, referees use replays, and golfers take mulligans. Accountants and auditors are expected to get it right the first time. Utilizing a case study format, this course will provide you with the skills to take on the most common problem areas in not-for-profit accounting and auditing and get them right the first time.

<b>Field of Study:</b> GO/NP	<b>Level:</b> Intermediate	<b>Recommended CPE Credit:</b> 8
<b>Speaker:</b> Chuck Borek	<b>Advanced Preparation:</b> None	<b>Qualifies for Ethics:</b> NO
<b>Vendor:</b> AICPA	<b>CFP Approved:</b> NO	<b>Qualifies for Yellow Book:</b> YES
<b>Hands-On Computer:</b> NO	<b>Requisite Knowledge:</b> Experience in the not-for-profit environment	

### **Solving Complex Single Audit Issues for Gov. and Nonprofit Organizations**

Gain comprehensive, practical hands-on guidance on implementing the requirements of the Single Audit Act and OMB Circular A-133. Improve audit quality by thoroughly understanding the A-133 audit requirements. Stay current in this specialized area of auditing through this highly rated course.

<b>Field of Study:</b> GO/NP	<b>Level:</b> Advanced	<b>Recommended CPE Credit:</b> 8
<b>Speaker:</b> Chuck Hicks	<b>Advanced Preparation:</b> None	<b>Qualifies for Ethics:</b> NO
<b>Vendor:</b> AICPA	<b>CFP Approved:</b> NO	<b>Qualifies for Yellow Book:</b> YES
<b>Hands-On Computer:</b> NO	<b>Requisite Knowledge:</b> Experience in the Yellow Book and A-133 environment	

### **Step by Step Guide to Compliance Auditing—A Gateway to Efficiency**

Peer reviewers have been given notice by the AICPA that they should consider audits that do not meet all the requirements listed on the A-133 Peer Review Checklist (Part A) as NOT MEETING professional standards. Given all the changes in the 2009 GAS and A-133 Audit Guide and requirements dealing with funds expended from the American Recovery and Reinvestment Act (ARRA) (...Contact NCACPA's Onsite Coordinator for full course description)

<b>Field of Study:</b> GO/NP	<b>Level:</b> Intermediate	<b>Recommended CPE Credit:</b> 8
<b>Speaker:</b> Marci Thomas	<b>Advanced Preparation:</b> None	<b>Qualifies for Ethics:</b> NO
<b>Vendor:</b> Loscalzo Associates	<b>CFP Approved:</b> NO	<b>Qualifies for Yellow Book:</b> YES
<b>Hands-On Computer:</b> NO	<b>Requisite Knowledge:</b> Knowledge of not-for-profit and governmental accounting and reporting, Yellow Book, and OMB Circular A-133	

### **Tax Exempt Organizations—Advanced Planning and Compliance for Tax Matters**

Tax exempt organizations are subject to a variety of complex tax issues and exposure to penalties in their everyday operations. Presentation of unusual transactions can complicate Form 990 and related Schedules. The IRS is expanding audit coverage of all types of exempt organizations. This program addresses the major tax issues exempt organizations face. (...Contact NCACPA's Onsite Coordinator for full course description)

<b>Field of Study:</b> GO/NP	<b>Level:</b> Advanced	<b>Recommended CPE Credit:</b> 8
<b>Speaker:</b> Lynn Nichols	<b>Advanced Preparation:</b> None	<b>Qualifies for Ethics:</b> NO
<b>Vendor:</b> Nichols Patrick CPE, Inc.	<b>CFP Approved:</b> NO	<b>Qualifies for Yellow Book:</b> NO
<b>Hands-On Computer:</b> NO	<b>Requisite Knowledge:</b> None	

### **The 2011 Revised Yellow Book for Financial Audits**

Do you perform financial audits in accordance with the Yellow Book? If so, you need to know the latest about the 2011 Yellow Book revision. Find out what stayed the same and what changed in the latest revision to the Yellow Book. This course does not address attestation engagements or performance audits conducted in accordance with the Yellow Book.

<b>Field of Study:</b> GO/NP	<b>Level:</b> Basic	<b>Recommended CPE Credit:</b> 4
<b>Speaker:</b> Fred Christensen	<b>Advanced Preparation:</b> None	<b>Qualifies for Ethics:</b> NO
<b>Vendor:</b> AICPA	<b>CFP Approved:</b> NO	<b>Qualifies for Yellow Book:</b> YES
<b>Hands-On Computer:</b> NO	<b>Requisite Knowledge:</b> Basic general audit knowledge and/or experience	

### **The 2011 Revised Yellow Book—Government Auditing Standards**

Do you perform engagements in accordance with the Yellow Book? If so, you need to know the latest about the 2011 Yellow Book revision. Gain a working knowledge of the latest Yellow Book standards from A to Z. Find out what stayed the same and what changed in the 2011 revision to the Yellow Book. Truly understand the relationship of Government Auditing Standards (...Contact NCACPA's Onsite Coordinator for full course description).

<b>Field of Study:</b> GO/NP	<b>Level:</b> Basic	<b>Recommended CPE Credit:</b> 8
<b>Speaker:</b> Chuck Hicks	<b>Advanced Preparation:</b> None	<b>Qualifies for Ethics:</b> NO
<b>Vendor:</b> AICPA	<b>CFP Approved:</b> NO	<b>Qualifies for Yellow Book:</b> YES
<b>Hands-On Computer:</b> NO	<b>Requisite Knowledge:</b> Basic general audit knowledge and/or experience	



# **Information Technology (IT)**



**Adobe Acrobat 9—Level 1**

Upon successful completion of this course, students will be able to access information in a PDF document, create PDF documents, navigate to specific content in a PDF document, modify PDF documents, work with multiple PDF documents, review a PDF document, and validate a PDF document.

**Field of Study:** IT**Speaker:** Kevin Strezo**Vendor:** New Horizons Computer Learning Center**Hands-On Computer:** YES**Level:** Basic**Advanced Preparation:** None**CFP Approved:** NO**Requisite Knowledge:** None**Recommended CPE Credit:** 8**Qualifies for Ethics:** NO**Qualifies for Yellow Book:** NO**Cloud Computing**

"The future is here! "Cloud Computing." You've heard the term, but what does it really mean and how will it impact you both personally and professionally? In this seminar, you will learn the fundamentals of cloud computing, including what cloud computing really is and how it differs from hosted services. (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** IT**Speaker:** Karl Egnatoff**Vendor:** K2 Enterprises**Hands-On Computer:** NO**Level:** Basic**Advanced Preparation:** None**CFP Approved:** NO**Requisite Knowledge:** Fundamental knowledge of computer operations and Internet usage**Recommended CPE Credit:** 8**Qualifies for Ethics:** NO**Qualifies for Yellow Book:** NO**Crystal Reports 2008—Basic Skills**

This course is designed for people who need output from a database. In some cases, database programs have limited reporting tools, and/or such tools may not be accessible. Explore the Crystal Reports interface; create a basic report and modify it; use formulas for filtering data; group report data; enhance a report; create a report using data sourced from an Excel database; and more.

**Field of Study:** IT**Speaker:** Suzanne Stitt**Vendor:** Knowledge Source**Hands-On Computer:** YES**Level:** Basic**Advanced Preparation:** None**CFP Approved:** NO**Requisite Knowledge:** None**Recommended CPE Credit:** 16**Qualifies for Ethics:** NO**Qualifies for Yellow Book:** NO**Crystal Reports 2008—Level 1**

In this course, students will create a basic report by connecting to a database and modifying its presentation.

**Field of Study:** IT**Speaker:** Kevin Strezo**Vendor:** New Horizons Computer Learning Center**Hands-On Computer:** YES**Level:** Basic**Advanced Preparation:** None**CFP Approved:** NO**Requisite Knowledge:** Students should also have basic word processing skills, such as copying and pasting text, formatting text, and so on**Recommended CPE Credit:** 16**Qualifies for Ethics:** NO**Qualifies for Yellow Book:** NO

### **Emerging Technologies—From the Screen to the Clouds**

This course will include the following topics

- \* From the screen to the cloud—an overview of how technology is touching and affecting business
- \* Hosting and infrastructure—review of server infrastructure, hosting, and data centers
- \* The cloud and virtualization—how infrastructure is changing from a hardware-based model to a service-based model, and how you can leverage that in your business

**Field of Study:** IT

**Speaker:** Mike Flanagan

**Vendor:** Knowledge Source

**Hands-On Computer:** YES

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Excel Macros—Part I**

You have used Excel for years and Lotus prior to that. During this time, you have said repeatedly, "One day, I'll learn how to write macros." Well, that time has arrived because this four-hour program will introduce you to the wide world of macros and Visual Basic for Applications (VBA) in Excel. Designed for those with little, if any, experience working with macros. (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** IT

**Speaker:** Karl Egnatoff

**Vendor:** K2 Enterprises

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Excel PivotTables for Accountants—Part I**

PivotTables are the most powerful feature of Excel, yet few accountants use them in their day-to-day activities. For some, PivotTables are too intimidating; for others, PivotTables are a foreign concept. With a little information, guidance, and demonstration from the instructor, you will be ready to begin using PivotTables to accomplish routine analysis and reporting. (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** IT

**Speaker:** Karl Egnatoff

**Vendor:** K2 Enterprises

**Hands-On Computer:** NO

**Level:** Advanced

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Good working knowledge of Microsoft Excel

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Excel Shortcuts—Increasing Productivity**

Instruction on advanced Excel functions—SUMIF, COUNTIF, VLOOKUP, & others—will increase productivity of all Excel users. Special instruction on IF function with advanced uses and nested statements to make intelligent worksheets. Shortcuts, shortcuts, & more shortcuts! Mark all input cells in a worksheet with one command. Write complex formulas the easy way. (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** IT

**Speaker:** Tommy Harrington

**Vendor:** COMPUhelp

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Advanced Excel knowledge

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Excel-Based Dashboards**

"Dashboard reporting is rapidly becoming the norm for organizations seeking to improve financial and operational reporting processes. Dashboards allow recipients easy access to mission-critical data, usually in an on-demand environment, thereby allowing users to get the information they need when they need it. Excel is an ideal tool for creating high-impact dashboards. (...Contact NCACPA's Onsite Coordinator for full course description)

<b>Field of Study:</b> IT	<b>Level:</b> Advanced	<b>Recommended CPE Credit:</b> 8
<b>Speaker:</b> Karl Egnatoff	<b>Advanced Preparation:</b> None	<b>Qualifies for Ethics:</b> NO
<b>Vendor:</b> K2 Enterprises	<b>CFP Approved:</b> NO	<b>Qualifies for Yellow Book:</b> NO
<b>Hands-On Computer:</b> NO	<b>Requisite Knowledge:</b> Fundamental knowledge of Excel operations	

### **Microsoft Access 2010—Level 1**

Upon successful completion of this course, students will be able to explore the Microsoft Office Access 2010 environment; examine the components of a database; work with tables; manage data in a table; query a database; design forms; generate reports; modify the field properties of a table to streamline data entry and maintain data integrity; join tables to retrieve data from (...Contact NCACPA's Onsite Coordinator for full course description)

<b>Field of Study:</b> IT	<b>Level:</b> Basic	<b>Recommended CPE Credit:</b> 8
<b>Speaker:</b> Don Whitsett	<b>Advanced Preparation:</b> None	<b>Qualifies for Ethics:</b> NO
<b>Vendor:</b> New Horizons Computer Learning Center	<b>CFP Approved:</b> NO	<b>Qualifies for Yellow Book:</b> NO
<b>Hands-On Computer:</b> YES	<b>Requisite Knowledge:</b> Working knowledge of Windows XP	

### **Microsoft Access 2010—Level I**

Upon successful completion of this course, participants will be able to identify the basic components of an Access database and the elements of the 2010 interface, build the structure of a database, manage data in tables, query a database, design forms, and generate reports.

<b>Field of Study:</b> IT	<b>Level:</b> Basic	<b>Recommended CPE Credit:</b> 8
<b>Speaker:</b> John Sweet	<b>Advanced Preparation:</b> None	<b>Qualifies for Ethics:</b> NO
<b>Vendor:</b> Knowledge Source	<b>CFP Approved:</b> NO	<b>Qualifies for Yellow Book:</b> NO
<b>Hands-On Computer:</b> YES	<b>Requisite Knowledge:</b> Microsoft Windows operating environment	

### **Microsoft Access 2010—Level II**

Upon successful completion of this course, students will be able to streamline data entry and maintain data integrity; join tables to retrieve data from unrelated tables: create flexible queries to display specified records; allow for user-determined query criteria, and modify data using queries; improve forms; customize reports to organize the displayed information and produce (...Contact NCACPA's Onsite Coordinator for full course description)

<b>Field of Study:</b> IT	<b>Level:</b> Intermediate	<b>Recommended CPE Credit:</b> 8
<b>Speaker:</b> John Sweet	<b>Advanced Preparation:</b> None	<b>Qualifies for Ethics:</b> NO
<b>Vendor:</b> Knowledge Source	<b>CFP Approved:</b> NO	<b>Qualifies for Yellow Book:</b> NO
<b>Hands-On Computer:</b> YES	<b>Requisite Knowledge:</b> Microsoft Access Level I or demonstrated proficiency	

### **Microsoft Excel 2010 Macro Programming—Level I**

This course teaches business professionals who wish to learn how to automate work done in Excel by clicking buttons and filling in custom dialog boxes.

