Supervision/Management Competencies: An Ethical Approach

Friday, September 4 10:30am - 12:30pm TBD 2.00 Credits $ Member Price: $89

The major topics covered in this course include:Overview of Virtue EthicsMilgram and Zimbardo case studiesNavigating the transition from "Buddy to Boss"Self-Awareness and Regard for OthersSetting Standards and Analyzing PerformanceUnconscious BiasCommunication Skills

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ACPEN: Understand Yours and Other People's Styles: Meet Them in the Middle and Be More Effective in Generating Great Results!

Friday, September 4 11:00am - 12:00pm TBD 1.00 Credits $ Member Price: $39

Communications Self-Awareness Leadership

Mining Your Firm Client Database for Revenue

Friday, September 4 11:00am - 12:00pm TBD 1.00 Credits $ Member Price: $55

The major topics that will be covered in this course include:How accounting and tax professionals can transform dormant data into dynamic growth. When leveraged strategically, your client base becomes more than a list --it becomes a roadmap to higher-value services, expanded engagements, and greater long-term retention.How to audit client records, segment strategically, and surface needs that often go unmet --all without adding complexity or compromising relationships.Using the data you already own and relationships you have already built to drive smarter growth.

ACPEN: Leading Risk Management Practices in a Dynamic Risk Environment - Part 2

Friday, September 4 11:00am - 12:02pm TBD 1.20 Credits $ Member Price: $39

Risk Management

ACPEN: K2’s Advanced Topics In Power BI

Friday, September 4 11:00am - 12:45pm TBD 2.00 Credits $ Member Price: $89

Creating formulas in Power BI with Data Analysis Expressions Adding Key Performance Indicators to your Power BI reports and dashboards Managing security in Power BI Publishing your reports and dashboards to Apps and

Content Packs for easy sharing with other team members

ACPEN: Employees Today and Tomorrow: Understanding and Improving The Employee Life Cycle

Friday, September 4 11:00am - 12:48pm TBD 2.00 Credits Member Price: $89

Understanding the various stages of the employment life cycle Onboarding and orientation Best practices and examples What goes wrong with training and growth priorities? Are performance evaluations necessary? Unleashing your staffs' hidden talents

CFO Series: Execute Your Strategy: Turn Plans into Results

Friday, September 4 11:00am - 1:00pm TBD 1.00 Credits Member Price: $89

The major topics that will be covered in this course include:The strategy-execution gap; common reasons why most strategic plans failWhy should financial planning lead strategy?Evaluating the lifespan and relevance of your strategic planBuilding your strategy to include risk managementBuilding an adaptive, finance-focused strategic approachWhat we should learn from the rise and fall of major companiesHow to align financial metrics with strategy

ACPEN: The Art of Marketing for CPAs

Friday, September 4 11:00am - 2:40pm TBD 4.00 Credits Member Price: $298

Why marketing and self promotion are so important today What keeps people from learning this skill, and how to overcome those obstacles How to get people (your boss, co-workers or clients) to like working with you How to sell someone on your services in a single minute How to attract more clients or the attention of your boss in a way that "wows" them How to get referrals from your clients or glowing reviews from your boss The 3 communication skills every business person needs to master, and why The 3 principles that really lead to more success in the business world, and how you can use those principles for you company and career

ACPEN: K2’s Artificial Intelligence For Accounting And Financial Professionals

Friday, September 4 11:00am - 3:00pm TBD 4.00 Credits Member Price: $149

Exploring AI applications in accounting and finance Understanding AI features in everyday tools Embracing the future: AI's impact on finance and accounting

