

On Demand Course List

Period Covered: December 2024 thru March 2025



TACのCPEコースはBeckerの
Primeコースのオンデマンド部
分となります。

Course ID	Name	Fields of Study	Description	Credits	Instructors	Lifecycle	Prime Subscription
11719/12807	Accounting for Variable Interest Entities	Accounting	This course will be an overview of: * U.S. GAAP requirements related to accounting and financial reporting for variable interest entities * Defining variable interest entities and primary beneficiaries * Quantitative and qualitative factors in determining when to consolidate a nonvoting interest	3	Jennifer Louis	Foundation	✔
33826/39260	Segment Reporting	Accounting	This course will be an overview of: * The accounting standards applicable to identification and disclosure of reportable segments * The terminology relevant to segment reporting * The implementation issues related to reportable segments	2.5	Mike Brown	Foundation	✔
31266/36369	Accounting and Attest Engagements for ESG	Accounting	This course will be an overview of: * The SEC proposal * FASB/GASB impact * Attestation requirements	1	Melisa Galasso	Premium	✔
23425/27248	Accounting and Auditing for Going Concern	Accounting	This course will be an overview of: * The various requirements related to going concern considerations for preparers under U.S. GAAP, IFRS, and Governmental GAAP. The recent changes to the auditing standards regarding going concern.	2	Melisa Galasso	Foundation	✔
31673/36866	Accounting and Auditing Update Q1 2024	Accounting	This course will be an overview of: * Current developments from accounting standard setters that discuss newly issued and proposed accounting standards. * Changes within the SEC, including new and proposed accounting and reporting rules and amendments issued by the commission.	2	Timothy F. Gearty	Premium	✔
32915/38316	Accounting and Auditing Update Q2 2024	Accounting	This course will be an overview of: * Current developments from accounting standard setters that discuss proposed accounting standards. * Changes within the SEC, including new and proposed accounting and reporting rules and amendments issued by the commission.	2.5	Timothy F. Gearty	Premium	✔
33951/39500	Accounting and Auditing Update Q3 2024	Accounting	This course will be an overview of: * Current developments from accounting standard setters that discuss proposed accounting standards. * Changes within the SEC, including new and proposed accounting and reporting rules and amendments issued by the commission.	2.5	Timothy F. Gearty	Premium	✔
35461/41355	Accounting and Auditing Update Q4 2024	Accounting	This course will be an overview of: * Current developments from accounting standard setters that discuss proposed accounting standards. * Select contemporary auditing topics that affect auditors, audit committees, and preparers of financial statements.	2.5	Timothy F. Gearty	Premium	✔
31950/37150	Accounting and Financial Reporting for Cryptocurrency and Other Digital Assets	Accounting	This course will be an overview of: * Common issues related to initial recognition and measurement, subsequent measurement or derecognition, presentation, and disclosure of cryptocurrency and other digital assets. * Feedback from the AICPA's Digital Assets Working Group intended to assist financial statement preparers and auditors with addressing these digital records.	2.5	Jennifer Louis	Premium	✔
29618/34343	Accounting and Reporting for Contributions, Including Gifts in Kind	Accounting	This course will be an overview of: * Accounting and reporting for non-exchange contributions * Special accounting, reporting, and disclosure requirements for various types of nonfinancial gifts, including free or reduced rent, digital assets, and more * Answers to frequently asked questions in applying U.S. GAAP requirements	2	Jennifer Louis	Foundation	✔
23532/27519	Accounting Changes and Error Corrections (ASC 250)	Accounting	This course will be an overview of: * The definition of and scope of various types of accounting changes. * Economic motives, justification, and evaluation of changing accounting methods. * The primary considerations for error corrections. * Illustrated examples of how to apply FASB ASC 250—Accounting Changes and Error	2	Amelia Hart	Foundation	✔

15247/17148	Accounting for Convertible Debt Instruments and Contracts in an Entity's Own Equity	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The amendments to the guidance on accounting and disclosures for convertible instruments. * Changes to accounting for contracts in an entity's own stock. * Amendments to the guidance on earnings per share as it relates to convertible instruments. 	2 Timothy F. Gearty	Foundation	✓
16412/18613	Accounting for debt modifications	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Highlights of the impact of changing debt terms * Identifying and accounting for troubled debt restructurings (TDRs) * Identifying and prospectively accounting for debt modifications with an existing lender * Identifying and accounting for debt extinguishments, when new debt is incurred with a 	2 Jennifer Louis	Premium	✓
24118/28237	Accounting for Derivative Financial Instruments and Hedging Activities (ASC 815)	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * How to account for hedging and derivatives activities and ensure compliance with related accounting standards 	2.5 Mike Brown	Foundation	✓
23341/27124	Accounting for Equity Instruments	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Accounting for equity securities and related ownership interests within the scope of ASC 321. * Applying the net asset value practical expedient for qualifying investments. * Applying the modified cost alternative method of accounting for certain investments. 	2 Jennifer Louis	Foundation	✓
34939/40653	Accounting for Income Taxes (ASC 740): Overview and Special Issues	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Preparing a tax provision * Identifying temporary and permanent differences * Calculating deferred tax asset (DTA) and deferred tax liability (DTL) * Assessing valuation allowance 	2 Jennifer Louis	Foundation	✓
23407/27199	Accounting for Stock Options and Other Stock-Based Compensation (ASC 718)	Accounting	<p>After completing this course, the learner should be able to:</p> <ul style="list-style-type: none"> * Define the capitalization and income tax rules outlined in ASC 718 * Define the impact of ASC 718 on nonpublic companies * Name the required disclosures under ASC 718 	1.5 Timothy F. Gearty	Foundation	✓
33823/39256	Accounting for Stock-Based Compensation	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * U.S. GAAP requirements related to accounting for stock-based compensation for both employees and nonemployees * Relevant fair value measurement guidance * Accounting for stock plan modifications 	3.5 Jennifer Louis	Foundation	✓
31291/36394	Accounting Update 2024	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Recent FASB standard-setting activity * Recent SEC comments and other current accounting issues 	5 Jennifer Louis	Premium	✓
35450/41344	Accounting Update 2025	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Accounting Standards Updates with open effective dates for public or nonpublic entities * Hot topics in accounting and financial reporting * Recent changes or enhancements to audit and attestation standards * Important interpretations of ethical requirements, including independence 	5 Jennifer Louis	Premium	✗
10692/11720	Activity-Based Costing to Manage Capacity	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The use of activity-based costing as a costing approach * The steps involved in developing an activity-based costing system * Using activity-based costing to manage cost and capacity * Determining the benefits available through the use of activity-based costing 	1.5 Timothy F. Gearty	Foundation	✓
24341/28555	Addressing Financial Reporting Issues and Bankruptcy Code Provisions, Part 1	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Bankruptcy law * The bankruptcy process * Issues and implications of Chapter 11 bankruptcies 	2 Timothy F. Gearty	Foundation	✓
25360/29579	Addressing Financial Reporting Issues and Bankruptcy Code Provisions, Part 2	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Bankruptcy law * The bankruptcy process * Issues and implications of Chapter 11 bankruptcies * Financial reporting examples 	2 Timothy F. Gearty	Foundation	✓

29286/33942	Advanced Derivative and Hedge Accounting Concepts	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Advanced guidance related to some of the more complex derivative and hedge accounting issues * Examples to illustrate important concepts and practical application 	3 Jennifer Louis	Foundation	✓
29272/33904	AICPA Valuation and Consulting Standards	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Statement on Standards for Consulting Services (SSCS) No. 1 to include the consulting process and consulting services for attest clients * Use of professional judgment under SSCS No. 1 * Introduction and scope of Statement on Standards for Valuation Services (SSVS) No. 1, 	2 Jennifer Louis	Foundation	✓
29577/34299	Applying the New Expected Credit Loss Model to Financial Instruments	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Principles behind the new expected credit loss model * Acceptable methods for evaluating expected credit loss for certain financial instruments * Enhanced disclosure requirements common for nonpublic entities that are not financial institutions 	2 Jennifer Louis	Foundation	✓
21197/24497	Asset Retirement and Environmental Obligations (ASC 410)	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The accounting standards applicable to the recognition and measurement of an asset retirement obligation * The terminology relevant to asset retirement obligations * The methods used to calculate asset retirement obligation liabilities 	3 Timothy F. Gearty	Foundation	✓
29886/34738	ASU's Effective 2023	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * ASUs effective in 2023 for public, private, and not-for-profit entities 	1 Melissa Galasso	Premium	✓
31446/36605	ASU's Issued in 2023	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * ASU 2023-01 through ASU 2023-09 	1 Melissa Galasso	Premium	✓
31929/37129	Becoming an Expert Witness	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The legal standard for expert witness testimony, including statutory and case law * The types of matters on which a CPA expert witness may provide testimony * Which qualifications an expert witness must possess * The preparation that is required of an expert witness 	2 Michael Brown	Foundation	✓
16575/18781	Building a persuasive case	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The role of persuasion in the accounting profession * The psychological and business motivations of accountants and clients during negotiations * Persuasive principles and tactics accountants can use in the course of their work * Ethical problems involved in using persuasive techniques and how to avoid them 	2 Timothy F. Gearty	Foundation	✓
31103/36056	Business Combinations and Consolidations, Part 1 (ASC 805 & 810)	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * When it is appropriate to use consolidated statements * How to choose and execute the right accounting method for your organization's portfolio of subsidiaries and investments 	1 Jennifer Louis	Foundation	✓
31113/36066	Business Combinations and Consolidations, Part 2 (ASC 805 & 810)	Accounting	<p>This course will be an overview of:</p> <p>When to use consolidated statements.</p> <p>How to choose and execute the right accounting method for your organization's portfolio of subsidiaries and investments.</p>	2 Jennifer Louis	Foundation	✓
23391/27181	Business Combinations and Goodwill	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Identifying the buyer * Determining the acquisition date * Recognition and measurement of assets acquired, liabilities assumed, and noncontrolling interest 	2 Jennifer Louis	Foundation	✓
29276/33919	Business Restructuring Part 1	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Understanding the definition of a business and when a set of activities may be either a business or may be assets * When to test assets for impairment losses and how to measure and recognize an impairment loss for the different forms of assets held by an entity 	2 Timothy F. Gearty	Foundation	✓

29312/34014	Business Restructuring Part 2	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Some of the concepts discussed in Business Restructuring: Part 1, including a discussion of contract termination costs in an exit and disposal activity * The guidance for accounting and reporting a discontinued operation of an entity * How and when an entity shall deconsolidate a subsidiary or a variable interest entity 	2 Timothy F. Gearty	Foundation
21725/25033	Carve-Out Financial Statements, Part 1	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * What are carve-out entity financial statements * The accounting requirements related to carve-out entity financial statements * Items to consider in the preparation of carve-out entity financial statements * Disclosures related to carve-out financial statements 	2 Timothy F. Gearty	Foundation
21726/25036	Carve-Out Financial Statements, Part 2	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The accounting requirements related to carve-out entity financial statements * Items to consider in the preparation of carve-out entity financial statements 	2 Timothy F. Gearty	Foundation
33938/39401	Common Disclosures for Nonpublic Entities	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * General disclosures about the entity and its environment * Common critical information that supplements the face financial statements * Highlighting risks and uncertainties through robust footnotes * Tailoring disclosures to the nature, size, and complexity of the entity to provide useful 	3.5 Jennifer Louis	Foundation
17763/20225	Comprehensive income	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The rules governing comprehensive income contained in ASC 220 * Coverage of recognition and initial measurement, subsequent measurement and reclassifications, and presentation and disclosure requirements * A series of interactive examples meant for users to practice the application of the standards 	2 Timothy F. Gearty	Foundation
22481/25988	Consolidation of VIEs, Part 1 (ASC 810)	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * How to determine when a company has a variable interest in another entity * How to determine which entities are not subject to consolidation as variable interest entities * How to identify the criteria used to identify the primary beneficiary 	2.5 Timothy F. Gearty	Foundation
22529/26036	Consolidation of VIEs, Part 2 (ASC 810)	Accounting	<p>This course will be an overview of:</p> <p>How to determine when a company has a variable interest in another entity</p> <p>How to determine which entities are not subject to consolidation as variable interest entities</p>	2 Timothy F. Gearty	Foundation
13285/14472	Construction Industry - Overall Landscape	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The nature of construction contractors and the significant roles they play in the economy and the many facets of the industry. * The features of the business environment, including characteristics common to contractors, types of contracts, contract modifications and changes, the bonding and surety process, joint 	1.5 Timothy F. Gearty	Premium
34226/39904	Construction Industry: Advanced Topics	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Accounting for and reporting investments in construction joint ventures * Recognition and initial measurement of business combinations * The financial statement presentation of joint ventures including the balance sheet and required disclosures 	1 Timothy F. Gearty	Premium
12890/14077	Cracking the Codification: U.S. GAAP research made easy	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * How the FASB Accounting Standards Codification presents all relevant U.S. accounting and financial reporting literature in a single, authoritative offering * The skills and knowledge to easily use the Codification in critical real-world applications 	1.5 Timothy F. Gearty	Foundation
21564/24867	Debt - Accounting and Financial Reporting Risks	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Discussion of debt subject to classification * Guidance on callable obligations * Accounting for lock-box or revolving credit arrangements * Refinancing of short-term obligations 	3.5 Jennifer Louis	Foundation
29339/34053	Disclosure and Sustainability Reporting: An SEC Overview	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Critical SEC rules governing Fair Disclosure * SEC rules governing non-GAAP financial measures * Sustainability reporting * Environmental, social, and corporate governance initiatives 	1.5 Timothy F. Gearty	Foundation













21635/24939	Earnings Per Share (ASC 260)	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The presentation and disclosures of EPS and their interpretation in financial statements. * How and when to compute EPS for financial statements. * Examples and interpretations of EPS disclosures from companies. 	3 Timothy F. Gearty	Foundation	✓
32566/37904	Equity (ASC 505)	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The definition and scope of elements classified as components of equity as well as general guidance related to equity * Pertinent rights, privileges, and terms associated with various securities outstanding * Applicable accounting and reporting requirements for stock dividends and stock splits, 	2 Stephanie Morris	Foundation	✓
23109/26614	Essentials for Businesses Receiving Government Assistance	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The common types of government assistance received by for-profit entities, including various recent COVID-19 funding sources * Alternative policy elections available for the proper accounting, reporting, and disclosure of government assistance in financial statements 	2 Jennifer Louis	Premium	✓
12151/13306	Evaluating the Quality of Earnings	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The impact of presentation and biased accounting * The steps to take to evaluate financial reporting quality * Quantitative tools to assess earnings quality * Instruments to control earnings management and low-quality financial reporting 	1 Timothy F. Gearty	Foundation	✓
28845/33305	Examining the New Lease Accounting Standard	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Topic 842, lease accounting and financial reporting * Accounting for lease modifications and concessions * Other important considerations for applying the new lease accounting standard 	2 Jennifer Louis	Premium	✓
25654/29877	Financial Instruments Derivatives and Hedging	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Background on why ASU was issued * Changes to presentation and disclosure * Simplifications permitted by the new standard 	1.5 Michael Hamilton	Foundation	✓
23386/27176	Financial Instruments — Recognition and Measurement	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Accounting standards that affect the treatment and reporting of financial instruments * Guidance under U.S. generally accepted accounting principles (GAAP) for the proper recognition and measurement of financial instruments * Reporting, presentation, and disclosure requirements for financial instruments 	1 Timothy F. Gearty	Foundation	✓
24588/28805	Financial Instruments: Credit Losses (ASC 326)	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Concepts related to accounting for credit losses under ASC 326 * The credit loss model for available-for-sale (AFS) debt securities and debt securities held at amortized cost 	1.5 Michael Brown	Foundation	✓
31423/36565	Financial Reporting Challenges Q1 2024	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Global and national economic issues and their impact on financial reporting * New accounting pronouncements that may have a major affect on your business and * Climate related issues * Miscellaneous SEC and FASB Items 	2 Timothy F. Gearty	Premium	✓
32874/38271	Financial Reporting Challenges Q2 2024	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Global and national economic issues and their impact on financial reporting. * New accounting pronouncements that may have a major affect on your business. * Miscellaneous SEC and business-related issues. * Climate-related issues. 	2.5 Timothy F. Gearty	Premium	✓
33969/39612	Financial Reporting Challenges Q3 2024	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * New accounting pronouncements that may have a major effect on your business * Global and national economic issues and their impact on financial reporting * Miscellaneous business-related issues 	2.5 Timothy F. Gearty	Premium	✓
35453/41347	Financial Reporting Challenges Q4 2024	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * New accounting pronouncements that may have a major affect on your business. * Global and national economic issues and their impact on financial reporting. * Miscellaneous business-related issues. 	2.5 Timothy F. Gearty	Premium	✓

10138/11163	Financial Reporting Framework for Small- and Medium-Sized Entities	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * General concepts and principles * Common statement of financial position line items, both current and long-term * Risks and uncertainties * Revenue recognition concepts 	3 Jennifer Louis	Foundation	✓
10676/11704	Forecasting for the Start-Up Business	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Expense and revenue for a start-up business plan * Costing techniques for determining expenses for a start-up business * Market analysis of available markets for a new or expanding business * Analysis techniques to verify forecasting accuracy 	3 Mike Brown	Foundation	✓
140/153	Foreign Currency Accounting (ASC 830)	Accounting	<p>Success in today's international business arena requires the ability to account for foreign currency and accurately translate assets, expenses, and gains and losses in compliance with GAAP. Learn how to apply the "functional currency" approach by utilizing both the current (translation) and temporal (re-measurement) methods.</p>	2 Timothy F. Gearty	Foundation	✓
24304/28504	Forensic Accounting	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The definition of forensic accounting * How forensic accounting differs from traditional accounting * The benefits of developing forensic accounting skills and incorporating them into your organization 	2 Timothy F. Gearty	Foundation	✓
31981/37181	Forensic Accounting	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The basics of forensic accounting, forensic audit, and forensic investigations * How to identify fraud red flags * Fraud trends * The impact of fraud on an organization 	2.5 Kelly Pope, Timothy F. Gearty	Foundation	✓
23985/28018	Foundations of Business Combinations and Noncontrolling Interests	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Concepts related to accounting for business combinations under ASC 805 * Concepts related to consolidations under ASC 810 * Compliance requirements for critical issues and understanding of the relevant guidance 	3.5 Michael Brown	Foundation	✓
29574/34296	Fraud in Your Practice	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Various types of fraud to watch for * Fraud in financial statements—the why and the how * Fraud in relation to tax returns * The importance of internal controls in preventing fraud 	2 Kelly Pope	Foundation	✓
14530/16170	GAAP financial statements (ASC 205-235)	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The SEC accounting rules applicable to the preparation and inclusion of financial statements in the Form 10-K (Annual Report) and the Form 10-Q (Quarterly Report) for those entities subject to such reporting requirements 	1.5 Timothy F. Gearty	Foundation	✓
31928/37128	GAAP Gang Q1 2024	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Current developments, which will be covered by an engaging panel of accounting experts who discuss the background of the proposed and final standards and their applicability to those preparing financial statements and those auditing financial statements * Changes within the SEC, including new and proposed accounting and reporting rules and 	2.5 Colleen Cunningham, Holly Grennan, Paul Stahlin, Rita Karachun, Robert H. Herz, Stephen D. Rivi	Premium	✓
33479/38908	GAAP Gang Q2 2024	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Current developments, which will be covered by an engaging panel of accounting experts who discuss the background of the proposed and final standards and their applicability to those preparing financial statements and those auditing financial statements * Changes within the SEC, including new and proposed accounting and reporting rules and 	2.5 Timothy F. Gearty	Premium	✓
34239/39923	GAAP Gang Q3 2024	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Current developments, which will be covered by an engaging panel of accounting experts who discuss the background of the proposed and final standards and their applicability to those preparing financial statements and those auditing financial statements * Changes within the SEC, including new and proposed accounting and reporting rules and 	2.5 Colleen Cunningham, Holly Grennan, Paul Stahlin, Rita Karachun, Robert H. Herz, Stephen D. Rivi	Premium	✓
35560/41460	GAAP Gang Q4 2024	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Current developments, which will be covered by an engaging panel of accounting experts who discuss the background of the proposed and final standards and their applicability to those preparing financial statements and those auditing financial statements * Changes within the SEC, including new and proposed accounting and reporting rules and 	2.5 Timothy F. Gearty	Premium	✓

35169/41057	GAAP Update 2024	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * ASUs Effective in 2024 * ASUs Coming down the Pike * FASB Projects 	2.5	Jennifer Louis	Foundation	✓
23262/27004	How ESG-Related Matters Impact Financial Statements and Audits	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The broad spectrum of quantitative and qualitative information that interested parties seek to understand about an entity's business strategy, cash flows, financial position, and financial performance. * Evolving guidance from the AICPA, SEC, PCAOB, and other stand-setters related to 	2	Jennifer Louis	Premium	✓
25829/30052	Impairment of Long-Lived Assets	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The typical assets subject to impairment, including finite- and indefinite-lived assets and the process for calculating the impairment loss * Judgements used in evaluating goodwill for impairment 	2	Jennifer Louis	Foundation	✓
23517/27479	Impairment of Tangibles, Intangibles and Goodwill	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The assets subject to impairment testing * How to calculate the impairment of fixed assets with both definite and indefinite lives * How to calculate the impairment of intangible assets other than goodwill * How to calculate the impairment of goodwill 	2	Timothy F. Gearty	Foundation	✓
29675/34400	Inspecting the Annual Report, Part 1	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Collecting annual report data from the SEC and a company's website * Required components of an annual report * Analytical tools to research and review financial filings * Questions to answer through an effective analysis 	2	Michael Brown	Foundation	✓
29677/34402	Inspecting the Annual Report, Part 2	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Looking beyond the financial statements reported in SEC filings to analysis provided by horizontal, vertical, and ratio analysis * Comparing company performance to appropriate competitors in similar classifications * Using benchmarks to evaluate trends indicated in financial results and compare to 	2	Mike Brown	Foundation	✓
19219/22125	Interim reporting (ASC 270)	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The accounting and disclosure principles for interim financial reporting for nonpublic entities * The unique requirements for interim financial reporting for publicly traded companies 	2	Timothy F. Gearty	Foundation	✓
15718/17685	Introduction to Bookkeeping	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Bookkeeping basics for small businesses * Common bookkeeping systems available for small businesses * Converting transaction information into a general ledger * Customizing bookkeeping systems, reports, and ledgers to meet a company's unique needs 	2	Stan Pollock	Foundation	✓
27904/32343	Introduction to Derivatives and Hedge Accounting	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Introductory accounting guidance related to derivatives and hedge accounting, with an emphasis on nonpublic entities * Examples to illustrate important concepts and practical application 	3.5	Jennifer Louis	Premium	✓
12126/13281	Introduction to Financial Reporting Quality	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * An introduction to financial reporting quality * Variations in reporting quality * Quality indicators and financial statement comparisons * Earnings quality and stock valuation 	1.5	Timothy F. Gearty	Foundation	✓
13037/14224	Introduction to Financing an Entity Using Equity Instruments	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Common stock issuance and subsequent accounting. * Recording dividends. * Special considerations for freestanding and embedded equity-linked instruments. * Accounting for debt with options to convert into equity instruments. 	3.5	Jennifer Louis	Foundation	✓
10934/11964	Inventory: Techniques to Manage, Account for, and Value	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Inventory management and valuation is one of the most critical functions of any business. It is also one of the most complex business functions, due to the sheer number of possible accounting approaches. Explore methodologies that are utilized in managing, costing, and valuing inventory. 	2	Timothy F. Gearty	Foundation	✓