**Field of Study:** IT

**Speaker:** Glen Christopher

**Vendor:** Knowledge Source

**Hands-On Computer:** YES

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Microsoft Excel 2010—Advanced Excel Macros and VBA Power Programming**

This course trains business professionals who need to deploy macros and VBA-based solutions to other users and wish to develop in-depth knowledge of VBA branching and looping syntaxes, strengthen understanding of VBA functions, and use advanced variable concepts.

**Field of Study:** IT

**Speaker:** Glen Christopher

**Vendor:** Knowledge Source

**Hands-On Computer:** YES

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Successfully complete Excel 2010 Macros Level 1

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Microsoft Excel 2010—Functions, Formulas, and Cool Tools**

This new course has been developed from the content of several prior Excel classes to include the most popular topics among CPAs through the past few years.

**Field of Study:** IT

**Speaker:** Glen Christopher

**Vendor:** Knowledge Source

**Hands-On Computer:** YES

**Level:** Advanced

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Microsoft Excel 2010—Level 2**

Upon successful completion of this course, students will be able to use advanced formulas, organize worksheet and table data using various techniques, create and modify charts, analyze data using PivotTables, Slicers, and PivotCharts, insert and modify graphic objects in a worksheet, customize and enhance workbooks, and understand the Microsoft® Office Excel® environment.

**Field of Study:** IT

**Speaker:** Don Whitsett

**Vendor:** New Horizons Computer Learning Center

**Hands-On Computer:** YES

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Working knowledge of Excel 2010

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### Microsoft Excel 2010—Level 3

In this course, students will learn how to automate common tasks, apply advanced analysis techniques to more complex data sets, collaborate on worksheets with others, and share Excel data with other applications.

**Field of Study:** IT

**Speaker:** Don Whitsett

**Vendor:** New Horizons Computer Learning Center

**Hands-On Computer:** YES

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Working knowledge of Excel 2007

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### Microsoft Excel 2010—Level II

Microsoft Excel 2010 Level II is for those who wish to learn the Intermediate features of the program. Take this course if you have to create charts from data, are responsible for printing and/or distributing worksheets in your organization or to your clients (including protecting worksheets), and if you need to explore some of the advanced functions of the software.

**Field of Study:** IT

**Speaker:** John Sweet

**Vendor:** Knowledge Source

**Hands-On Computer:** YES

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Microsoft Excel Level I or demonstrated proficiency

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### Microsoft Excel 2010—Level III

Take this course if you are a sophisticated Excel user and/or need to use the advanced and powerful features of Excel's multiple worksheet/workbook functionality, collaborate with others, audit and analyze worksheet data, and create PivotTables and PivotCharts.

**Field of Study:** IT

**Speaker:** John Sweet

**Vendor:** Knowledge Source

**Hands-On Computer:** YES

**Level:** Advanced

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Microsoft Excel Levels 1 and 2 or demonstrated proficiency

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### Microsoft Excel Magic—Tips and Timesavers

Learn the skills necessary to use Microsoft Excel in a more productive manner. Create and use spreadsheets using techniques that will enhance productivity and increase speed. This course contributes toward the Microsoft Proficiency Guidelines for Excel.

**Field of Study:** IT

**Speaker:** John Sweet

**Vendor:** Knowledge Source

**Hands-On Computer:** YES

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Experience with Microsoft Windows and a basic working knowledge of Microsoft Excel

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Microsoft Office 2010—New Features**

This course covers those features of Microsoft Office 2010 that are new to the Office system, with dedicated units for the new features of each application. In Word, students will learn to use the Navigation pane and apply new text effects. In Excel they will use sparklines, filter data with slicers, and create a PivotChart. In PowerPoint they will organize slides into sections, (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** IT

**Speaker:** John Sweet

**Vendor:** Knowledge Source

**Hands-On Computer:** YES

**Level:** Update

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Microsoft Outlook 2010 Crash Course—Learn Outlook in One Day!**

This course is a fast-paced class designed for those who are familiar with the basics of Outlook and want to explore the functions and features that improve productivity in a corporate environment. In addition to covering the shortcuts and basics from the Foundations course, the Crash Course includes topics on shared calendars, forms, address book management, personal folders, (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** IT

**Speaker:** John Sweet

**Vendor:** Knowledge Source

**Hands-On Computer:** YES

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Microsoft Windows operating environment

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Microsoft Outlook 2010—New Features**

In this course, students will work with the features of Outlook 2010.

**Field of Study:** IT

**Speaker:** Daniel Wyke

**Vendor:** New Horizons Computer Learning Center

**Hands-On Computer:** YES

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Working knowledge of Microsoft Office Outlook 2010

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Microsoft PowerPoint 2010 Crash Course—Learn PowerPoint in One Day!**

Take this course if you are a self-taught PowerPoint user and want to learn about the new features as well as the many powerful features of the new PowerPoint 2010. This course is designed to teach students how to create a professional, polished presentation from start to finish. Use templates, graphics, tables, charts, and more to wow your audience and make your presentation stand out.

**Field of Study:** IT

**Speaker:** John Sweet

**Vendor:** Knowledge Source

**Hands-On Computer:** YES

**Level:** Advanced

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

**Microsoft PowerPoint 2010—Level 1**

Upon successful completion of this course, students will be able to explore the PowerPoint 2010 interface and familiarize themselves with using it to create a presentation, format text on slides, add graphical objects to a presentation, modify graphical objects on slides, work with tables in a presentation, import charts to a presentation, and prepare to deliver a presentation.

<b>Field of Study:</b> IT	<b>Level:</b> Basic	<b>Recommended CPE Credit:</b> 8
<b>Speaker:</b> Don Whitsett	<b>Advanced Preparation:</b> None	<b>Qualifies for Ethics:</b> NO
<b>Vendor:</b> New Horizons Computer Learning Center	<b>CFP Approved:</b> NO	<b>Qualifies for Yellow Book:</b> NO
<b>Hands-On Computer:</b> YES	<b>Requisite Knowledge:</b> Working knowledge of Windows XP	

**Microsoft PowerPoint 2010—Level 2**

Upon successful completion of this course, students will be able to customize the PowerPoint environment, customize a design template, add SmartArt graphics to a presentation, add special effects to a presentation, customize a slide show, collaborate on a presentation, and secure and distribute a presentation.

<b>Field of Study:</b> IT	<b>Level:</b> Intermediate	<b>Recommended CPE Credit:</b> 8
<b>Speaker:</b> Daniel Wyke	<b>Advanced Preparation:</b> None	<b>Qualifies for Ethics:</b> NO
<b>Vendor:</b> New Horizons Computer Learning Center	<b>CFP Approved:</b> NO	<b>Qualifies for Yellow Book:</b> NO
<b>Hands-On Computer:</b> YES	<b>Requisite Knowledge:</b> Working knowledge of Windows 2000 and PowerPoint 2010	

**Microsoft Project 2010—Level 1**

In this course, students create a project plan containing tasks, organize these tasks in a work breakdown structure containing task relationships, create and assign resources, and finalize the project to implement the project plan.

<b>Field of Study:</b> IT	<b>Level:</b> Basic	<b>Recommended CPE Credit:</b> 8
<b>Speaker:</b> Don Whitsett	<b>Advanced Preparation:</b> None	<b>Qualifies for Ethics:</b> NO
<b>Vendor:</b> New Horizons Computer Learning Center	<b>CFP Approved:</b> NO	<b>Qualifies for Yellow Book:</b> NO
<b>Hands-On Computer:</b> YES	<b>Requisite Knowledge:</b> An understanding of project management concepts	

**Microsoft Project 2010—Level 2**

Upon successful completion of this course, students will be able to exchange project plan data with other applications, update a project plan, manage project costs, report project data visually, and reuse project plan information.

<b>Field of Study:</b> IT	<b>Level:</b> Intermediate	<b>Recommended CPE Credit:</b> 8
<b>Speaker:</b> Don Whitsett	<b>Advanced Preparation:</b> None	<b>Qualifies for Ethics:</b> NO
<b>Vendor:</b> New Horizons Computer Learning Center	<b>CFP Approved:</b> NO	<b>Qualifies for Yellow Book:</b> NO
<b>Hands-On Computer:</b> YES	<b>Requisite Knowledge:</b> A working knowledge of Microsoft Project	

### **Microsoft Word 2010 Crash Course—Learn Word in One Day!**

Finally! This new course covers all the features that most people struggle with on those hard-to-create-and-maintain documents including creating headers and footers; using section breaks; creating tables, using graphic objects; and creating and using styles. Take this course if you are a self-taught Word user or have not had formal training for this version to learn the new and (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** IT

**Speaker:** John Sweet

**Vendor:** Knowledge Source

**Hands-On Computer:** YES

**Level:** Advanced

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **PDF Documents—Beyond the Basics**

This seminar focuses on how to use Adobe Acrobat for creating and using Portable Document Format (PDF) files. PDF is the recognized standard for exchanging digital documents and has become the standard document format for many electronic document management systems. Understanding how to use PDFs effectively is rapidly becoming a necessary business skill. (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** IT

**Speaker:** Val Steed

**Vendor:** K2 Enterprises

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Fundamental knowledge of PDFs

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **QuickBooks 2011 Essentials**

This course provides practical exercises for everything from setting up a new company file and chart of accounts to working with asset and liability accounts. Work through the exercises using QuickBooks Pro, QuickBooks Premier General Business Edition, or QuickBooks Premier Accountant Edition. Reduce frustration associated with trial and error and increase your proficiency with QuickBooks 2011!

**Field of Study:** IT

**Speaker:** Glen Christopher

**Vendor:** Knowledge Source

**Hands-On Computer:** YES

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **QuickBooks 2011 Extreme**

Discover everything QuickBooks can do for you, including integration with Microsoft Excel and Microsoft Word. Solve your toughest problems and get your questions answered. Attendees can work through exercises using QuickBooks Pro, QuickBooks Premier General Business Edition, or QuickBooks Premier Accountant Edition while previewing screens and features in any Premier edition.

**Field of Study:** IT

**Speaker:** Glen Christopher

**Vendor:** Knowledge Source

**Hands-On Computer:** YES

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Basic QuickBooks knowledge or QuickBooks 2011—Level 1

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### QuickBooks 2011—Level 1

In this course, students will examine how to use QuickBooks to best meet the needs of their business, by being introduced to its basic features.

**Field of Study:** IT

**Speaker:** Kevin Strezio

**Vendor:** New Horizons Computer Learning Center

**Hands-On Computer:** YES

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** This course requires a basic understanding of the computer operating system you are using

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### QuickBooks 2011—Level 2

This course shows how to use the advanced features in QuickBooks to create estimates, convert estimates into invoices, process sales tax and payroll, generate reports, and work with other applications.

**Field of Study:** IT

**Speaker:** Don Whitsett

**Vendor:** New Horizons Computer Learning Center

**Hands-On Computer:** YES

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** QuickBooks 2009 Level 1

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### Tech Tips—Enhance Your Computing Savvy!

Take this class to enhance your PC skills. Topics include Windows settings, browsers and toolbar clutter, file and folder organization, data storage and security, data loss prevention, password management, Internet security, email security and management, cloud computing, mobile device synchronization, buying the right PC, Microsoft Office tips, and hardware and software (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** IT

**Speaker:** Steve Denning

**Vendor:** Knowledge Source

**Hands-On Computer:** YES

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### Technology Tips for Small Business Computer Networking

Take this class to learn about the many considerations in selecting and implementing a network solution for your office. Each component of a small business network is thoroughly addressed. Topics include types of networks, server hardware and software, core network devices, wireless access points, storage considerations, data loss prevention, sharing resources, printers, remote (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** IT

**Speaker:** Steve Denning

**Vendor:** Knowledge Source

**Hands-On Computer:** YES

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Tommy Harrington's Extreme Excel**

In this course, Tommy will give advanced instruction on the most useful Excel functions. You will increase your knowledge and productivity with Excel by learning to manage lists and databases, prepare presentations and charts, and automate many routine tasks with Excel macros.

**Field of Study:** IT

**Speaker:** Tommy Harrington

**Vendor:** COMPUhelp

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Windows 7—Level 1**

Students will log on to Windows 7, explore its interface, identify the different components in the interface, customize the Windows 7 desktop, manage files and folders, use the common tools and programs available in Windows 7, and browse the Internet.

**Field of Study:** IT

**Speaker:** Daniel Wyke

**Vendor:** New Horizons Computer Learning Center

**Hands-On Computer:** YES

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Windows 7—Level 2**

Upon successful completion of this course, students will be able to customize the Windows 7 environment, configure user accounts, work with applications in Windows 7, work with devices, manage networks, secure your system data, enhance system performance, and work with Internet Explorer 8.

**Field of Study:** IT

**Speaker:** Daniel Wyke

**Vendor:** New Horizons Computer Learning Center

**Hands-On Computer:** YES

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Working knowledge of Windows 7

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Word and PowerPoint Update**

This course will fully explain the new features of Microsoft Word and PowerPoint 2007. Create letters, memos, and documents in Word for financial reporting and learn to format characters, paragraphs, and documents. Make great-looking presentations in PowerPoint quickly and easily by reusing custom layouts. Learn tips and shortcuts to save hours each week.