BUNDLE: CFO Series - September 2026

Friday, September 4 11:00am - 7:00pm TBD 4.00 Credits Member Price: $249

The major topics that will be covered in this course include:All times listed are Eastern Time ZoneWeek 1: CFO Series: Execute Your Strategy: Turn Plans into ResultsCPE: 2Field of Study: Auditing and Business Management & Organization Discussion Leader: Robert Mims, CPADate: Friday, September 4, 11:00 amDescription: Organizations that execute a wise strategy succeed; others are executed in the market. Many organizations invest significant time in strategic planning but fall short when it comes to execution. According to McKinsey, most fail to properly execute their strategy. This session explores the critical transition from strategy to performance while challenging outdated planning models and myths. We often don't think of strategy in the same context of longer-term organizational projects, like ERP transitions or risk management. Why should you consider "killing" your current plan and building a new plan centered around financial performance? We'll dive into the reasons strategies fail, uncover the practical tools for bridging the planning-performance gap, and explore how strong financial integration enables strategy to succeed. We will review what works and what must be stopped immediately. Week 2: CFO Series: Advanced Financial Analysis: Use the Right ToolsCPE: 2Field of Study: FinanceDiscussion Leader: Brian Maturi, MBA, FCA & Don Minges, MBADate: Friday, September 11, 11:00 amDescription: Humans are hard-wired to fear uncertainty, but we can learn from the ambiguity that is common today. The upside of uncertainty is that it is the gateway to new possibilities, including new tools. The analytical tools we currently use were designed for the physical world, but today we live in a data-driven digital world, especially for those in the service economy. What are the best tools to deal with unknowns and ambiguity in today's environment? We will show you how to use the right tools in the proper manner. Week 3: CFO Series: Accounting for People: Trends, Costs, & TalentCPE: 2Field of Study: Accounting and Business Management & OrganizationDiscussion Leader: Robert Mims, CPADate: Friday, September 18, 11:00 amDescription: Do you truly feel qualified to manage HR? Leaders are increasingly responsible for the human resources function, despite limited formal training in people management. This seminar explores how to account for people as a valued asset rather than an expense. Managing the costs, trends, and risks associated with today's ever-changing workforce has changed. From recruiting and retention, to engagement and compensation alternatives. The modern finance leader must understand how employee-related decisions drive both performance and profitability. This session will examine the financial implications of HR trends, workforce planning, and the evolving role of talent strategy. We'll also explore how to influence investments in people through accounting and reporting tools. Successful organizations have moved employees to the left side of their balance sheet. Have you? Week 4: CFO Series: Amazingly Crazy Fraud Cases - Lessons LearnedCPE: 2Field of Study: AuditingDiscussion Leader: Robert Berry MBA, CPA, CIA, CISADate: Friday, September 25, 11:00 amDescription: Some fraud cases are so unbelievable, they sound like Hollywood scripts, but they're all real, and we can learn a lot from them. In this fast-paced, story-driven discussion we'll review some outrageous fraud cases; from forged financials and luxury lifestyles, to deepfakes and fake companies that fooled the smartest people in the room. You'll hear the stories, spot the red flags, and walk away with practical takeaways to help you strengthen your professional skepticism, identify fraud warning signs, and build a better fraud prevention mindset. If you enjoy a relevant story with a side of financial insight, you're in the right place. We all can learn valuable lessons from these outrageous and real frauds.

Tax Depreciation: Review and Update

Friday, September 4 11:30am - 1:30pm TBD 2.00 Credits Member Price: $89

The major topics that will be covered in this class include:Recent tax legislation and developments related to capitalizationEligible property for Section 179 and Section 168(k)Discussion of the Section 179 deduction and its use to depreciate real propertyThe Section 168(k) deduction and its use to depreciate real propertyDisposition of segments of real propertyExchanges of tangible personal property after repeal of the like-kind exchange rulesOther

related topics

ACPEN: The Radar Phenomenon

Friday, September 4 12:00pm - 12:58pm TBD 1.00 Credits Member Price: $39

Internal Controls Fraud Prevention Fraud Investigation

ACPEN: Empowering HR Pros' Thriving in 2025 and Beyond

Friday, September 4 12:00pm - 12:59pm TBD 1.00 Credits Member Price: $39

Human Resources Business Strategy Wellbeing Professional Development

ACPEN: Investment Scam Losses: How to Get Deductions

Friday, September 4 12:00pm - 1:00pm TBD 1.00 Credits Member Price: $39

Categorization of various scams The keys to deductibility Review of the client's required actions to allow deductibility Disclosures and forms reporting required for deductibility “Tales from the Front” – practice issues CPAs are dealing with in these extraordinary situations

Resistance to Resilience: Strive for Tech Change Acceptance

Friday, September 4 12:00pm - 1:00pm TBD 0.00 Credits Member Price: $55

The major topics that will be covered in this course include:Resistance to resilience in embracing new technologiesOvercoming barriers and ensuring successful implementationCutting-edge audit technologies, including AI, data analytics, and automationInsights into the Technology Acceptance Model (TAM)

ACPEN: Digging Deep with Excel Pivot Tables

Friday, September 4 12:00pm - 1:01pm TBD 1.00 Credits Member Price: $39

Data preparation and cleansing Pivot table creation Pivot table customization Navigating Excel’s PivotTable Analyze tab

ACPEN: AI In Audit and Financial Reporting

Friday, September 4 12:00pm - 1:06pm TBD 1.60 Credits Member Price: $39

Artificial Intelligence Audit Financial Reporting

ACPEN: Safety Synergy: Uniting Elements for a Secure Workplace

Friday, September 4 12:00pm - 1:07pm TBD 1.20 Credits Member Price: $39

How to evaluate physical security Increase situational awareness Simple De-escalation techniques Mental Health awareness Safe Termination Strategy Active Shooter Response Overview

ACPEN: Revenue Recognition Topic 606 - Identify Performance Obligations Part 2

Friday, September 4 12:00pm - 1:18pm TBD 1.40 Credits Member Price: $39

Revenue Recognition Accounting

ACPEN: Was It Fraud or Just Poor Audit Quality?