28393/32843	Lease Accounting: Mastering the Requirements	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * FASB's Accounting Standard Update for Leases (Topic 842) * Key differences between ASC Topic 842 and the International Accounting Standards Board (IASB) new lease accounting standard, IFRS 16, Leases 	2 Jennifer Louis	Foundation
24382/28598	Liabilities (ASC 400-480)	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The definition and scope of various types of liabilities * The nature, types, valuation, disclosure, and recognition of liabilities * The primary considerations for accounting for liabilities * Illustrated examples of how to apply FASB ASC 405-480, Accounting for Liabilities 	3.5 Mike Brown	Foundation
24384/28600	Liquidation Basis of Accounting (ASC 205-30)	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * ASU 2013-07, Presentation of Financial Statements (Topic 205) * The liquidation basis of accounting * Going concern * Liquidity challenges, going concern, substantial doubt, economic and industry risk factors, and other related issues 	1.5 Michael Brown	Foundation
10077/11101	Managing the Company's Cash and Credit	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Factors and considerations in establishing credit terms * Financial ratios commonly used to make credit decisions and evaluate annual debt covenant compliance * Financial indicators used to assess management's efficiency in managing company 	1.5 Timothy F. Gearty	Foundation
32518/37856	Mastering Accounting for Income Taxes (ASC 740)	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Foundational knowledge and critical strategies * Intraperiod and interperiod tax allocation * Relevant issues surrounding accounting for income taxes 	2.5 Tara Fisher	Foundation
3432/4894	Meeting SEC Disclosure Requirements: Compensation Discussion and Analysis	Accounting	<p>Gain a solid understanding of the many elements and requirements of the Compensation Discussion and Analysis (CD&A) as we explain the required disclosures along with guidance on how to obtain the required information effectively and efficiently. Participants will receive guidance and recommendations that help ensure compliance and minimize the likelihood of receiving comments from the SEC.</p>	1 Timothy F. Gearty	Foundation
23422/27245	Meeting SEC Disclosure Requirements: MD&A, Part 1	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Compliance with Securities and Exchange Commission (SEC) regulations relating to the MD&A section of an entity's annual financial report * Guidelines applicable to the MD&A section of an entity's annual financial report * Complex issues related to preparing MD&A disclosures 	2 Timothy F. Gearty	Foundation
23423/27246	Meeting SEC Disclosure Requirements: MD&A, Part 2	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Compliance with SEC regulations and guidelines as it applies to the MD&A section of an entity's annual financial report * Current MD&A compliance and guidance that will clarify many of the complex issues related to preparing MD&A disclosures 	1 Timothy F. Gearty	Foundation
23461/27382	Meeting SEC Disclosure Requirements: MD&A, Part 3	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Compliance with SEC regulations and guidelines, which is critical and applies to the MD&A section of an entity's interim period and annual financial reports * Current MD&A compliance and review guidance that will clarify many of the complex issues related to preparing MD&A disclosures 	1 Timothy F. Gearty	Foundation
15454/17386	Mergers and Acquisitions Due Diligence	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * What takes place during the merger and acquisition process. * The key players of a merger and acquisition and the roles they fulfill in the transaction. * The models and techniques that are used to value the target company that will be merged or acquired. 	2 Timothy F. Gearty	Foundation
34234/39917	New Quality Control Standard	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The PCAOB's new quality control standard 	1 Jennifer Louis	Foundation
18783/21609	Non-GAAP financial measures	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The background and history of non-GAAP financial measures * Guidance and interpretations related to non-GAAP financial measures * SEC comment letter examples * Other developments in pro forma financial reporting 	1.5 Timothy F. Gearty	Foundation

35391/41285	Non-GAAP Financial Measures	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The background and history of non-GAAP financial measures * Guidance and interpretations related to non-GAAP financial measures * SEC comment letter examples * Other developments in pro forma financial reporting 	2 Timothy F. Gearty	Foundation	✓
18730/21552	Nonmonetary transactions	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The definition of monetary and nonmonetary transactions * The distinction between monetary and nonmonetary transactions * Determining whether a nonmonetary transaction has commercial substance and how to account for it 	2.5 Timothy F. Gearty	Foundation	✓
31584/36766	Nonprofits: Accounting, Reporting, Operational and Compliance Challenges 2024	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Special accounting and financial reporting considerations for nonprofits * Unique operational considerations for nonprofit management and those charged with governance to monitor * Compliance requirements commonly faced by nonprofits when providing external financial 	2.5 Jennifer Louis	Premium	✓
30311/35197	Not-for-Profit Accounting and Auditing Update 2024	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * CECL * Recently issued FASB standards 	1 Jennifer Louis	Premium	✓
1456/1868	Not-for-Profit Entities: Financial Statement Presentation (ASU 2016-14)	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The history, deliberations, and overview leading up to FASB's issuance of ASU 2016-14. * Shortcomings in financial statement presentation for not-for-profit entities that led to the changes. * Net asset reporting classification changes for not-for-profit entities. 	1.5 Melissa Galasso	Foundation	✓
29273/33914	Opening a New Chapter: Fresh-Start Accounting	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Business qualification for fresh-start accounting (ASC 852) * Presentation of financial information when using fresh-start accounting (ASC 852) * Disclosures required by fresh-start accounting (ASC 852) 	1 Timothy F. Gearty	Foundation	✓
30780/35727	Other Comprehensive Basis of Accounting (OCBOA)	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Defining what qualifies as a comprehensive basis of accounting other than GAAP * Differentiating the advantages and disadvantages of using a special purpose framework * Describing the major accounting and financial reporting differences between special purpose frameworks and GAAP 	2 Michael Brown	Foundation	✓
26221/30445	Pension Accounting and Reporting Requirements	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The accounting and reporting of pension and other postretirement benefits 	1 Timothy F. Gearty	Foundation	✓
29195/33799	Preparing for Current Expected Credit Losses (CECL) Model	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The events and background that led to the changes in credit loss reporting * Institutions affected and when they need to adopt the standard * Main provisions of the current expected credit loss (CECL) standard and amendments * Methods used to implement the standard and guidance on how to apply them 	1.5 Timothy F. Gearty	Foundation	✓
30606/35546	Preparing the Statement of Cash Flows	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Basic format and presentation of the statement of cash flows * Definition of cash and cash equivalents * Disclosure of noncash activities * Proper classification of cash flow activities 	3 Michael Brown	Foundation	✓
21220/24520	Private Company Council: Impact on Financial Reporting	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * PCC ASUs issued * PCC ASUs proposed 	2 Melissa Galasso	Premium	✓
9296/10299	Quality Control Standards, Part 1	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The applicability and elements of quality control * Basic considerations when reviewing the work of others * Basic objectives and definitions of quality control standards for nonissuer engagements under QC Section 10 	1 Timothy F. Gearty	Foundation	✓

9338/10346	Quality Control Standards, Part 2	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * How to apply the PCAOB's QC Section 20 to an issuer engagement * The system of quality control * Quality control policies and procedures * Administration of a quality control system 	1 Timothy F. Gearty	Foundation 
9345/10353	Quality Control Standards, Part 3	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * What may be included in monitoring procedures * How inspection procedures contribute to the monitoring function * How to monitor one's own compliance and decide if it is beneficial to engage in external inspection procedures 	1 Timothy F. Gearty	Foundation 
9357/10365	Quality Control Standards, Part 4	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * How to apply the PCAOB's QC Section 40 to an attest engagement * The system of quality control and personnel management element of quality control * Competencies expected in performing accounting, auditing, and attestation engagements for quality control policies and procedures 	1 Timothy F. Gearty	Foundation 
9358/10366	Quality Control Standards, Part 5	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Membership requirements (SEC Practice Sections) * The types of quality control standards for personnel education, communication, firm obligations, and compliance with independence that are included in the SEC Practice Section (SECPS) Requirements of Membership 	1 Timothy F. Gearty	Foundation 
29776/34547	Reporting and Disclosures for Discontinued Operations	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * How to report discontinued operations and disclose disposals of property, plant, and equipment. * How to present financial statements and disclose disposals of property, plant, and equipment. 	2 Michael Brown	Foundation 
24429/28645	Revenue Recognition – Disclosures	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Disclosures for public companies required under Topic 606 * Disclosure requirements for nonpublic business entities 	2 Michael Brown	Foundation 
9137/10130	Revenue Recognition: ASC 606 Analysis for the Technology Industry	Accounting	<p>Revenue recognition is one of the most important reporting areas faced by accountants and standard setters.</p> <p>This program provides a high level overview of the basic revenue recognition principles of ASC 606. The program also provides an in-depth analysis and specific examples of how the new revenue recognition guidance shall be applied to entities that operate in the technology industry.</p>	1 Timothy F. Gearty	Foundation 
20066/22979	Revenue Recognition: Mastering the Fundamentals	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Revenue recognition, which is one of the most important reporting areas faced by accountants and standard setters * Identifying GAAP requirements of revenue recognition including multiple-element arrangements 	2 Timothy F. Gearty	Foundation 
13906/15316	Revenue, capitalization, and expense recognition for software companies	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The legacy GAAP accounting standards that previously applied to software revenue recognition * Revenue recognition principles applicable to entities who sell and license software. * The principles of revenue recognition for vendors who provide software-as-a-service 	2 Timothy F. Gearty	Foundation 
118/131	SEC Comfort Letters	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The purpose of comfort letters in the underwriting process. * The information that is typically included in a comfort letter. * The parties involved in the comfort letter process: who prepares a comfort letter, who uses a comfort letter, and how a comfort letter is used. 	2 Timothy F. Gearty	Foundation 
24206/28369	SEC Initial Public Offering Requirements	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * IPO inclusive of the purpose along with the pros and cons of going public * The process of bringing a company to a publicly traded market * The role of the independent auditor and other professionals * Case studies of IPOs highlighting the outcomes and success factors 	2 Michael Brown	Foundation 
31362/36469	SEC Quarterly Update Q1 2024	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Current developments within the SEC highlighting personnel changes and topics of interest to preparers and users of public company financial statements * How the SEC Division of Enforcement has addressed certain alleged violations of securities laws 	2 Timothy F. Gearty	Premium 

32875/38272 SEC Quarterly Update Q2 2024	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Current developments within the SEC highlighting personnel changes and topics of interest to preparers and users of public company financial statements. * How the SEC Division of Enforcement has addressed certain alleged violations of securities laws. 	2.5 Timothy F. Gearty	Premium	✓
33950/39499 SEC Quarterly Update Q3 2024	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Current developments within the SEC highlighting personnel changes and topics of interest to preparers and users of public company financial statements. * How the SEC Division of Enforcement has addressed certain alleged violations of securities laws. 	2.5 Timothy F. Gearty	Premium	✓
35459/41353 SEC Quarterly Update Q4 2024	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Current developments within the SEC highlighting personnel changes and topics of interest to preparers and users of public company financial statements. * How the SEC Division of Enforcement has addressed certain alleged violations of securities laws. 	2.5 Timothy F. Gearty	Premium	✓
29883/34735 SEC Reporting Requirements, Part 1	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The role the Securities and Exchange Commission plays in the context of information reporting requirements of public companies * The purpose, requirements, and deadlines for the following: Statement S-1, Statement F-1, Form D, Form 10-K, Form 10-Q, Form 11-K, Form 20-F, Form 40-F, Form 6-K, Form 8-K, Form 3, 	2 Timothy F. Gearty	Foundation	✓
29912/34765 SEC Reporting Requirements, Part 2	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The auditor's role in the process of SEC reporting * The statutory sources of the auditor's obligations in the SEC reporting process including the Securities Act of 1933, the Securities Exchange Act of 1934, and the Sarbanes-Oxley Act of 2002 * The PCAOB's role with respect to auditors and accounting standards 	1.5 Timothy F. Gearty	Foundation	✓
29931/34784 SEC Reporting Requirements, Part 3	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The various roles inherent in corporate governance * Various concepts related to the auditor's role in SEC reporting, including but not limited to: (i) consents, (ii) comfort letters, (iii) annual management certifications, (iv) quarterly management certifications, (v) integrated audits, (vi) auditor independence, (vii) Regulation S-K, 	1.5 Timothy F. Gearty	Foundation	✓
31057/36009 SEC Requirements on Cybersecurity Risk Management, Strategy, Governance, and Incident Disclo Accounting		<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The SEC's rule on cybersecurity risk management, strategy, governance, and incident disclosure * Cybersecurity threats * SEC disclosure requirements 	1 Timothy F. Gearty	Premium	✓
31382/36489 SEC Update 2024	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Certain Proposed, Amended, and Final Rules as issued by the SEC * Current developments within the SEC highlighting personnel changes and topics of interest to preparers and users of public company financial statements * How the SEC Division of Enforcement has addressed certain alleged violations of securities 	4 Timothy F. Gearty	Premium	✓
30667/35610 Special Purpose Acquisition Companies (SPACs)	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * What exactly a special purpose acquisition company (SPAC) is * How SPACs are formed to raise capital in public equity markets * The accounting and financial reporting requirements of a SPAC 	1.5 Timothy F. Gearty	Foundation	✓
15148/17041 Standard Costing	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Description and application of standard costing. * Calculation and analysis of cost variances. * Current trends and management considerations related to standard costing. * Examples of standard costing. 	2.5 Katie Harris	Foundation	✓
18867/21694 Statement of cash flows (ASC 230)	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The statement of cash flows as a required U.S. GAAP financial statement that requires knowledge of ASC 230 * The significant but sometimes subtle differences between net income, cash flow, and operating, investing, and financing activities 	2 Timothy F. Gearty	Foundation	✓
30953/35903 Sustainability Accounting and Integrated Reporting	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The standards and conceptual framework behind sustainability accounting, including the history and purpose of the Sustainability Accounting Standards Board (SASB) and roles of other leading organizations * Implementation basics of the SASB Standards and new sustainability disclosure standards 	2 Timothy F. Gearty	Foundation	✓

32281/37498	Sustainability Spotlight Quarterly Update Q1 2024	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Welcome to the Sustainability Spotlight Quarterly Update, your essential guide to staying at the forefront of the ever-evolving world of Sustainable Business Management (SBM), including Environmental, Social, and Governance (ESG) reporting, compliance and long-term value creation. In this dynamic course, we'll empower you with the latest insights, trends, and news 	2.5 Jeff Thomson, Lucia Wind, Robert H. Herz, Timothy F. Gearty	Premium	✓
33412/38841	Sustainability Spotlight Quarterly Update Q2 2024	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Welcome to the Sustainability Spotlight Quarterly Update, your essential guide to staying at the forefront of the ever-evolving world of Sustainable Business Management (SBM), including Environmental, Social, and Governance (ESG) reporting, compliance and long-term value creation. In this dynamic course, we'll empower you with the latest insights, trends, and news 	2.5 Timothy F. Gearty	Premium	✓
34695/40389	Sustainability Spotlight Quarterly Update Q3 2024	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Welcome to the Sustainability Spotlight Quarterly Update, your essential guide to staying at the forefront of the ever-evolving world of Sustainable Business Management (SBM), including Environmental, Social, and Governance (ESG) reporting, compliance and long-term value creation. In this dynamic course, we'll empower you with the latest insights, trends, and news 	2.5 Timothy F. Gearty	Premium	✓
35562/41462	Sustainability Spotlight Quarterly Update Q4 2024	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Welcome to the Sustainability Spotlight Quarterly Update, your essential guide to staying at the forefront of the ever-evolving world of Sustainable Business Management (SBM), including Environmental, Social, and Governance (ESG) reporting, compliance and long-term value creation. In this dynamic course, we'll empower you with the latest insights, trends, and news 	2.5 Timothy F. Gearty	Premium	✓
31325/36428	The Future of ESG Reporting	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Global trends related to environmental, social, and governance (ESG) reporting * Assurance engagements that can assist in verifying the reasonableness of reported metrics * How ESG reporting is influencing financial statements and annual reports 	2.5 Jennifer Louis	Foundation	✓
16596/18802	The GameStop Short Squeeze	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Recent developments in the trading frenzy of GameStop stock that resulted in a short selling squeeze of hedge funds. * How a short sale of securities works and its potential impacts on other forms of stock transactions. 	1 Timothy F. Gearty	Premium	✓
30497/35414	The Revised Conceptual Framework	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The FASB Conceptual Framework * How the Conceptual Framework is organized * The key foundational principles that support the Conceptual Framework * Recent revisions and enhancements to the Conceptual Framework 	2 Jennifer Louis	Foundation	✓
16115/18116	Transfers and servicing of financial assets (ASC 860)	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * ASC 860 and the guidance related to transfers and servicing of financial assets * What qualifies as a transfer of a financial asset * Control criteria for transfers of financial assets * How to account for sales-type transfers and finance-type transfers 	2 Timothy F. Gearty	Premium	✓
25650/29873	Transparency and Accuracy Through Fair Value Measurements (ASC 820)	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * What different definitions and guidance in the measurement of fair value contribute to added complexity in generally accepted accounting principles (GAAP) * How practical insight into fair value measurements can help bring transparency and accuracy to an organization's financial statements 	1.5 Timothy F. Gearty	Foundation	✓
29368/34084	Understanding the Newly Released IFRS Sustainability Disclosure Standards	Accounting	<p>Industry experts will join Tim Gearty in this timely event to discuss the inaugural standards (IFRS S1 and S2) issued by the ISSB which provide a global baseline for sustainability-related disclosures.</p>	2 Bob Herz, Jeff Thomson, Timothy F. Gearty	Premium	✓
25431/29650	What is Integrated Reporting?	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The rationale for the move to IR * IR implementation * Creating a corporate report using the IR format * The role of technology in IR 	1.5 Michael Brown	Foundation	✓
32936/38337	XBRL: Today's Language of Business Reporting	Accounting	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The history of eXtensible Business Reporting Language (XBRL) * The use of Extensible Markup Language (XML) and XBRL in business reporting * U.S. Financial Reporting Taxonomy * SEC rules for using XBRL in financial reporting 	1.5 Michael Brown	Foundation	✓

355/371	Accounting for Revenues in Government (Emphasis on Non-Exchange Transactions)	Accounting (Governmental)	Revenue recognition is one of the most important reporting areas faced by accountants and standard setters. Avoid the many traps related to recognizing revenue in governments while you become familiar with GAAP requirements of revenue recognition.	3 John Lord	Foundation	✓
33000/38403	Annual GASB Update 2024	Accounting (Governmental)	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Accounting standards issued by the Government Accounting Standards Board (GASB) that have been recently issued as well as those that will be effective in the near future. 	2.5 Melisa Galasso	Premium	✓
33313/38739	FASAB: Federal Accounting and Reporting Annual Update 2024	Accounting (Governmental)	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Participants will gain insights into the FASAB, the status of the planned work products of the FASAB, and the most recent changes to the FASAB Handbook 	2.5 Tom Cox	Premium	✓
8100/8678	Federal Appropriation Principles-An Overview	Accounting (Governmental)	Participants will gain a practical and relevant understanding of the federal appropriation principles and processes.	1.5 David Harvey, CPA	Foundation	✓
24426/28642	Federal Government Contracting: An Introduction	Accounting (Governmental)	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Government contracting in the federal sector. It will describe roles and responsibilities of government and contractor personnel, address the organization of the Federal Acquisition Regulation (FAR) and certain key provisions, describe contract elements and types, identify the major components of the procurement cycle, and develop an understanding of accounting 	2.5 David Harvey, CPA	Foundation	✓
11187/12235	GASB 84: Fiduciary Activities	Accounting (Governmental)	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * GASB 84 * Decision making process for identifying fiduciary activities * Financial reporting 	1 Melisa Galasso	Foundation	✓
19012/21839	GASB 94 – Public Private and Public-Public Partnerships and Availability Payment Arrangements	Accounting (Governmental)	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Financial reporting guidelines for PPP and APA 	2 Melisa Galasso	Premium	✓
19563/22470	GASB 96 – Subscription-Based Information Technology Arrangements (SBITAs)	Accounting (Governmental)	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * GASB 96 * SBITAs 	1 Melisa Galasso	Premium	✓
26124/30348	GASB Disclosure Framework Issued	Accounting (Governmental)	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Impact of new conceptual framework on disclosures 	1 Melisa Galasso	Premium	✓
8434/9355	GASB Other Postemployment Benefits (OPEB)	Accounting (Governmental)	<p>This course will cover the following:</p> <ul style="list-style-type: none"> * GASB Statement No. 74, Financial Reporting for Postemployment Benefit Plans Other Than Pension Plans * GASB Statement No. 75, Accounting and Financial Reporting for Postemployment Benefits Other Than Pensions 	2 Melisa Galasso	Foundation	✓
8496/9431	GASB Statement 87: Leases	Accounting (Governmental)	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Lessee Accounting * Lessor Accounting 	2 Melisa Galasso	Foundation	✓
34694/40388	GASB'S New Financial Reporting Model	Accounting (Governmental)	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * GASB 103 	1 Melisa Galasso	Premium	✓

19258/22164	Introduction to Government/Fund Accounting	Accounting (Governmental)	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Government accounting and financial reporting reports * Government fund accounting * State and local government consolidated financial statements * Analyzing government financial statements 	4 Jennifer Louis	Foundation	✓
21562/24865	Mastering Presentation and Disclosures by Not-for-Profit Entities for Contributed Nonfinancial Assets Accounting (Governmental)		<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * ASU 2020-07, Presentation and Disclosures by Not-for-Profit Entities for Contributed Nonfinancial Assets, provides new guidance for nonprofits on how they present and disclose their gifts in kind. * The new standard does not change recognition or measurement. GIKs will still be presented 	1 Melissa Galasso	Premium	✓
9056/10045	New Accounting Guidance on Not-for-Profit Revenue Recognition	Accounting (Governmental)	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Introduction to Topic 606 * ASU 2018-08 	2 Melissa Galasso	Premium	✓
14838/16678	Revenue & Expenses: Proposed Changes For Governmental Entities	Accounting (Governmental)	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * GASB's Preliminary Views Document on revenue and expense recognition 	1 Melissa Galasso	Premium	✓
33808/39241	What's Going on at the Not-For-Profit Advisory Committee 2025	Accounting (Governmental)	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The Not-for-Profit Advisory Committee (NAC) * September 2023 and March 2024 NAC meeting topics * Trends in not-for-profit accounting 	1 Melissa Galasso	Premium	✓
13041/14228	A Guide Through Common Audit Deficiencies	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Common audit deficiencies * Risk Assessment * Documentation * Estimates 	2 Melissa Galasso	Foundation	✓
23302/27082	Accountants' Responsibility Regarding Fraud, Part 1	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Fraud: The issues * Fraud: The CPA's responsibility * Profile of employees who commit fraud * Employee fraud 	2 Timothy F. Gearty	Foundation	✓
23337/27120	Accountants' Responsibility Regarding Fraud, Part 2	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Common motivations to commit fraud * Financial statement fraud, asset misappropriation, billing fraud, and other types of fraud * The CPA's responsibilities in detecting and preventing fraud 	2 Timothy F. Gearty	Foundation	✓
9843/10861	AICPA Control Risk Assessment Requirements	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Common deficiencies in internal control risk assessment * Procedures for internal control assessment * Components of internal controls * Testing operating effectiveness of internal controls 	2 Melissa Galasso	Foundation	✓
22201/25706	AICPA Cybersecurity Standards, Part 1	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Recent cybersecurity threats and the professional standard-setter response * Guidance for performing and reporting on cybersecurity risk management program attestation engagements 	1 Timothy F. Gearty	Premium	✓
35222/41116	AICPA Cybersecurity Standards, Part 1	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Recent cybersecurity threats and the professional standard-setter response * Guidance for performing and reporting on cybersecurity risk management program attestation engagements 	1 Jennifer Louis	Premium	✓
22202/25707	AICPA Cybersecurity Standards, Part 2	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Desirable elements for management's description of an entity's cybersecurity risk management program * Relationship to COSO's Internal Control—Integrated Framework * Control criteria that can be used to evaluate the effectiveness of an entity's cybersecurity 	2 Timothy F. Gearty	Premium	✓