**Field of Study:** IT

**Speaker:** Tommy Harrington

**Vendor:** COMPUhelp

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

**Word Shortcuts, Tips, and Tricks**

Create letters, memos, and other documents. Learn to format characters, paragraphs, and documents. Save, open, and print documents. Learn shortcuts for editing text with Drag and Drop and other advanced shortcuts. Work with tables. This seminar is appropriate for all versions of Microsoft Word.

**Field of Study:** IT**Speaker:** Tommy Harrington**Vendor:** COMPUhelp**Hands-On Computer:** NO**Level:** Basic**Advanced Preparation:** None**CFP Approved:** NO**Requisite Knowledge:** None**Recommended CPE Credit:** 4**Qualifies for Ethics:** NO**Qualifies for Yellow Book:** NO



# **Management**

## **(MG)**



### **2011 Labor and Employment Law Update**

Modern businesses exist in a complex environment of labor and employment laws. Learn from experienced practitioners how to comply with and understand these laws applying to organizations and clients. New laws and recent legal developments will be covered along with our interpretation of existing compliance issues.

**Field of Study:** MG

**Speaker:** David Siler

**Vendor:** Distinctive Human Resources

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Advanced Controller and CFO Skills**

If you want to be secure in your position as the “financial sheriff,” you must be able to document your worth to the company’s leaders by exhibiting the advanced skills that help you add value and contribute to the success of the organization. In this advanced course, you will experience the ten critical skills that add value to your company and boost your career, so you quickly (...Contact NCACPA’s Onsite Coordinator for full course description)

**Field of Study:** MG

**Speaker:** James Lindell

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Advanced

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Basic or Beginning Controllers course in lieu of experience

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Analyzing Costs, Productivity, and Efficiency—Three Ways to Boost Your Bottom Line**

This hands-on workshop gives you specific ways to immediately impact an organization’s bottom line. These proven techniques for plugging the most overlooked profit leaks come from specific strategies for lowering costs, improving productivity, or gaining efficiencies. We will explore the different methods in depth to show how easy they are to implement, yet how huge a bottom-line impact they have. Each tool or strategy is one to pass on to clients and co-workers.

**Field of Study:** MG

**Speaker:** James Lindell

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Building Success as a Professional Manager—Skills for Sustaining Success**

Today’s effective financial leaders must exhibit ongoing credibility and adaptability to maintain their effectiveness successfully. Facts and circumstances are constantly changing in today’s business environment. While the fundamentals of successful financial management do not vary, the landscape in which finance professionals operate is in constant flux. (...Contact NCACPA’s Onsite Coordinator for full course description)

**Field of Study:** MG

**Speaker:** Diane White

**Vendor:** Executive Education Inc.

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** Bring a calculator

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Coaching Skills for CPAs, Controllers, and Financial Managers**

Professional athletes have multiple coaches—business people rarely utilize coaches. This course will focus on creating the coaching skills that are required to raise the performance of your employees.

**Field of Study:** MG

**Speaker:** James Lindell

**Vendor:** Thorsten Consulting Group, Inc.

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Compensation Law Compliance for CPAs**

Dive deep into the “mother” of all compensation laws—the Fair Labor Standards Act (FLSA). Explore the following areas of concern—FLSA coverage, minimum wage, new white-collar exemption (part 541), exempt vs. non-exempt status, overtime, hours of work, child labor restrictions, legal penalties/violations, exceptions, wage & hour investigations, and more.

**Field of Study:** MG

**Speaker:** David Siler

**Vendor:** Distinctive Human Resources

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Controller’s Update—Latest Trends for Today’s Financial Manager**

Let us bring you up to date on the latest trends and issues in ethics, accounting, corporate finance, treasury management, and business systems. Learn about leading-edge topics in managerial accounting and finance in a session that is packed with tips and how-to guidance for immediate use. More than half of the material is new every year, and existing topics are updated for new approaches in implementation or application. Put these hot new tips to work in your company now.

**Field of Study:** MG

**Speaker:** James Lindell

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Experience in financial management of a small or midsize company

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Essential Skills for the Survival and Growth of Your Organization**

Existing skills are becoming obsolete at an accelerating rate. Many management systems were designed to meet the needs of a more stable industrial environment that experienced only incremental changes. Obviously, these are ill-equipped for today. Gone are the days when the financial staff were primarily viewed as the gatekeepers of the organization, responsible for counting/calculating results and providing a series of reports. The rate of change in the responsibilities of the finance group has accelerated and will continue to accelerate faster than available resources. This will require non-traditional skills such as establishing an innovative environment and managing financial and cultural issues, as well as leading efforts to continuously improve the organization’s competitive position.

**Field of Study:** MG

**Speaker:** John Cox

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Management experience in accounting, finance, or operations

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Excel Budgeting and Forecasting Techniques**

Recent research reveals that nearly 75% of North American companies use Excel as their primary budgeting and forecasting tool. This course is designed to provide participants with the Excel knowledge and skills necessary to prepare budgets and forecasts more efficiently and with greater accuracy. (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** MG

**Speaker:** Val Steed

**Vendor:** K2 Enterprises

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Fundamental knowledge of Excel operations

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Financial Forecasting—Planning for Success**

The secret to success is in the planning! With CPAs constantly being asked to plan the company's future, forecasting is an area to demonstrate your special value. This course provides the basic tools necessary to project the balance sheet and statements of income and cash flows. Learn to determine maximum sustainable growth, predict external funds needed, identify the evidence of growth mismanagement, and more.

**Field of Study:** MG

**Speaker:** James Lindell

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Familiarity with basic financial statements

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Financial Management—Skills for Success in the Corporate World**

Every year thousands of professionals transition out of public accounting. No matter where these aspiring CPAs go, the realization is the same. They are not fully prepared for "life after the CPA firm." Newly transitioned employees want to make an immediate impact on their new organizations, and the new organizations want them to contribute immediately. (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** MG

**Speaker:** Richard Karwic

**Vendor:** Executive Education Inc.

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** Bring a calculator

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Hiring Right ...The First Time**

How often have you made a hiring decision believing the new employee could "walk on water" only to discover that, within 3–6 months, you needed to terminate him/her? Selecting the best candidate involves getting the right information to predict the candidate's potential future success. Eliciting behavioral information will also protect your organization from potential charges of discrimination.

**Field of Study:** MG

**Speaker:** Sheila Birnbach

**Vendor:** Sheila Birnbach

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 2

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **How to Deal with Underperformance and Difficult Employee Situations**

Have you ever counseled an employee about his/her performance only to find that behavior continuing? When you counsel an employee, how do you get his/her commitment to change the problem? Do you feel as if you're doing all the talking in a counseling session? Do you tend to procrastinate on counseling an employee for fear of conflict or tension—or tears? (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** MG

**Speaker:** Sheila Birnbach

**Vendor:** Sheila Birnbach

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 2

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **I've Hired the Best Candidate. Now What?**

We all know the importance of making a good first impression and the short period of time it takes to make one. Have you ever hired a new employee only to have him or her leave within a short time after he or she joined you? Is your organization making a good first impression on new hires? Are your behaviors on his/her first week on the job consistent with your values? (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** MG

**Speaker:** Sheila Birnbach

**Vendor:** Sheila Birnbach

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 2

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Identify, Explain, & Present Financial Information to Non-Accountants**

Do your business associates and/or clients have difficulty understanding the financials? Are they making decisions without comprehending the financial impact of their actions? They frequently "smother in detail and crave for knowledge." This high-impact interactive program is loaded with practical ideas and techniques to help associates and clients make better business decisions. (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** MG

**Speaker:** Jack Park

**Vendor:** Financial Insights

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Lean Office**

Many organizations/offices are faced with the prospect of trimming costs and increasing productivity. Applying the time-tested concepts involved in the Lean enterprise to an office environment is one way to achieve a more productive and efficient workplace. This program will introduce the CPA to these topics—what is a Lean office? (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** MG

**Speaker:** David Siler

**Vendor:** Distinctive Human Resources

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Managing People, Performance, and Pressure—A Workshop for CPAs in Industry**

If you are like most CPAs, you probably did not receive a substantial amount of training, coaching, and mentoring to prepare you to be a first-time manager. So you probably did what most managers do when put on the spot—you improvised (otherwise known as “trial by fire,” or “on-the-job training”). As a result, you developed a management style or “management modus operandi” that (...Contact NCACPA’s Onsite Coordinator for full course description)

**Field of Study:** MG

**Speaker:** Simon D’Arcy

**Vendor:** Frank Sanitate Associates

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Only Financial Officer—Skills for Smaller Company Financial Managers**

The title “Chief Financial Officer” is not an accurate description of what many financial managers do because the word “chief” implies that the company has more than one. This seminar covers four major topics of importance to the financial manager who must do it all. We have designed “Only Financial Officer” to give financial managers in small to medium-sized companies the high-level (...Contact NCACPA’s Onsite Coordinator for full course description)

**Field of Study:** MG

**Speaker:** Richard Karwic

**Vendor:** Executive Education Inc.

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** Bring a calculator

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Redefining Controllership Skills for a Challenging World**

You will be facing the most challenging years ahead, between global competitive pressures, disgruntled support staff, stressed-out senior management, and difficult cash environments. As a controller in this fast-changing world, you have the responsibility of carefully balancing technical and financial skills with effective leadership skills. (...Contact NCACPA’s Onsite Coordinator for full course description)

**Field of Study:** MG

**Speaker:** Robert Monaghan

**Vendor:** Monaghan Group, PLLC

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Taking Planning and Budgeting to a Higher Level—Critical Skills to Make the Trip**

Budgeting is both an art and a science. Learn how to apply leading-edge tools and methods to make your planning process more strategic and your budget process more flexible. Your budget should not lead to turf wars over precious and scarce resources. Learn how to build a set of decision-making processes early and how to use them to make smart allocation choices that benefit the entire organization. Have your planning and budget processes work to increase higher earning potential.

**Field of Study:** MG

**Speaker:** John Cox

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** At least two years’ experience preparing budgeting and conducting planning

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

**The Cure for Your HR Headaches**

Are you frustrated by employees who don't do what you expect, or employees whose behavior makes you question what they were thinking? Are you lying awake at 2:00 am worrying about staffing issues at the office or trying to find the courage to discipline or terminate an unproductive employee? Are you wondering how to deal with an employee "attitude" that poisons your office? (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** MG**Speaker:** Sheila Birnbach**Vendor:** Sheila Birnbach**Hands-On Computer:** NO**Level:** Basic**Advanced Preparation:** None**CFP Approved:** NO**Requisite Knowledge:** None**Recommended CPE Credit:** 2**Qualifies for Ethics:** NO**Qualifies for Yellow Book:** NO**Trends in Human Resources**

This course predicts HR leadership principles and techniques. Topics include future developments in compensation plan design, effective staffing strategies, assessing employee skills, employee relations for tomorrow's workforce, the changing employee/employer relationship, and workplace communication. Topics discussed will be broken into current fads vs. sustainable issues of substance.

**Field of Study:** MG**Speaker:** David Siler**Vendor:** Distinctive Human Resources**Hands-On Computer:** NO**Level:** Intermediate**Advanced Preparation:** None**CFP Approved:** NO**Requisite Knowledge:** None**Recommended CPE Credit:** 8**Qualifies for Ethics:** NO**Qualifies for Yellow Book:** NO

# **Personal Development (PD)**



### **“Four Rs” of Communicating—Talking, Listening, Writing, & Presenting**

Everyone has heard of the “three Rs”—Reading, ‘Riting and ‘Rithmetic. This course highlights the CPAs’ “four Rs” that are key to their success in communicating. A recent survey shows that at least six hours of every 40-hour week is wasted to poor communication between staff and managers. Of all communication, 70% to 90% is misunderstood. As a manager or business owner with (...Contact NCACPA’s Onsite Coordinator for full course description).

**Field of Study:** PD

**Speaker:** Scott Shackleton

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Management experience in industry or public practice

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Achieving Balance in Work and Life**

Due to the constant stress of a fast-paced life, overwork, and family demands, it’s easy to feel one’s life is out of balance. When this happens, all areas of your life can suffer. By learning key methods for setting priorities and goals, overcoming stress, and deciding what’s most important to you, you can achieve new levels of balance and greater results. Having more balance in (...Contact NCACPA’s Onsite Coordinator for full course description)

**Field of Study:** PD

**Speaker:** Jonathan Robinson

**Vendor:** Frank Sanitate Associates

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Creating and Maintaining Successful Work Relationships**

Intra-office conflict got you down? Then this seminar is for you. Today’s worker spends much more time at work than at home. Because of this, work relationships are more prominent in our lives. Good work relationships, therefore, should be a goal for all, to ensure high levels of productivity, job satisfaction, and performance. This seminar shows participants the role that personality or “style” plays in understanding ourselves and others. The participant will learn how to effectively communicate with and motivate other “styles.”