Friday, September 4 12:00pm - 1:27pm TBD 1.60 Credits Member Price: $79

Financial statement manipulation Ethics enforcement process Auditor conflicts of interest

ACPEN: The FASB Conceptual Framework

Friday, September 4 12:00pm - 2:00pm TBD 2.00 Credits Member Price: $89

Purpose and structure of the FASB Conceptual Framework Recognition and derecognition criteria Measurement concepts and approaches Qualitative characteristics of useful financial information Elements of financial statements Footnote disclosure requirements Relationship between the framework and standard-setting Practical application of the framework in accounting decisions

ACPEN: What's Going on at the AICPA (2026/27)

Friday, September 4 12:00pm - 2:00pm TBD 2.00 Credits Member Price: $89

AICPA audit and attestation developments Next phase of quality management Monitoring and remediation responsibilities SSAE No. 24 and SSARS No. 26 updates Exposure drafts on confirmations and fraud SAS No. 149 and group audit implications

Leverage PowerBI.com to Create Data Analysis for Others

Friday, September 4 12:00pm - 2:00pm TBD 0.00 Credits Member Price: $89

The major topics that will be covered in this class include:Tour of the PowerBI.com Interface: An in-depth walkthrough of the PowerBI.com environment, focusing on user interface elements, navigation, and customization.PowerBI.com Concepts: Fundamental concepts of PowerBI.com, including its architecture, data handling capabilities, and integration features.Connecting to Data: Techniques for connecting various data sources to PowerBI.com, ensuring seamless data integration and synchronization.Visualizations and Dashboards: Creating impactful visualizations and assembling informative dashboards to present data compellingly.Q&A Feature: Explore the interactive Q&A feature to derive insights through natural language queries.Sharing Datasets, Reports, Dashboards: Best practices for sharing datasets, reports, and dashboards with different audiences so they can leverage your data analysis work.Creating Apps: Learn how to package reports and dashboards into apps for easy distribution and consumption.

Risk Wrangling: Surviving the Modern Business Rodeo

Friday, September 4 12:00pm - 2:00pm TBD 0.00 Credits Member Price: $89

The major topics that will be covered in this course include:Risk is the common thread in an evolving landscapeRisk assessmentResponding to assessed risksAuditing standardsOther insights from AICPA guidanceFraud considerationsThe role of analyticsFinancial reporting considerationsRisk mitigation

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ACPEN: The Successful Family Business

Friday, September 4 12:00pm - 3:39pm TBD 4.00 Credits Member Price: $149

Business Management Organization

ACPEN: Habits That May Keep You from Promotions, Raises or Achieving Your Potential in Organizations: Small Steps Can Lead to Big Changes

Friday, September 4 12:00pm - 3:49pm TBD 4.00 Credits Member Price: $149

Leadership Management

ACPEN: Ethics: Critical Thinking, Case Studies, and Fraud

Friday, September 4 12:00pm - 4:00pm TBD 4.00 Credits Member Price: $149

Ethical decision-making in finance Professional codes of ethics and conduct Real-world case studies on ethical dilemmas Impact of ethics on the financial profession

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ACPEN: K2’s Data Analytics For Accountants And Auditors

Friday, September 4 12:00pm - 4:00pm TBD 4.00 Credits Member Price: $149

Understanding the importance of data analytics in modern business environments Generating and interpreting data analytics using everyday applications such as Microsoft Excel and Microsoft's Power BI platform Using regression analysis to create and validate forecasts and projections

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Best Practices: Conducting Meaningful Walkthroughs

Friday, September 4 12:30pm - 2:30pm TBD 0.00 Credits Member Price: $89

The major topics that will be covered in this course include:Review of audit procedures.Documentation requirements.Real world examples of red flags that may arise.

Business Partnerships: Managing Supplier Relationships

Friday, September 4 1:00pm - 2:00pm TBD 1.00 Credits Member Price: $55

The major topics that will be covered in this course include:Overview of supplier contractsCase studies of successful and not-so-successful supplier relationshipsRisk potentials

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ACPEN: The Controllership Series - The Controllers Role in Strategic Thinking and Advising - Part 1

Friday, September 4 1:00pm - 2:08pm TBD 1.80 Credits Member Price: $89

Controller Management Financial Strategy Strategic Thinking Critical Thinking Financial Judgment

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ACPEN: K2’s Client Accounting Services For CPA Firms: Strategies For Growth And Success

Friday, September 4 1:00pm - 2:46pm TBD 2.00 Credits Member Price: $89

CAS overview to understand the service offerings, client needs, and market opportunities Selecting technology tools in CAS for accounting, workflow, and client collaboration Designing Service Delivery Models that are scalable and efficient processes for CAS Managing client relationships and setting expectations to deliver consistent value Evaluating pricing strategies, including fixed fee, subscription, and other pricing models Ensuring governance and meeting regulatory standards for data security and compliance Adapting to emerging technologies and evolving client demands to future-proof the practice

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ACPEN: Employees Today and Tomorrow: The ROI on Your People?

Friday, September 4 1:00pm - 2:48pm TBD 2.00 Credits Member Price: $89

Dealing with people issues the right way Conflict management issues How to truly empower your employees? Organizational culture and how to be a part of positive change What are some the ‘other’ employee issues that go unsaid? What does work/life balance mean today?

ACPEN: Metrics Management – Dashboards, Performance Tools, and Open-Book Management

Friday, September 4 1:00pm - 3:00pm TBD 2.00 Credits Member Price: $89

Business Performance Management (BPM) concepts and tools Designing effective dashboards and scorecards Using color, visuals, and layout to improve understanding Common reporting and dashboard failures Asking the right questions: what happened, why, and what’s next Open-book management principles and requirements Linking metrics to incentives and behavior Building trust through transparency and clarity

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Schedule K-1: What is it & What do I do with it?