33257/38683	AICPA Engagement Quality Review (EQR)	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Common Deficiencies * SQMS 1, A Firm's System of Quality Management * SQMS 2, Engagement Quality Reviews * AU-C 220, Quality Management for an Engagement Conducted in Accordance with 	1.5 Jenni McAllister	Foundation	✓
15615/17572	An executive overview of SASes 134 – 143	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The changes to audit standards due to the issuance of SAS 134 through 143 	2 Melissa Galasso	Premium	✓
30282/35146	Analytical Procedures Used by Auditors	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Describing the definition and application of analytical procedures * Using substantive analytical procedures to satisfy audit objectives * Designing and performing substantive analytical procedures * Strengthening substantive analytical procedures 	3 Jennifer Louis	Foundation	✓
31800/36993	Annual Update for Employee Benefit Plans	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The employee benefit plan landscape and an update on the Department of Labor Activity * The recent changes that have an impact on employee benefit plan auditing and reporting, as well as what is on the horizon * The risk assessment process and the steps to ensure compliance with the standards, 	4 Melissa G. Critcher	Premium	✓
28295/32741	Asset Misappropriation Schemes	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The different types of asset misappropriation schemes * The profile of individuals who commit asset misappropriation fraud * The prevention and detection of asset misappropriation schemes 	2 Michael Brown	Foundation	✓
20423/23507	Audit Opinions: Understanding the Fundamentals from Standards to Reports	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * With corporate scandals ushering in the 21st century and the recent economic downturn, the role of the auditor has taken on heightened significance in today's corporate world. In this two-part course, participants will obtain the necessary background and skills to: * Conduct audits in accordance with generally accepted auditing standards (GAAS) 	3 Timothy F. Gearty	Foundation	✓
22146/25514	Audit Risk Assessment: The Do's and Don'ts, Part 1	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Whether it's data inaccuracies and omissions, incorrect accounting estimates, or elements that don't comply with generally accepted accounting principles (GAAP), the sources of material misstatements on financial statements are plentiful and common. Auditors who fail to appropriately modify their opinions on materially misstated financial statements pose a serious 	2 Timothy F. Gearty	Foundation	✓
22147/25515	Audit Risk Assessment: The Do's and Don'ts, Part 2	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Whether it's data inaccuracies and omissions, incorrect accounting estimates, or elements that don't comply with generally accepted accounting principles (GAAP), the sources of material misstatements on financial statements are plentiful and common. Auditors who fail to appropriately modify their opinions on materially misstated financial statements pose a serious 	2 Timothy F. Gearty	Foundation	✓
8435/9356	Audit Sampling, Part 1: Introduction to Basic Sampling Concepts and Terms	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Audit sampling and its definition * When audit sampling is valuable * Audit sampling and audit evidence * Sampling risk in statistical and nonstatistical sampling 	2.5 Melissa Galasso	Foundation	✓
8436/9357	Audit Sampling, Part 2: Attribute Sampling for Tests of Controls and Selecting a Representative S	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Attribute sampling and audit sampling * Sample size determination * Sample selection * Issues relating to tests of controls 	2 Melissa Galasso	Foundation	✓
8553/9518	Audit Sampling, Part 3: Substantive Audit Sampling – An Introduction	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Determining the extent of further audit procedures * Substantive audit sampling techniques and tolerable misstatement * Audit implications of substantive test results * Communications with management and governance 	2.5 Melissa Galasso	Foundation	✓
8581/9550	Audit Sampling, Part 4: Classical Variables Sampling (CVS) Techniques	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Classical Statistical Sampling * Applying CVS Sampling * Theory of Classical Statistical Sampling * The Audit Application of This Theory 	1.5 Melissa Galasso	Foundation	✓













8490/9415	Auditing Accounts Receivable	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The audit risks associated with accounts receivable and how to assess those risks * Areas for internal control weaknesses within the accounts receivable cycle * Audit procedures used to detect material misstatement in accounts receivable * Financial statement presentation and disclosure requirements 	2 Kayla Stevko, CPA	Foundation
21986/25342	Auditing Cash and Cash Equivalents	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Understanding different audit areas for cash and cash equivalents. * Areas for internal control weaknesses. * Audit procedures used to detect material misstatement in cash. * Financial statement presentation and disclosure requirements. 	1 Mike Brown	Foundation
30669/35612	Auditing Cash and Cash Equivalents (Dynamic Format)	Auditing	<p>This course will be an overview of:</p> <p>Understanding different audit areas for cash and cash equivalents.</p> <p>Areas for internal control weaknesses.</p>	1.5 Michael Brown	Foundation
32485/37816	Auditing Contingencies	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The audit risks associated with contingencies and how to assess those risks * Areas for internal control weaknesses within the contingency valuations process * Audit procedures used to identify and value material contingencies * Financial statement presentation and disclosure requirements 	2.5 Jennifer Louis	Foundation
8884/9863	Auditing Current Liabilities	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The audit risks associated with current liabilities and how to assess those risks. * Areas for internal control weaknesses within the payables cycle. * Audit procedures used to detect material misstatement in current liabilities. * Financial statement presentation and disclosure requirements. 	2 Kayla Stevko, CPA	Foundation
25497/29716	Auditing Employee Benefit Plans, Part 1	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The rules and regulations from the IRS and Department of Labor (DOL) associated with employee benefit plans * The audit and reporting requirements associated with employee benefit plans * The risk assessment process and related documentation including internal controls 	2.5 Melissa G. Critcher	Foundation
25498/29721	Auditing Employee Benefit Plans, Part 2	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * How to design audit procedures in direct response to assessed risks of material misstatement * The common audit procedures for employee benefit plan engagements * How the auditor should respond when operational and administrative errors are identified 	2.5 Melissa G. Critcher	Foundation
30315/35201	Auditing Fair Value	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Accounting for fair value * Auditing estimates (AU-C 540) * Audit strategies 	2 Jennifer Louis	Foundation
8667/9646	Auditing Inventory	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The audit risks associated with inventory and how to assess those risks. * Areas for internal control weaknesses within the inventory cycle. * Audit procedures used to detect material misstatement in inventory. * Financial statement presentation and disclosure requirements. 	1.5 Elizabeth Walsh	Foundation
9315/10318	Auditing Long Term Liabilities	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The audit risks associated with long term liabilities and how to assess those risks. * Areas for internal control weaknesses within the payables cycle. * Audit procedures used to detect material misstatement in long term liabilities. * Financial statement presentation and disclosure requirements. 	2 Kayla Stevko, CPA	Foundation
9990/11014	Auditing Prepaid Expenses	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The audit risks associated with prepaid expenses and how to assess those risks * Areas for internal control weaknesses within the prepaid expense process * Audit procedures used to identify and value prepaid expenses * Financial statement presentation and disclosure requirements 	1.5 Holly Hawk	Foundation
8594/9565	Auditing Property, Plant & Equipment	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The audit risks associated with property, plant & equipment and how to assess those risks. * Areas for internal control weaknesses within the property, plant & equipment cycle. * Audit procedures used to detect material misstatement in property, plant & equipment. * Financial statement presentation and disclosure requirements. 	2 Kayla Stevko, CPA	Foundation

21723/25027	Auditing Revenue Recognition	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * GAAP requirements for revenue recognition * Important considerations in auditing revenue * PCAOB guidance for transition adjustments, transition disclosures, controls, and risk assessment 	2.5 Mike Brown	Foundation	✓
11067/12104	Auditing Typical Investments	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The audit risks associated with a typical investment portfolio and how to assess those risks. * Areas for internal control weaknesses within the investments cycle. * Audit procedures used to detect material misstatement within typical investments. * Financial statement presentation and disclosure requirements. 	2 Kayla Stevko, CPA	Foundation	✓
31295/36398	Auditing Update 2024	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Recent guidance issued by the AICPA for financial statement audits * Recent guidance issued by the AICPA for SSARS and SSAE engagements * Recent changes related to professional standards and quality management * Recent PCAOB activity 	5 Jennifer Louis	Premium	✓
35187/41081	Auditing Update 2025	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Recent guidance issued by the AICPA for financial statement audits * Recent guidance issued by the AICPA for SSARS engagements * Recent changes related to professional standards and quality management * Recent PCAOB activity 	5 Jennifer Louis	Premium	✓
12841/14019	Common Issues in Auditing Student Financial Assistance	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Single audit procedures to test compliance * Student financial aid 	2 Melissa Galasso	Premium	✓
16993/19216	Comparing the Audit Standards - AICPA vs. PCAOB vs. International Standards	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The three primary audit standard-setting bodies. * Differences between the audit standard requirements of the AICPA, IAASB, and PCAOB. * Certain special issues faced in the United States as it relates to financial statement audits. * Special considerations when an auditor is required to comply with multiple auditing 	3 Jennifer Louis	Foundation	✓
28557/33015	Compilations and Reviews: Avoiding Peer Review Deficiencies	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Significant requirements related to preparation, compilation, and review engagements * General ethical and quality control considerations * When each type of SSARs engagement applies * Required procedures for each type of engagement 	4.5 Jennifer Louis	Foundation	✓
14882/16722	Completing the Audit	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The requirements related to completing an audit * Common final testwork and procedures performed as part of audit completion activities * Financial statement review procedures * Audit reporting 	3 Holly Hawk	Foundation	✓
21219/24519	Corruption, Part 1	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * How and why corruption happens * How to deter and detect it in an organization 	1.5 Timothy F. Gearty	Foundation	✓
21491/24794	Corruption, Part 2	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * How foreign corrupt practices are defined * How and why corruption happens * The proactive steps businesses can take to manage risk 	2.5 Timothy F. Gearty	Foundation	✓
28293/32739	COSO Internal Control Framework	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The COSO Internal Control Framework, which has been considered the most widely accepted internal control framework in the world since its initial publication in 1992 	2.5 Timothy F. Gearty	Foundation	✓
28822/33282	COSO: Internal Control Over Sustainability Reporting	Auditing	<p>Bob Herz, Jeff Thomsen and Shari Littan, contributing authors to the COSO framework titled: Achieving Effective Internal Control over Sustainability Reporting: Building Trust and Confidence through the COSO Internal Control- Integrated Framework will join Tim Gearty in this timely event to discuss this newly released framework. Hear from this expert panel on the call to action for this framework and the rationale behind what has been included in the guidance.</p>	2 Bob Herz, Jeff Thomson, Shari Littan, Timothy F. Gearty	Premium	✓

14032/15442	Drafting Audit Reports Under SAS No. 134 and PCAOB	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Types of financial statement audit opinions. * Common report modifications and explanatory language under the new standards. * Special reporting considerations, such as reporting on special purpose financial statements. * Preparing audit reports under PCAOB Auditing Standards. 	3 Jennifer Louis	Premium	✓
23494/27455	Employee Benefits, Part 2—Defined Contribution Plans	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The differences between defined contribution and defined benefit plans * The components of net assets available for benefits * The financial disclosures relevant to a defined contribution plan * The audit considerations for a defined contribution plan 	2 Timothy F. Gearty	Foundation	✓
23513/27475	Employee Benefits, Part 3 - Defined Benefit Pension Plans	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The operation, administration, reporting, and auditing of defined benefit plans * The key components of net assets available for benefits, changes in net assets available for benefits, accumulated plan benefits, and changes in accumulated plan benefits * The financial disclosures relevant to a defined benefit plan 	2.5 Timothy F. Gearty	Foundation	✓
33740/39173	Enhancing Audit Quality	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The Enhancing Audit Quality initiative * Highlights of completed and in-process projects * Summarization of Statement on Quality Control Standards and planned updates * Recently issued audit standards intended to improve audit quality 	2.5 Jennifer Louis	Foundation	✓
28556/33014	Evaluating Design and Implementation of Internal Controls on Audits	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Responsibilities for evaluating the design and implementation of internal controls on a financial statement audit * Requirements for considering the impact of identified deficiencies on gathering sufficient and appropriate audit evidence 	2 Jennifer Louis	Foundation	✓
20328/23410	Evaluating Financial Statement Elements With Accounting Uncertainty	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Identifying financial statement areas containing recognition, measurement, presentation, or disclosure uncertainty. * Applying common techniques for evaluating the proper accounting treatment of loss contingencies, allowances, accruals, and other areas with recognition and measurement 	3 Jennifer Louis	Foundation	✓
33691/39122	Evaluating Internal Controls	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The importance of each of the key components of a sound system of internal controls over financial reporting, regardless of an entity's nature, size, complexity, or current operating environment * Understanding the critical role of information technology (IT) general and application 	2.5 Jennifer Louis	Foundation	✓
22016/25373	Examination Engagements – Direct and Assertion-Based (SSAE 21)	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * How direct and assertion-based examinations provide reasonable assurance on a variety of subject matters. * Requirements for planning and performing examination engagements. * Elements of examination reports and other required communications. 	2 Jennifer Louis	Foundation	✓
14340/15849	Financial Statement Fraud	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Ways in which both large and small companies are vulnerable to fraud. According to the ACFE's most recent Report to the Nations, the average organization loses an estimated 5 percent of its annual revenue to fraud each year. This course on financial statement fraud will identify what to look for and provide insights that can help any company prevent the most 	2.5 Timothy F. Gearty	Foundation	✓
23438/27279	Fraud in Not-for-profits	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Fraud statistics in the not-for-profit industry * Common scams for committing fraud in the not-for-profit industry * Cultural strategies for preventing fraud in a not-for-profit * Policies, procedures, and practices to prevent fraud in a not-for-profit 	1.5 Timothy F. Gearty	Foundation	✓
26720/31105	Fraud in the Construction Industry, Part 1	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The nature of fraud in the construction industry * Fraud indicators in the construction industry * Fraud existence and occurrence in the construction industry * Perpetrator characteristics and behavioral indicators of fraud in the construction industry 	1 Bethmara Kessler	Premium	✓
26724/31109	Fraud in the Construction Industry, Part 2	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Various construction contract risks * Various construction fraud schemes * The relationship between procurement and construction fraud * Perpetrator tactics associated with contract bidding 	1 Bethmara Kessler	Premium	✓













26870/31255	Fraud in the Construction Industry, Part 3	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The process of fraud investigation in the construction industry * Documents used to investigate fraud occurrences in the construction industry * Types of investigation interviews 	1 Bethmara Kessler	Premium	✓
26972/31357	Fraud in the Construction Industry, Part 4	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The process of collecting and analyzing evidence for a fraud investigation * The impact of prevention and detection controls on combatting fraud in the construction industry * Prevention techniques companies can use against fraud in the construction industry * Detection techniques companies can use to uncover fraud in the construction industry 	1 Bethmara Kessler	Premium	✓
29340/34054	Fraud Investigation, Part 1	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The existence of fraud and the circumstances that support the need for investigations * The elements of fraud investigation and inquiry * Fraud investigation approaches, methods, and techniques * The importance of physical and electronic evidence used in fraud investigations 	1 Timothy F. Gearty	Foundation	✓
21133/24433	Fraud Investigation, Part 2	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Concealment investigation approaches, methods, and techniques * The elements of discovery sampling to gather evidence * The importance and value of documentary evidence * The process of obtaining documentary evidence 	1 Timothy F. Gearty	Foundation	✓
11188/12236	Fraud Investigation, Part 3	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Interrogation plans, procedures, and techniques * The elements of crisis stages in fraud * Witness inquiry and communication techniques * The techniques of detecting deceptive behavior in an interview 	1.5 Timothy F. Gearty	Foundation	✓
30456/35350	Fraud Update 2024	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Fraud trends * Recent fraud cases * Internal controls and fraud risk management * Fraud risk committees 	2 Bethmara Kessler	Premium	✓
35392/41286	Fraud Update 2025	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Fraud trends. * Recent fraud cases. * Internal controls and fraud risk management. * Fraud risk committees. 	2.5 Zach Chism	Premium	✓
8559/9525	Fundamental IT Auditing Concepts	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The importance of IT-related controls and IT auditing * IT audit-related professional certifications * IT components and terms * IT organizational components 	2 David Harvey, CPA	Foundation	✓
34508/40201	GAAS Update 2024	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * QM Standards—SQMS No. 1, SQMS No. 2, SAS 146 * SAS 147 * SAS 149 * ASB projects 	2.5 Melissa Galasso	Premium	✓
15849/17818	Going concern uncertainty	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * U.S. GAAP Requirements * Auditor's Responsibilities * Audit Procedures * Audit Report 	3 Jennifer Louis	Premium	✓
28292/32738	Group Audits (SAS 149)	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * SAS 149's impact on group audits * New terminology in AU-C 600 * Requirements when performing a group audit 	1 Melissa Galasso	Foundation	✓
142/155	How to Assess Internal Controls and Safeguard Assets	Auditing	<p>Internal control is a process designed to reasonably assure an organization's objectives are met regarding operational efficiency and effectiveness, financial reporting reliability, and compliance with laws and regulations. Gain a thorough overview of internal control and a practical perspective that can be applied to any organization.</p>	2 Timothy F. Gearty	Foundation	✓

20760/23844	How to Properly Prepare Audit Documentation and Workpapers, Part 1	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Audit documentation and procedures, including planning and supervision, internal control, and substantive testing * Generally accepted auditing standards (GAAS) 	2 Timothy F. Gearty	Foundation 
20765/23849	How to Properly Prepare Audit Documentation and Workpapers, Part 2	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Audit documentation and procedures, including planning and supervision, internal control, and substantive testing * Generally accepted auditing standards (GAAS) 	2 Timothy F. Gearty	Foundation 
165/178	How to Properly Review Audit Documentation and Workpapers, Part 1	Auditing	In this two part course, Managers and Partners will gain a firm understanding of the practical objectives and goals of workpaper reviews as well as all of the issues – from the conceptual to the specific.	2 Timothy F. Gearty	Foundation 
35408/41302	How to Properly Review Audit Documentation and Workpapers, Part 1	Auditing	In this two-part course, managers and partners will gain a firm understanding of the practical objectives and goals of workpaper reviews as well as all of the issues—from the conceptual to the specific	2.5 Timothy F. Gearty	Foundation 
166/179	How to Properly Review Audit Documentation and Workpapers, Part 2	Auditing	In this two part course, Managers and Partners will gain a firm understanding of the practical objectives and goals of workpaper reviews as well as all of the issues – from the conceptual to the specific.	2 Timothy F. Gearty	Foundation 
35447/41341	How to Properly Review Audit Documentation and Workpapers, Part 2	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The practical objectives and goals of workpaper reviews as well as all of the issues, from the conceptual to the specific 	2.5 Timothy F. Gearty	Foundation 
12088/13207	Identifying and Communicating Internal Control Matters on An Audit	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Required communications related to internal control matters noted on a financial statement audit * Additional responsibilities when performing an integrated audit of internal controls * Properly classifying significant deficiencies and material weaknesses 	3.5 Jennifer Louis	Foundation 
8330/9152	Introduction to Audit Sampling	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Sampling Terminology * Attribute verses Variable Sampling * Sample Size * Sample Selection 	2 Melissa Galasso	Foundation 
21581/24884	Introduction to Employee Benefits, Part 1	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The definition of different types of employee benefit plans * The effect of government regulations on employee benefit plans * The issue of internal control of a service organization relevant to an audit of an employee benefit plan 	2.5 Timothy F. Gearty	Foundation 
29297/33979	Managing Professional Liability Risk in Nonattest Services	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Differentiations between attest and non-attest services * The Code of Professional Conduct and other professional requirements relevant to non-attest services * Best practices for engaging, performing, documenting, and communicating the results of 	3 Jennifer Louis	Foundation 
22732/26242	Mastering Audit Evidence Requirements Post-SAS 142 and SAS 144	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Requirements of SAS 142 and SAS 144 related to audit evidence. * Previous requirements being retained related to audit evidence. 	2 Jennifer Louis	Premium 
12958/14145	Navigating System and Organization Control (SOC) Reports	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The history and background of SOC reporting * AICPA's determination of the need for SOC reporting * The components of SOC 1, SOC 2, and SOC 3 reports * Determining the appropriate SOC report for an organization 	2 Mike Brown	Foundation 

31351/36458	PCAOB Audit Standards, Part 1	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * PCAOB Auditing Standards (AS) 1101, 1105, 1201, 1215, 1220, and 1301 	2.5 Michael Brown	Foundation 
31471/36639	PCAOB Audit Standards, Part 2	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The Public Company Accounting Oversight Board (PCAOB), a not-for-profit organization established by Congress to oversee the audits of public companies * Auditing standards issued by the PCAOB, based on the reorganized standards from PCAOB Release No. 2015-002 on March 31, 2015, and amended by Release No. 2017-001 on June 1, 	2.5 Michael Brown	Foundation 
31472/36640	PCAOB Audit Standards, Part 3	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Audit procedures for internal control over financial reporting * Audit procedures in response to risks—nature, extent, and timing * Audit procedures for specific aspects of the audit 	2.5 Michael Brown	Foundation 
31582/36764	PCAOB Audit Standards, Part 4	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Auditing supplemental information accompanying audited financial statements * Evaluating audit results * Evaluating consistency of financial statements * Reporting on whether a previously reported material weakness continues to exist 	2.5 Mike Brown	Foundation 
29676/34401	PCAOB Inspection Reports for the Six Largest US Firms	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The PCAOB's strategic plan for 2022-2026 * The PCAOB's objectives in issuing inspection reports * The procedures, processes, and format used to issue the PCAOB inspection reports * Audit deficiencies noted within the 2021 inspection reports of the six largest U.S. audit firms 	1.5 Timothy F. Gearty	Premium 
28847/33380	Planning for a Smooth Audit: How to Work With Your Auditors	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The client-external auditor relationship * The general stages of the external audit * Tools and techniques corporations can use throughout the external audit process 	2 Jennifer Louis	Foundation 
21634/24938	Professional Judgment in Audit	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The Center for Audit Quality's new guide, Professional Judgment Resource. * Common potential judgment tendencies, traps, and biases. * Strategies to avoid potential judgment tendencies and traps and to mitigate possible biases. * Guidelines pertaining to the documentation of an auditor's decision-making process. 	2 Timothy F. Gearty	Foundation 
8408/9326	Professional Skepticism for Public Accountants	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Professional skepticism defined and differentiated from professional judgment * Characteristics of sufficient appropriate audit evidence and relationship to audit risk * Applying concepts to both audit and non-audit engagements * Specific tips for enhancing the exercise of professional skepticism 	3.5 Jennifer Louis	Foundation 
26637/31022	Quality Management Standards	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * SQSM 1 * SQSM 2 * SAS 146 * SSARS 26 	2 Melissa Galasso	Premium 
29887/34739	Remote Auditing	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Important considerations for remote auditing * Best practices as identified by the AICPA and practice aid vendors * Technology's impact on remote auditing now and in the future 	1 Jennifer Louis	Foundation 
17856/20475	Reporting on subject matters other than historical financial statements	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The most common attest engagements on subject matters other than historical financial statements. * Common threads between relevant attest standards contained in the most recent SSARs and the SAEs. 	3 Jennifer Louis	Foundation 
16339/18533	Required auditor communications	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * AU-C Section 210, Terms of Engagement. * AU-C Section 240, Consideration of Fraud in a Financial Statement Audit. * AU-C Section 250, Consideration of Laws and Regulations in an Audit of Financial Statements. 	3 Jennifer Louis	Foundation 

8162/8844	Root Cause Analysis, Part 1	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * This is part 1 of a two part course that will take a look at how to effectively use Root Cause Analysis (RCA). We will dive into understanding why events occur and how to develop effective recommendations to prevent recurrence of negative outcomes and promote recurrence of positive ones. The course will also cover how Internal Auditors can use RCA. 	2 Timothy F. Gearty	Foundation
8164/8846	Root Cause Analysis, Part 2	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * This is part 2 of a two part course that will take a look at how to effectively use Root Cause Analysis (RCA). We will dive into understanding why events occur and how to develop effective recommendations to prevent recurrence of negative outcomes and promote recurrence of positive ones. The course will also cover how Internal Auditors can use RCA. 	1.5 Timothy F. Gearty	Foundation
15022/16913	SAS 143: Auditing Estimates	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The changes to audit requirements for estimates as issued in SAS 143 	1 Melissa Galasso	Premium
19196/22101	SSAE No. 19 - Agreed upon procedures engagements	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The requirements of SSAE No. 19, Agreed-Upon Procedures Engagements. * Overcoming quality control challenges in agreed-upon procedures engagements. 	2 Jennifer Louis	Foundation
20627/23711	SSARS 21	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * General principles for engagements performed in accordance with SSARS * Objectives, requirements, and reporting for preparation engagements * Objectives, requirements, and reporting for compilation engagements * Objectives, requirements, and reporting for review engagements 	1.5 Timothy F. Gearty	Foundation
12143/13298	The Auditor's Responsibilities Relating to Other Information Included in Annual Reports	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * SAS 137 * Audit procedures for annual reports 	1 Melissa Galasso	Foundation
21317/24620	The Impact of Sarbanes-Oxley on Internal Controls	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The Committee of Sponsoring Organizations (COSO) of the Treadway Commission Study established internal control to be a process with five interrelated components. Learn how the far-reaching COSO principles enable compliance with the stringent requirements of the watershed Sarbanes-Oxley Act of 2002 . 	2.5 Timothy F. Gearty	Foundation
11849/12965	The Life Cycle of the Internal Audit	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The definition of an internal audit * The purpose and importance of an internal audit * Steps that are involved in the life cycle of the internal audit * Technology's impact on internal audits 	1 Timothy F. Gearty	Foundation
11481/12553	The New Employee Benefit Plan (EBP) Auditor's Report	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The changes to the auditor's report for ERISA audits * New terminology for EBP audits * Changes to procedures as result of new standard 	2 Melissa Galasso	Premium
21028/24301	Understanding and Applying SAS 142 - Audit Evidence	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The Auditing Standards Board issued SAS 142 in July 2020. The standard provides expanded guidance on whether sufficient appropriate evidence has been obtained in an audit. * The standard is updated to include a focus on more modern technologies used by those in industry as well as auditors when obtaining evidence. 	1 Melissa Galasso	Foundation
24305/28505	Upcoming Peer Review, Part 1	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Recent changes to the peer review standards, interpretations, and other related guidance. This course will summarize these changes and help with preparation for upcoming peer reviews. * The new quality control forms related to the review of the design of, and the firm's compliance with, a firm's system of quality control. 	1.5 Mike Brown	Foundation
24339/28553	Upcoming Peer Review, Part 2	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * How to prepare for an upcoming peer review * Recent changes to the peer review standards, interpretations, and other related guidance * The new quality control forms related to the review of the design of and the firm's compliance with a firm's system of quality control 	1.5 Michael Brown	Foundation