**Field of Study:** PD

**Speaker:** Holly Basso

**Vendor:** Premier Training and Consulting

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Dealing with Difficult People—Communication Strategies for CPAs**

Let’s face it—some people can be hard to work with, including clients, managers, partners, staff, or even blamers and whiners in your office who squander precious time and energy gossiping to their cohorts. People working in the accounting field get challenged by more difficult behaviors than we want to admit. Spending a day with this acclaimed national presenter in mastering (...Contact NCACPA’s Onsite Coordinator for full course description)

**Field of Study:** PD

**Speaker:** Simon D’Arcy

**Vendor:** Frank Sanitate Associates

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Don't Go to Work Unless It's Fun!**

How often do you say, "I can't wait to get to work"? Usually it is the other way around. Yet there are very specific actions you can take and attitudes that can be formed so that you can greatly enhance your enjoyment at work. Increased productivity is a by-product as well. Learn to create an organization where everyone looks forward to coming to work every day!

**Field of Study:** PD

**Speaker:** Frank Sanitate

**Vendor:** Frank Sanitate Associates

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Effective Workplace Communication**

How you communicate with bosses, subordinates, colleagues, clients, and the opposite gender can make or break your career! You have taken all the technical education courses you need to be successful in auditing, tax, and consulting, but your boss passed you over because you are not taken seriously. What's missing? It's probably your communication skills. See how blending a mix of communication styles can turn communication breakdowns into breakthroughs. Learn how to speak so you are heard, and listen so you get the real message. Discover how to open lines of communication, make productive meetings, give persuasive presentations, and more.

**Field of Study:** PD

**Speaker:** John Cox

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Supervisory responsibilities

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Enhancing the Success of Your Organization With a Winning Culture**

In this period of global competition and rapid change, world-class organizations have learned that two crucial things are needed for success—excellent customer service and maximum efficiency. The most successful organizations have effectively established cultures where all employees are committed to these dual tasks, giving customers the ultimate in service and accomplishing this in the most efficient manner. Gain an understanding of organizational cultures and how to promote the team culture for maximum customer service and efficiency. Learn detailed suggestions and models on how to change culture and formulate the winning culture within both the finance function and the entire organization.

**Field of Study:** PD

**Speaker:** James Lindell

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Management experience in accounting, finance, or operations

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Financial Leadership 2011**

Today's financial leaders must help organizations create value, not simply measure it. Financial people play key roles in transforming visions and strategies into action programs at every level of the organization. This seminar deals primarily with practical day-to-day leadership applications, not broad theoretical concepts. (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** PD

**Speaker:** Jack Park

**Vendor:** Financial Insights

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Growing Your Business with Social Media**

This class will help you enhance your exposure on the web and create a strong Facebook presence which can lead to added business from your customers' friends and acquaintances. Learn the best direction and how to avoid damaging your brand by inappropriate use of Facebook or delegating it without understanding enough to know if your impact is positive or negative. Also learn the benefits of global and local networking through LinkedIn. Your customers want to "pre-screen" you before they trust you with their hard earned money and these tools give them a way to do that. You will receive a good working knowledge of LinkedIn for increasing your business, your sales, and advancing your career. Many of us already have busy lives and we will show you how to get the maximum benefit without spending a lot of time on the web.

**Field of Study:** PD

**Speaker:** Martin Brossman

**Vendor:** CoachingSupport.com

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Negotiating Skills for Finance Professionals**

The ability to negotiate is not something people are born with—it is a skill that grows with practice. Negotiating is not compromising nor creating a win/lose outcome. In this interactive workshop, discover that you are better able to negotiate for what you want when you want it by knowing the four critical skills of P.A.R.C. Negotiate your way through any situation—buying (...Contact NCACPA's Onsite Coordinator for full course description).

**Field of Study:** PD

**Speaker:** Al Ward

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Experience in financial management

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Personal Leadership Skills—Personality, Memory, and NLP**

People skills are the most significant skill that professionals need to develop and yet are often the last skill perfected. This course will help participants understand personality types and successful interactions with clients, peers, and family. In addition, participants will learn neuro-linguistic programming and develop the ability to better understand nonverbal language, which is of key importance in communication. Participants will also learn techniques to enhance their memory and to improve the ability to recall key facts.

**Field of Study:** PD

**Speaker:** James Lindell

**Vendor:** Thorsten Consulting Group, Inc.

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Problem Solving and Creative Thinking**

As a CPA, your most important skill is your ability to solve problems—both for clients and for yourself. Understanding the root of problems and the techniques to resolve them is a learnable skill. This workshop will help you tap into your ability to break out of old paradigms—old ways of thinking—to create powerful ways of thinking and problem-solving.

**Field of Study:** PD

**Speaker:** Frank Sanitate

**Vendor:** Frank Sanitate Associates

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Shortcuts to Success—14 Best Tools for Personal and Professional Growth**

Professionals have worked years to develop techniques and practices that are most effective in helping people to succeed both in business and personal life. This workshop distills 14 of those techniques, which participants can begin to practice immediately.

**Field of Study:** PD

**Speaker:** Jonathan Robinson

**Vendor:** Frank Sanitate Associates

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Successful Presentation Skills for the CPA**

Are you afraid of making presentations? Does your success depend on your ability to present and persuade groups of people? If so, then Successful Presentation Skills for the CPA is an ideal course to improve your “stage” skills.

**Field of Study:** PD

**Speaker:** James Lindell

**Vendor:** Thorsten Consulting Group, Inc.

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** To have experienced “butterflies” in the stomach prior to delivering a speech or presentation

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **That’s Not What I Said!—Effective Workplace Communication**

How you communicate with bosses, subordinates, colleagues, clients, and the opposite gender can make or break your career! You have taken all the technical education courses to be successful in auditing, tax, and consulting, but your boss passed you over because you are not taken seriously. What’s missing? It’s probably your communication skills. See how blending a mix of (...Contact NCACPA’s Onsite Coordinator for full course description).

**Field of Study:** PD

**Speaker:** Bryant Carthan

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Supervisory responsibilities

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **The Leadership Challenge—Leading Change and Inspiring Others**

Leaders are not born; they are made, and usually self-made.—Warren Bennis

Is your team, department, or organization going through a period of change or transition? Watch out if you think the answer is “no.” Whether obvious or not, change is happening. The only question is, are you leading the way through it? Whether or not you believe that you possess the qualities of a great (...Contact NCACPA’s Onsite Coordinator for full course description)

**Field of Study:** PD

**Speaker:** Simon D’Arcy

**Vendor:** Frank Sanitate Associates

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **The Leadership Secrets of Football’s Master Coaches**

There are multiple common threads between championship football teams and peak performance organizations. Many of the high-impact strategies of America’s most successful football coaches can be adapted by CPAs to improve an organization’s performance. Successes on the gridiron and in the boardroom are often enhanced by similar tactics. (...Contact NCACPA’s Onsite Coordinator for full course description)

**Field of Study:** PD

**Speaker:** Jack Park

**Vendor:** Financial Insights

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Time Mastery for CPAs—Ways to Maximize Your Productivity and Satisfaction**

You don’t ever again have to say, “Gee, what happened to my time today?” You can not only gain control over your space, your schedule, your priorities, and your life—you can do it with grace and ease. That is what mastery is about! This workshop can change your life.

**Field of Study:** PD

**Speaker:** Frank Sanitate

**Vendor:** Frank Sanitate Associates

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Triple Your Memory and Confidence and Halve Your Stress**

CPAs are no longer just “bean counters.” In order to be successful, they have to be able to learn faster, feel confident working in difficult situations, and overcome stress efficiently and effectively. Fortunately, each of these skills can be quickly learned in a single day. Using the latest “inner technology,” participants will be guided in powerful and practical ways to triple (...Contact NCACPA’s Onsite Coordinator for full course description)

**Field of Study:** PD

**Speaker:** Jonathan Robinson

**Vendor:** Frank Sanitate Associates

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO



# **Specialized Knowledge (SK)**



**AICPA's Trusted Business Advisor Workshop**

Attend the Trusted Business Advisor<sup>SM</sup> Workshop, and become part of a growing group of CPAs who are learning practical tools, techniques and skills for strategic client planning. Through solution-driven sessions, you'll learn how to translate the issues clients face into opportunities for consulting with them — by hearing first-hand why some clients switch firms (...Contact NCACPA's Onsite Coordinator for full course description).

**Field of Study:** SK**Speaker:** Instructor TBD**Vendor:** AICPA**Hands-On Computer:** NO**Level:** Advanced**Advanced Preparation:** None**CFP Approved:** NO**Requisite Knowledge:** None**Recommended CPE Credit:** 8**Qualifies for Ethics:** NO**Qualifies for Yellow Book:** NO**Auto Dealers—Special Tax And Accounting Considerations**

The "Car Business" is as unique as it appears. Big dollars and complex transactions make informed accounting services imperative. A CPA who has the knowledge required to serve this special market can make a real difference in the client's relationships with banks and vehicle manufacturers, not to mention a difference in the net, after tax, \$\$\$ left over for the client the dealer. (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** SK**Speaker:** Lynn Nichols**Vendor:** Nichols Patrick CPE, Inc.**Hands-On Computer:** NO**Level:** Intermediate**Advanced Preparation:** None**CFP Approved:** NO**Requisite Knowledge:** None**Recommended CPE Credit:** 4**Qualifies for Ethics:** NO**Qualifies for Yellow Book:** NO**Banking Regulations**

This course updates you on Dodd-Frank and changes to existing banking regulations. The course will primarily focus on those regulations that affect the consumer.

**Field of Study:** SK**Speaker:** Tamara Milliken**Vendor:** Tamara Milliken**Hands-On Computer:** NO**Level:** Basic/Intermediate**Advanced Preparation:** None**CFP Approved:** NO**Requisite Knowledge:** General banking knowledge**Recommended CPE Credit:** 4**Qualifies for Ethics:** NO**Qualifies for Yellow Book:** NO**Business Valuation in Divorce in North Carolina**

The course will review all 20-plus reported cases in divorce business valuation in North Carolina, focusing on the most critical cases for the business valuator to know.

**Field of Study:** SK**Speaker:** Carolyn Woodruff**Vendor:** Carolyn Woodruff**Hands-On Computer:** NO**Level:** Intermediate**Advanced Preparation:** None**CFP Approved:** NO**Requisite Knowledge:** None**Recommended CPE Credit:** 4**Qualifies for Ethics:** NO**Qualifies for Yellow Book:** NO

### **Construction Contractors—Special Tax and Accounting Considerations**

This program explains and illustrates work-in-process, over- and under-billing, classification of current vs. long-term assets and liabilities, contractor-specific disclosure rules, FIN 46R, SFAS 109, FIN 48, percentage of completion, completed contract method, “look back” rules, disclosure of “uncertain tax positions,” Section 199, and unique audit program and financial statements.

**Field of Study:** SK

**Speaker:** Lynn Nichols

**Vendor:** Nichols Patrick CPE, Inc.

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Economic Outlook—Quantitative Easing, Fiscal Deficits, and Trade Deficits**

This course will begin by summarizing recent economic and financial developments. We will then consider the economics of persistent budget deficits and steps to reduce them, the consequences of quantitative easing by the Federal Reserve, the necessary steps to prevent inflationary repercussions, trade deficits, and external borrowing. Then we will turn to a consideration of alternative scenarios for monetary and fiscal policy and their economic consequences. Finally, we will consider the most likely economic developments over the coming year and their effects.

**Field of Study:** SK

**Speaker:** John Lapp

**Vendor:** John Lapp

**Hands-On Computer:** NO

**Level:** Update

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** General knowledge of economic conditions, financial markets, and investments

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Essential Governance Training—Part 1**

This session will discuss the important roles and responsibilities of nonprofit board members.

**Field of Study:** SK

**Speaker:** Marci Thomas

**Vendor:** Nonprofit Board Resource

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Essential Governance Training—Part 2**

This session will discuss the uncertainty that nonprofits face today and how to address the internal and external risks by performing a risk assessment and determining how those risks should be mitigated. Nonprofits often do not think broadly enough in identifying what could go wrong, and it’s the things that the board doesn’t know that can hurt them. (...Contact NCACPA’s Onsite Coordinator for full course description)

**Field of Study:** SK

**Speaker:** Marci Thomas

**Vendor:** Nonprofit Board Resource

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Excel Functions, Macros, & Data Commands—The 3 Most Important Areas**

This Intermediate to Advanced Excel course focuses on the three most important areas of Excel—functions, macros, and data commands. Participants will receive a complete list and detailed description for all Excel functions—your instructor will present demonstrations and discussions for using all functions most relevant to the CPA. (...Contact NCACPA's Onsite Coordinator for full course description)

<b>Field of Study:</b> SK	<b>Level:</b> Intermediate	<b>Recommended CPE Credit:</b> 8
<b>Speaker:</b> Carlton Collins	<b>Advanced Preparation:</b> None	<b>Qualifies for Ethics:</b> NO
<b>Vendor:</b> AdvisorCPE	<b>CFP Approved:</b> NO	<b>Qualifies for Yellow Book:</b> NO
<b>Hands-On Computer:</b> NO	<b>Requisite Knowledge:</b> Basic knowledge of any version of Excel	

### **Financial Guide to Divorce in North Carolina**

This course will provide an overview of the divorce litigation environment in North Carolina, divorce taxation, and North Carolina divorce law.

<b>Field of Study:</b> SK	<b>Level:</b> Intermediate	<b>Recommended CPE Credit:</b> 4
<b>Speaker:</b> Carolyn Woodruff	<b>Advanced Preparation:</b> None	<b>Qualifies for Ethics:</b> NO
<b>Vendor:</b> Carolyn Woodruff	<b>CFP Approved:</b> NO	<b>Qualifies for Yellow Book:</b> NO
<b>Hands-On Computer:</b> NO	<b>Requisite Knowledge:</b> None	

### **From Personnel Mgr to Human Capital Officer—The Transition to Strategic HR**

In this course, we will state the nature of change in Human Resources (HR) today, identify the most time-consuming HR activities, analyze critical business processes, address increasing administrative requirements, and discuss how strategic HR management is critical to the success of the organization.