Friday, September 4 1:00pm - 3:00pm TBD 2.00 Credits Member Price: $89

The major topics that will be covered in this course include:Overview of Schedule K-1 for Partnerships, S Corporations, and Estates/TrustsReporting Schedule K-1 information on Form 1040Basis limitations, loss limitations, and material participation rulesQualified Business Income (QBI) Deduction and Schedule K-1 integrationSchedules K-2 and K-3 requirements

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Surgent's Depreciation Rules for Bonus and Section 179 Expensing

Friday, September 4 1:00pm - 3:00pm TBD 2.00 Credits Member Price: $99

OBBBA permanently restores 100% bonus depreciation Notice 2026-11 confirms existing bonus framework and availability of component elections Qualified improvement property (QIP) is boosted by OBBBA Qualified production property (QPP): established by OBBBA, clarified by Notice 2026-16 Definitions Timing Inclusions/exclusions Third-party lease scenarios Election mechanics Recapture New enlarged Section 179 ceiling limitations OBBBA energy incentives sunset guide 179D deduction still in play Tangible property regulations and their role in a strategic hierarchy of depreciation

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Surgent's Succession Planning for the Small Business Owner: Finding the Exit Ramp

Friday, September 4 1:00pm - 4:30pm TBD 4.00 Credits Member Price: $159

How to find unrelated buyers of a business Maintaining control of the business succession process Turning over the reins to family members: when to give up control Finding the right team to sell a business Options for selling a business to an unrelated party Options for selling a business to family members Options for selling a business to employees Overcoming the emotional attachment to a business Selling to family members for a life annuity Using family partnerships and trusts to transfer a business

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ACPEN: K2's Best Word, Outlook, And PowerPoint Features

Friday, September 4 1:00pm - 5:00pm TBD 4.00 Credits Member Price: $149

Creating Word and PowerPoint documents with greater ease and efficiency Enabling critical Outlook options for improved productivity Best practices for working with Word, Outlook, and PowerPoint

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Common Deficiencies in SSARS Engagements

Friday, September 4 1:00pm - 5:00pm TBD 0.00 Credits Member Price: $149

The major topics that will be covered in this course include:Frequent problem areas in preparation, compilation, and review engagementsThe root causes of noncompliancePractical approaches firms can use to improve consistency, documentation, and overall engagement performance

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Yellow Book Ethics

Friday, September 4 1:30pm - 3:30pm TBD 2.00 Credits Member Price: $89

The major topics that will be covered in this course include:The concept of public interestEthics, independence, and professional judgmentCompetence and continuing professional educationQuality control and peer reviewProper use of government information, resources, and positionProfessional behavior

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Surgent's Ethical Considerations for the CPA

Friday, September 4 1:30pm - 5:00pm TBD 4.00 Credits Member Price: $159

Examine the CPA's role in today's economy Compare similarities and differences between individual and business ethics Explore the link between ethics, integrity and scruples Discuss the basic attributes of ethics and professional conduct Review the history of the CPA profession and the CPA's requirement to adhere to ethics policies and codes of conduct Review the AICPA's Code of Professional Conduct and a CPA's responsibilities to the public, clients and colleagues Discuss the common rules and statutes faced daily in the CPA profession. Case studies may also be utilized to present potential ethical dilemmas CPAs may face during their careers Review CPA Independence violations by current legal case examples

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Coping With the Growth of Online Fraud

Friday, September 4 1:30pm - 5:30pm TBD 0.00 Credits Member Price: $149

The major topics covered in this course include:The actuation of online and other cyber fraudsFraudulent acts that are initiated electronicallyAutomated and employee driven methods that can reduce cyber-fraud risk

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ACPEN: When You Hear Hoofbeats, It May Be a Zebra

Friday, September 4 2:00pm - 2:56pm TBD 1.00 Credits Member Price: $39

Internal Controls Fraud Prevention Fraud Investigation

ACPEN: Interviewing, Onboarding and Training 101

Friday, September 4 2:00pm - 2:58pm TBD 1.00 Credits Member Price: $39

Best practices on interviewing Best practices for onboarding Best practices with training

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Financial Planning: Auto & Homeowners Insurance

Friday, September 4 2:00pm - 3:00pm TBD 1.00 Credits Member Price: $55

The major topics that will be covered in this course include:Overview of Insurance types Overview of Insurance policies and contract sectionsExamples of types of policies and coverages

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ACPEN: Revenue Recognition - Determine the Transaction Price - Part 1

Friday, September 4 2:00pm - 3:07pm TBD 1.20 Credits Member Price: $39

Revenue Recognition Accounting

ACPEN: White-Collar Crime: What Every CPA Should Know

Friday, September 4 2:00pm - 3:45pm TBD 1.00 Credits Member Price: $89

Definitions of white-collar crime White-collar crime characteristics and statistics The CPA’s role in combating white-collar crime

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ACPEN: Travel/Entertainment Expenses and Taxes: What You Need to Know for Compliance