8110/8690	Use of Internal Auditors and Initial Audits	Auditing	<p>This course will address two areas recently updated by the AICPA when performing audits.</p> <ul style="list-style-type: none"> * First we will look at how an auditor can use an internal auditor and what the requirements to use an internal auditor are. * We'll then switch gears to discuss the requirements under the Clarity Standards for Initial Audits 	2 Melisa Galasso	Foundation
29194/33798	Use of Specialists and Auditing Estimates	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The audit procedures required when using a specialist * The audit procedures required when auditing an estimate 	2 Melisa Galasso	Foundation
20141/23089	What is Changing in Risk Assessment	Auditing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The AICPA has issued SAS 145, Understanding the Entity and Its Environment and Assessing the Risks of Material Misstatement. Risk assessment has been identified as an area of focus by the Enhancing Audit Quality Initiative of the AICPA and this SAS clarifies risk assessment in hopes of improving audit quality. This course will review the updated terminology 	2 Melisa Galasso	Premium
27587/31978	Yellow Book Examination Engagements	Auditing (Governmental)	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The planning, fieldwork, and reporting requirements of an examination engagement under government auditing standards * Application of principles to real-life scenarios, such as compliance examinations of federal government awards 	2 Jennifer Louis	Premium
15299/17217	Common audit deficiencies: Governmental audits	Auditing (Governmental)	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Common audit deficiencies for governmental entities * Common Yellow Book Deficiencies * Common Single Audit Deficiencies 	2 Melisa Galasso	Foundation
26995/31386	Enterprise Risk Management in the Federal Government - OMB Circular A-123	Auditing (Governmental)	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The Sarbanes-Oxley Act in 2002 changed the internal control financial reporting game and prompted the federal government to update its own internal control policies issuing OMB Circular 123. By 2016, OMB Circular A-123 was revised to introduce a management responsibility for implementing Enterprise Risk Management (ERM) in federal agencies. In this 	2 Tom Cox	Foundation
15645/17609	Evaluating the Effectiveness of Not-For-Profit Entities	Auditing (Governmental)	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The unique financial characteristics of not-for-profit entities, with particular emphasis on entities organized for charitable purposes and the economic warning signs of financial weakness that can threaten service delivery * The importance of not-for-profit financial performance and basic measures of financial 	2.5 Katie Harris	Foundation
23491/27431	Federal Government Contracting - Contract Fraud	Auditing (Governmental)	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Participants will gain a practical and relevant understanding of the potential for fraud in the federal government contracting environment. 	1.5 David Harvey, CPA	Foundation
23387/27177	Federal Government Contracting - Unallowable Costs	Auditing (Governmental)	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Participants will gain a practical and relevant understanding of accounting for unallowable cost under federal government contracts. 	2.5 Tom Cox	Foundation
24433/28650	Fraud and Abuse in Nonprofit and Government Environments	Auditing (Governmental)	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The fraud environment * The fraud triangle and common types of fraud * Results of recent fraud surveys * Unique concerns to governmental and non-profit entity environments 	2 Jennifer Louis	Foundation
21988/25344	GAO Green Book - Government Internal Control Standards	Auditing (Governmental)	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * "Internal Control—Integrated Framework" has been considered the most widely accepted internal control framework in the world since its initial publication by the Committee of Sponsoring Organizations of the Treadway Commission (COSO)—a joint initiative of five prominent accounting, finance, and auditing organizations. The Green Book is an adaptation of 	3 Tom Cox	Foundation
24210/28376	Housing and Urban Development Audits for Financial Service Institutions	Auditing (Governmental)	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Audit guidance applicable to HUD-approved Title II lenders * Compliance requirements HUD-approved lenders must meet, including practices related to quality control, origination, valuation, servicing, financial reporting, and recertification * Recommended audit procedures for auditors to follow in reviewing a lender's compliance 	3 Tom Cox	Foundation

24430/28646	Housing and Urban Development: An Auditing Introduction	Auditing (Governmental)	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The basics of HUD (Housing and Urban Development) and FHA (Federal Housing Administration) mortgage programs and the respective auditing requirements * HUD and FHA lending * Introduction to governmental audits 	3 Jennifer Louis	Foundation 
23404/27196	Improper Payments: Legislation and Mitigation	Auditing (Governmental)	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * This course will allow the participant to acquire a practical overview of improper payment legislation and guidance and the federal government's efforts to reduce and recover improper payments. 	2 David Harvey, CPA	Foundation 
10498/11526	Intermediate Governmental Accounting	Auditing (Governmental)	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The process used to convert fund financial statements to government-wide financial statements while defining the underlying internal control and financial reporting principles that underpin that process. 	2.5 Timothy F. Gearty	Foundation 
8653/9631	Internal Control Considerations—Focus on Non-profits and Governmental Entities	Auditing (Governmental)	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Definition and overall objective of internal controls * Structural standards for internal control * Objectives, components, and principles of internal control * Special considerations for internal control over compliance with federal awards 	3 Jennifer Louis	Foundation 
15551/17500	Introduction to Federal Grants	Auditing (Governmental)	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Rules governing the awarding and accounting of grants to state and local governments, as well as not-for-profit organizations and other eligible entities. * The Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (2 CFR Part 200) that govern the award and administration of grants issued by Federal awarding agencies 	5 Tom Cox	Foundation 
15713/17677	Not-for-profit accounting and reporting: an introduction	Auditing (Governmental)	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The accounting and reporting functions in the not-for-profit world, with particular emphasis on the practical aspects of financial statements and revenue recognition * Asset transfers and the unique issues presented by artwork capitalization, split interest agreements, investments, fixed assets, and fund accounting 	3 Katie Harris	Foundation 
19453/22359	Performance Audits Under Yellow Book	Auditing (Governmental)	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Scope and nature of Government Auditing Standards * Performance audits introduction * Ethics, independence, and professional judgment * Competence 	4 Jennifer Louis	Foundation 
23515/27477	Risk Management in the Public Sector	Auditing (Governmental)	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Introduction to enterprise risk management * The COSO ERM framework * Application techniques/implementing ERM * Use of ERM techniques in government 	3 Tom Cox	Foundation 
24428/28644	Single Audit Quality: Focus on Designing and Performing Test of Control and Compliance	Auditing (Governmental)	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The primary regulations and regulatory bodies * Relevance of AU-C 935, Compliance Audits to a Single Audit * Internal control and compliance auditor responsibilities * Allowable cost and allocable cost testing 	2 Jennifer Louis	Foundation 
29392/34110	Single Audit Quality: Focus on Risk Assessment, Evaluating Results, and Reporting	Auditing (Governmental)	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Major players and relevant guidance * AU-C 935, Compliance Audit * Single Audit applicability * Major program determination 	2.5 Jennifer Louis	Foundation 
29775/34542	Tips for Selecting Auditors for a High-Quality Single Audit	Auditing (Governmental)	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Necessary characteristics for auditors engaged to perform Single Audits * Suggested process for auditor selection * Tips for selecting an auditor that is most likely to result in a high-quality outcome 	2 Jennifer Louis	Foundation 
33809/39242	Uniform Guidance Update 2024	Auditing (Governmental)	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * 2024 Compliance Supplement * Changes to Uniform Guidance * New Data Collection Form 	1 Jennifer Louis	Premium 

28348/32794	Writing Yellow Book and Single Audit Reports That Comply With Requirements	Auditing (Governmental)	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Required elements of reports prepared in accordance with Government Auditing Standards and Single Audit. * Drafting findings to meet the needs of report users. * Avoiding peer review and regulatory oversight deficiencies related to writing financial 	2 Jennifer Louis	Foundation	✓
30978/35928	Yellow Book and Single Audit Update 2024	Auditing (Governmental)	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Scope and nature of government auditing standards (the Yellow Book), including general standards, independence, and competence * Requirements for performing a financial statement audit and preparing related reports and communications in accordance with generally accepted auditing standards and the Yellow Book * Requirements associated with Uniform Guidance for Federal Awards, including performing a financial statement audit and preparing related reports and communications in accordance with 	2.5 Tom Cox	Premium	✓
35011/40810	Yellow Book Financial Audits and Attest Engagements	Auditing (Governmental)	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Generally Accepted Government Auditing Standards (GAGAS) provide a sturdy and solid framework for conducting high-quality financial audits of government entities and other entities that receive government awards. This course explains those standards and how they can assist auditors to objectively acquire and evaluate sufficient, appropriate evidence and report the 	3.5 Tom Cox	Foundation	✓
30393/35279	Yellow Book Update 2024	Auditing (Governmental)	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Scope and nature of government auditing standards (Yellow Book) * Yellow Book general standards, including independence * Requirements for performing a financial statement audit in accordance with generally accepted auditing standards and the Yellow Book 	2 Jennifer Louis	Premium	✓
31473/36641	Bringing an Ethical Mindset to ESG	Behavioral Ethics	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Components of ESG * ESG considerations in today's business landscape * Practical strategies for identifying ethical dilemmas * Integration of ethical decision making into ESG practices 	1 Amelia Hart	Foundation	✓
28931/34394	Ethical and Independence Considerations in Yellow Book Engagements	Behavioral Ethics	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Applicability of government auditing standards * Ethical principles that lay the foundation for Yellow Book engagements * Independence rules and documentation requirements 	2 Jennifer Louis	Foundation	✓
33009/38412	Ethics: Integrity, a Foundation for Success	Behavioral Ethics	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * How unethical behavior can ruin careers, bring debilitating fines to companies, and lead to prison terms for executives and others * How regulation and compliance influence the standards and expectations for ethical behavior 	2 Jennifer McAllister	Foundation	✓
33970/39613	Ethics: Integrity, a Foundation for Success (Adaptive Course Format)	Behavioral Ethics	<p>We're testing a new course format and would love your feedback. This course format differs from the other CPE courses you might have taken. Instead of watching or listening to an on-demand course, you will be asked questions before learning. You may know the answers, but it's ok if you don't. By answering questions first, you'll master core concepts with confidence. Using intelligent software designed to help you learn quickly, these modules will adjust to your existing knowledge and zero in on what you still need to learn. You still earn CPE, just in a different way.</p>	2 Timothy F. Gearty	Foundation	✓
35570/41470	Excel: Data Driven Diversity, Equity, and Inclusion	Behavioral Ethics	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The application of Excel to summarize and analyze data related to diversity, equity, and inclusion. * The use of Simpson's Diversity Index to measure diversity, equity, and inclusion. * How metrics can be used to improve teams and decrease turnover. 	1 Michael Brown	Foundation	✓
12949/14136	Expectations of Corporate Governance and Social Responsibility in Today's World	Behavioral Ethics	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Agency theory and the role of the artificial person in corporate governance * CSR and ESG applied to the execution of today's corporate governance * The role of organizational culture—vision, mission, values, and team member engagement—in CSR/ESG success * Measuring CSR/ESG success—the role of psychometrics 	1.5 Timothy F. Gearty	Foundation	✓
23368/27156	Leadership and Balance in Turbulent Times	Behavioral Ethics	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Ethics, integrity and their relationship to challenging changes * A leadership approach to positive cultural change * Methods for identifying and dealing with fear, failure and resistance to change * Techniques and tools for facilitating change 	2 Greg Conderacci	Foundation	✓
29389/34107	Maintaining professional ethics in a culture of oversharing	Behavioral Ethics	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Oversharing on social media: What it is and how to avoid it * How to build a positive digital persona to present the best possible professional appearance online * Best practices for messages on social media 	1 Allison McLeod	Foundation	✓

31816/37009	Navigating AI Ethics: Balancing Innovation and Responsibility	Behavioral Ethics	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The intersection of behavioral ethics and artificial intelligence * The ethical challenges and considerations that arise in the development and deployment of AI systems * How AI systems interact with human behavior 	1	Kelly Pope	Foundation	✓
12665/13832	Sexual harassment – creating a safe and positive workplace (IL)	Behavioral Ethics	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Title VII of the Civil Rights Act of 1964, the Illinois Human Rights Act (IHRA), and case law principles concerning the prohibition and prevention of workplace discrimination, sexual harassment, and retaliation in the workplace * The different types of workplace discrimination and harassment in Illinois 	2	Mike Brown	Premium	✓
35737/41643	Sexual Harassment: Creating a Safe Workplace: Connecticut (All)	Behavioral Ethics	This 2.0-hour course is designed for both supervisors and non-supervisors to meet Connecticut's legal requirements for sexual harassment prevention training. The course provides a comprehensive overview of workplace sexual harassment, including definitions, applicable federal and state laws, and the importance of maintaining a harassment-free environment. Through case studies, examples, and scenarios, participants will gain practical understanding of reporting and investigating complaints, the role of bystanders, and the "Five	2		Premium	✓
35734/41640	Sexual Harassment: Creating a Safe Workplace: Non-Supervisory	Behavioral Ethics	This course is designed to provide non-supervisory employees with a comprehensive understanding of workplace sexual harassment, including its definitions, applicable laws, and the importance of maintaining a harassment-free environment. Through case studies, examples, and scenarios, participants will learn to recognize sexually harassing behaviors, appropriate responses, and the steps for reporting and investigating complaints. The course also emphasizes the role of bystanders in preventing harassment, introducing the "Five Ds" of	1		Foundation	✓
35736/41642	Sexual Harassment: Creating a Safe Workplace: Non-Supervisory: California	Behavioral Ethics	This 1.0-hour course for Non-Supervisory Employees in California, is designed to meet the specific requirements set forth by California regulations. It provides a comprehensive overview of workplace sexual harassment, including definitions, applicable laws, and the importance of maintaining a harassment-free environment. Through case studies, examples, and scenarios, participants will gain practical understanding of key concepts, learn detailed procedures for reporting complaints, and understand the prohibition of retaliation. The course also emphasizes	1		Premium	✓
35738/41644	Sexual Harassment: Creating a Safe Workplace: Non-Supervisory: Delaware	Behavioral Ethics	This 1.0-hour course for Non-Supervisory Employees in Delaware, is designed to meet the specific requirements set forth by Delaware regulations. It provides a comprehensive overview of workplace sexual harassment, including definitions, applicable laws, and the importance of maintaining a harassment-free environment. Through case studies, examples, and scenarios, participants will gain practical understanding of key concepts, learn detailed procedures for reporting complaints, and understand the prohibition of retaliation. The course also emphasizes	1		Premium	✓
35741/41647	Sexual Harassment: Creating a Safe Workplace: Non-Supervisory: Illinois	Behavioral Ethics	This 1.0-hour course for Non-Supervisory Employees in Illinois and the city of Chicago, is designed to meet the specific requirements set forth by Illinois and the city of Chicago regulations. It provides a comprehensive overview of workplace sexual harassment, including definitions, applicable laws, and the importance of maintaining a harassment-free environment. Through case studies, examples, and scenarios, participants will gain practical understanding of key concepts, learn detailed procedures for reporting complaints, and understand the	1		Premium	✓
35743/41649	Sexual Harassment: Creating a Safe Workplace: Non-Supervisory: Maine	Behavioral Ethics	This 1.0-hour course for Non-Supervisory Employees in Maine, is designed to meet the specific requirements set forth by Maine regulations. It provides a comprehensive overview of workplace sexual harassment, including definitions, applicable laws, and the importance of maintaining a harassment-free environment. Through case studies, examples, and scenarios, participants will gain practical understanding of key concepts, learn detailed procedures for reporting complaints, and understand the prohibition of retaliation. The course also emphasizes the role of bystanders in preventing harassment and introduces the "Five Ds" of bystander intervention to promote a supportive workplace culture. This training ensures that non-supervisory employees are well-equipped to	1		Premium	✓
35745/41651	Sexual Harassment: Creating a Safe Workplace: Non-Supervisory: New York	Behavioral Ethics	This 1.0-hour course for Non-Supervisory Employees in New York State and New York City, is designed to meet the specific requirements set forth by New York State and New York City regulations. It provides a comprehensive overview of workplace sexual harassment, including definitions, applicable laws, and the importance of maintaining a harassment-free environment. Through case studies, examples, and scenarios, participants will gain practical understanding of key concepts, learn detailed procedures for reporting complaints, and understand the prohibition of retaliation. The course also emphasizes the role of bystanders in preventing harassment and introduces the "Five Ds" of bystander intervention to promote a supportive workplace culture. This training ensures that non-supervisory employees are well-equipped to	1		Premium	✓
35733/41639	Sexual Harassment: Creating a Safe Workplace: Supervisory	Behavioral Ethics	This course is designed to provide supervisors with a comprehensive understanding of workplace sexual harassment, including its definitions, applicable laws, and the importance of maintaining a harassment-free environment. Through detailed procedures for reporting and investigating complaints, case studies, and practical examples, supervisors will learn to recognize sexually harassing behaviors, appropriate responses, and the significance of bystander intervention. The course emphasizes the role of supervisors in preventing harassment, conducting harassment audits, and implementing effective sexual harassment	2		Foundation	✓
35735/41641	Sexual Harassment: Creating a Safe Workplace: Supervisory: California	Behavioral Ethics	This 2.0-hour supervisory course is designed to meet California's requirements for sexual harassment prevention training. It provides supervisors with a comprehensive understanding of sexual harassment, including definitions, applicable federal and state laws, and the importance of maintaining a harassment-free environment. The course covers key topics such as harassment audits, risk factor assessments, appropriate responses to sexually harassing behaviors, and the steps for reporting and investigating complaints. Additionally, it emphasizes the role of bystander intervention and outlines specific regulations that apply to California	2		Premium	✓

35740/41646	Sexual Harassment: Creating a Safe Workplace: Supervisory: Delaware	Behavioral Ethics	This 2.0-hour supervisory course is designed to meet Delaware's requirements for sexual harassment prevention training. It provides supervisors with a comprehensive understanding of sexual harassment, including definitions, applicable federal and state laws, and the importance of maintaining a harassment-free environment. The course covers key topics such as harassment audits, risk factor assessments, appropriate responses to sexually harassing behaviors, and the steps for reporting and investigating complaints. Additionally, it emphasizes the role of bystander intervention and outlines specific regulations that apply to Delaware	2	Premium	✗
35742/41648	Sexual Harassment: Creating a Safe Workplace: Supervisory: Illinois	Behavioral Ethics	This 2.0-hour supervisory course is designed to meet Illinois and Chicago's requirements for sexual harassment prevention training. It provides supervisors with a comprehensive understanding of sexual harassment, including definitions, applicable federal and state laws, and the importance of maintaining a harassment-free environment. The course covers key topics such as harassment audits, risk factor assessments, appropriate responses to sexually harassing behaviors, and the steps for reporting and investigating complaints. Additionally, it emphasizes the role of bystander intervention and outlines specific regulations that apply to	2	Premium	✓
35744/41650	Sexual Harassment: Creating a Safe Workplace: Supervisory: Maine	Behavioral Ethics	This 2.0-hour supervisory course is designed to meet Maine's requirements for sexual harassment prevention training. It provides supervisors with a comprehensive understanding of sexual harassment, including definitions, applicable federal and state laws, and the importance of maintaining a harassment-free environment. The course covers key topics such as harassment audits, risk factor assessments, appropriate responses to sexually harassing behaviors, and the steps for reporting and investigating complaints. Additionally, it emphasizes the role of bystander intervention and outlines specific regulations that apply to Maine	2	Premium	✓
35746/41652	Sexual Harassment: Creating a Safe Workplace: Supervisory: New York	Behavioral Ethics	This 2.0-hour supervisory course is designed to meet New York and New York City's requirements for sexual harassment prevention training. It provides supervisors with a comprehensive understanding of sexual harassment, including definitions, applicable federal and state laws, and the importance of maintaining a harassment-free environment. The course covers key topics such as harassment audits, risk factor assessments, appropriate responses to sexually harassing behaviors, and the steps for reporting and investigating complaints. Additionally, it emphasizes the role of bystander intervention and outlines specific regulations	2	Premium	✓
31927/37127	Virginia Ethics 2024: Why we do the things we do?	Behavioral Ethics	This course will be an overview of: <ul style="list-style-type: none"> * Background of the concepts of ethics, morals and values. * Ethical principles and why they matter. * Common ethical issues in accounting. * Contributors, rationalizations and moral disengagement. * Ethical dilemmas. 	2 Elizabeth Walsh	Premium	✓
21985/25341	Why Diversity Matters	Behavioral Ethics	This course will be an overview of: <ul style="list-style-type: none"> * Why diversity matters to everyone * Why diverse teams outperform homogenous teams * How diversity increases employee engagement * How diversity unlocks innovation * How diversity boosts company reputation and goodwill 	1 Jeannine Brown		✓
34734/40429	Why Diversity Matters	Behavioral Ethics	After completing this course, the learner should be able to: <ul style="list-style-type: none"> * Recall the importance of diversity * List reasons why diversity matters in business * Describe the impact of diversity on individuals and teams * Recognize the challenges of DEI initiatives 	1 Kelly Pope	Foundation	✓
18989/21816	Why do we do the things we do?	Behavioral Ethics	This course will be an overview of: <ul style="list-style-type: none"> * Background of the concepts of ethics, morals and values. * Ethical principles and why they matter. * Common ethical issues in accounting. * Contributors, rationalizations and moral disengagement. 	1.5 Michael Brown	Foundation	✓
23376/27164	Why we do the things we do for enrolled agents	Behavioral Ethics	This course will be an overview of: <ul style="list-style-type: none"> * Background of the concepts of ethics, morals, and values * Ethical principles and why they matter * Common ethical issues in accounting * Contributors, rationalizations, and moral disengagement 	2 Mike Brown	Foundation	✓
8990/9869	Contract Law for Accountants	Business Law	This course will be an overview of:This course will be an overview of: <ul style="list-style-type: none"> * How contracts can be defined as agreements that are enforceable in a court of law * The elements necessary for there to be an enforceable contract: agreement, consideration, legal capacity, and legality * Available defenses that may result in the contract not being enforced, if a contract exists 	2.5 Peter Olinto, National Lead Instructor, JD	Foundation	✓
28555/33013	Accounting Firm's System of Quality Control, Part 1	Business Management and Organization	This course will be an overview of: <ul style="list-style-type: none"> * Guidance used to incorporate Statement on Quality Management Standards (SQMS) No. 1 * Transition from a principles-based to a risk-based approach for a firm's system of quality management * Eight interrelated components of a firm's quality management system 	1 Timothy F. Gearty	Foundation	✓