<b>Field of Study:</b> SK	<b>Level:</b> Basic	<b>Recommended CPE Credit:</b> 2
<b>Speaker:</b> Heather Sperduto	<b>Advanced Preparation:</b> None	<b>Qualifies for Ethics:</b> NO
<b>Vendor:</b> ADP	<b>CFP Approved:</b> NO	<b>Qualifies for Yellow Book:</b> NO
<b>Hands-On Computer:</b> NO	<b>Requisite Knowledge:</b> None	

### **Long-Term Care Financing—Knowing and Evaluating the Options**

We're hearing about "Long-Term Care" everywhere. The boomers are concerned about their parents now and themselves in the future. Employers have employees who are caring for parents and asking who will care for them in the future. Regular health insurance doesn't pay for long-term care, Medicare pays only for short-term care, and it's tougher to qualify for Medicaid. What are the options?

<b>Field of Study:</b> SK	<b>Level:</b> Basic	<b>Recommended CPE Credit:</b> 8
<b>Speaker:</b> Betty Doll	<b>Advanced Preparation:</b> None	<b>Qualifies for Ethics:</b> NO
<b>Vendor:</b> Betty Doll	<b>CFP Approved:</b> NO	<b>Qualifies for Yellow Book:</b> NO
<b>Hands-On Computer:</b> NO	<b>Requisite Knowledge:</b> None	

### Physician Finances

If you are presently doing tax and accounting work for physicians and want to identify special MAS projects they need that you can provide, then sign up for this program. Identify opportunities to provide valuable consulting services in practice management cost structure and collections and keep pace with changes in health care delivery. (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** SK

**Speaker:** Eric Burgmaier

**Vendor:** Nichols Patrick CPE, Inc.

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### Professional Issues Update

This session will cover major issues affecting our profession. Topics will include matters being discussed in the US Congress and NC General Assembly. What are our standard setters and regulators up to? What is happening on the international scene that will affect you? What are the latest actions by the NC State Board of CPA Examiners?

**Field of Study:** SK

**Speaker:** Max Mukelabai

**Vendor:** NCACPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 2

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### Tech Update for CPAs 2011—The Latest Computers, Apps, Internet, & Gadgets

One of the highest rated CPE courses available today, this full day technology update is dedicated to complete coverage of the critical technology topics most important to CPAs, including computers, printers, software, operating systems, networking, wireless devices, technology strategies, security measures, Internet solutions, website solutions and remote access tools. (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** SK

**Speaker:** Carlton Collins

**Vendor:** AdvisorCPE

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** No computer experience required; suitable for all levels of experience

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### Technology Symposium 2011—The Best Material from 8 Technology CPE Courses

"This full-day course features the very best material from eight of J. Carlton Collins's top-rated CPE courses, as follows:

1. Excel Data Analysis and Financial Reporting—Excel provides specialized data tools for analyzing data and generating financial reports, yet surveys show that most CPAs are unaware of these tools or don't know how to use them. (...Contact NCACPA's Onsite Coordinator for full course description)

"

**Field of Study:** SK

**Speaker:** Carlton Collins

**Vendor:** AdvisorCPE

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **The Rainmaker Academy Workshop**

Selling is a process. All professions are inundated with workshops that inspire in the short-term but rarely produce long-term, transformational results. The basic differentiator between The Rainmaker Academy and most sales and marketing programs is that WE TRANSFORM THE CULTURE of accounting firms. Our documented record of success has been responsible for over \$600 million. (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** SK

**Speaker:** Instructor TBD

**Vendor:** The Rainmaker Academy

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 6

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Trucking Companies—Special Tax and Accounting Considerations**

This program explains and illustrates special issues facing the motor freight transportation industry, including multi-state taxations, worker classification of drivers, prepaid tires, rebuilt wrecks, other revenue equipment, economic performance, loss and damage claims, deposit premiums, revenue recognition, depreciation, federal reporting requirements, and other regulatory issues.

**Field of Study:** SK

**Speaker:** Lynn Nichols

**Vendor:** Nichols Patrick CPE, Inc.

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Workers' Compensation Services for Small Business**

In this class, we will define Workers' Compensation, its policies, coverage, and parts/benefits; state the current market conditions; and identify benefits to employer and employee liability concerns.

**Field of Study:** SK

**Speaker:** Heather Sperduto

**Vendor:** ADP

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 2

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO



# **Taxation**

## **(TX)**



### **2010 Health Care Reform Act—Critical Tax and Insurance Ramifications for You, Your Business, and Your Clients**

Dramatic and significant tax and health insurance changes are coming to America! The nearly \$1 trillion, 10-year cost of the Patient Protection and Affordable Care and Reconciliation Acts of 2010 will change the way health insurance is delivered and how we will pay for it. Be informed of these changes and get tips for strategies to best deal with them.

**Field of Study:** TX  
**Speaker:** Steve Lustig  
**Vendor:** AICPA  
**Hands-On Computer:** NO

**Level:** Basic  
**Advanced Preparation:** None  
**CFP Approved:** NO  
**Requisite Knowledge:** None

**Recommended CPE Credit:** 4  
**Qualifies for Ethics:** NO  
**Qualifies for Yellow Book:** NO

### **2011 Annual Tax Planning Guide for S Corporations, Partnerships, and LLCs**

As long as LLCs, partnerships, and S Corporations form the backbone of many CPAs' practice, in-depth knowledge of all tax aspects of these entities will be essential. The purpose of this practical course is to focus on planning issues in creating, operating, and liquidating S Corporations, partnerships, and LLCs. This course is essential for CPAs in public accounting and industry (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** TX  
**Speaker:** James Vastarelli  
**Vendor:** Surgent McCoy CPE, LLC  
**Hands-On Computer:** NO

**Level:** Intermediate  
**Advanced Preparation:** None  
**CFP Approved:** NO  
**Requisite Knowledge:** A basic course in partnership theory and S Corporation theory

**Recommended CPE Credit:** 8  
**Qualifies for Ethics:** NO  
**Qualifies for Yellow Book:** NO

### **Advanced Concepts in Estate Planning**

Estate planning comes roaring back in 2011 following its 2010 dormancy, and with it many clients who had escaped transfer taxes during the past decade now find themselves in need of major planning. The purpose of this course is to explore the current thinking of practitioners, commentators, and the Internal Revenue Service regarding estate-planning strategies and techniques, fully (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** TX  
**Speaker:** Scott Emerson  
**Vendor:** Surgent McCoy CPE, LLC  
**Hands-On Computer:** NO

**Level:** Advanced  
**Advanced Preparation:** None  
**CFP Approved:** NO  
**Requisite Knowledge:** A strong background in estate planning and previous completion of basic- and intermediate-level courses in this area

**Recommended CPE Credit:** 8  
**Qualifies for Ethics:** NO  
**Qualifies for Yellow Book:** NO

### **Advanced Critical Tax Issues for LLCs and Partnerships**

What impact do the higher individual tax rates have on pass-through entities such as partnerships? The purpose of this course is to provide an in-depth discussion of selected advanced-level issues affecting LLCs and LLPs in light of the changes in the income tax.

**Field of Study:** TX  
**Speaker:** Deborah Phillips  
**Vendor:** Surgent McCoy CPE, LLC  
**Hands-On Computer:** NO

**Level:** Advanced  
**Advanced Preparation:** None  
**CFP Approved:** NO  
**Requisite Knowledge:** A beginning course in LLCs/partnerships; experience with LLC/partnership clients

**Recommended CPE Credit:** 8  
**Qualifies for Ethics:** NO  
**Qualifies for Yellow Book:** NO

### **Advanced Critical Tax Issues for S Corporations**

What impact do the higher individual tax rates have on pass-through entities such as S Corporations? This course goes beyond the basics and addresses important practical issues that an experienced practitioner must know. Even if you have attended other S Corporation courses, you will learn something new in this course.

<b>Field of Study:</b> TX	<b>Level:</b> Advanced	<b>Recommended CPE Credit:</b> 8
<b>Speaker:</b> Deborah Phillips	<b>Advanced Preparation:</b> None	<b>Qualifies for Ethics:</b> NO
<b>Vendor:</b> Surgent McCoy CPE, LLC	<b>CFP Approved:</b> YES	<b>Qualifies for Yellow Book:</b> NO
<b>Hands-On Computer:</b> NO	<b>Requisite Knowledge:</b> A basic course in S Corporations; some experience in advising S Corporations and their shareholders	

### **Advanced Estate Planning—Practical Strategies for Your Clients**

Help your top clients protect their estates' assets from the previous and anticipated 45% estate tax. With current uncertainties in the estate and gift tax laws, consider the impact of alternative tax provisions. Once your client has accumulated wealth, varying techniques utilizing wills, foundations, and trusts can be employed to minimize or (...Contact NCACPA's Onsite Coordinator for full course description).

<b>Field of Study:</b> TX	<b>Level:</b> Advanced	<b>Recommended CPE Credit:</b> 8
<b>Speaker:</b> Robert Barnhill	<b>Advanced Preparation:</b> None	<b>Qualifies for Ethics:</b> NO
<b>Vendor:</b> AICPA	<b>CFP Approved:</b> NO	<b>Qualifies for Yellow Book:</b> NO
<b>Hands-On Computer:</b> NO	<b>Requisite Knowledge:</b> Basic knowledge of estate and gift taxation or completion of the AICPA course Estate Planning Essentials—Tax Relief for Your Clients' Estates	

### **Advanced Form 1041 Practice Workshop**

The use of trusts must be reevaluated in a post-tax reform world, with higher income tax rates for both the trust and its beneficiaries. Practitioners who understand the basics of Subchapter J and Form 1041 compliance soon find complex problems requiring sophisticated applications. This course builds upon our intermediate-level course to concentrate on the most difficult issues in (...Contact NCACPA's Onsite Coordinator for full course description)

<b>Field of Study:</b> TX	<b>Level:</b> Advanced	<b>Recommended CPE Credit:</b> 8
<b>Speaker:</b> Robert Barnhill	<b>Advanced Preparation:</b> None	<b>Qualifies for Ethics:</b> NO
<b>Vendor:</b> Surgent McCoy CPE, LLC	<b>CFP Approved:</b> YES	<b>Qualifies for Yellow Book:</b> NO
<b>Hands-On Computer:</b> NO	<b>Requisite Knowledge:</b> A course in Form 1041 preparation and experience in preparation	

### **Advanced Issues in Mergers, Acquisitions, and Sales of Closely Held Businesses**

Here's a topic with a lot of "sizzle"! There is typically no more financially important decision an owner makes than the purchase or sale of a business. Business transactions are marquee events in the history of most closely held businesses and therefore demand inordinate attention to detail and process. Many skill sets are involved in this process, and topics such as accounting, taxes, negotiations, business valuations, strategic thinking, finance, family businesses, and group dynamics are covered here. Follow the real-life situations in this course, so you can be your clients' trusted strategic advisor.

<b>Field of Study:</b> TX	<b>Level:</b> Advanced	<b>Recommended CPE Credit:</b> 4
<b>Speaker:</b> Steve Lustig	<b>Advanced Preparation:</b> None	<b>Qualifies for Ethics:</b> NO
<b>Vendor:</b> AICPA	<b>CFP Approved:</b> NO	<b>Qualifies for Yellow Book:</b> NO
<b>Hands-On Computer:</b> NO	<b>Requisite Knowledge:</b> Experience in business taxation and mergers & acquisitions	

### **Advanced Part/LLC Workshop—Optional Step-Up in Basis Under Section 754**

Changes in the individual income tax rates require more complex planning for clients invested in partnerships. This course explores the practical issues in the many instances in which a step-up in basis can create tax advantages for partners and members. This course includes case studies to illustrate the critical points.

**Field of Study:** TX

**Speaker:** Pamela Davis-Vaughn

**Vendor:** Surgent McCoy CPE, LLC

**Hands-On Computer:** NO

**Level:** Advanced

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Experience in dealing with partnerships and LLCs; one or more intermediate courses on partnerships and LLCs

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Advanced Tax Strategies for LLC and Partnership Transactions**

Plan now to protect your LLC and partnership clients from potential tax traps. Study the complex issues necessary to ensure the LLC, partnership, and its owners attain maximum benefits. Focus on a broad range of distribution issues including disproportionate distributions of “hot” assets and structuring distributions to retiring partners to maximize tax benefits for the retiring (...Contact NCACPA’s Onsite Coordinator for full course description).

**Field of Study:** TX

**Speaker:** William Harden

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Advanced

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Completion of LLC and Partnership Taxation—Beyond the Basics or equivalent knowledge and experience

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Advanced Tax Strategies for S Corporations**

The tax practitioner needs to understand the intricacies of the ever-popular S Corporation form of doing business. The ins and outs of planning and reporting successful complex S Corporation transactions are set out in this course. It also covers the latest tax rules that govern the taxation of S Corporations and will help you minimize your client’s tax bill with (...Contact NCACPA’s Onsite Coordinator for full course description).