Friday, September 4 2:00pm - 3:47pm TBD 2.00 Credits Member Price: $89

Definition of what qualifies as an entertainment expense Strategies to deduct business entertainment expenses Deductibility of meals Situations not subject to the 50% meals and entertainment reduction How to handle automobile issues related to employer-provided parking Proper accounting for deductible vs. non-deductible expenditures The four steps to analyze business expenses The latest federal legislation, cases and rulings

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ACPEN: Practical Excel Topics for Today's Accountant

Friday, September 4 2:00pm - 3:56pm TBD 2.00 Credits Member Price: $89

Data validation Underutilized, but powerful, formulas Formulas for manipulating, transforming, and cleansing data Formulas for data analysis Reference formulas such as =VLOOKUP Pivot tables Solver as a tool for performing multivariate analysis Mail merge Custom formatting

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ACPEN: Accounting for Construction Contractors

Friday, September 4 2:00pm - 4:00pm TBD 2.00 Credits Member Price: $89

Overview of FASB ASC 910 AICPA guidance for construction contractors Industry specific accounting considerations Revenue recognition methods Percentage of completion method Completed contract method Contract modifications Contract costs and allocation Complex accounting issues in construction

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ACPEN: Effective Manager - Traits and Skills

Friday, September 4 2:00pm - 4:00pm TBD 2.00 Credits Member Price: $99

Management Leadership

ACPEN: Introduction to Single Audit

Friday, September 4 2:00pm - 4:00pm TBD 2.00 Credits Member Price: $89

Uniform Guidance requirements for Single Audits Performance and reporting standards unique to Single Audits Internal controls over compliance Structure and use of the Compliance Supplement Federal program compliance requirements Reporting considerations in a Single Audit

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Generative AI Strategy for Accountants

Friday, September 4 2:00pm - 4:00pm TBD 0.00 Credits Member Price: $89

The major topics that will be covered in this course include:Evolution and current state of AI technologies in accountingDevelopment of comprehensive AI usage policies and guidelinesImplementation frameworks for integrating AI into accounting workflowsStrategic approaches to AI-driven process automation and optimizationMethods for identifying and capitalizing on AI opportunitiesBest practices for human-AI collaboration in accountingRisk management and ethical considerations for AI implementation

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ACPEN: IT Controls & SOC Reporting in Financial Audits

Friday, September 4 2:00pm - 5:00pm TBD 3.50 Credits Member Price: $109

SOC Reporting Information Technology General Controls (ITGC) Audit Reliance

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ACPEN: Building Personal Leadership Skills

Friday, September 4 2:00pm - 5:38pm TBD 4.00 Credits Member Price: $149

Leadership Personality Types Communication Uses of AI in the work place

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ACPEN: The CPA as Strategic Advisor: Leading the Client Advisory Team

Friday, September 4 2:00pm - 6:00pm TBD 4.00 Credits Member Price: $149

The CPA as team leader Roles of key advisory professionals Identifying cross-disciplinary planning opportunities Coordinating planning strategies Communication and collaboration Structuring advisory relationships Risk and professional responsibility

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CFO Solutions to IRS Problems

Friday, September 4 2:00pm - 6:00pm TBD 4.00 Credits Member Price: $149

The major topics that will be covered in this course include:The authority of IRS in assessing and collecting taxes.The common misconceptions when dealing with IRS.Common questionable actions by business owners.How to prepare for an IRS audit.The seven options in IRS collections.Possible criminal tax violations by CFOs and small business owners.

Microsoft Outlook "Must Know" Email Tips

Friday, September 4 2:30pm - 4:30pm TBD 0.00 Credits Member Price: $89

The major topics that will be covered in this class include:Using Quick Parts to streamline message composition.Eliminating inefficient back and forth appointment scheduling with the Bookings app.Using category codes and contacts to send bulk emails.Sending emails to Teams and OneNote.Organizing your inbox with custom views, rules and folders.Mastering the search tools to find emails quickly.Review of key option settings to maximize email productivity.

ACPEN: The Controllership Series - The Controllers Role in Strategic Thinking and Advising - Part 2

Friday, September 4 3:00pm - 4:02pm TBD 1.20 Credits Member Price: $39

Controller Management Financial Strategy Strategic Thinking Critical Thinking Financial Judgment

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ACPEN: The Head and Heart of Ethics - Featuring Bob Mims and Don Minges

Friday, September 4 3:00pm - 4:05pm TBD 1.00 Credits Member Price: $39

The difficult trade-offs in making choices. Functioning in the ‘gray’ areas. The value of trust. How lack of accountability can lead to ethical issues.

ACPEN: K2's Introducing Artificial Intelligence To Human Resources Pros

Friday, September 4 3:00pm - 4:08pm TBD 1.20 Credits Member Price: $39

How to get started with AI Today's major AI platforms How to use AI tools AI risks that we must manage

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ACPEN: Employees Today and Tomorrow : Are Employees Assets?