28846/33346	Accounting Firm's System of Quality Control, Part 2	Business Management and Organization	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Application of Statement on Quality Management Standards (SQMS) No. 1 * How firms can implement elements of Statement on Quality Management Standards (SQMS) No. 1 to improve audit quality * Guidance available for next steps and timeline for implementation of new standards 	1 Timothy F. Gearty	Foundation	✓
20509/23593	Best Practices for Hybrid Work	Business Management and Organization	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Background and terminology. * Compilation of mistakes made to date for return-to-work. * Essential considerations for management, office(s), policies, health of workplace. * Essential considerations for employees, psychological safety, sensitivity to personal home 	2 Evelyn Grammar	Foundation	✓
31925/37125	Business Leaders Roundtable Q1 2024	Business Management and Organization	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Join our panel of industry experts as they explore the ever-changing dynamics in the business world. This course offers an in-depth exploration of contemporary business challenges, providing a comprehensive overview of rapidly changing topics facing business leaders today. Ultimately, participants will emerge with a holistic leadership approach, synthesizing knowledge 	2.5 Jeff Thomson, Leslie Seidman, Ralph Thomas, Timothy F. Gearty	Premium	✓
33220/38646	Business Leaders Roundtable Q2 2024	Business Management and Organization	<p>Join our panel of industry experts as they explore the ever-changing dynamics in the business world. This course offers an in-depth exploration of contemporary business challenges, providing a comprehensive overview of rapidly changing topics facing business leaders today. Ultimately, participants will emerge with a holistic leadership approach, synthesizing knowledge from diverse topics to navigate the intricate and interconnected challenges of today's global business environment.</p>	2.5 Jeff Thomson, Paul Stahlin, Ralph Thomas, Timothy F. Gearty	Premium	✓
33975/39618	Business Leaders Roundtable Q3 2024	Business Management and Organization	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Join our panel of industry experts as they explore the ever-changing dynamics in the business world. This course offers an in-depth exploration of contemporary business challenges, providing a comprehensive overview of rapidly changing topics facing business leaders today. Ultimately, participants will emerge with a holistic leadership approach, synthesizing knowledge 	2.5 Jeff Thomson, Paul Stahlin, Ralph Thomas, Timothy F. Gearty	Premium	✓
35561/41461	Business Leaders Roundtable Q4 2024	Business Management and Organization	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Join our panel of industry experts as they explore the ever-changing dynamics in the business world. This course offers an in-depth exploration of contemporary business challenges, providing a comprehensive overview of rapidly changing topics facing business leaders today. Ultimately, participants will emerge with a holistic leadership approach, synthesizing knowledge 	2.5 Timothy F. Gearty	Premium	✓
17134/19363	Change management: Audit your change implementation	Business Management and Organization	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Change management activities – mapping basic processes and procedures. * Methods for collecting data on change management activities. * Key controls of change management – people, processes, and technology. * Indicators of derailment or inadequate change management. 	1.5 Jim Eicher	Foundation	✓
16765/18977	Change management: Cultivating a culture that embraces change	Business Management and Organization	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Perceptions of change – the pros and cons. * Lessons learned about change from the COVID pandemic and the ongoing application. * Natural responses and how to tame human nature in response to change. * Resilience as a tool to overcome natural responses to change. 	1.5 Jim Eicher	Foundation	✓
31350/36457	Client Management	Business Management and Organization	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Building, developing, and sustaining positive client relationships. * Understanding client expectations as part of the client relationship. * Developing skills in CPAs of all levels to serve client needs. * Managing tasks and tools to develop additional work with existing clients and new client 	2 Bethmara Kessler	Foundation	✓
21295/24597	Consulting Skills: Development of Consulting Reports	Business Management and Organization	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * What is a consulting report? * Structure of a consulting report. * Types of consulting reports. * How to write a consulting report. 	2.5 Holly Hawk	Foundation	✓
21292/24594	Consulting Skills: How to conduct a consulting engagement	Business Management and Organization	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The basics (terms and definitions). * The five steps of the consulting engagement cycle. * Structuring a successful consulting engagement. * Managing risk related to consulting engagements. 	2 Jim Eicher	Foundation	✓
21299/24601	Consulting skills: How to develop a product strategy	Business Management and Organization	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * What is a consultant's role in developing strategies? * Steps to develop a strategy for a product. * Steps to develop a strategy for a service. * How to measure success of a product or service and how to address shortages. 	2 Jim Eicher	Foundation	✓

21296/24598	Consulting skills: How to develop customer surveys	Business Management and Organization	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * What is a survey? * Why should you survey your customers? * What are the methodologies of surveying your customers? * How do you link survey questions to the customer's journey map with your company? 	2 Evelyn Grammar	Foundation
21293/24595	Consulting skills: Product and service innovation processes	Business Management and Organization	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Map your customer's journeys with your products and services. * Identify customer's problems with your products and services. * Name the attributes of what customers want. * Name the phases of the innovation process. 	2 Jim Eicher	Foundation
15617/17574	Delegation in a small firm	Business Management and Organization	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The basic concepts and behaviors that are part of successful delegation. * Barriers to delegation. * How to determine what tasks to delegate. * How to choose the person to whom a task is delegated. 	1.5 Kelly Pope	Foundation
21834/25144	Enhancing Reports with Visuals	Business Management and Organization	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Examining the meaningful types of visuals used in consulting reports. * Identifying best practices when using visuals. * Identifying software used in creating visuals. * Understanding and exploring specific software used to create visuals. 	2 Holly Hawk	Foundation
17611/19970	Mining gold: Mapping your clients' decision journey with your firm	Business Management and Organization	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * A background on client decision journeys. * Defining target markets and client personas. * Mapping the clients' decision journey. * Enriching the client's decision journey touchpoints. 	1 Jim Eicher	Foundation
9148/10143	New Leader Assimilation	Business Management and Organization	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Differences between leaders and managers * Types of leadership styles * Skills and characteristics of effective leaders * Leadership strategies to promote a positive culture, motivate others, enact change, and 	1 Timothy F. Gearty	Foundation
23412/27218	Seeking Millennials and Generation Z	Business Management and Organization	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Characteristics of millennials and Generation Z * Common life experiences of millennials and Generation Z * Strategies for recruiting, hiring, and engaging millennials and Generation Z * Ways of engaging millennials and Generation Z within an accounting firm workplace 	2 Holly Hawk	Foundation
19935/22845	Taking Your Firm to the Next Level	Business Management and Organization	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Elements of a strategic plan. * Assessing your firm's readiness to grow. * McKinsey's Three Growth Horizons. * Growth vs. scale. 	1 Evelyn Grammar	Foundation
29779/34586	Trends in Change Management 2024	Business Management and Organization	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Trends and how to keep up with them * Global trends and ways your company can give consideration to them * Business trends * Accounting and finance trends 	2 Kelly Pope	Foundation
34935/40641	Trends in Change Management 2025	Business Management and Organization	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Trends and how to keep up with them * Global trends and thoughts for considering their impact on your business * Business trends * Accounting and finance trends 	2.5 Scott Larson	Foundation
19013/21840	Change management: Making strategy happen	Communications & Marketing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The strategic and tactical framework to successfully implement change initiatives * The tools to assess the progress of each phase of the framework * Timing the change implementation to enable optimum success 	2 Jim Eicher	Foundation
19280/22186	Coaching employees for better results	Communications & Marketing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The similarities and differences between coaching and mentoring * The benefits of coaching and mentoring * Coaching and mentoring approaches including diversity, equity, and inclusion * Effective strategies for coaching and mentoring employees 	1.5 Evelyn Grammar	Foundation

14316/15825	Collaborating to Build Your Personal and Professional Networks	Communications & Marketing	<p>This course will be an overview of Client Rapport Foundations:</p> <ul style="list-style-type: none"> * Yesterday and today. * Hierarchies and networks. * From command and control to influence and collaboration. 	1 Jim Eicher	Foundation
15198/17096	Creating effective presentations	Communications & Marketing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Introduction to presentation basics * Presentation methods * Presenting quantitative information * Best practices for presentations 	1 Michael Brown	Foundation
31466/36631	Data Visualization	Communications & Marketing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * How to visualize data effectively * How to find and cite quality data sources * How to craft the story around the data * How to choose the best format and tools to analyze and visualize data for different 	1 Jacob Shortt	Foundation
15907/17885	Developing a growth mindset	Communications & Marketing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Background of growth mindsets * How to develop a growth mindset. * The power of a growth mindset. * The impact of a growth mindset on your firm. 	1 Jim Eicher	Foundation
10390/11418	Developing Client Rapport: Making Everyone a Match!	Communications & Marketing	<p>After completing this course, the learner should be able to:</p> <ul style="list-style-type: none"> * Significantly reduce client problem solving cycle time. * Minimize any client remorse, improving the "feel good" factor. * Capture more new clients, retaining more repeat clients. 	2 Jim Eicher	Foundation
13435/14633	Developing ideal working relationships	Communications & Marketing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Definitions from Neurolinguistics as a foundation for rapport. * Broken rapport – Broken trust. * How people experience the world. * How to 'read' clues from others' words. 	1 Jim Eicher	Foundation
12708/13880	Effective business communication	Communications & Marketing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The importance of clear, compelling communications in a business setting * The differences among communicating with peers, subordinates, superiors, and clients * The most common forms of business communications such as emails, letters, memos, reports, and presentations, and when to use each method * Best practices for email communications 	1.5 Timothy F. Gearty	Foundation
8637/9613	Effective Business Writing for CPAs, Part 1	Communications & Marketing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Writing effective communication critical to success * Communicating with others with the purpose to convince others to do something, give us permission, or simply inform * Prepare written communication that is clear and logical 	2 Elizabeth Walsh	Foundation
16576/18782	Effective business writing for CPAs, part 2	Communications & Marketing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The most critical format and grammatical elements utilized when preparing written audit reports and developing critical components of an audit report 	2.5 Timothy F. Gearty	Foundation
12315/13475	Email communications	Communications & Marketing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The art of crafting meaningful emails that save time for both the sender and the recipient, avoid embarrassing and potentially costly snafus, and advance business objectives 	1.5 Timothy F. Gearty	Foundation
9187/10187	Executive Presence	Communications & Marketing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The key components of Executive Presence * Where you need to step up your confidence and enhance your self worth and capabilities * What is Gravitas and how you can enhance your skills to create followership * The importance of appearance in gaining your executive presence 	2 Cheryl Weir	Foundation
31651/36843	Get your Emails and Reports Read	Communications & Marketing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Typical mistakes and complaints about emails and reports * Research on the impact of information overload * Techniques for planning emails and reports that are easy on the ears and eyes and that get results 	1 Jina Etienne	Foundation

19383/22289	Getting new clients	Communications & Marketing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The key components for getting new clients. * How to identify the perfect client. * The value of effective marketing. * Methods to measure the success of client acquisition strategies. 	1 Evelyn Grammar	Foundation
313/326	Job Interviewing Skills	Communications & Marketing	<p>Even for the most personable and outgoing individuals, successful interviewing takes much more than charm and personality. Participants will be able to apply the proven, effective tools that make a difference throughout the interview process. From the first stages of the application process through the interview itself and subsequent follow-up, you'll learn techniques that help with skills like preparing an effective résumé, answering the tough questions and writing an appropriate thank you letter.</p>	2 Timothy F. Gearty	Foundation
8466/9387	Leadership – Others	Communications & Marketing	<p>This course helps users master powerful communication and create followership. After taking the course, users should also be able to recognize the different styles of communication; understand the possible limitations in each communication style; know how to build and/or restore trust; listen generously and understand the five modes of conflict.</p>	2.5 Cheryl Weir	Foundation
14652/16472	Leadership skills	Communications & Marketing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * What makes a leader * Traditional traits of a leader * Non-traditional traits of a leader 	2 Timothy F. Gearty	Foundation
3418/4824	Leadership-Self	Communications & Marketing	<p>This course helps users to better understand how their leadership style is viewed by others, learn the importance of emotional intelligence, and identify emotional competencies. After taking the course, users should also be able to recognize the leadership style of others and how to flex their own leadership style.</p>	2 Cheryl Weir	Foundation
8138/8742	Leadership—Team	Communications & Marketing	<p>This course helps users listen better and with more empathy. It helps users develop greater empathy for others. After taking the course, users should also be able to improve their communication with others by hearing them and interacting with what they hear through improved listening and increased empathy.</p>	2 Cheryl Weir	Foundation
28848/33381	Leveraging Social Media for Firm Success	Communications & Marketing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * How social media began, and its evolution to the present day * The duties of a social media manager and how they cultivate a brand * Social media practices used to recruit and retain prospective employees and target customers to improve operations 	1 Ryan Bakke	Foundation
32025/37226	Meetings that Work	Communications & Marketing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * How meetings can be used effectively in the workplace * Self-assessment of strengths and weaknesses in the area of soft skills * How to appropriately set expectations for meetings * Recognizing how problems arise in meetings and ways to best address them 	2.5 Mike Brown	Foundation
316/329	Negotiation Skills	Communications & Marketing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The definition of negotiations, especially in the context of accounting situations. * The basics of negotiation skills, including the stages of successful negotiations and the interpersonal skills required to complete negotiations. * Methods for overcoming objections, counteracting negativity, and reaching consensus 	1.5 Timothy F. Gearty	Foundation
15396/17328	Networking Skills	Communications & Marketing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Commonly accepted etiquette and practices for attending virtual and in-person business networking events. * Best uses for online platforms for networking. * Communication basics for professional networking in writing. 	1.5 Michelle Pace	Foundation
19382/22288	Promoting your firm online using brand management	Communications & Marketing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The differences between marketing, advertising and public relations. * What brand management is and does. * Various online options for brand management and the dynamics of each. * A basic framework for creating a brand management strategy for your firm. 	1 Jim Eicher	Foundation
12123/13252	Public Speaking and Presentation Skills	Communications & Marketing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Types of presentations and speeches that accountants may be called upon to make, including best practices for researching, planning, and preparing presentations; techniques to handle distractions, unexpected problems, and nervousness; and effective methods of sharing information in presentations, especially financial or accounting data 	1.5 Timothy F. Gearty	Foundation

19255/22161	Role of the Leader in Talent Development	Communications & Marketing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Contemporary leadership theory and practice * Personal character traits real leaders must have * Negative organizational consequences of ineffective leaders * Gardening practices that foster high-performing teams 	2 Timothy F. Gearty	Foundation	✓
32398/37653	Staying Connected with Your Clients on Social Media	Communications & Marketing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Social media basics * Social media platforms * Building a social media strategy * Best practices for social media for small firms 	1 Patrice Johnson	Foundation	✓
30997/35947	Storytelling with Data	Communications & Marketing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * What a story is * How audiences listen and remember * Deciding the purpose of your presentation * How to choose the best structure to craft your story 	1 Jacob Shortt	Foundation	✓
72/85	Take Control: Use Conflict to Your Advantage	Communications & Marketing	<p>With the average U.S. employee spending nearly three hours a week in conflict at a cumulative cost of nearly \$360 billion per year, conflict is a major economic and productivity drain in today's workplace. Identify your own conflict resolution style and learn how to manage conflict to produce positive outcomes while turning conflict into a win-win proposition.</p>	1.5 Cheryl Weir, Timothy F. Gearty	Foundation	✓
8607/9583	The Art of High-Impact Conversations	Communications & Marketing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The steps one must take to lead high-impact conversations * Situations that call for high-impact conversations * Why leaders need the skills to engage in high-impact conversations * Problematic situations and resolutions in which high-impact conversations may be difficult 	1.5 Timothy F. Gearty	Foundation	✓
11631/12714	The Change Bully: Workplace Bullies - What to Do and When to Move On	Communications & Marketing	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Bullies, bullies everywhere--- * The Change Bully Framework * Bullying antidotes and "counter moves" 	1 Jim Eicher	Foundation	✓
77/90	The Ultimate Endorsement: Unleash the Power of You	Communications & Marketing	<p>Everyone has gaps in their ability to gain the endorsement of others. Led by an experienced executive coach, this course will help participants understand how executive presence, "exquisite communication," professional foundation and micro messaging overcome those gaps and gain powerful support.</p>	2 Cheryl Weir, Timothy F. Gearty	Foundation	✓
23349/27135	Alteryx for Excel Users: Basic Programming Concepts	Computer Software & Applications	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Basic programming concepts found in programming languages like Excel and Alteryx * Data types in Excel and Alteryx * Reading and writing variables in Excel and Alteryx * Functions (formulas) in Excel and Alteryx 	2 Matt Pickard	Premium	✓
27829/32258	Alteryx for Excel Users: More Data Manipulation	Computer Software & Applications	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Importing data * Data sorting * Data filtering * Data summarization 	2.5 Matt Pickard	Premium	✓
15906/17884	Artificial intelligence and machine learning—What's the buzz?	Computer Software & Applications	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Artificial intelligence (AI), machine learning (ML), predictive analytics (PA), and how they differ from other related concepts. * Models, what they mean, and how they are used in ML and PA. * Different PA models (algorithms), with an understanding of where and when each algorithm 	1 Matt Pickard	Foundation	✓
28844/33304	Excel Metrics: Best Practices	Computer Software & Applications	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Questions to consider when determining the right metric to utilize * Baseball – How metrics once considered the best way to assess hitters have given way to a variety of new metrics * Finance – How research has given rise to metrics such as the Beneish M-Score and Altman 	1 Mike Brown	Foundation	✓
34660/40354	Excel: Cool Tricks	Computer Software & Applications	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Use of ranges and naming conventions * AutoFill and Flash Fill functionalities * Use of sorting and filtering functions 	1 Michael Brown	Foundation	✓

34942/40675	Excel: Data Cleaning	Computer Software & Applications	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The significance of Excel in data analysis * Explanations of Excel functions and tools * Effective uses of Excel functions and tools * The application of Excel using real-world examples 	1 Michael Brown	Foundation 
33901/39335	Excel: Magic with Excel	Computer Software & Applications	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Explanations of Excel functions and tools * Effective uses of Excel functions and tools * The application of Excel using real-world examples 	1 Michael Brown	Foundation 
29953/34810	Excel: Making Sense of Data 2024	Computer Software & Applications	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Critical tasks that can be used to make sense of data in Microsoft Excel, including: <p>Bringing in raw data into Excel to begin the analysis process</p>	1 Michael Brown	Foundation 
34661/40355	Excel: More Cool Tricks	Computer Software & Applications	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * How to use the functions INDEX, MATCH, and IFS * LOOKUP functions and the different use cases for VLOOKUPs and XLOOKUPs and how to identify issues with your formulas * Use of Excel formula auditing tools 	1 Michael Brown	Foundation 
33902/39336	Excel: More Magic with Excel	Computer Software & Applications	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Methods of using Excel to make logical decisions * Excel formulas and tools that can be used to format data * Effective uses of Excel tables and charts * Examples using Excel tools and tricks 	1 Michael Brown	Foundation 
28326/32772	Excel: Top 10 Functions for Accountants	Computer Software & Applications	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Ten critical functions for accountants to know including: <p>VLOOKUP XLOOKUP</p>	1 Michael Brown	Foundation 
34946/40705	Excel: What's New in Office 365	Computer Software & Applications	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The Excel features and benefits of Office 365 * The use of artificial intelligence in Office 365 * New Excel functions in Office 365 * Explanations of features of Excel charts, maps, and tables in Office 365 	1 Michael Brown	Foundation 
29311/34013	IDEA for Excel Users: Creating Reports	Computer Software & Applications	<p>This introductory course is based on CaseWare IDEA®. The course will be an overview of:</p> <ul style="list-style-type: none"> * The definition, benefits, and basic use case scenarios of IDEA * The IDEA interface * Importing data into IDEA and an introduction to basic IDEA functionality * Creating reports in IDEA 	2.5 Holly Hawk	Premium 
26060/30283	Introduction to SpreadJS: The Excel Alternate for the CPA Exam	Computer Software & Applications	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Why the CPA exam is shifting from Microsoft Excel to SpreadJS * The benefits of SpreadJS * The functionality provided by SpreadJS * How SpreadJS will be used in CPA Exam scenarios 	1 Jacob Shortt	Foundation 
17312/19543	Power BI: Creating reports	Computer Software & Applications	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Introduce to Power BI Desktop * Demonstrate how to import a dataset. * Discuss various other ways data can be imported. * Explain dimensions and measures and when and how to use them. 	3 Matt Pickard	Foundation 
18727/21549	Power BI: Understanding machine learning concepts	Computer Software & Applications	<p>This course will be an overview of:</p> <p>Introduction to Power BI</p> <ul style="list-style-type: none"> * Downloading and installing Power BI * Signing up for a Power BI account * Getting data into Power BI 	3 Matt Pickard	Foundation 
23408/27200	Python for Excel Users: A Gentle Introduction	Computer Software & Applications	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Basic programming concepts – variables, conditional statements, functions, and loops * Python and how its similar to and different from tools such as Excel, Tableau, and Alteryx * Python's capabilities for machine learning and data analytics * Reasons to learn and use Python 	2 Matt Pickard	Premium 

26971/31356	Tableau for Excel Users: Creating Reports	Computer Software & Applications	This course will provide an overview of the software Tableau and how it can be utilized to create effective reporting. The training will allow Excel users to transition seamlessly into the Tableau software via a walkthrough of the Tableau interface and features. This will include how to import data from Excel into Tableau, how to create formulas, implement filtering, and create simple yet effective visual reports.	2 Jacob Shortt	Premium	✓
20349/23431	What artificial intelligence brings to excel that makes your life easier	Computer Software & Applications	This course will be an overview of: <ul style="list-style-type: none"> * Demonstrate how Flash Fill works * Discuss various ways to employ Flash Fill to make data preparation faster and easier * Demonstrate how Analyze Data (Excel Ideas) works * Discuss various ways to employ Ideas to quickly extract answer from data 	1 Matt Pickard	Foundation	✓
15567/17519	Macroeconomic analysis - Bringing the big picture into focus, part 1	Economics	This course will be an overview of: <ul style="list-style-type: none"> * The basics of macroeconomics. * The concepts of supply and demand. * The most common economic theories—classical and Keynesian. * The business cycle. 	2.5 Peter Olinto	Foundation	✓
15636/17593	Macroeconomic analysis – Bringing the big picture into focus, part 2	Economics	This course will be an overview of: <ul style="list-style-type: none"> * The importance of fiscal policy, including the pros and cons of various fiscal policy theories. * Monetary policy and its impact on the economy. * The banking system and the role of the Federal Reserve. 	2.5 Peter Olinto	Foundation	✓
16341/18535	Microeconomic analysis – Understanding the effect on supply and demand, part 1	Economics	This course will be an overview of: <ul style="list-style-type: none"> * The study of the economy at the individual, firm, and industry level * The laws of supply and demand * The impact of shortages and surpluses * The relationship between time and the market adjustment process 	3 Peter Olinto	Foundation	✓
16342/18536	Microeconomic analysis – Understanding the effect on supply and demand, part 2	Economics	This course will be an overview of: <ul style="list-style-type: none"> * The law of supply and demand. * The different types of competitive market structures. * The impact of shortages and surpluses on supply and demand. * The relationship between time and the market adjustment process. 	3 Peter Olinto	Foundation	✓
16529/18730	Application of financial statement analysis in equity valuation	Finance	This course will be an overview of: <ul style="list-style-type: none"> * The types of financial statement analysis and why they are important * The types of equity valuation methods including balance sheet, discounted cash flow, and earnings multiple methods * The importance of these measurements and what information they provide 	2 Timothy F. Gearty	Premium	✓
32799/38196	Application of Financial Statement Analysis in Forecasting	Finance	This course will be an overview of: <ul style="list-style-type: none"> * Developing financial forecasts * Using financial statement analysis tools in creating financial forecasts * The role of nonfinancial data in financial forecasting * The challenges in developing accurate financial forecasts 	1.5 Scott Larson	Premium	✓
34225/39902	Application of Process Costing to the Manufacturing Industry	Finance	This course will be an overview of: <ul style="list-style-type: none"> * Steps in developing manufactured product cost information using process costing * The various process costing methods—weighted average, standard costs, and FIFO costs used by a manufacturing firm * Special situations that occur in process costing within the manufacturing industry 	3 Scott Larson	Premium	✓
27932/32373	Budgeting Behavioral Issues: Techniques to Properly Align Your Organization	Finance	This course will be an overview of: <ul style="list-style-type: none"> * How to align management and organizational goals * Approaches to the development of budgets and standards * Behavioral considerations when developing budgets and standards * Considering behavioral issues when reporting on and evaluating performance 	3 Scott Larson	Foundation	✓
18229/20982	Capital budgeting: The tools to enhance shareholder value part 1	Finance	This course will be an overview of: <ul style="list-style-type: none"> * The importance of capital project decisions * Approaches used to determine the selection of appropriate capital projects * Pros and cons of the various tools used to make investment decisions * The use of cash flow analysis in making capital budgeting decisions 	3 Peter Olinto	Foundation	✓
18230/20983	Capital budgeting: The tools to enhance shareholder value part 2	Finance	This course will be an overview of: <ul style="list-style-type: none"> * The required rate of return for capital acquisitions * Risk analysis related to capital investments * Evaluating the optimal capital budget and impact of capital rationing in making capital investment decisions 	2.5 Peter Olinto	Foundation	✓