**Field of Study:** TX

**Speaker:** Jim McCoy

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Advanced

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Completion of S Corporation Key Issues, Compliance and Strategies—An IRS Target Area or equivalent knowledge and experience

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Advanced Tax—Partnership, Multiple Corp, Series LLC, & Disregarded Entity**

Business entities serve non-tax objectives as well as tax objectives, and many clients need multiple entities to realize both in an efficient way. Further, states are much more aggressive in pursuing nexus tax liability. Exploring when to run a business as a single entity or when to step up to multiple entities is a growing area of business and tax planning, and not just for large (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** TX

**Speaker:** Pamela Davis-Vaughn

**Vendor:** Surgent McCoy CPE, LLC

**Hands-On Computer:** NO

**Level:** Advanced

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** A strong knowledge of general tax law related to business entities

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Advanced Technical Tax Forms Training—Form 1040 Issues**

Experienced staff can get bogged down in busy season with difficult tax returns that have multiple K-1s, AMT, at-risk basis, and passive activity loss issues. These are the topics that experienced staff, managers, and partners should understand in depth. This course will cover the practical and complex issues in dealing with these most difficult matters and assist the CPA firm in (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** TX

**Speaker:** James Vastarelli

**Vendor:** Surgent McCoy CPE, LLC

**Hands-On Computer:** NO

**Level:** Advanced

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** 5+ years of experience in the area of study is recommended

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Advanced Technical Tax Forms Training—LLCs, S Corps, and Partnerships**

It is critical that staff be trained on the increasingly complex forms-related issues that challenge them each busy season. This course will help experienced staff in planning productivity as well as in avoiding costly mistakes when dealing with flow-through entities such as S Corporations, LLCs, and partnerships.

**Field of Study:** TX

**Speaker:** James Vastarelli

**Vendor:** Surgent McCoy CPE, LLC

**Hands-On Computer:** NO

**Level:** Advanced

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Basic- to intermediate-level experience in preparing forms 1120S and 1065

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **AICPA's 2011 Individual Tax Review Series—Beyond the Basics**

This outstanding course covers the more difficult aspects of individual federal tax returns. It is the perfect follow-up for the primer "Nuts and Bolts" course. These two courses comprise the individual tax review series, which provides the latest practical insights from nationally recognized tax experts. Both courses not only will focus on the critical tax areas, but also will (...Contact NCACPA's Onsite Coordinator for full course description).

**Field of Study:** TX

**Speaker:** Jim McCoy

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **An Introduction to Income Tax Issues of Farmers and Land Owners**

This four-hour farming program focuses on income and social security tax issues that tax preparers often face with farming clientele. Special rules apply to certain facts and circumstances for farmers, and often, landowners too.

<b>Field of Study:</b> TX	<b>Level:</b> Intermediate	<b>Recommended CPE Credit:</b> 4
<b>Speaker:</b> Guido van der Hoeven	<b>Advanced Preparation:</b> None	<b>Qualifies for Ethics:</b> NO
<b>Vendor:</b> Guido van der Hoeven	<b>CFP Approved:</b> NO	<b>Qualifies for Yellow Book:</b> NO
<b>Hands-On Computer:</b> NO	<b>Requisite Knowledge:</b> General Income tax background	

### **Basis/Distributions for Pass-Through Entities—An IRS Hot Spot**

With the advent of the electronic matching of K-1 information with items on partners' and S Corporation shareholders' returns, the IRS is scrutinizing more closely than ever the basis owners have and the transactions in which the computation of basis is required. This course addresses the rules used to determine basis for partnerships and S Corporations (...Contact NCACPA's Onsite Coordinator for full course description).

<b>Field of Study:</b> TX	<b>Level:</b> Intermediate	<b>Recommended CPE Credit:</b> 8
<b>Speaker:</b> William Harden	<b>Advanced Preparation:</b> None	<b>Qualifies for Ethics:</b> NO
<b>Vendor:</b> AICPA	<b>CFP Approved:</b> NO	<b>Qualifies for Yellow Book:</b> NO
<b>Hands-On Computer:</b> NO	<b>Requisite Knowledge:</b> Experience in business taxation	

### **C Corporation—Advanced**

Tax free incorporation . . . or not! Taxable distributions . . . or not! Mergers, acquisitions, and reorganizations made simple. Understand the law governing corporate organization, distributions of property, liquidations, reorganizations, carryover of net operating losses, and other corporate tax attributes. You might be the only one in your office who knows the real balance of "Earnings and Profits" and why that number might be important. Increased rates of income tax on individuals will make the regular, or C, corporation a popular alternative to S Corporation status.

<b>Field of Study:</b> TX	<b>Level:</b> Advanced	<b>Recommended CPE Credit:</b> 8
<b>Speaker:</b> Richard Wright	<b>Advanced Preparation:</b> None	<b>Qualifies for Ethics:</b> NO
<b>Vendor:</b> Nichols Patrick CPE, Inc.	<b>CFP Approved:</b> NO	<b>Qualifies for Yellow Book:</b> NO
<b>Hands-On Computer:</b> NO	<b>Requisite Knowledge:</b> None	

### **Choice of Entity—Which Is Best?**

Compare and contrast the tax and non-tax aspects of various entity forms including sole proprietorships, single member LLCs, partnerships, C Corporations, S Corporations, and limited liability companies. Explore planning opportunities and potential pitfalls of each entity type.

<b>Field of Study:</b> TX	<b>Level:</b> Intermediate	<b>Recommended CPE Credit:</b> 4
<b>Speaker:</b> Steve Dilley	<b>Advanced Preparation:</b> None	<b>Qualifies for Ethics:</b> NO
<b>Vendor:</b> Federal Tax Workshop	<b>CFP Approved:</b> NO	<b>Qualifies for Yellow Book:</b> NO
<b>Hands-On Computer:</b> NO	<b>Requisite Knowledge:</b> None	

### Choosing the Best Entity Structure

Tax rates are an important factor in choosing the form of business organization, and the changes made by the new law demand a reconsideration of current businesses and a different analysis for new ventures. This unique course compares and contrasts the tax aspects of C Corporations, S Corporations, partnerships, sole proprietorships, and limited liability companies. This in-depth (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** TX  
**Speaker:** Susan Smith

**Level:** Intermediate  
**Advanced Preparation:** A beginner course in partnerships/LLCs and in S Corporations

**Recommended CPE Credit:** 4  
**Qualifies for Ethics:** NO

**Vendor:** Surgent McCoy CPE, LLC  
**Hands-On Computer:** NO

**CFP Approved:** NO  
**Requisite Knowledge:** Basic partnerships, LLCs, and S Corporation knowledge

**Qualifies for Yellow Book:** NO

### Choosing the Best Entity Structure Under the New Tax Law in 2011

Tax rates are always an important factor in choosing the form of business organization, and the higher individual rates in 2011 demand a reconsideration of current businesses and a different analysis for new ventures. By comparing and contrasting the tax aspects of C corporations, S corporations, partnerships, sole proprietorships, and limited liability companies, this course (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** TX  
**Speaker:** Edward Sixt  
**Vendor:** Surgent McCoy CPE, LLC  
**Hands-On Computer:** NO

**Level:** Intermediate  
**Advanced Preparation:** None  
**CFP Approved:** YES  
**Requisite Knowledge:** A beginner course in partnerships/LLCs and in S corporations

**Recommended CPE Credit:** 8  
**Qualifies for Ethics:** NO  
**Qualifies for Yellow Book:** NO

### Closely Held Business Taxation—49 Practical Ways to Cut Taxes

Walk away with 49 practical tax strategies and challenges facing your closely held business clients. Employ business strategies that will minimize the tax burden not only on the business but also on the owners. The tips and strategies are uniquely laid out in the course to allow you to easily and quickly identify and focus on those tax-saving strategies that fit your client's situation.

**Field of Study:** TX  
**Speaker:** Houston Smith  
**Vendor:** AICPA  
**Hands-On Computer:** NO

**Level:** Intermediate  
**Advanced Preparation:** None  
**CFP Approved:** NO  
**Requisite Knowledge:** Basic knowledge of business taxation

**Recommended CPE Credit:** 8  
**Qualifies for Ethics:** NO  
**Qualifies for Yellow Book:** NO

### **Complete Taxation of Property Transactions—Acquisition to Disposition**

Gain a comprehensive and practical understanding of the various complex tax laws dealing with property transactions from acquisition to disposition. This course provides a thorough analysis of the rules dealing with depreciation, amortization, like-kind exchanges, involuntary conversions, and sale of property. It also covers important property-related timing issues and planning (...Contact NCACPA's Onsite Coordinator for full course description).

**Field of Study:** TX

**Speaker:** William Harden

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Familiarity with federal tax issues for property transactions

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Cost Segregation Studies—Do It Yourself?**

A cost segregation study is a process of identifying costs related to a building that should be classified or reclassified from real property to personal property. Most CPAs are familiar with the concept and how this valuable strategy can save taxes and improve cash flow. This program is NOT a high-level review of the general concepts & benefits of cost segregation studies. (... Learn More)

**Field of Study:** TX

**Speaker:** Lynn Nichols

**Vendor:** Nichols Patrick CPE, Inc.

**Hands-On Computer:** NO

**Level:** Advanced

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Delving into the Top Twelve Issues for Partnerships, LLCs, and S Corps**

This course reviews specialized issues in the taxation of partnerships, LLCs, and S Corporations. Twelve common issues, each providing significant tax-planning opportunities or potential traps for the unwary, are identified, and the tax consequences associated with different types of pass-through entities are explored. Case studies are included with each issue to illustrate how (...Contact NCACPA's Onsite Coordinator for full course description).

**Field of Study:** TX

**Speaker:** William Harden

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Advanced

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Intermediate courses in taxation of partnerships and LLCs and taxation of S Corporations, or equivalent knowledge or experience

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Effective and Efficient Senior-Level Review of Tax Returns in Busy Season**

Most review techniques developed by professionals are self taught. The purpose of this course is to give the seasoned reviewer additional and advanced procedures via a multitude of checklists to more thoroughly review various tax returns. Its emphasis is not planning; rather, it is to review a return effectively and thoroughly.

**Field of Study:** TX

**Speaker:** Martin Scheckner

**Vendor:** Surgent McCoy CPE, LLC

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Experience in preparing and reviewing Forms 1040, 1120S, and 1065

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Estate Planning Essentials—Tax Relief for Your Clients' Estates**

What is the estate tax? What is the gift tax? How are they interrelated? Explore the use of wills, trusts, and life insurance as vehicles to reduce the estate tax. Whether your clients are accumulating wealth or planning for its distribution upon death, advise them on the most tax-efficient way to structure their affairs to minimize taxation on the transfer of their wealth (...Contact NCACPA's Onsite Coordinator for full course description).

**Field of Study:** TX

**Speaker:** Rose Bailey

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Estate Planning Strategies—Minimizing Taxes and Maximizing Wealth**

What is the estate tax? What is the gift tax? How are they interrelated? Explore the use of wills, trusts, and life insurance as vehicles to reduce the estate tax. Whether your clients are accumulating wealth or planning for its distribution upon death, advise them on the most tax-efficient way to structure their affairs to minimize taxation on the transfer of their wealth to intended beneficiaries.

**Field of Study:** TX

**Speaker:** Steve Lustig

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Farm Taxation—Planning Opportunities and Pitfalls**

This session will enable practitioners to recognize tax opportunities and pitfalls impacting agricultural taxpayers and will allow practitioners a forum to discuss current tax issues affecting farm and ranch clients.

**Field of Study:** TX

**Speaker:** Chris Hesse

**Vendor:** LarsonAllen LLP

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** 2 years of experience with farm tax return preparation

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Federal and North Carolina State Tax Update**

This course provides a brief overview of a number of areas that have changed since the end of 2008 that may have the most impact on practitioners in 2010 and beyond. We will highlight areas of new legislation and clarification of existing laws. We will also touch on important cases, rulings, and other pronouncements issued by the IRS or the NC Department of Revenue over the last 18 months.

**Field of Study:** TX

**Speaker:** Mike Wenig

**Vendor:** Mike Wenig and Vaughn Ramsey

**Hands-On Computer:** NO

**Level:** Update

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Federal Estate and Gift Tax Returns—Forms 706 and 709 Workshop**

The estate tax and generation-skipping transfer tax return with a vengeance in 2011, and the gift tax rates increase dramatically. Changes in the transfer tax under new law are mirrored in the compliance requirements. The purpose of this course is to learn how to prepare Forms 706 and 709 in these circumstances. This practical, over 200-page manual guides the CPA through the (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** TX

**Speaker:** Michael Quigley

**Vendor:** Surgent McCoy CPE, LLC

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** YES

**Requisite Knowledge:** A basic course in estate planning

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Federal Tax Camp**

Both business and individual clients are affected by all of the tax changes occurring in 2011, requiring the tax advisor to practice extensive tax planning. Jack Surgent, the nation's #1 rated tax instructor, will update you on the most important tax issues that require your attention in 2011, but this course will also review the major trends and changes in the case and regulatory (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** TX

**Speaker:** Susan Smith

**Vendor:** Surgent McCoy CPE, LLC

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** YES

**Requisite Knowledge:** Experience with individual and business clients

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Fiduciary Income Tax Returns—Form 1041 Workshop**

As income tax rates rise on estates, trusts, and their beneficiaries, consideration of the income tax effects becomes more critical. The purpose of this course is to explain the complicated income tax rules of estates and trusts, fiduciary accounting, and how to prepare Form 1041. This practical manual is an excellent reference source for your practice.