Friday, September 4 3:00pm - 4:48pm TBD 2.00 Credits Member Price: $89

GAAP vs economic value of employees The changing landscape of work The need to change management tactics Different generations and demographics Understanding the differences What issues do they present? How do we improve our understanding? Employee engagement/assessment surveys and what they should tell us Successful tactics for today's workforce

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Business Tax Update: OBBA and Recent Developments

Friday, September 4 3:00pm - 5:00pm TBD 2.00 Credits Member Price: $89

The major topics that will be covered in this class include:Recent legislation impacting business taxpayersThe One Big Beautiful Bill ActExtenders legislation updateMeals and entertainment expense reportingPartnership and S corporation updateIncome and deductions

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Steps to Stop External Fraud

Friday, September 4 3:00pm - 5:00pm TBD 0.00 Credits Member Price: $89

The major topics covered in this course include:Types of external fraudConsiderations as organizations work to reduce fraud riskExternal fraud and known parties/External fraud unknown perpetrators

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ACPEN: K2's Better Productivity Through Artificial Intelligence And Automation Tools

Friday, September 4 3:00pm - 7:00pm TBD 4.00 Credits Member Price: $149

Practical opportunities to leverage artificial intelligence and automation in business settings Potential risks associated with using AI and automation, including inherent ethical issues Pros and cons associated with tools such as ChatGPT, Gemini, Power Automate, and Zapier

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Using ChatGPT with Excel

Friday, September 4 3:30pm - 5:30pm TBD 0.00 Credits Member Price: $89

The major topics that will be covered in this class include:Introduction to ChatGPT and other AI (Artificial Intelligence) language modelsDiscussion of best practices for using ChatGPT with ExcelUse ChatGPT to create, debug and explain formulasUse ChatGPT to learn how to use Excel featuresUse ChatGPT to automate repetitive tasks in ExcelUse ChatGPT to easily create macros

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ACPEN: A Fox in the Henhouse/Courthouse

Friday, September 4 4:00pm - 4:57pm TBD 1.00 Credits Member Price: $39

Internal Controls Fraud Prevention Fraud Investigation

ACPEN: Written Information Security Plans

Friday, September 4 4:00pm - 4:57pm TBD 1.00 Credits Member Price: $39

Introduction to the Gramm-Leach-Bliley Act and its impact on data security Circular 230 compliance and due diligence for practitioners AICPA Statements of Standards relevant to WISP requirements Key components of a Written Information Security Plan Training requirements for employees, staff, and contractors Practical guidance for drafting and implementing a WISP FTC enforcement of data security standards for PTIN holders Best practices for maintaining and updating WISP compliance

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ACPEN: Professional Skepticism for the Public Accountant

Friday, September 4 4:00pm - 4:58pm TBD 1.00 Credits Member Price: $39

Self-evaluation of skepticism Requirements set forth by the AICPA Code of Professional Conduct Risk assessment Analytical procedures Advice for cultivating your professionally skeptical mindset

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ACPEN: Revenue Recognition Determine the Transaction Price Part 2

Friday, September 4 4:00pm - 5:01pm TBD 1.00 Credits Member Price: $39

Revenue Recognition Accounting

ACPEN: Federal Disasters - How to Deduct Personal Casualty Losses

Friday, September 4 4:00pm - 5:02pm TBD 1.00 Credits Member Price: $39

Federal Disaster Relief Act provisions enacted in December, 2024 and July, 2025 Comparison of personal use casualties with business/investment casualties When to claim casualty losses How to postpone casualty gains Filled-in forms examples Time limits for amended returns

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ACPEN: Managing Generational and Cultural Variances

Friday, September 4 4:00pm - 5:23pm TBD 1.60 Credits Member Price: $79

Management Leadership Cultural Variances Generational Variances

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ACPEN: Self-Rental Real Estate: Integrating the Passive Activity Rules with the Flow-Through Entity Deduction Rules

Friday, September 4 4:00pm - 5:54pm TBD 2.00 Credits Member Price: $89

Definition of self-rental property – both for Sections 199A and 469 Self-rental income from directly owned properties and reporting on Form 1040, Schedule E, page 1 Self-rental income from indirectly owned (partnerships, S corporations) and reporting on Form 1040, Schedule E, page 2 Self-rental property and the Form 8582 (passive activity) Self-rental property and the flow-through entity grouping election Self-rental property and ""former passive activities"" rules Real-life situations illustrate the various possibilities and discuss the consequences of failing to comply with the reporting standards

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ACPEN: 2026/27 Governmental Auditing Update: Yellow Book & Uniform Guidance

Friday, September 4 4:00pm - 6:00pm TBD 2.00 Credits Member Price: $89

2024 Yellow Book revisions and implementation updates Quality management and key audit role changes GAO implementation delay and audit planning implications Green Book updates and internal control considerations 2024 Uniform Guidance overhaul Single Audit requirement updates AICPA GAS/Single Audit Guide (Appendix B) changes

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ACPEN: Accounting for Credit Losses – Getting to Know CECL

Friday, September 4 4:00pm - 6:00pm TBD 2.00 Credits Member Price: $89

Overview of ASU 2016 13 Introduction to the CECL model Differences between CECL and prior GAAP Methods for applying CECL Application of CECL to loans Application of CECL to trade receivables Presentation requirements Disclosure requirements Coordination between accounting and finance functions