27881/32315	Capital Investment: Cash Flow Analysis in Capital Budgeting	Finance	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The framework for capital budgeting for the purposes of making investment decisions * Techniques and methods for forecasting and evaluating cash flows 	2	Scott Larson	Premium	✓
28821/32281	Capital Investment: Real Options in Capital Budgeting	Finance	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Motivation for use of real options in capital budgeting * Types of real options in business investment decisions * Valuation of real options * Application of real option analysis to business investment decisions 	1.5	Scott Larson	Premium	✓
28270/32716	Capital Investment: Risk Analysis in Capital Budgeting	Finance	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The process for making capital investment decisions and creating capital budgets * Types of risks inherent in the capital investment process * Strategies for incorporating risk analysis into the capital investment decision-making process 	2.5	Scott Larson	Premium	✓
15450/17382	Corporate distribution decisions: dividend versus share repurchases	Finance	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Company decisions regarding distributions to shareholders * Different types of dividend policies and the reasons companies select specific policies * Company decisions regarding repurchasing stock * Implications of the COVID-19 pandemic on distribution to shareholders 	2.5	Peter Olinto	Premium	✓
29716/34448	Cost control and management for service industries	Finance	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The characteristics of service firms and recent trends for cost control and management * The budgeting process for service firms * Using a job costing system for service firms * Using an activity-based costing system for service firms 	2	Scott Larson	Premium	✓
29051/33623	Cost Management: Material Costs and Labor costs	Finance	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Basic material and labor cost management concepts and trends * Internal controls pertaining to material and labor costs * Steps to account for material and labor costs * Key characteristics unique to material and labor costs 	2.5	Scott Larson	Premium	✓
28441/32891	Estimating the Optimal Capital Structure	Finance	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The importance of determining an optimal capital structure * The basic theories of capital structure * The process of estimating an optimal capital structure 	1.5	Scott Larson	Premium	✓
34943/40676	Excel: Enterprise Risk Management	Finance	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The significance of Excel in assessing enterprise risk * Explanations of enterprise risk Excel functions * Effective uses of Excel for enterprise risk assessment * The application of Excel using real-world enterprise risk examples 	1.5	Mike Brown	Foundation	✓
29313/34015	Excel: Solve Hard Problems in Corporate Finance	Finance	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Using sample work order data, examine different ways to identify specific transactions, how to manipulate text fields, and how to use conditional highlighting to flag selected information. * Using sample insurance policy information, review the benefits provided by using Table functionality in Excel, how to utilize UNIQUE to identify unique items within a list, sorting tools in the Table along with the SORT function, and leveraging SUMIFS to selectively summarize information within a larger set of data. * Using baseball statistics as an example, look at how to identify performance for a team. Use XLOOKUP to pull data for selected players and then summarize that information. Also review 	1	Michael Brown	Foundation	✓
34945/40695	Excel: Technical Analysis Trading Strategies	Finance	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Technical stock analysis using Excel * Using Excel to model moving average trading rules * Determining buy, hold, and sell strategies with Excel * Comparing two stocks within the same industry using Excel 	1.5	Mike Brown	Foundation	✓
18869/21696	Explaining financial results to non-financial managers	Finance	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The relationship between accounting and business operations * The accounting information generating processes and its assumptions * The information conveyed by major financial statements * The use financial statement information for business decisions 	2	David Wang	Foundation	✓
31850/37043	Financial Planning and Analysis with Analytical Capabilities	Finance	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The basics of financial planning and analysis * Techniques in data analytics that can be used for financial planning and analysis * Using data analytics techniques for business decisions 	1.5	Holly Hawk	Foundation	✓

20418/23501	Financial Statement Analysis - Understanding the Numbers	Finance	<p>This course will be an overview of:</p> <p>In today's high-stakes business world, the ability to accurately assess the financial health of an organization is essential.</p>	2 Timothy F. Gearty	Foundation	✓
26660/31045	Financial Statement Analysis: Cash Flow and Operations	Finance	<p>Fundamental concepts covered in this course include:</p> <p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Interrelations and differences between cash-based and accrual-based analysis of operating activities * Preparation of the statement of cash flows using both direct and indirect methods * Using income and expenses to assess operational performance and risks in order to predict 	2 Scott Larson	Premium	✓
29747/34479	Financial Statement Analysis: Financing Activities	Finance	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Accounting, reporting, and disclosure considerations related to debt and equity financing, leases, other liabilities, and other financing options * Differences between GAAP and IFRS principles related to financing activities * Considerations when performing financial statement analysis relating to financing activities 	2 Mike Brown	Premium	✓
30094/34955	Financial Statement Analysis: Investing Activities	Finance	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Accounting of investments in long-term assets and intercompany investments * Comparison of U.S. GAAP and IFRS requirements for reporting and disclosing investments in long-term assets and intercompany investments * Analysis of investments in long-term assets and intercompany investments, including 	2 Jennifer Louis	Premium	✓
16239/18323	Financial statement analysis: Liquidity and solvency	Finance	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The concepts of liquidity and solvency. * The importance of financial statement analysis. * The use of liquidity and solvency ratios in financial statement analysis. 	2 Timothy F. Gearty	Premium	✓
15986/17964	Financial statement analysis: Profitability and growth	Finance	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The issues that affect the profitability of shareholders' investments and growth of their investments. * Investment profitability analysis. * Investment growth analysis. 	2 Timothy F. Gearty	Premium	✓
31853/37046	Financial Therapy and the CPA	Finance	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The financial therapy industry, including what financial therapy is and who practices financial therapy * Financial therapy skills, tools, and knowledge that may be helpful for a CPA * Resources and ethical support for a CPA 	2 Elaine Luttrull	Foundation	✓
33976/39619	Identity Theft Prevention	Finance	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * What identity theft entails and how it has evolved * Effective preventative measures against identity theft * Sources to use to help prevent identity theft * How to recognize that identity theft has occurred 	1 Timothy F. Gearty	Foundation	✓
35223/41117	Identity Theft Today	Finance	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * How identity thieves can take your money, destroy your credit, and ruin your reputation * Ways to stay a step ahead of this ever-changing crime by taking effective preventative measures * How to put your life back in order if you do fall victim 	1 Kelly Pope	Foundation	✓
97/110	Investment Decision: Techniques to determine the optimal allocation of resources	Finance	<p>Today's resource constrained environment has made it critical that you plan and optimally utilize the resources available to your organization. In this course you will deepen your understanding and application of the financial tools that will assist your organization in the allocation of its resources.</p>	3 Timothy F. Gearty	Foundation	✓
27906/32346	Managing Manufacturing Overhead Costs	Finance	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Manufacturing overhead costs * Types of costs and behavior patterns * Activity-based costing * Various overhead application methods 	2.5 Scott Larson	Premium	✓
28115/32561	Multinational Corporate Finance: Direct Foreign Investment	Finance	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Basic direct foreign investment concepts and trends * Reasons to consider direct foreign investment opportunities * Host country impact on direct foreign investment * Assessing potential direct foreign investment opportunities 	2 Scott Larson	Premium	✓












16460/18661	Multinational corporate finance: International capital budgeting	Finance	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Process of multinational capital budgeting. * Decision-making in multinational capital investment. * Valuation methods used for international companies. * Analysis of real options in international setting. 	3 Peter Olinto	Premium	✓
33272/38698	Multinational Corporate Finance: Liability and Financing Management	Finance	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Capital budgeting and structure decision making by multinational corporations and their subsidiaries * Both internal and external short-term local and foreign financing options * The cost-saving benefits and risks related to foreign currency financing, including hedging strategies * Long-term debt financing, including local and foreign options and analyzing the debt denomination, debt maturity, and fixed or floating rate decisions * International trade payment and financing methods and the agencies that assist and 	1.5 Paul Kern	Premium	✓
31292/36395	Personal Financial Planning	Finance	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Basic personal financial planning * Establishing and using a budget * Income tax planning * Retirement, college, and estate planning 	3 Tom Tillery, MA Ed, MSFS, CFP®, CLU®, ChFC®, LUTCF, CRPC®	Foundation	✓
14715/16536	Short term financing and working capital management: Cash and liquidity	Finance	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Short-term financing decisions * Working capital and liquidity management * Short-term investment options * Cash management 	2.5 Peter Olinto	Premium	✓
25362/29581	Special Topics in Capital Formation: Derivatives and Hybrid Financing	Finance	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The reasons companies use alternative financing options * Types of derivatives and hybrid financing * Financing options when using derivatives or hybrid financing 	3 Michael Hamilton, Timothy F. Gearty	Premium	✓
28068/32514	Special Topics in Capital Formation: Leases and Intermediate-Term Financing	Finance	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Leasing fundamentals and the development of lease accounting over time * Lease analysis from the perspective of both the lessee and the lessor * Tax considerations in leasing and financing decisions * Intermediate financing as an alternative to leasing 	3 Scott Larson	Premium	✓
16927/19150	Special topics in strategic cost management	Finance	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * What strategic cost management is and how it is utilized in business * Key criteria, definitions, and terms for strategic cost management * Real-world examples of strategic cost management in use * Current and potential implications of the COVID-19 pandemic on strategic cost management 	2.5 Timothy F. Gearty	Premium	✓
28116/32562	Strategic Cost Management: Techniques and Technologies	Finance	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The definition, importance, and purpose of strategic cost management * Techniques used in strategic cost management * Technological advances and their application to strategic cost management * Examples of strategic cost management in action 	2 Scott Larson	Premium	✓
16411/18612	Taxes and corporate strategies: Decisions for acquisitions and divestitures	Finance	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Methods involved in corporate M&A and divestiture activity. * Inner workings of taxable and tax-free corporate acquisitions. * Major tax issues associated with M&As and divestitures. * The effect of the COVID-19 pandemic on M&A and divestiture activity. 	3 Timothy F. Gearty	Premium	✓
19529/22436	Taxes and corporate strategies: Multinational investment decisions	Finance	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * History and recent trends of multinational investments of U.S. corporations * Implications of the COVID-19 pandemic on multinational investments * Framework and statistics for multinational taxation * Tax computing and reporting of the U.S. multinational tax system 	3.5 Tara Fisher	Premium	✓
26545/30914	The Future of the Finance Function in a Digital Economy	Finance	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The finance function in the modern era * Adapting the finance function to the digital economy * Current and future technologies for the finance function * Cybersecurity threats to the finance function 	1.5 Scott Larson	Premium	✓
9493/10505	The New Controllershship: Keys to Boosting Financial Performance, Part 1	Finance	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Organizational management to allow for change to occur. * Modern, dynamic management techniques. * Planning and reorganizing old ways of budgeting to work in today's new environment. * Risk management and avoidance. 	1 Allegra Helms	Foundation	✓

9492/10504	The New Controllershship: Keys to Boosting Financial Performance, Part 2	Finance	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Benchmarking and how to use it to measure control. * Cash management in modern day society. * Electronic systems and cloud computing. * Predicting the movement of future interest rates. 	1 Allegra Helms	Foundation	✓
25692/29915	Working Capital and Supply Chain Management	Finance	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Various factors that can impact supply chain management * Companies' working capital considerations * Concerns relating to the management of accounts receivable, inventory, and accounts payable 	2.5 Michael Hamilton	Premium	✓
31267/36370	Identity Theft: How to Detect, Prevent, and Recover in the Digital Age	Information Technology	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Trends in identity theft * Various identity theft targets, schemes, and scams * Tips for protecting your identity * Guidance for fixing problems related to identity theft 	2.5 Bethmara Kessler	Foundation	✓
22900/26410	Alteryx: Data Manipulation and Descriptive Analytics	Information Technology	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Examining the steps when performing data analytics. * Understanding a foundation on Alteryx. * Exploring how to use Alteryx to perform several commonly used data manipulation techniques to generate descriptive-level information and highlight potential anomalies. 	2 Holly Hawk	Premium	✓
29722/34454	Artificial Intelligence for Accountants	Information Technology	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * What artificial intelligence is * Different types of artificial intelligence * Artificial intelligence software * How artificial intelligence will improve accounting practices 	3 Jacob Shortt	Premium	✓
16086/18064	Bitcoin: Key concepts to understand about the original blockchain	Information Technology	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The advent of Bitcoin * Bitcoin and its use of blockchain * Critical concepts and terminology * How the Bitcoin blockchain works 	1.5 Mark Sheldon	Premium	✓
19451/22357	Blockchain and IT Governance	Information Technology	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Blockchain and IT Governance * Smart Contracts and IT Governance * IT Governance Framework 	1.5 Reza Barkhi	Premium	✓
16698/18908	Blockchain assurance and COSO and COBIT standards	Information Technology	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Blockchain * Distributed Trust and Auditing * COSO * COBIT 	1.5 Reza Barkhi	Foundation	✓
26465/30786	Bridging the Gap between Understanding and Applying Data Analytics	Information Technology	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Big data and how big data can be utilized within multiple industries * The definition and importance of data analytics, including specific data analytics examples * Types of analytics that can be performed, data analytics tools, and the benefits of emerging technologies partnering with big data 	2.5 Holly Hawk	Premium	✓
29136/33721	Building Your Business in the Cloud	Information Technology	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Cloud computing concepts, including storage and software as a service * Data protection strategies * Cloud computing advantages and disadvantages with a focus on storage and software as a service 	2 Bethmara Kessler	Premium	✓
12962/14149	California Consumer Privacy Act and what it means for accountants	Information Technology	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The details and requirements of the CCPA for businesses as well as the new rights consumers have * How to identify companies and clients that may be subject to the CCPA * Steps companies and accountants can take in order to be compliant with the CCPA * The economic impact of the CCPA on different industries and the estimated costs of 	2 Mike Brown	Foundation	✓
33001/38404	Controllershship and IT Management	Information Technology	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The controller's responsibilities regarding IT systems and internal controls * Differences in the controller's responsibility in designing, implementing, and maintaining effective internal controls based on the size of the company and the management personnel available * A review of the principles and framework provided by the Committee of Sponsoring 	3 Holly Hawk	Foundation	✓













31828/37021	Cyber Never Sleeps: How to Protect Your Organization	Information Technology	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Cybercrime history, facts, and trends * A review of internal and external cyber threats * The risks and opportunities of emerging technologies * Strategies to protect your organization from cyber threats 	1	Bethmara Kessler	Premium	✓
35036/40904	Cyber Trends 2025	Information Technology	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Cyber trends * Recent cyber breaches and cases * Methods used by cybercriminals * Actions to improve your cyber hygiene 	2.5	Bethmara Kessler	Premium	✓
29833/34672	Cybersecurity Preparedness for CPAs	Information Technology	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Current cybersecurity threats and how to mitigate data breach risk * SEC and other regulatory guidance on cybersecurity risk and responses * Guidance for performing and reporting on cybersecurity risk management programs 	3	Jennifer Louis	Foundation	✓
27270/31661	Cybersecurity Supply Chain Risk Management	Information Technology	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Cybersecurity and supply chain risk management (C-SCRM) * C-SCRM threat landscape and important sources of federal guidance * C-SCRM events * C-SCRM critical success factors 	2	Bethmara Kessler	Premium	✓
23111/26616	Cybersecurity Threats and Bad Actors	Information Technology	<p>This course will be an overview of the:</p> <ul style="list-style-type: none"> * Trends in the cybersecurity landscape * Characteristics, traits, and motivations of bad actors * Top cyber methods used by company insiders that threaten organizations * Top cyber methods used by company outsiders that threaten organizations * Common remedial measures that help clients protect their cybersecurity 	2	Bethmara Kessler	Premium	✓
15839/17807	Cybersecurity: Understanding social engineering and its impact on data security	Information Technology	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Social engineering. * Six key principles of influence. * Types of social engineering. * Laws. 	2	Kelly Pope	Premium	✓
15818/17786	Cybersecurity: I've been hacked! Now what? A framework for preventing cyber attacks	Information Technology	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * History of hacking. * Types of hacking. * Financial services industry hacks. * Strategies to prevent financial data hacking. 	2	Kelly Pope	Premium	✓
29300/33982	Data Privacy Regulations and Risk Assessment Frameworks	Information Technology	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The impact of technology on privacy * Data privacy and data security * Privacy laws and data protection compliance * Privacy risk assessment frameworks 	2	Jacob Shortt	Foundation	✓
12846/14032	Foundations in data and analytics for the accounting profession	Information Technology	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * How the increase in data and data analysis tools are changing the skills needed in the accounting profession * How to apply the business analytics cycle to identify questions, identify and prepare data, perform analyses, and communicate results * How descriptive, predictive, and prescriptive analytics are used in business 	1	Ann Dzurinin	Premium	✓
32194/37410	Going Digital, Staying Human: Retooling your Digital Dexterity for Success	Information Technology	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The dynamics of technology in business * How technology can help or hinder effective functioning and growth of a company * The mindset required to leverage technology for profitability and productivity * How to assess, plan, and enact strategies to use technology for successful outcomes 	1	Chris Mitchell	Foundation	✓
21255/24557	Helping Cyber Clients Build Resiliency	Information Technology	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Cybersecurity and cyber resiliency * Ownership, oversight, and governance of cyber resilience in organizations * The NIST cybersecurity and cyber resilience frameworks * A risk management framework and corresponding set of actions that build cyber resiliency 	2	Bethmara Kessler	Premium	✓
31268/36371	How to Build a Successful Cybersecurity Program	Information Technology	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Information security * The role of the cybersecurity professional * The components of a cybersecurity program * The risks associated with BYOD, IoT, and third-party access 	2	Kelly Pope	Premium	✓

28394/32844	Introduction to IT Security	Information Technology	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Introduction to IT security and cybersecurity * IT and Cybersecurity risk analysis, management, and risk treatments * IT and Cybersecurity access controls * Types of IT and cybersecurity threats 	2 Bethmara Kessler	Foundation	✓
26548/30933	Overview of Net Neutrality	Information Technology	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The definition of net neutrality * The history of net neutrality * Legal actions involving Comcast and Verizon * FCC rulemaking on net neutrality 	1 Zach Chism	Premium	✓
14998/16882	Performing and Interpreting Data Analytics	Information Technology	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * How to perform descriptive, predictive, and prescriptive analyses using tools available in Microsoft Excel * How to interpret the results of descriptive, predictive and prescriptive analyses * How to identify potential outliers and their potential effect on the analysis results * How to test and interpret model assumptions. 	3 Ann Dzurinin	Premium	✓
10876/11904	Smart Contracts on the Blockchain	Information Technology	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Distributed ledger concepts, with a focus on smart contracts and blockchain * Key features of smart contracts * Patterns of interaction between smart contracts and blockchains and other real-world systems 	2.5 Tim Riser	Premium	✓
26869/31254	Technology ABCs: Artificial Intelligence (AI), Blockchain, and Cybersecurity	Information Technology	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Artificial intelligence (AI) and its uses * Blockchain and virtual currencies * Methods to combat cybercrime and enhance cybersecurity 	2 Mark Sheldon	Foundation	✓
19934/22844	The Decentralized Autonomous Organization: Key concepts on the future of blockchain-based co	Information Technology	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The historical context of decentralized autonomous organizations (DAOs) * The building blocks of DAOs: Key concepts and principles * DAOs in action: Contemporary and emerging models * Emerging regulatory issues for DAOs 	1 Tim Riser	Premium	✓
16936/19159	The oracle problem: When blockchain smart contracts rely on external data	Information Technology	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Smart contracts, Dapps, and DAOs * Oracles versus data sources * Oracle risks and mitigating actions * Oracles as service organizations 	1 Mark Sheldon	Foundation	✓
26725/31110	Understanding Blockchain Technology	Information Technology	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The basics of blockchain * Applications of blockchain to virtual currencies * Applications of blockchain to other types of transactions * Investments in blockchain technology 	1.5 Mark Sheldon	Foundation	✓
23367/27155	Bystander Training	Management Services	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * What is a bystander? * What is harassment? * What is unconscious bias, and what role does it play in harassment? * How do I safely and appropriately get involved in a situation? 	1 Maya Bordeaux	Foundation	✓
14291/15797	Change Management	Management Services	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Definition of change management * The change management process * The roles in change management * The change tools 	1 Jim Eicher	Foundation	✓
17035/19259	Characteristics of an effective organization: Success inside and out	Management Services	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The best practices of companies that build success from the inside out. 	2.5 Michael Brown	Foundation	✓
32840/38237	Conflict Management: Using Conflict to Your Advantage	Management Services	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Definitions of good and poor conflict management. * Impacts of poor conflict management. * Characteristics and examples of the five modes of conflict. * Factors influencing conflict choices. * Conflict resolution strategies. 	1 Mike Brown	Foundation	✓

25673/29896	Considering an ESOP	Management Services	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The purposes for which ESOPs can be used * The structure of ESOPs * How ESOPs operate * The benefits and disadvantages of ESOPs 	2 Timothy F. Gearty	Foundation ✓
12148/13303	Developing Business in the Professional Services Industry	Management Services	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The values and beliefs required to effectively develop new business. * Process and tools for strategically building a network. * The planned account development (PAD) process including industry and company analysis, opportunity identification, and pursuit planning. * The client discussion process (CDP) and key skills. <p>The ability to accurately and successfully evaluate performance and link performance to control standards is critical for organizations that seek to maximize effectiveness and efficiency. See how the proper control and performance evaluation techniques, applied to operations, marketing and finance, can ensure companywide success.</p>	2 Chuck Kovach	Foundation ✓
63/76	Drive Organizational Efficiency and Effectiveness Through Control & Performance Evaluation	Management Services	<p>The ability to accurately and successfully evaluate performance and link performance to control standards is critical for organizations that seek to maximize effectiveness and efficiency. See how the proper control and performance evaluation techniques, applied to operations, marketing and finance, can ensure companywide success.</p>	3 Timothy F. Gearty	Foundation ✓
8491/9416	Enterprise Risk Management - Integrating with Strategy & Performance, Part 1	Management Services	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The definition of Enterprise Risk Management * Key Enterprise Risk Management concepts including strategy, risk profile, risk appetite, performance and business context * The components and principles of Enterprise Risk Management and their supporting principles 	2 Timothy F. Gearty	Foundation ✓
8500/9438	Enterprise Risk Management—Integrating with Strategy & Performance, Part 2	Management Services	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Components and principles of enterprise risk management * Techniques used to define risk appetite and evaluate alternative strategies * Techniques used to identify, evaluate and respond to risk * Linking risk management results to ongoing strategy development * Steps taken to review and revise application of enterprise risk management components 	2 Timothy F. Gearty	Foundation ✓
17234/19463	Leading through emotional intelligence	Management Services	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The research on emotional intelligence. * Daniel Goleman's five domains of emotional intelligence. * The 20 competencies for each domain of emotional intelligence. * Differences between leaders with high emotional intelligence and leaders with low emotional intelligence. * Strategies for improving your emotional intelligence. 	2 Evelyn Grammar	Foundation ✓
10074/11098	Management Keys to Success, Leadership, Continued Improvement and Self-Management	Management Services	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * How to motivate today's workers * The art of psychology and determine why people act as they do * How the most successful organizations try new and different ways of motivation * How to negotiate with others about change 	2.5 Elizabeth Walsh	Foundation ✓
10072/11096	Management Keys to Success: Culture and Leadership	Management Services	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Why some organizations are more successful than others * How a finance professional can best navigate the new-style organization and influence its success * How a finance professional can be more successful as an individual 	2 Elizabeth Walsh	Foundation ✓
10073/11097	Management Keys to Success: Hiring the Best Personalities	Management Services	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * How to hire the best people * How to train people to be their best * How to motivate to keep the best people 	1 Elizabeth Walsh	Foundation ✓
34503/40196	Managing a Virtual Team	Management Services	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Research on high-performing virtual teams * Situations, behaviors, and techniques that enhance or deter a virtual team's performance * The challenges of remote team members * Virtual meetings that engage the whole virtual team to produce successful results 	2.5 Andrea Jennings	Foundation ✓
16556/18761	Project management: Be a people-savvy leader throughout	Management Services	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * What it means to lead people on a project. * Why influence is a critical part of the PM leadership role, and how to develop and utilize influence with individuals. * How to grow the PM's circle of influence and gain additional access for broader influence to 	1.5 Cinda Voegtli	Foundation ✓