**Field of Study:** TX

**Speaker:** Scott Emerson

**Vendor:** Surgent McCoy CPE, LLC

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** YES

**Requisite Knowledge:** A basic course on estates and trusts; preparation of income tax returns

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Financial Accounting for LLCs and Partnerships**

This comprehensive program discusses the tax basis financial accounting and how it relates to LLCs and partnerships. In addition, will clarify "book" and "tax" accounting concepts for LLCs and partnerships, including special allocations. Practical examples illustrate the impact of complex partnership allocation rules for financial accounting and tax.

**Field of Study:** TX

**Speaker:** Steve Dilley

**Vendor:** Federal Tax Workshop

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Form 1065 Schedule K-1—Basis Calcs & Distributions for Partnerships & LLCs**

This course is designed to get the accountant up to speed in the area of basis calculations and distribution planning for partnerships, LLCs, and their owners. The cornerstone of this course is the in-depth line by line analysis of the Form 1065 Schedule K-1 and how these items affect a partner or member's outside basis, whether or not losses are deductible, and the tax treatment of distributions.

**Field of Study:** TX

**Speaker:** Pat Garverick

**Vendor:** Garverick CPE

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Form 1120S Schedule K-1—Basis Calcs & Distributions for S Corporations**

This course gets the accountant up to speed quickly in the area of basis calculations and distribution planning for S Corporations and their shareholders. The cornerstone of this course is the in-depth line-by-line analysis of the Form 1120S Schedule K-1 and how these items affect a shareholder's stock and debt basis, whether or not losses are deductible, and the tax treatment of distributions.

**Field of Study:** TX

**Speaker:** Pat Garverick

**Vendor:** Garverick CPE

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Hot IRS Tax Examination Issues for Individuals and Businesses**

Recently, the IRS has dramatically ramped up its examination of individuals and small business taxpayers. Now, more than ever, CPAs need clients to understand the need for documentation and procedures to substantiate what IRS auditors are pursuing. Learn the high audit risk areas and ways to help clients survive an IRS audit with little or no change. It is critical for CPAs in (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** TX

**Speaker:** Martin Scheckner

**Vendor:** Surgent McCoy CPE, LLC

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Experience in preparing individual and business tax returns

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Innovative Tax Tips for Individuals**

Get the latest techniques for building and conserving wealth through proactive tax planning and investment strategies. Completely updated for tax law changes, this course will bring you up to date on ways to save taxes with strategies for retirement savers, investors, homeowners and real estate investors, college savers, small business owners, and just about anyone who pays taxes.

**Field of Study:** TX

**Speaker:** Steve Lustig

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Basic knowledge of individual income taxation

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Innovative Tax Tips for Small Businesses**

Will you be the bearer of good or bad tidings for your clients? This fast-paced, information-packed course shows you how to keep more profits in the pockets of corporate and small business clients and their owners! It showcases state-of-the-art planning ideas and tax-saving devices employed by the savviest practitioners. Top-notch AICPA presenters read between the lines of new developments to wring every last drop of tax benefits that make you a hero to your clients.

**Field of Study:** TX  
**Speaker:** Steve Lustig  
**Vendor:** AICPA  
**Hands-On Computer:** NO

**Level:** Intermediate  
**Advanced Preparation:** None  
**CFP Approved:** NO  
**Requisite Knowledge:** Basic knowledge of corporate income taxation

**Recommended CPE Credit:** 4  
**Qualifies for Ethics:** NO  
**Qualifies for Yellow Book:** NO

### **International Taxation for Individuals—Foreign Nationals and Expatriates**

We will discuss the highlights of foreign national and expatriate taxation. Our topics will include utilizing the foreign earned income exclusion and foreign tax credits to avoid double taxation. We will discuss residency issues, totalization agreements, and tax elections.

**Field of Study:** TX  
**Speaker:** Meg Deal  
**Vendor:** Meg Deal  
**Hands-On Computer:** NO

**Level:** Intermediate  
**Advanced Preparation:** None  
**CFP Approved:** NO  
**Requisite Knowledge:** Basic understanding of the principles of individual taxation

**Recommended CPE Credit:** 4  
**Qualifies for Ethics:** NO  
**Qualifies for Yellow Book:** NO

### **International Taxation—To and From the United States**

Whether you're doing—or just considering doing—business abroad, this course is a must! Gain an understanding of tax advantages and traps of global business operations. Intelligently advise your clients or business on taxation of inbound and outbound transactions and operations. The course highlights initiation of inbound US operations by foreign businesses and outbound foreign (...Contact NCACPA's Onsite Coordinator for full course description).

**Field of Study:** TX  
**Speaker:** Robert M. Gilwee  
**Vendor:** AICPA  
**Hands-On Computer:** NO

**Level:** Basic  
**Advanced Preparation:** None  
**CFP Approved:** NO  
**Requisite Knowledge:** A working knowledge of US business and corporate taxation

**Recommended CPE Credit:** 8  
**Qualifies for Ethics:** NO  
**Qualifies for Yellow Book:** NO

### **Introduction to International Tax**

This course focuses on tax issues US companies face when doing business overseas. Topics include international tax nexus concepts, selecting the appropriate organizational form to do business in a foreign country, US tax compliance relating to international operations, transfer pricing, the foreign tax credit, tax treaties, and other selected topics.

**Field of Study:** TX  
**Speaker:** Trent Green  
**Vendor:** Trent Green  
**Hands-On Computer:** NO

**Level:** Basic  
**Advanced Preparation:** None  
**CFP Approved:** NO  
**Requisite Knowledge:** None

**Recommended CPE Credit:** 8  
**Qualifies for Ethics:** NO  
**Qualifies for Yellow Book:** NO

### **IRS Procedure—Audits, Appeals, Assessment, Settlement, & Collection**

IRS compliance initiatives will target auto dealers, Schedule C sole proprietorships, and “hobby losses” in 2011. Other compliance programs focus on specific industries and issues. Even tax-exempt organizations are being audited at record rates. Be prepared! Learn how the Service’s examination process works, how to present issues to the Appeals Division. (...Contact NCACPA’s Onsite Coordinator for full course description)

**Field of Study:** TX

**Speaker:** Richard Wright

**Vendor:** Nichols Patrick CPE, Inc.

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Key Tax Issues Facing Members in Industry**

This course focuses on key federal tax issues from the internal accountant’s point of view, as well as exploring the planning alternatives and weighing the tax risk of those alternatives.

**Field of Study:** TX

**Speaker:** Doug Van Der Aa

**Vendor:** Federal Tax Workshop

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Limited Liability Company and Partnership Tax Return Preparation Workshop**

This course provides accountants with an introduction to and an understanding of tax return preparation issues for limited liability companies and partnerships, with an emphasis on the preparation of Form 1065 and Schedule K-1 including an eight-step process to accurately complete Form 1065 and related sub-schedules. Participants will be able to gain a thorough understanding (...Contact NCACPA’s Onsite Coordinator for full course description)

**Field of Study:** TX

**Speaker:** Jim McCoy

**Vendor:** Surgent McCoy CPE, LLC

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **LLCs and Partnerships—Loss, Liquidation, Termination, Continuation, & Sale**

How do partnerships fare following tax reform? This course will provide an in-depth discussion of selected advanced-level issues affecting LLCs and LLPs in light of new changes in the income tax.

**Field of Study:** TX

**Speaker:** Susan Smith

**Vendor:** Surgent McCoy CPE, LLC

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** A beginning course in LLCs/partnerships; experience with LLC/partnership clients

**CFP Approved:** NO

**Requisite Knowledge:** A beginning course in LLCs/partnerships; experience with LLC/partnership clients

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Mastering Basis, Distributions & Loss Limitation for S Corps & LLCs**

The most difficult concepts to master when dealing with flow-through business entities are the basis and distribution concepts. Major error and malpractice issues occur if the CPA does not fully understand the impact of these rules. This course is designed to focus on the practical applications of these rules.

**Field of Study:** TX

**Speaker:** Jim McCoy

**Vendor:** Surgent McCoy CPE, LLC

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Mergers, Acquisitions, and Sales of Closely Held Businesses**

If you ever wanted to know the mechanics of buying, selling, or merging companies, this course offers key insights into the transaction marketplace. This material is aimed at a broad audience of business owners, senior managers, chief financial officers, advisors to closely held businesses, bankers, auditors, and attorneys. Business transactions are marquee events in the history (...Contact NCACPA's Onsite Coordinator for full course description).

**Field of Study:** TX

**Speaker:** Robert M. Gilwee

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Advanced

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Experience in business taxation and mergers & acquisitions

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Multistate Income Tax—Simplifying the Complexities**

Multistate taxation has become one of the hottest areas in the tax arena. The recent decline in state revenues and the increased audit activity by the states means both increased problems and opportunities. Mastering both the theoretical disputes and the "nuts and bolts" of compliance is essential to success. Gain the skills necessary to navigate through this maze of multistate (...Contact NCACPA's Onsite Coordinator for full course description).

**Field of Study:** TX

**Speaker:** Michael A. Hannah

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Experience in corporate taxation

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Multistate Tax Update**

You can't afford to ignore recent changes in state and local tax. Even tax-savvy businesses and their advisers often neglect to consider the consequences of state and local taxes. States are imposing new taxes, and their courts are enforcing nexus even when taxpayers are not physically present in a state. With this drastic increase in the importance of state and local taxation, it becomes more important than ever to attend this fast-paced update on recent multistate tax developments, focusing on issues confronting small and middle market companies and offering practical guidance for minimizing tax liability.

**Field of Study:** TX

**Speaker:** Pamela Davis-Vaughn

**Vendor:** Surgent McCoy CPE, LLC

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **New Federal Tax Law—Current Developments You Need to Know**

With the increasing complexity and ever-changing nature of tax laws and issues, today's accountant needs a one-day update course focusing on the hottest tax topics. This course will deal with both federal individual and business developments, alerting the tax practitioner about many items that may affect clients or businesses.

**Field of Study:** TX

**Speaker:** Pat Garverick

**Vendor:** Garverick CPE

**Hands-On Computer:** NO

**Level:** Update

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **North Carolina's Changing Tax Law Landscape—An Overview of Corporate Income Tax, Sales Tax, Tax Credits, and Tax Audit Issues**

As North Carolina's budget and fiscal woes continue unabated to a degree not experienced by lawmakers and tax administrators in nearly 80 years, the need to increase tax revenues without increasing tax rates will undoubtedly result in stricter enforcement of existing tax laws. Taxpayers need to be aware of the issues they will encounter when filing tax returns and dealing with the North Carolina Department of Revenue. Mike Hannah, former assistant secretary of revenue for legal services for North Carolina, will provide attendees with an overview and unique insight into the latest challenges and opportunities for taxpayers dealing with state tax issues. The tax administration landscape in North Carolina has changed significantly over the last several years, and taxpayers need to have a complete understanding of how best to comply with new and existing state tax laws.

**Field of Study:** TX

**Speaker:** Michael A. Hannah

**Vendor:** Michael A. Hannah

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Good basic understanding of NC taxes

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Overview, Life Insurance and Other Trusts**

With major changes in the estate and gift tax, the role of trusts changes as well. The purpose of this course is to explore the many beneficial uses of trusts, an essential element in estate planning. This course gives insights and practical pointers concerning trusts of every shape and size after tax reform.

**Field of Study:** TX

**Speaker:** Michael Quigley

**Vendor:** Surgent McCoy CPE, LLC

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Basic knowledge in estate and gift tax and estate and trust income taxation (Form 1041)

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Partnership Taxation—Advanced (Part II)**

This course explores the advanced tax issues and problems of planning for tax allocations among the partners, for collapsible partnerships, for computing the basis of partnership assets including optional Section 754 adjustments, for structuring a sale vs. liquidation of a partnership interest, and for avoiding the termination of a partnership.

**Field of Study:** TX

**Speaker:** Bill Tankersley

**Vendor:** Bill Tankersley

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Attendance at the Tankersley course, Partnership Taxation—Let the Games Begin (Part I), or equivalent knowledge

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Partnership Taxation—Let the Games Begin (Part I)**

This course explores the complex tax issues created by transactions between a partnership and its partners, including contributions of property and services, disguised sales, distributions from a partnership of money (actual and constructive) and property, changes in a partner's or partnership's share of liabilities, and the retirement of a partnership interest.

**Field of Study:** TX

**Speaker:** Bill Tankersley

**Vendor:** Bill Tankersley

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Partnerships Overview and Update**

This course examines the critical issues and special opportunities facing general partnerships and their partners; examines the relationship between limited liability companies and partnerships; and emphasizes practical situations and planning opportunities.

**Field of Study:** TX

**Speaker:** Doug Van Der Aa

**Vendor:** Federal Tax Workshop

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** A basic working knowledge of partnership taxation

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Payroll Taxes, Benefits, and 1099 Reporting—Everything You Need to Know**

This course is designed to provide you with practical pointers for managing the payroll tax and reporting function. Learn how to avoid the frequent penalties in payroll tax reporting and what has changed in the past few years. It also shows how to handle reporting and withholding requirements for employee fringe benefits. Master the often confusing rules for Form 1099 (...Contact NCACPA's Onsite Coordinator for full course description).