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ACPEN: Internal Audit in The Future

Friday, September 4 4:00pm - 6:00pm TBD 2.00 Credits Member Price: $99

Internal Audit IIA Standards Emerging Risks Technology

Bytes, Bias, and Balance: Data Ethics for Savvy Accountants

Friday, September 4 4:00pm - 6:00pm TBD 0.00 Credits Member Price: $89

The major topics that will be covered in this course include:The transformative role of artificial intelligence (AI) in accounting and auditingEnhancing efficiency and innovation with AI toolsMitigating challenges such as overreliance, data security vulnerabilities, and ethical dilemmas

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ACPEN: Project Management for Tax Preparers: Improving Workflow, Efficiency, and Client Service

Friday, September 4 4:00pm - 8:00pm TBD 4.00 Credits Member Price: $149

Project management in tax practices Client onboarding and initiation Workflow and execution strategies Monitoring and risk management Communication and collaboration

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Retaining Top Talent: Strategies for CPA Firms

Friday, September 4 5:00pm - 6:00pm TBD 0.00 Credits Member Price: $55

To purchase the report referenced in this presentation, or any of the research papers published by CPA Crossings, visit https://www.cpacrossings.com/research. The major topics that will be covered in this course include: The true cost of turnover versus retention investment Research findings on why professionals leave or stay Whole-person

retention strategies beyond compensation Work-life balance solutions that maintain productivity Career development paths for non-partner track professionals Business model transformations for sustainable staffing Technology and outsourcing strategies to reduce burnout Retention strategies specific to diverse talent and younger professionals

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ACPEN: Cybersecurity & IT Risk for IT Auditors and Financial Auditors

Monday, September 7 9:00am - 12:00pm TBD 3.00 Credits $ Member Price: $109

Cybersecurity IT Risk Governance IT Security Framework(s)

ACPEN: Cash Management: Strategies for Long-Term Success

Tuesday, September 8 8:00am - 9:49am TBD 2.00 Credits $ Member Price: $89

Developing short-term cash flow projections How do we assure adequate cash availability without having idle cash? Take advantage of your bank's cash management services Working capital loans Controlled disbursement accounts Sweep accounts and other short-term investments ACH transactions Direct transfers Lock boxes Credit and collections Reconciliation frequency Managing cash short-falls

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ACPEN: K2's Automation For Increasing Personal Efficiency And Effectiveness

Tuesday, September 8 9:00am - 10:00am TBD 1.00 Credits $ Member Price: $39

What are integration and automation? Exploring Integration Platform as a Service (iPaaS) tools and services Intelligent Voice Assistants (IVAs) and home automation systems Personal automation workflows and time-saving strategies Smart home integration and optimization

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Mining Your Firm Client Database for Revenue

Tuesday, September 8 9:00am - 10:00am TBD 1.00 Credits $ Member Price: $55

The major topics that will be covered in this course include:How accounting and tax professionals can transform dormant data into dynamic growth. When leveraged strategically, your client base becomes more than a list --it becomes a roadmap to higher-value services, expanded engagements, and greater long-term retention.How to audit client records, segment strategically, and surface needs that often go unmet --all without adding complexity or compromising relationships.Using the data you already own and relationships you have already built to drive smarter growth.

ACPEN: A Guide to Sampling - Part 2

Tuesday, September 8 9:00am - 10:47am TBD 2.00 Credits Member Price: $89

Auditing Yellowbook

ACPEN: Better Business Writing: Improve Your Speed and Quality

Tuesday, September 8 9:00am - 11:00am TBD 2.00 Credits Member Price: $89

Writing Communications

ACPEN: Conflicts of Interest: Dealing With Ethical Dilemmas in Business and Industry

Tuesday, September 8 9:00am - 11:00am TBD 2.00 Credits Member Price: $89

Do conflicts of interest matter? Are we aware of common conflicts of interest? What does the Code of Professional Conduct require? How to recognize Conflicts of Interest? Ethical issues regarding competence and gifts and entertainment Trade-offs involved in dealing with conflicts of interest? Suggestions on how to avoid conflicts of interest.

S Corporations: Calculating Shareholder Basis

Tuesday, September 8 9:00am - 11:00am TBD 2.00 Credits Member Price: $89

The major topics that will be covered in this course include:Discuss the calculation of basis when the entity is formed including the impact of contributed propertyExplain the importance of shareholder loans to the entityUses a comprehensive example to illustrate the mechanics of the basis determination processSchedule K-1 Basis and Form 7203Discuss how basis is impacted by distributions of corporation propertyExplain how basis is impacted by sale/or liquidation of the S corporation interestDiscuss how S corporation losses impact Form 1040 Schedule E reportingShow how to get from the Schedule K-1 information to the basis calculations

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Shortcuts that Excel Users Love

Tuesday, September 8 9:00am - 11:00am TBD 0.00 Credits Member Price: $89

The major topics covered in this course include:The power of keyboard shortcutsOft used features with more capability than meets the eyeNew helpful featuresNote: This session is taught using Hands-On methodology. We provide practice files that tie to the examples in the course materials so participants can undertake all the steps in unison with the instructor.