10684/11712	Project management: Begin a project with strong goals and support	Management Services	<p>This course will cover:</p> <ul style="list-style-type: none"> * The benefits of a strong project kickoff * The steps of a strong project start * Practical "tools" for project manager and team for each step * How to use a Kickoff meeting to work on each step 	1.5 Cinda Voegtli	Foundation 
10875/11903	Project management: Build a strong team with communication	Management Services	<p>This course will cover:</p> <ul style="list-style-type: none"> * What a strong team looks like and does * The stages of team development, what happens in each, and how to accelerate to becoming a strong team * Conflict in project teams, typical sources and reactions, and how to handle and avoid * Important values, perceptions, styles, preferences of each team member and why they 	1.5 Cinda Voegtli	Foundation 
16649/18856	Project management: Close strongly with customers and the team	Management Services	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * What it means to finish a project strongly and the sequence of work to achieve. * Techniques for judging that the deliverables of a project are ready to go to customers. * Approaches for planning ahead for and executing transitions of the project's deliverables to the customer and any support teams. 	2 Cinda Voegtli	Foundation 
13563/14765	Project Management: Identifying and handling project risks	Management Services	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * What project risk is and when a team should consider it during a project * Techniques for identifying risks to a project's success * How to assess whether and how much each risk could hurt a project * Ways to avoid or lessen the likelihood and/or severity of a risk occurring 	2 Cinda Voegtli	Foundation 
14534/16176	Project management: Manage the project to get it all done	Management Services	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * How business-focused project goals get translated into aspects of managing the team to achieve those goals * The major components of the project manager's job in managing a project * Multiple techniques for tracking the big picture and details of a project * How to regularly assess whether the project is on track to meet its goals * How a team works together during a project to consider suggested changes and ensure that 	1.5 Cinda Voegtli	Foundation 
12948/14135	Project management: Plan the work, resources, budget, timeline	Management Services	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Parallel, iterative process for planning a project * How to identify all the cross-functional work on a project * How to collaboratively create and evolve a project timeline * How to create a project budget and procurement plan * How to ensure the team's estimates, make trade-offs, and evolve to an agreed-upon plan for 	2 Cinda Voegtli	Foundation 
10421/11449	Project management: Practical project management (for any effort)	Management Services	<p>This course will be an overview of the:</p> <ul style="list-style-type: none"> * The need for practical techniques for managing projects * Philosophy of a "just enough, just right" approach * Foundational tenets that determine project success * Lifecycle of stages for a team to organize a project and collaborate throughout 	1.5 Cinda Voegtli	Foundation 
21649/24953	Services Selling - You are the Product	Management Services	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The services selling mindset * Targeting services and clients * Identifying potential clients * Conducting potential client discussions 	1 Jim Eicher	Foundation 
24584/28801	Sexual Harassment: Creating a Safe and Positive Workplace	Management Services	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Current climate, events, and trends associated with sexual harassment in the workplace * Model sexual harassment prevention policies * Appropriate training requirements and contents * Next steps for enacting ongoing cultural change 	2 Andrea Jennings	Foundation 
25405/29624	Sexual Harassment: Creating a Safe and Positive Workplace (CA)	Management Services	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Current climate, events, and trends associated with sexual harassment in the workplace * Model sexual harassment prevention policies * Appropriate training requirements and contents * Next steps for enacting ongoing cultural change 	2 Andrea Jennings	Premium 
25473/29692	Sexual Harassment: Creating a Safe and Positive Workplace (ME)	Management Services	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Current climate, events, and trends associated with sexual harassment in the workplace * Model sexual harassment prevention policies * Appropriate training requirements and contents * Next steps for enacting ongoing cultural change * Title VII of the Civil Rights Act of 1964, the Maine Human Rights Act ("MHRA"), and case law 	2 Andrea Jennings	Premium 

13905/15315	Sexual Harassment: Creating a Safe and Positive Workplace (NY Employee Focused)	Management Services	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Title VII of the Civil Rights Act of 1964, the New York State Human Rights Law, the New York City Human Rights Law, and case law principles concerning the prohibition and prevention of workplace discrimination, sexual harassment, and retaliation. * The different types of workplace discrimination and harassment in New York State and City. * Employees' rights and employers' responsibilities. * Strategies for preventing workplace discrimination and harassment. <p>Note: New York State and New York City requires employers to provide employees with sexual harassment prevention training fulfilling set requirements. This course covers all New York State and New York City requirements with the exception of the employer/employee interactive portion. New York employers should be expected to address questions asked by employees.</p>	2	Mike Brown	Premium	✓
64/77	Strategic Management: The Tools to Compete in the Era of Rapid Change, Part 1	Management Services	<p>It's a rapidly evolving world today, and success demands the ability to plan at both the strategic and tactical levels. In this two-part course participants will learn how strategic analysis, strategic and tactical plans, and the budgeting process interact with one another. They will also learn the underlying core concepts and process of successful planning and budgeting.</p>	3	Peter Olinto	Foundation	✓
68/81	Strategic Management: The Tools to Compete in the Era of Rapid Change, Part 2	Management Services	<p>It's a rapidly evolving world today, and success demands the ability to plan at both the strategic and tactical levels. In this two-part course participants will learn how strategic analysis, strategic and tactical plans, and the budgeting process interact with one another. They will also learn the underlying core concepts and process of successful planning and budgeting.</p>	3	Peter Olinto	Foundation	✓
33935/39398	Techniques for Project Scope and Time Management	Management Services	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * What project scope includes and techniques for being thorough in defining scope with the team and customers * What the time parameters of a project include and techniques for being thorough in project schedule definition * What scope management and time management are, when they occur, and techniques for managing throughout a project or contract * What scope creep is, typical sources, how to recognize that it's happening or could happen, and what to do about it 	2.5	Cinda Voegtli	Foundation	✓
23223/26959	Why Incorporate Environmental, Social, and Corporate Governance (ESG)	Management Services	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Background of environmental, social, and corporate governance (ESG) * Importance of ESG * Trends in investor consideration of ESG * Requirements and recommended considerations of financial statement disclosures related 	2	Timothy F. Gearty	Foundation	✓
15840/17808	10 Habits of highly successful careers	Personal Development	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Habits you can work on to advance in your career. * Tasks you should be working on. * Questions you should ask yourself in taking ownership for your career. * When to ask others for help to ensure you are getting the guidance and advice you need. 	2	Tom Cox	Foundation	✓
16764/18976	Becoming a highly effective performer! Making the best of YOUR time!	Personal Development	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * What is difficult about managing YOUR time? * How to set priorities. * What is the distinction between distractions and procrastination. * How to gain a discipline around your biggest tasks. 	1.5	Evelyn Grammar	Foundation	✓
11718/12806	Becoming a Manager	Personal Development	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Definition of the manager role * The values and beliefs needed to be a great manager * The new range of skills required of managers * The goals, process, and skills of delegating and providing feedback effectively 	2	Chuck Kovach	Foundation	✓
22479/25986	Behavioral Interviewing	Personal Development	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * This course covers types of interviews an employer may conduct and the differentiating value of behavioral interviewing. Course participants will learn about the processes of preparing for and conducting a behavioral interview, as well as using behavioral interviewing to assess experienced and inexperienced candidate skills. 	1.5	Timothy F. Gearty	Foundation	✓
12090/13209	Being a Trusted Advisor	Personal Development	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Elements of building trust with clients, prospects, and internal stakeholders * The values and beliefs of a trusted advisor * Critical required skills including listening, partnering, flexibility, and emotional intelligence * The trusted advisor approach to developing new business including networking, prospect pursuit, and proposals * Building a trusted advisor culture and approach in your department, whether client-facing or 	2	Chuck Kovach	Foundation	✓

13392/14588	Careers in accounting	Personal Development	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Accounting's specialized areas * Different careers available to accountants * How the role of an accountant varies by organization and function 	2 Mike Brown	Foundation 
35611/41515	Critical Thinking: The Key to Success in Any Job	Personal Development	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The top skills and attributes employers look for * What critical thinking is * Why critical thinking is important * The steps of critical thinking 	1 Paul Kern	Foundation 
29615/34340	Executive Leadership Tools: DISC Behavior Style	Personal Development	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The DISC assessment * The four personality types of the DISC assessment * How to interact with other DISC personality types * How the DISC assessment may be used in the workplace 	2 Kelly Pope	Foundation 
29777/34582	Executive Leadership Tools: Myers-Briggs Personality Types	Personal Development	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Personality theory assessment – Myers-Briggs' 16 types * Four dimensions of personality types identified * The 16 personality types framework * How Myers-Briggs personality typing is used 	2 Kelly Pope	Foundation 
31290/36393	Finding a Better Work-Life Balance	Personal Development	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The definition of work-life balance and its benefits. * Causes and dangers of work-life imbalance. * Strategies for achieving balance between work and life. * Alternative approaches to the concept of work-life balance. 	1 Michael Brown	Foundation 
10744/11772	Getting "UPI" Supercharging Your Energy	Personal Development	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The Time Management "Trap" * The Energy Supercharger Model * Boosting physical, intellectual, emotional, spiritual energy * Dodging the Energy Vampires 	2 Greg Conderacci	Foundation 
14031/15441	How To Support And Engage Your Team During A Crisis	Personal Development	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The risks associated with a crisis and how to create a crisis management plan and response team * Best practices for in-person and remote work during a crisis that focus on communication, schedules, management, and technology use * Methods of motivating in-person and remote employees using time management, stress management, recognition, team building, and cross-training 	2 Mike Brown	Foundation 
30879/35828	Leadership Mindsets for Tough Times	Personal Development	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The techniques and tips leaders can use to navigate stormy waters created by change * How to take advantage of the opportunities change brings to flourish in the post-pandemic world * How to spark the "outside the box" creativity that will set you and your organization apart in the future 	2 Bethmara Kessler	Foundation 
18829/21656	Leading with empathy	Personal Development	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * What empathy is and why it matters. * Barriers to empathy. * Positive impact of empathy to the bottom line. * How to develop empathy skills. 	1 Evelyn Grammar	Foundation 
15269/17170	Managing with courage	Personal Development	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * What is managerial courage? * How to develop managerial courage. * The impact of managerial courage. * Habit to build to support managerial courage. 	1 Kelly Pope	Foundation 
9663/10679	Managing Your Career Using the 70-20-10 Rule	Personal Development	<p>This course will be an overview of the:</p> <ul style="list-style-type: none"> * Best practices in career development * Research on time-tested guidelines for successful development of managers into leaders * 70-20-10 rule for career development * Self-assessment process of career development plan 	1.5 Krys Moskal Amdurer	Foundation 
10461/11489	MOTIVATORS: Understanding What Drives Your Behaviors, and What Drives Others' Behaviors	Personal Development	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * "Why" individuals behave the way they do. * The values that comprise each of the seven universal motivators. * Insights into patterns of combinations of motivators. * The importance of this knowledge in self-awareness. 	1 Krys Moskal Amdurer	Foundation 

30974/35924	No Easy Choices: Decision-Making Under Stress	Personal Development	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The art and science of making better decisions * Opening your eyes—and your colleagues’—to the blind spots that can lead to bad decisions * Pushing through the barrier of fear so that you can make the tough choices that lead to a better future for you and others 	1 Kelly Pope	Foundation
10758/11786	Power of Positivity	Personal Development	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The definitions, characteristics, and benefits of positivity * Different forms of positivity * The actions and behaviors that lead to positive life and career outcomes for you * Steps to measure your positivity 	2 Greg Conderacci	Foundation
14318/15827	Problem Solving	Personal Development	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * How to identify the real problem, not just the symptoms. * How to identify the stakeholders involved in the problem. * How to select analytical tools to analyze the problem. * How to select creative tools to generate alternative solutions. 	1 Michael Brown	Foundation
21981/25336	Psychological Safety: Creating Safe Places for Employees to Thrive	Personal Development	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The workplace stressors that employees face. * How to fight against bias in the workplace. * Learning how to make the workplace a place of psychological safety. * Strategies to handle workplace scenarios. 	1 Jeannine Brown	Foundation
16181/18264	Resilience: Bouncing back from major setbacks	Personal Development	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * What is resilience and why does it matter? * Benefits of resilience – personally and professionally. * Steps to building resilience in the workplace. * Tools for building resilience. 	1.5 Jim Eicher	Foundation
23477/27414	Serving on a board: What a CPA needs to know	Personal Development	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * General information about board service for both corporate and not-for-profit entities * Identifying organizations or companies that may be a good fit for board service * Governance considerations for board members * Professional benefits to the CPA of serving on a board 	2 Michael Brown	Foundation
27878/32312	Stress Management at Work	Personal Development	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Understanding the symptoms of stress * Identifying workplace stress triggers * Recognizing the emotional and physical impacts of stress * Determining the most appropriate coping skills to alleviate stress in the workplace 	1.5 Jina Etienne	Foundation
22783/26293	The Millennial Leaders	Personal Development	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The characteristics of the millennial leaders' generation * The different types of leadership jobs millennials hold and the trends over the last several years * Millennial leaders' management style and the skills they will need to be successful in the 	1.5 Holly Hawk	Foundation
18163/20843	The power of personalities at work	Personal Development	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Different personality types * The motivational drives of personality types * Common frustrations various personality types may experience * How different personality types communicate * Best personality types to work together in peer-to-peer and manager-to-peer scenarios 	2 Michelle Pace	Foundation
12238/13393	The truth about multitasking	Personal Development	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Why multitasking has become the norm in the accounting profession * The latest research on the impact of both multitasking and multicomunication on outcomes and workplace performance * Whether multitasking is effective or not, and when * Alternatives to multitasking and multicomunications 	1 Timothy F. Gearty	Foundation
14427/15941	Time Management for Professionals	Personal Development	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Causes of time wasters at work * Common and effective time management systems * Productivity-enhancing techniques * Holding productive meetings virtually and in person 	2 Mike Brown	Foundation
16650/18857	Transitioning from buddy to boss	Personal Development	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The essential roles and skills of an independent contributor, a manager, and a leader * The progression of learning from self development to managing your team * The five stages of team development * Quick summary of Situational Leadership and team, and readiness * How to assess your customers' satisfaction with your team's work 	1.5 Evelyn Grammar	Foundation













14770/16600	Who needs conflict anyway: Reframing to avoid and mitigate conflict	Personal Development	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Conflict is not about you: Framing, the rapport cycle and the structure of conflict * That's not what I meant!: Strategies for avoiding conflict * Damage control: Tactics for mitigating conflict 	1	Jim Eicher	Foundation	✓
20804/23934	Women Lead with Confidence	Personal Development	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The confidence gap * Elements of confidence * Techniques to develop confidence * Actions to take to reinforce confidence 	2	Jina Etienne	Foundation	✓
35690/41596	Women Lead with Confidence	Personal Development	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The confidence gap * Elements of confidence * Techniques to develop confidence * Actions to take to reinforce confidence 	2.5	Andrea Jennings	Foundation	✓
28910/33473	Adaptive and Transformative Leadership	Personnel/Human Resources	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Research and best practices in adaptive and transformational leadership * Leadership competencies for future success * Organizational competencies for future success 	1	Mike Brown	Foundation	✓
12840/14018	Diagnosing your organization	Personnel/Human Resources	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The nonfinancial organizational diagnosis processes. * Reasons to conduct a nonfinancial organizational assessment. * Criteria for selecting the nonfinancial organizational assessment team (internal and external). 	1	Krys Moskal Amdurer	Premium	✓
26700/31085	Establishing a Successful Mentoring Program	Personnel/Human Resources	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The components of a successful mentoring program * Different types of mentoring programs * Roles and expectations in the mentoring program * Best practices of successful mentoring programs * The process of selecting, matching, and monitoring participants in the mentoring program 	2	Michael Brown	Foundation	✓
35206/41100	Fostering a Culture of Ownership	Personnel/Human Resources	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The concepts of responsibility, accountability, entitlement, employee satisfaction, employee engagement, culture, and ownership * Essential elements of a culture of ownership * Building a culture of ownership 	1.5	Chris Mitchell	Foundation	✓
12122/13251	Fostering a Culture of Ownership	Personnel/Human Resources	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Definitions of responsibility, accountability, entitlement, employee satisfaction, employee engagement, culture and ownership. * Essential elements of a culture of ownership. * Building a culture of ownership. 	1	Krys Moskal Amdurer	Foundation	✓
33900/39334	Fostering a Culture of Premier Client Experience (CX)	Personnel/Human Resources	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Definitions and latest research on best practices in CX * Levels of maturity in CX/TX * Components of a TX framework * Traits and actions of top CX-focused leaders 	2.5	Holly Hawk	Foundation	✓
12647/13814	Help your new hires hit the ground running	Personnel/Human Resources	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The definitions onboarding, orientation, assimilation and organizational culture. * Research on the importance of onboarding and productivity and retention. * How to assimilate new leaders and new team members. * Strategies for the first 90 days. 	2	Krys Moskal Amdurer	Foundation	✓
23460/27381	Implementing a Competency Framework for Accountants	Personnel/Human Resources	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The basic elements of a competency * Steps in developing a competency framework * Current CPA competency model * Process to create a training and development framework 	1.5	Evelyn Grammar	Foundation	✓
10877/11905	Launching a Winning Team	Personnel/Human Resources	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * What is a team-based organization. * How a team-based organization differs from a hierarchy. * How do teams develop. * How to assess the "maturity" levels of teamwork in communications, interpersonal 	1	Krys Moskal Amdurer	Foundation	✓

13301/14488	Leading vs. managing: What to do when and with whom	Personnel/Human Resources	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Leaders vs. Managers: Born or Made? * Leading vs. Managing Framework * Questions Leaders and Managers MUST Ask 	1 Jim Eicher	Foundation
29013/33576	Lessons Learned Working from Home	Personnel/Human Resources	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Organizing your workspace at home * Dealing with distractions * Coping with living at work * Motivating yourself to be productive 	1 Michael Brown	Foundation
13672/14886	Motivating remote workers	Personnel/Human Resources	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Definitions and theories of motivation. * Passion pyramid. * Tips for managers to foster a culture of virtual collaboration. 	1 Kelly Pope	Foundation
13562/14764	Myths and realities of working from home	Personnel/Human Resources	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Research on working from home. * Myths and realities about the home workspace. * Myths and realities about the remote worker. * Myths and realities about remote work productivity. 	1 Kelly Pope	Foundation
16925/19147	Performance management essentials	Personnel/Human Resources	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Elements of the performance management cycle * Process for planning the timeline of activities * The structure the documentation process * The structure of the performance appraisal meeting 	1 Evelyn Grammar	Foundation
13389/14585	Stimulating innovative thinking in your team	Personnel/Human Resources	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Definitions of creativity and innovation. * Innovation team processes. * Tools for creating solutions. * Adoption of innovative solutions. 	1 Kelly Pope	Foundation
15847/17816	Strategic thinking	Personnel/Human Resources	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Definitions of strategy and strategic thinking. * Definition of competitive advantage. * Models and tools for developing strategies. * Core competencies for strategic thinking for competitive advantage. 	1 Jim Eicher	Foundation
16834/19053	Talent management and succession planning	Personnel/Human Resources	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Definitions and trends. * Talent management. * Succession planning and using the 9-box grid. 	1 Evelyn Grammar	Foundation
25359/29578	The Future of the Accounting and Tax Profession	Personnel/Human Resources	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The overall accounting industry's outlook * Key challenges and changes anticipated in the industry * Recommended best practices for managing these changes effectively 	1 Michael Brown	Foundation
13321/14508	The power of using compelling questions	Personnel/Human Resources	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * What is a question? * Why use questions? * Questions for <ul style="list-style-type: none"> o Developing a strategy. 	1 Greg Conderacci	Foundation
20634/23718	Turning around a dysfunctional team	Personnel/Human Resources	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The major causes of dysfunction in a team. * How to evaluate leadership influence (if any) on the team's dysfunction. * The steps to resolve team dysfunctions. * Managing the dynamics of virtual team dysfunctions. 	1 Jina Etienne	Foundation
19323/22229	A CPA's Guidebook to Ethical Behavior: A CPE Ethics Course for Texas CPAs	Regulatory Ethics	<p>This State Board-approved course meets state license renewal requirements for ethics.</p> <p>This course will be an overview of:</p> <p>The definition of ethics and various theories of ethics A review of the AICPA Code of Professional Conduct A review of the Texas Rules of Professional Conduct The temptations of unethical behaviors</p>	4 Allison McLeod	Premium

23338/27121	AICPA's Ethics Codification Project	Regulatory Ethics	The AICPA's Ethics Codification is the primary focus of this course—its history, purpose, and organization. The course outlines the key changes implemented as a result of the project and explains the conceptual framework approach to the new Codification. Concrete examples are employed to illustrate how to use the new Codification as well as how to use the research features available that are online.	2 Timothy F. Gearty	Foundation	✔
32976/38379	Annual Professional Ethics Update 2024	Regulatory Ethics	This course will be an overview of: <ul style="list-style-type: none"> * Recent regulatory ethics changes * Final interpretations issued by the Professional Ethics Executive Committee (PEEC) of the AICPA 	2.5 Melissa Galasso	Premium	✔
12825/14003	Anti-Retaliation: What You Need to Know	Regulatory Ethics	This course will be an overview of: <ul style="list-style-type: none"> * Current climate, events, and trends associated with workplace retaliation and its prevention * Issues regarding disclosure/whistle-blowing that are particularly relevant to CPAs * Model anti-retaliation policies 	1.5 Timothy F. Gearty	Premium	✔
35694/41600	Anti-Retaliation: What You Need to Know	Regulatory Ethics	This course will be an overview of: <ul style="list-style-type: none"> * Current events and relevant court cases and rulings * Recent changes in regulatory guidance and requirements meant to strengthen whistleblower protections * Key decision points to consider when CPAs become whistleblowers 	2 Robin Rohmer	Premium	✔
23369/27157	Arizona Ethics	Regulatory Ethics	This course meets state license renewal requirements for ethics. This course will be an overview of: <ul style="list-style-type: none"> * This course will cover the AICPA Code of Professional Conduct and its applicability to accounting professionals. It also covers ethical standards addressed by the International Ethics Standards Board for Accountants, IRS Circular 230, and Arizona's State Board of Accountancy 	4 Timothy F. Gearty	Premium	✔
8570/9536	California Regulatory Review	Regulatory Ethics	This course provides California licensees an understanding of provisions of the California Accountancy Act and the Board of Accountancy Regulations specific to the practice of public accountancy in California emphasizing the provisions applicable to current practice situations. The course also includes an overview of historic and recent disciplinary actions taken by the California Board of Accountancy, highlighting the misconduct which led to licensees being disciplined. This course includes a discussion of the following laws and regulations:	2 John Lord	Premium	✔
32686/38049	Circular 230 Practice before the IRS	Regulatory Ethics	This course will be an overview of: <ul style="list-style-type: none"> * The history of the issuance of Circular 230 by the Treasury Department. * The authority granted to, and responsibilities of, the Office of Professional Responsibility. * The parties subject to Circular 230. * Forms 2848 and 8821. 	2 Allison McLeod	Foundation	✔
23417/27223	Colorado Rules and Regulations	Regulatory Ethics	This course will be an overview of: <ul style="list-style-type: none"> * The governing bodies responsible for enforcing the rules and regulations applicable to public accountants in Colorado * The state-specific rules governing professional conduct in Colorado * Explain the processes and procedures applicable to those engaged in the practice of public 	2 Timothy F. Gearty	Premium	✔
32937/38338	Creating a culture of integrity	Regulatory Ethics	This course will be an overview of: <ul style="list-style-type: none"> * Integrity in general, including definitions and the importance of integrity in the workplace * The general steps required to build a culture of integrity * Circular 230 regulations and best practices for tax practitioners * Common examples of incorporating the five-step process to build a culture of integrity in a workplace 	2 Michael Brown	Foundation	✔
30839/35788	Delaware Ethics (Approval ACC-AC-101323-065189)	Regulatory Ethics	This course will be an overview of: <ul style="list-style-type: none"> * The AICPA Code of Professional Conduct * The state-specific rules governing professional conduct in Delaware * The processes, procedures, and governing bodies responsible for enforcing the rules applicable to those engaged in the practice of public accounting in Delaware 	4 Timothy F. Gearty	Premium	✔
19275/22181	Ethics - Understanding and applying the AICPA Code of Professional Conduct	Regulatory Ethics	This course will be an overview of: This course will cover the AICPA Code of Professional Conduct and its applicability for accounting professionals and the role of the Securities and Exchange Commission. This course will result in 2 qualifying CPE credits for general ethics in the following states: <ul style="list-style-type: none"> * Alabama Ethics * Kansas Ethics * Kentucky Ethics * Missouri Ethics * Montana Ethics 	2 Timothy F. Gearty	Foundation	✔