**Field of Study:** TX

**Speaker:** Edgar Gee

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Working knowledge of payroll tax issues or payroll type functions

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Practical Aspects of International Tax Compliance for US-Based Companies**

When US companies do business overseas, they trigger a host of US tax filing requirements. This course provides an overview of what those compliance requirements are and how to complete some of the more common tax forms. Emphasis will be on conveying an understanding of the purpose behind various tax forms and the principles necessary to complete them effectively.

**Field of Study:** TX

**Speaker:** Trent Green

**Vendor:** Trent Green

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** An understanding of the fundamentals of international tax is assumed. This course is designed to build upon Introduction to International Tax for US-Based Companies (offered July 16 and October 15)

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Practical Tips and Techniques for Dealing with the IRS**

Are you prepared to face the IRS all the way from preparing a client's return through the audit and collection processes? Gain practical insights on everything needed to choose or reject a tactic when dealing with the IRS. Represent your client with confidence and evaluate your client's options.

**Field of Study:** TX

**Speaker:** Steve Lustig

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Experience in business taxation

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Preparing C Corporation Tax Returns for New Staff and Paraprofessionals**

This course is a great foundation to introduce new preparers to tax rules related to business returns. The objective of this course is to train new staff accountants, data processing employees, paraprofessionals, and bookkeepers to prepare a complicated federal corporate income tax return. It is a hands-on, practical course in filling out most tax forms, with extra emphasis on form (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** TX

**Speaker:** Jim McCoy

**Vendor:** Surgent McCoy CPE, LLC

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Preparing Complex 1040s, Calculate NOLs**

For many clients, tax simplification is only a dream. This program is designed for the accountant who is ready to handle the most complex individual client's individual income tax preparation problems.

**Field of Study:** TX

**Speaker:** Richard Wright

**Vendor:** Nichols Patrick CPE, Inc.

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Two or more years' preparation experience

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Preparing Individual Tax Returns for New Staff and Paraprofessionals**

The objective of this course is to train new staff accountants, data processing employees, paraprofessionals, and bookkeepers to prepare a complicated federal individual income tax return. Over the years, thousands of new staff have received practical, hands-on experience to become familiar with most tax forms. This course covers the latest tax law changes, making it essential for your new staff.

**Field of Study:** TX

**Speaker:** Jim McCoy

**Vendor:** Surgent McCoy CPE, LLC

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Preparing LLC, Partnership, and S Corporation Federal Income Tax Returns**

This unique course will enable the practitioner to learn in one day how to prepare S Corporation, LLC, and partnership tax returns. The course focuses on an identical trial-balance-to-completed-tax-return case study prepared on both Form 1120S and Form 1065, allowing one to explore the similarities and differences of these popular entity structures.

**Field of Study:** TX

**Speaker:** Jim McCoy

**Vendor:** Surgent McCoy CPE, LLC

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** YES

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Preparing LLCs, Partnership, and S Corp Federal Income Tax Returns**

This unique course will enable the practitioner to learn in one day how to prepare S Corporation, LLC, and partnership tax returns. The course focuses on an identical trial-balance-to-completed-tax-return case study prepared on both Form 1120S and Form 1065, allowing one to explore the similarities and differences of these popular entity structures.

**Field of Study:** TX

**Speaker:** Jim McCoy

**Vendor:** Surgent McCoy CPE, LLC

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** YES

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Professional Employer Organization (PEO) Overview**

In this course, we will cover the definition of a Professional Employer Organization, the PEO advantage, the human resources value chain, the strategic benefits of PEO services, and employment law basics. We will also identify appropriate actions for common management decisions.

**Field of Study:** TX

**Speaker:** Heather Spurduto

**Vendor:** ADP

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 2

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Real Estate Accounting and Financial Reporting—Tackling the Complexities**

Whether the issue is revenue recognition, measurement, fair value, or impairment, the real estate industry has some unique and complex accounting and financial reporting challenges. So if you advise or work for companies with real estate holdings, this course is for you. Learn how to properly record the purchase, sale, rental, or development of your real estate holdings.

**Field of Study:** TX

**Speaker:** Jeffrey Lieman

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Basic knowledge of real estate accounting

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Retirement Services for Today's Small Businesses**

Following this course, you will be able to identify Solo (k) Plans, 401(k) Plans, Simple IRAs, SEP Plans, and contribution and salary deferral limits for today and beyond.

**Field of Study:** TX

**Speaker:** Heather Sperduto

**Vendor:** ADP

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 2

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **S Corp and Partnership and LLC Tax Update**

If you are a practitioner who wants the latest information on tax changes affecting your business clients or employers, then you should take this enlightening course. You will learn invaluable knowledge, strategies, techniques, innovative tax-planning concepts, income-generating ideas, and other planning opportunities available to S Corporations, partnerships, LLCs, and LLPs.

**Field of Study:** TX

**Speaker:** Susan Smith

**Vendor:** Surgent McCoy CPE, LLC

**Hands-On Computer:** NO

**Level:** Update

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Experience with pass-through entity clients

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **S Corporations— Updates & Key Planning Issues for the Former C Corporation**

This course will provide an update on recent developments and coverage of issues facing S Corporations that were formerly C Corporations.

**Field of Study:** TX

**Speaker:** Doug Van Der Aa

**Vendor:** Federal Tax Workshop

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **S Corporations—Financial Accounting**

This comprehensive discussion addresses the complex financial accounting issues of an S Corporation.

**Field of Study:** TX

**Speaker:** Steve Dilley

**Vendor:** Federal Tax Workshop

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Sales and Use Tax—Guide to Doing It Right**

Increased opportunities and problems abound for tax practitioners with the recent decline in state revenues and the accompanying increased audit activity by the states. Moreover, changes in technology; growth in multistate activity; increased catalog sales, e-commerce, and Internet-related sales; and a raised level of state aggressiveness have made sales and use tax even more (...Contact NCACPA's Onsite Coordinator for full course description).

**Field of Study:** TX

**Speaker:** Michael A. Hannah

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Experience in taxation

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Solving the Choice of Entity Riddle—Key Tax and Business Implications**

Choice of entity issues are relevant throughout the life of a business. When starting a new business, a crucial first decision is choosing the correct form of entity to accomplish the company's goals. This course targets the ever-increasing tax advantages and disadvantages of general and limited partnerships, C and S Corporations, LLCs and LLPs, as well as individual proprietorships. Focus on key issues surrounding the factors that drive the optimal form of organization for a business. Explore plenty of case studies from real-life client situations.

**Field of Study:** TX

**Speaker:** Steve Lustig

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Experience in business taxation

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Spring Tax Update and IRS Recent Developments**

This program will address the extensive and significant tax legislation enacted in 2011, with a focus on health care reform issues as they affect the small business. Tax cases and rulings affecting individuals and businesses will be covered. This seminar will be crammed with examples and critical information the practitioner needs to plan for the remainder of 2011 and beyond.

**Field of Study:** TX

**Speaker:** William Harden

**Vendor:** Federal Tax Workshop

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Strategies and Tactics in the New War Against Higher Individual Taxes**

Tax planning strategies are only as good as what they add to the bottom line. With significant tax changes now in place in 2011, clients need to review their best options for action. You want to retain clients, your firm wants to generate more revenue, and your clients simply want their wealth to grow. This course focuses on practical, innovative ideas and techniques that you and (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** TX

**Speaker:** Edward Sixt

**Vendor:** Surgent McCoy CPE, LLC

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Experience in individual income tax planning and return preparation

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Tax Depreciation—A Comprehensive Review and Update**

This course familiarizes participants with tax and accounting depreciation rules, with emphasis on both basic and special situations.

**Field of Study:** TX

**Speaker:** Doug Van Der Aa

**Vendor:** Federal Tax Workshop

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Tax Update for Pass-Through Entities—S Corporations, Partnerships, & LLCs**

Be prepared for the issues affecting S Corporations, partnerships, and limited liability companies. Learn about the latest law changes, rulings, and pronouncements affecting these pass-through entities. Flow-through taxation is one of the most challenging areas of practice, and our discussion leaders will help navigate this complexity. Provide more value to your clients by (...Contact NCACPA's Onsite Coordinator for full course description).

**Field of Study:** TX

**Speaker:** Jim McCoy

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Familiarity with federal tax issues for flow-through entities

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Taxation of Construction Contractors**

This course explores tax issues facing the construction industry and the intricacies of contractor tax law and regulations. Tax topics covered include an overview of tax accounting for the contractor including deferred income taxes, taxation of small and large contractors, alternative minimum tax considerations for contractors, the look-back method (...Contact NCACPA's Onsite Coordinator for full course description).

**Field of Study:** TX

**Speaker:** Edgar Gee

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Experience in providing services for construction contractors

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **The Best Federal Tax Update Course by Surgent McCoy**

Both business and individual clients are affected by all of the tax changes occurring in 2011, requiring that the tax advisor practice extensive tax planning. Not only will you be updated on the most important tax issues that will require your attention in 2011, but this course will also review the major trends and changes in the case and regulatory law. Included is full coverage (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** TX

**Speaker:** Jim McCoy

**Vendor:** Surgent McCoy CPE, LLC

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** YES

**Requisite Knowledge:** Experience with individual and business clients

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **The Best S Corporation, Limited Liability, and Partnership Update Course**

Practitioners need to keep abreast of all tax changes affecting pass-through entities used by their business clients and employer, and this enlightening course delivers that information. You will learn invaluable knowledge, strategies, techniques, innovative tax-planning concepts, income-generating ideas, and other planning opportunities available to S Corporations, partnerships, LLCs, and LLPs.

**Field of Study:** TX

**Speaker:** James Vastarelli

**Vendor:** Surgent McCoy CPE, LLC

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Experience with pass-through entity clients

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **The Complete Guide to Fringe Benefits**

Fringe benefits can save individuals taxes that would otherwise be paid due to the tax rate increases and potential surtaxes that may or will apply. This course explores the tax advantages and potential pitfalls of providing fringe benefits to employees. It offers a clear and concise overview of this specialized area of tax law. This course is a must for anyone advising on compensation issues.

**Field of Study:** TX

**Speaker:** Susan Smith

**Vendor:** Surgent McCoy CPE, LLC

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **The Complete Guide to Payroll Taxes and 1099 Issues**

Employment taxes are often overlooked as an area where more planning may be effective. Payroll taxes have become an increasing burden for the average business, and IRS penalties for noncompliance have risen dramatically in recent years. They have also been subject to employer incentives. The Service has announced that uncovering noncompliance by employers ranks high on its audit (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** TX

**Speaker:** Deborah Phillips

**Vendor:** Surgent McCoy CPE, LLC

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **The Top 50 Business Tax Mistakes Practitioners Make and How to Fix Them**

Learn the traps practitioners fall into—before you make the mistake. Attend this enjoyable yet very informative course that will explore, in a practical way, the top errors made in compliance and tax planning for business entities. The focus of this course is how to avoid these missteps and plan for a better tax result. Experienced practitioners will benefit from a wealth of (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** TX

**Speaker:** Edward Sixt

**Vendor:** Surgent McCoy CPE, LLC

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Experience with business clients

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Tips and Traps for Dealing with the IRS—From Start to Finish**

Are you prepared to face the IRS all the way from preparing a client's return through the audit and collection processes? Gain practical insights on everything needed to choose or reject a tactic when dealing with the IRS. Represent your client with confidence and evaluate your client's options. Recognize what triggers an audit, how to negotiate, how to settle on appeal, and how to (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** TX

**Speaker:** William Harden

**Vendor:** AICPA

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** Experience in business taxation

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Top 10 Tax Issues in Dealing with LLCs and Partnerships**

Partnerships and LLCs involve unique problems that require careful attention. This course covers selected critical tax issues that practitioners need to know when working with partnerships and limited liability companies, with a focus on planning opportunities and pitfalls.

**Field of Study:** TX

**Speaker:** Deborah Phillips

**Vendor:** Surgent McCoy CPE, LLC

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** A basic course in partnership theory or experience in tax compliance or planning for partnerships and LLCs

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Transfer Pricing—Understanding the Big Picture**

Transfer pricing—determining intercompany pricing for cross-border transactions—is a key issue facing companies with foreign operations. While the focus of this course is on providing a plain English overview of the tax issues related to transfer pricing, it also explores the significant ramifications an enterprise's transfer pricing policies have on financial accounting, (...Contact NCACPA's Onsite Coordinator for full course description)

**Field of Study:** TX

**Speaker:** Trent Green

**Vendor:** Trent Green

**Hands-On Computer:** NO

**Level:** Basic

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** General knowledge of corporate business operations

**Recommended CPE Credit:** 8

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO

### **Travel and Entertainment Expenses—Planning and Update**

This program will enhance participant knowledge of statutory and regulatory guidance related to travel and entertainment expenses and provide planning opportunities related to travel, entertainment, and automobile expenses.

**Field of Study:** TX

**Speaker:** Steve Dilley

**Vendor:** Federal Tax Workshop

**Hands-On Computer:** NO

**Level:** Intermediate

**Advanced Preparation:** None

**CFP Approved:** NO

**Requisite Knowledge:** None

**Recommended CPE Credit:** 4

**Qualifies for Ethics:** NO

**Qualifies for Yellow Book:** NO