ACPEN: Advanced IT Audit & Real-World Testing

Tuesday, September 8 9:00am - 12:00pm TBD 3.00 Credits Member Price: $109

Information Technology General Controls (ITGC) Testing Audit Execution Workpapers

Surgent's Business Law for Small Business Owners

Tuesday, September 8 9:00am - 12:30pm TBD 4.00 Credits Member Price: $159

Contract principles Legal issues related to various types of business organizations Worker classification Employee rights and the duties of employers Real property law

ACPEN: Gamed: Why Performance Targets and Incentives Fail and How to Fix Them

Tuesday, September 8 9:00am - 12:40pm TBD 4.00 Credits Member Price: $149

Diagnosing problems with existing performance targets and incentives Designing performance targets (that work in the real world) Designing incentives the drive the intended behaviours and outcomes Avoiding common mistakes, problems and pitfalls with performance targets and incentives

Forensic Accounting: Investigating Divorce Cases

Tuesday, September 8 9:00am - 1:00pm TBD 0.00 Credits Member Price: $149

The major topics that will be covered in this course include:The role of a forensic accountant in divorce proceedingsThe marketing of forensic accounting services to family law attorneysHow to conduct a financial investigationCommon areas to uncover hidden assets or incomeThe basic calculations in evaluating marital assetsTestifying in depositions and divorce court

ACPEN: Hands-On Tax Return Workshop – S Corporations (Form 1120S)

Tuesday, September 8 9:00am - 4:38pm TBD 8.00 Credits Member Price: $300

Extensive review of the S corporation income tax laws with an emphasis on any new legislative Schedule K analysis– determine if income statement items are separately (i.e. schedule K) or non-separately stated income and expense items Discuss how schedule K items get allocated to shareholders on their schedule K-1s Look at detailed Schedule K-1 information reporting to shareholders needed for the qualified business income (QBI) deduction, 3.8% net investment income tax and business interest expense limitations Talk about the unreasonably low officer compensation issues Learn the special tax treatment of fringe benefits paid to 2% shareholders and family members Schedule M-1 – calculate the reconciliation of income or loss per books with income or loss per income tax return Schedule M-2 – detailed step-by-step calculation of the AAA, PTI, E&P and OAA accounts Basic overview of the tax treatment of distributions including when a S corporation has prior C corporation earnings and profits (E&P) Review the importance and basics of calculating a shareholder’s stock and debt basis Basic overview

of the potential S corporation built in gains tax from the conversion of a C to S corporation

You Don't Know What You Don't Know About Microsoft Excel

Tuesday, September 8 9:00am - 5:00pm TBD 0.00 Credits Member Price: $239

The major topics covered in this course include:Excel shortcuts and time saversWorking with templates, formats, styles, and themesCustomizing and enhancing ExcelProtecting and securing workbooksFormula building and the Excel function libraryNote: This session is taught using a Hands-On methodology. We provide practice files that tie to the examples in the course materials so participants can undertake all the steps in unison with the instructor.

Corporate Transparency Act Developments

Tuesday, September 8 9:30am - 11:30am TBD 2.00 Credits Member Price: $89

The major topics that will be covered in this course include:Background of the Corporate Transparency ActBeneficial Ownership Information Reporting (BOIR) Rule Entities required to report.Reporting requirements imposed by the CTADue dates of reportsInformation needed to satisfy the BOIRImpact of failure to reportHow to submit a reportCourt rulings on CTA’s unconstitutionalityImplications to entities as a result of the ruling in NSB.Potential reporting requirements due to FinCen’s proposed rulemaking with respect to non-financed purchases of residential real estate and gratuitous transfers.

What's Behind the Data?

Tuesday, September 8 9:30am - 11:30am TBD 0.00 Credits Member Price: $89

The major topics that will be covered in this course include:Ways in which data and information can be misleadingCommon pitfalls when encountering dataHow to re-evaluate the data to avoid those pitfalls

ACPEN: The Ethics of How We Treat People; Why it Matters?

Tuesday, September 8 10:00am - 10:50am TBD 1.00 Credits Member Price: $39

Is it ethical to mistreat others? What are the signs and consequences of mistreatment? Why does treating people ethically matter for finance and business professionals? The consequences of mistreating people? What is the return on treating people well?

ACPEN: AI Risk Fundamentals: Understanding Emerging Tech Threats

Tuesday, September 8 10:00am - 11:03am TBD 1.00 Credits Member Price: $39

AI Landscape Risks Core AI Technologies Security Vulnerabilities Privacy Concerns Assessment Frameworks

ACPEN: Applying the New Expected Credit Loss Model

Tuesday, September 8 10:00am - 11:46am TBD 2.00 Credits Member Price: $89

Principles behind the new expectation credit loss model Acceptable methods for evaluating expected credit loss for certain financial instruments Enhanced disclosure requirements common for nonpublic entities

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ACPEN: Bears Will Be Bears - Fraudsters Too

Tuesday, September 8 10:00am - 11:47am TBD 1.00 Credits Member Price: $89

Internal Controls Fraud Prevention Fraud Detection Fraud Investigation