28994/33557	Ethics and professional conduct for CPAs in Florida (approval 0020313)	Regulatory Ethics	<p>This course will be an overview of:</p> <p>* This course has been approved to meet the Ethics requirement in the state of Florida. It is in an organization's best interest to demonstrate a public commitment to integrity and ethical decision making. This course will introduce participants to the foundations of ethical behavior and provide the opportunity to examine ethical dilemmas, offering behavioral insight and guidance into critical real-world situations. This course also covers the AICPA Code of Professional Conduct and specific requirements for CPAs licensed in the state of Florida. All it takes is a look at news headlines to see a business world littered with victims of unethical behavior. See not only how unethical behavior can ruin careers, bring debilitating expenses and fines to any company, and lead to prison terms for executives and others, but how individuals</p>	4 Timothy F. Gearty	Premium	✔
22203/25708	Ethics, integrity, and AICPA Code of Professional Conduct (expanded version)	Regulatory Ethics	<p>This is an expanded version of our course titled Ethics, Integrity, and the AICPA Code of Professional Conduct. It will cover the AICPA Code of Professional Conduct, ethical standards addressed by the International Ethics Standards Board for Accountants, and IRS Circular 230.</p> <p>Individuals and companies that act with integrity can drive employee and customer satisfaction while improving company performance.</p>	4 Timothy F. Gearty	Foundation	✔
22187/25617	Ethics, Integrity, and the AICPA Code of Professional Conduct	Regulatory Ethics	<p>This course will result in 4 qualifying CPF credits for general ethics in the following states and This course will cover the AICPA Code of Professional Conduct and its applicability for accounting professionals and also covers ethical standards addressed by the International Ethics Standards Board for Accountants and IRS Circular 230.</p> <p>This course will result in 3 qualifying CPE credits for general ethics in the following states and territories:</p> <p>* Arkansas Ethics</p>	3 Timothy F. Gearty	Foundation	✔
33013/38420	Georgia Ethics	Regulatory Ethics	<p>This course will be an overview of:</p> <p>* Georgia's rules, laws, and policies for CPAs</p> <p>* Georgia's requirements for continuing professional education for CPAs</p>	1 Patrice Johnson	Premium	✔
9212/10213	Government Ethics and Independence	Regulatory Ethics	<p>This course will be an overview of:</p> <p>* Rules that govern ethical behavior and independence in the government environment</p>	2 Timothy F. Gearty	Foundation	✔
23426/27249	Idaho Accountancy Act and Rules	Regulatory Ethics	<p>This course will be an overview of:</p> <p>* Rules and regulations applicable to Idaho CPAs</p> <p>* The Idaho Accountancy Act applicable to Idaho CPAs</p> <p>* Licensing requirements applicable to Idaho CPAs and accounting firms</p> <p>* Processes and procedures applicable to those engaged in the practice of public</p>	2 Timothy F. Gearty	Premium	✔
23324/27105	Independence – Historical Insights and Today's Rules	Regulatory Ethics	<p>Well-developed accounting standards and independent audits have helped make the U.S. capital markets a national asset. Because auditor objectivity is crucial to investor confidence, regulators and others become concerned when they perceive actions that may impair or appear to impair independence. That's why accounting compliance in today's business world demands a solid understanding of the most current ethics rules relating to independence, no matter the regulatory body.</p>	3 Timothy F. Gearty	Foundation	✔
26464/30785	Independence Requirements for Auditors	Regulatory Ethics	<p>This course will be an overview of:</p> <p>* The requirements for independence included in the AICPA's Code of Professional Conduct</p>	2.5 Melissa Galasso	Premium	✔
16366/18561	Independence technical overview	Regulatory Ethics	<p>This course will be a high-level overview of:</p> <p>* The independence rules from the American Institute of Certified Public Accountants (AICPA)</p> <p>* The independence rules from the Securities and Exchange Commission (SEC)</p> <p>* The independence rules from the Public Company Accounting Oversight Board (PCAOB)</p> <p>* The IRS independent tax return preparer rules</p> <p>* Global independence standards established by the International Federation of Accountants</p>	1.5 Michael Brown	Foundation	✔
35776/41727	Independence technical overview (Adaptive Course Format)	Regulatory Ethics	<p>We're testing a new course format and would love your feedback. This course format differs from the other CPE courses you might have taken. Instead of watching or listening to an on-demand course, you will be asked questions before learning. You may know the answers, but it's ok if you don't. By answering questions first, you'll master core concepts with confidence. Using intelligent software designed to help you learn quickly, these modules will adjust to your existing knowledge and zero in on what you still need to learn. You still earn CPE, just in a different way.</p>	1 Michael Brown	Foundation	✔
26441/30739	Independence Update: AICPA, GAGAS & PCAOB	Regulatory Ethics	<p>This course will be an overview of:</p> <p>* This course will look at the various rules related to Independence and compare and contrast the requirements. Each standard setter has put their own flavor on the concept of independence. This overview course will help auditors understand the nuances of independence and ensure they meet the requirements to perform attest services for their clients.</p>	2 Melissa Galasso	Foundation	✔

30880/35829	Louisiana Ethics	Regulatory Ethics	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Regulatory agencies who oversee Certified Public Accountants * Concepts and rules applicable to Louisiana's Certified Public Accountants * Similarities and differences between the AICPA Code of Professional Conduct and Louisiana Board Rules 	3 Timothy F. Gearty	Premium	✓
23459/27379	Mississippi Public Accountancy Law and Regulations	Regulatory Ethics	<p>This general course will be an overview of:</p> <ul style="list-style-type: none"> * Mississippi's Public Accountancy Law and Regulations 	1 Timothy F. Gearty	Premium	✓
13417/14613	Navigating the International Code of Ethics for Professional Accountants	Regulatory Ethics	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The international ethics environment and applicable regulations * The International Ethics Standards Board for Accountants * The four main parts of the ICEPA and the key standards within each section * Ethics standards for both accountants in public practice and in business * Ethics standards for those performing audit or review engagements and those performing 	1.5 Mike Brown	Foundation	✓
30317/35203	New York Ethics 2024-2026	Regulatory Ethics	<p>This program utilizes the Laws and Regulations as promulgated by the New York State Board for Public Accountancy as the framework for presenting this material. Additionally, the ethical guidance developed by the AICPA restructured via the Codification of Ethical Standards has been inserted into the framework where appropriate.</p>	4 Timothy F. Gearty	Premium	✓
26558/30943	NOCLAR: Ethics & Audit Requirements	Regulatory Ethics	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * "Responding to Noncompliance With Laws and Regulations" [1.180.010 and 2.180.010] * SAS 147, Inquiries of the Predecessor Auditor Regarding Fraud and Noncompliance With Laws and Regulations 	1 Melissa Galasso	Foundation	✓
33316/38742	Ohio - Professional Standards & Responsibilities	Regulatory Ethics	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Ohio statutes, board rules, and regulations * Rules for practicing as a CPA in Ohio * Ohio rules of professional conduct, ethical guidance, and disciplinary process * The AICPA Code of Professional Conduct and its applicability for accounting professionals 	3 Jenni McAllister	Premium	✓
33041/38448	Standards for Tennessee CPAs: State Specific Ethics	Regulatory Ethics	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Importance of ethics * License requirements * Unlicensed activity * Continuing professional education * Peer review * Rules of professional conduct 	2 Heather Luttrell	Premium	✓
14319/15828	The Role of the Whistleblower	Regulatory Ethics	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The role of the whistleblowing in the workplace * A historic overview of famous cases and their outcomes * Laws protecting workers' rights in whistleblowing cases * Programs, procedures, and concepts important to whistleblowing laws 	1 Kelly Pope	Foundation	✓
23212/26940	Utah ethics - Certified Public Accountant Licensing Act and Associated Rule	Regulatory Ethics	<p>This course meets state license renewal requirements for one hour of CPE that covers Title 58, Chapter 26a, the Certified Public Accountant Licensing Act, and Rule R156-26a. Utah licensees also need three credits on the AICPA Code of Conduct, ethical dilemmas, and business ethics.</p> <p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Utah's CPE requirements for ethics * The Utah Certified Public Accountant Licensing Act 	1 Heather Luttrell	Foundation	✓
31447/36606	Washington State Ethics 2024	Regulatory Ethics	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The AICPA Code of Professional Conduct and its applicability for accounting professionals. * Ethical standards addressed by the International Ethics Standards Board for Accountants and IRS Circular 230. * The 2024 Washington State ethics requirements and recent legislative changes. 	4 Timothy F. Gearty	Premium	✓
14290/15796	Wyoming Ethics	Regulatory Ethics	<p>This State Board-approved course meets state license renewal requirements for ethics.</p> <p>This course will be an overview of:</p> <p>Wyoming statutes, board rules, and regulations</p> <p>Rules for practicing as a CPA in Wyoming</p> <p>Wyoming rules of professional conduct, ethical guidance, and disciplinary process</p> <p>The AICPA Code of Professional Conduct and its applicability to accounting professionals</p>	4 Timothy F. Gearty	Premium	✓

25586/29809	A Sampling of Industries and Sectors, Part 1	Specialized Knowledge	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The basic components of the most common industries in the marketplace * Current trends in the different industries * The differences accountants/auditors will encounter based on industry * Future expectations in the different industries 	2.5 Michael Brown	Foundation 
25604/29827	A Sampling of Industries and Sectors, Part 2	Specialized Knowledge	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The basic components of the most common industries in the marketplace * Current trends in the different industries * The differences accountants/auditors will encounter based on industry * Future expectations in the different industries 	2 Michael Brown	Foundation 
17403/19634	Business valuation approaches, methods, and procedures, part 1	Specialized Knowledge	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The income approach to business valuation * The market approach to business valuation * Asset-based approaches, the guideline publicly traded company method and guideline merged and acquired company method, to business valuation 	2 Timothy F. Gearty	Foundation 
17404/19635	Business valuation approaches, methods, and procedures, part 2	Specialized Knowledge	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The two asset-based approach models—adjusted net asset value and excess earnings value * Revenue Rule 59-60 * Valuation reconciliation * Business valuation reports 	2 Timothy F. Gearty	Foundation 
9658/10674	Business Valuation Discounts and Premiums	Specialized Knowledge	<p>This course will cover the following:</p> <ul style="list-style-type: none"> * An overview of the world of discounts and premiums * The valuation impact of Control Premiums and Minority Interest Discounts * The usage of Marketability and Liquidity Discounts * A discussion of lesser applied discounts by valuers 	4 Joel Diccico	Foundation 
9940/10962	Business Valuation: Introduction to Fair Value Measurement: Part 1	Specialized Knowledge	<p>This course will cover the following:</p> <ul style="list-style-type: none"> * An Overview of Basic Fair Value Concepts * Fair Value Option 	1.5 Joel Diccico	Foundation 
9942/10966	Business Valuation: Introduction to Fair Value Measurement: Part 2	Specialized Knowledge	<p>This course will cover the following:</p> <ul style="list-style-type: none"> * Fair Value Measurement Applicability to Assets and Liabilities * General Assessment of the Fair Value Regime and its Future in the Accounting World 	2 Joel Diccico	Foundation 
25731/29954	Business Valuation: Valuing Intangibles, Part 1	Specialized Knowledge	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Intangibles and their impact on financial statements * Identifying the various types of intangibles * The various methods used for valuing intangibles 	1.5 Joel Diccico	Foundation 
25825/30048	Business Valuation: Valuing Intangibles, Part 2	Specialized Knowledge	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Valuation techniques for brands and customer relations * Purchase price allocations, goodwill, and impairments 	1.5 Joel Diccico	Foundation 
22377/25883	Business Valuations, Special Considerations	Specialized Knowledge	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Concept of value * Stocks and bonds * Debt securities * Preferred stock 	2.5 Timothy F. Gearty	Foundation 
9355/10363	Cost of Capital, Part 1	Specialized Knowledge	<p>This course will cover the following:</p> <ul style="list-style-type: none"> * Grasping the Full Meaning of the Cost of Capital * Fundamental Cost of Equity Mechanics 	1.5 Joel Diccico	Foundation 
9356/10364	Cost of Capital, Part 2	Specialized Knowledge	<p>This course will cover the following:</p> <ul style="list-style-type: none"> * Advanced Techniques in Calculating the Cost of Equity * Cost of Debt, Preferred Stock, and Weighted Average Cost of Capital Calculations * Routine Mistakes in the Calculation of the Cost of Capital 	1.5 Joel Diccico	Foundation 

27997/32438	Crowdfunding	Specialized Knowledge	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Raising funds from investors via crowdfunding * SEC regulations regarding crowdfunding * Accounting and tax implications for the practice of crowdfunding * Real-life anecdotes of crowdfunding in action 	2 Michael Brown	Foundation
9541/10553	Developing Powerful Business Acumen	Specialized Knowledge	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Business acumen definitions and importance * Key components of business acumen * Strategies for building business acumen in an accounting firm 	1.5 Timothy F. Gearty	Foundation
125/138	Introduction to Business Valuation	Specialized Knowledge	<p>Properly performed business valuations require an understanding of appropriate standards and practices as well as a familiarity with related elements, principles and theory. Obtain a sound overview of the discipline of business valuation as you learn how to start engagements the right way and gather and analyze data for a successful conclusion.</p>	1.5 Timothy F. Gearty	Foundation
18778/21604	Introduction to software development and software-as-a-service (SaaS) companies	Specialized Knowledge	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Software development and SaaS companies, including a brief history of each type and how and when they came into being * Examples of software development and SaaS companies, including key industry terms * Business models used by software development and SaaS companies * How business models of software development and SaaS companies lead to revenue 	2 Michael Brown	Foundation
262/275	Leadership: Based on the Book "LEAD... for God's Sake!"	Specialized Knowledge	<p>This course is a conversation about the pursuit of leadership between Todd Gongwer and Tim Gearty. Gongwer is the author of the book titled LEAD... for God's Sake!, which is a parable for finding the heart of leadership. The book has received praise by many recognized leaders in business and recognized successful sports leaders such as: Lou Holtz, College Football Hall of Fame coach and ESPN analyst, and Urban Meyer, Head Football Coach of Ohio State University.</p>	1.5 Timothy F. Gearty	Foundation
22673/26183	Managing Consulting Engagements: The Family Office	Specialized Knowledge	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * What is a family office? * The purpose, role, and work of a family office. * Types and costs of family offices. * Family office best practices. 	2.5 Tom Tillery, MA Ed, MSFS, CFP®, CLU®, ChFC®, LUTCF, CRPC®	Premium
26973/31359	Overview of the Business Valuation Profession and Current Events	Specialized Knowledge	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The profession of business valuation * Overview of business valuation methodologies * Types of engagements and reports * Research sources and databases 	3.5 Joel Diccico	Foundation
9294/10297	Understanding the Fundamentals of Investments – A Guide for Accountants	Specialized Knowledge	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The securities market, the financial firms providing services to individual investors, and the agencies providing oversight of securities markets and investment professionals * The various types of investment securities (stocks, bonds, mutual funds, exchange-traded funds, stock options) and the risk-return characteristics of each * The principles and tools of investment analysis and selection of suitable investments: the 	3 Peter Olinto, National Lead Instructor, JD	Foundation
28714/33174	Excel: Tools for Decision Making	Statistics	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Solver Add-In Functionality within Excel * Utilizing Solver for a variety of business scenarios, including: <ul style="list-style-type: none"> o Single objective decision making o Multiple objective decision making – determining an ideal mix o Historical scenario-based decision making * Using Excel to organize and solve other business problems, including: <ul style="list-style-type: none"> o Multiple objective decision making – using "swan swan" methodology 	1 Mike Brown	Foundation
30095/34956	Advanced Individual Tax - Schedule C	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * What type of entity reports on Schedule C * Specific deductions on Schedule C * Treatment of business assets on Schedule C * Application of the payroll tax and self-employment tax 	3 Stan Pollock	Foundation
31468/36633	Individual Taxes: Income and Deductions (2023 Returns)	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Identifying total income * Computing adjusted gross income * Calculating the standard deduction and itemized deductions * Determining federal tax liability 	3 Tara Fisher	Foundation

31184/36180	Preparing Form 1040 for Tax Year 2023	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Filing considerations * Income inclusions and exclusions * Adjusted gross income and taxable income * Standard deduction and itemized deductions 	3.5 Tara Fisher	Foundation	✔
30093/34954	State Tax Highlights Q4 2023	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Recent and proposed federal tax laws * State conformity * Significant trends in multistate tax concepts (nexus, sourcing, etc.) * Quarterly changes to state tax law 	2 Heather Luttrell	Premium	✔
31877/37070	Taxation of Corporate Liquidations	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The basics of corporate taxation and the identification of a corporate liquidation * The U.S. federal income tax consequences of a taxable and nontaxable liquidation * The requirements of a Section 332 liquidation * Deemed and de facto liquidations 	1.5 Stephanie Morris	Foundation	✔
15461/17393	A focus on special topics for S corporations - revocation, termination, & reorganization	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The fundamental differences in the ways S corporations can be terminated * The tax implications when entities cease to be an S corporation or when they terminate by voluntary revocation * The regulations governing redemptions, liquidations, and reorganizations 	2 Stan Pollock	Foundation	✔
31514/36682	Amending Business Income Tax Returns: Why, When, and How	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The why and how of filing amended business tax returns * The appropriate forms to file for C corporations, S corporations, partnerships, and proprietorships seeking to amend a filed return * The circumstances in which an amended return must be filed 	1 Stan Pollock	Foundation	✔
33301/38727	An Introduction to Charitable Conservation Contributions	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * What, why, and who of charitable conservation contributions * Key criteria and terms for claiming this deduction * Conservation easements, including syndicated conservation easements * Documentation and relevant forms to support the deduction 	1.5 Stephanie Morris	Premium	✔
33936/39399	Analyzing personal casualty gains and losses	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Personal and disaster-related casualty gains and losses * How to compute casualty gains and loss deductions * How and when to report casualty- and disaster-related gains and losses 	1 John Stevko	Foundation	✔
15322/17240	Base Erosion and Anti-Abuse Tax	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Background and Policy * Methodology and Computations * Filing Requirements 	2 Tara Fisher	Foundation	✔
32180/37396	Being Employment Tax Savvy	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Employment tax fundamentals, specifically focused on employer's obligations * Withholding and remittance requirements * Penalties for failure to withhold appropriate amounts * Tax consequences for certain employee benefits 	2.5 John Stevko	Foundation	✔
31491/36659	Best tips for operating an S corporation	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Operational framework of S corporations * Operating guidelines of S corporations * Stock sale rules and regulations * Federal, state and local taxation implications * Issues and questions relating to switching from one type of corporation to another * Salary and income issues * Retirement planning under an S corporation 	2 Stan Pollock	Foundation	✔
29913/34766	Business Interest Expense under Section 163(j)	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The calculation of the Sec. 163(j) limitation * Definitions of "interest expense" and "adjusted taxable income" * Application to corporate and partnership taxpayers * The exceptions to the limitation for small businesses, real estate businesses, and farming businesses 	1.5 Stan Pollock	Premium	✔
35695/41601	Cancellation of Debt	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Cancellation-of-debt income (CODI) * The codes, regulations, rulings, and cases that shaped this increasingly complex area of tax law * Critical terms and concepts which provide a historical view that puts the issue in perspective 	2 Joel Diccio	Premium	✔

18827/21654	Capital assets and preparing Schedule D	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Defining and characterizing capital assets * Calculating and reporting the tax on capital assets * Evaluating the tax effects from the disposal of capital assets 	2 Timothy F. Gearty	Foundation
31676/36869	Capital Gains and Losses: The Fundamentals	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Capital gains and losses, capital assets, and capital gains taxation * Nuances and complications of Internal Revenue Code Section 1231 * The critical issues related to capital gains taxation 	1.5 Heather Luttrell	Foundation
31381/36488	Cash and Accrual Methods of Tax Accounting	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The differences between federal tax rules and financial accounting in computing income and deductions * The cash and accrual methods of tax accounting under the Federal Code * How disputed amounts are handled for the two methods 	1 Timothy F. Gearty	Foundation
29778/34584	Choice of Business Entity	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The types of business entities and their legal and tax characteristics * The taxation of sole proprietorships, partnerships, C corporations, and S corporations * The tax forms associated with business entities and their owners 	1 Seth Colwell	Foundation
23405/27197	Compliance Issues of Sales and Use Tax in the United States – Part 1	Taxes	<p>The three courses on U.S. sales and use tax intend to provide a comprehensive overview of the sales and use tax system in the United States.</p> <ul style="list-style-type: none"> * Course I, Fundamentals of Sales and Use Tax in the United States, focuses on the basics of sales and use tax as well as nexus standards and the implications of Court rulings such as the Supreme Court's decision on the 1992 Quill case and the recent 2018 Wayfair case. * Course II, Compliance Issues in Sales and Use Tax in the United States, provides details on compliance issues such as registration, calculating tax liabilities, reporting, payment, penalties, appeals, and audit management. * Course III, Reform and Development of Sales and Use Tax in the United States, focuses on: <ol style="list-style-type: none"> (1) The sales tax reform and the Streamlined Sales Tax (SST); (2) Hot topics in tax treatment regarding e-commerce, Internet sales, M&A, sales of digital 	3 Susie (Qi) Duong, PhD	Foundation
23313/27094	Compliance Issues of Sales and Use Tax in the United States – Part 2	Taxes	<p>The three courses on U.S. sales and use tax intend to provide a comprehensive overview of the sales and use tax system in the United States.</p> <ul style="list-style-type: none"> * Course I, Fundamentals of Sales and Use Tax in the United States, focuses on the basics of sales and use tax as well as nexus standards and the implications of Court rulings such as the Supreme Court's decision on the 1992 Quill case and the recent 2018 Wayfair case. * Course II, Compliance Issues in Sales and Use Tax in the United States, provides details on 	2.5 Susie (Qi) Duong, PhD	Foundation
21833/25143	Controlled Foreign Corporations	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Impact of controlled foreign corporation (CFC) status * Shareholder taxation in the CFC environment * Reporting provisions impacted by the CFC rules 	3 Tara Fisher	Foundation
31512/36680	Corporate Earnings and Profits: An Overview	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The basics on what corporate earnings and profits ("E&P") are and how a computation works. * The common adjustments to taxable income to compute E&P. * The ordering of utilizing E&P. * The impact of corporate transactions on E&P. 	1 Mike Shumann	Foundation
33010/38413	Corporate Taxation and Preparation Strategies, Part 1	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Formation of C corporations * Taxation of C corporations * Preparation of C corporation tax returns 	2 Timothy F. Gearty	Foundation
24427/28643	Corporate Taxation and Preparation Strategies, Part 2	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The formation of C and S corporations * The taxation of C and S corporations * The distribution of C and S corporations * The liquidation of C and S corporations 	2 Timothy F. Gearty	Foundation

32486/37818	Debtor and creditor income taxation	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Cancellation of Debt Income (CODI) * Tax Code, related regulations, IRS rulings, and case law and how they have shaped this increasingly complex area of tax law * Critical terms and concepts, and a valuable historical view that puts the issue in perspective 	1.5 Timothy F. Gearty	Premium	✓
31511/36679	Dissecting the Internal Revenue Code	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The history of the Internal Revenue Code and revisions that have been made * The basic concepts of the Internal Revenue Code * An outline of the Internal Revenue Code * Research methods in the Internal Revenue Code 	1.5 Tara Fisher	Foundation	✓
31685/36878	Earned income tax credit – Rules and common pitfalls	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The history and purpose of the EIC * The rules to follow and documentation required to claim the EIC * The calculation of the EIC * The common errors associated with the EIC 	1 Seth Colwell	Foundation	✓
30736/35679	Entity Specific Tax Update 2024	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Final regulations, tax rulings, and court cases relating to corporations, partnerships, S corporations, and limited liability companies (LLCs) * Compliance issues and other considerations related to business entities 	4 Stan Pollock	Premium	✓
33413/38842	Equity-Based Compensation: Non-Statutory Options	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The basics of equity compensation and common terms used when discussing equity compensation * Key characteristics that define each type of equity compensation * Taxation of stock compensation to the employee and the employer 	1 Timothy F. Gearty	Foundation	✓
31677/36870	Estate and gift taxes, part 1	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The estate and gift tax system * A comparison between current tax law and anticipated future law changes * The complex and constantly changing rules that govern estate and gift taxes 	1.5 Julie McGinty	Foundation	✓
33790/39223	Examinations of Cash Intensive Businesses	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The basic audit techniques utilized by the IRS * Specific challenges raised when the taxpayer has a cash-intensive business * The specific schedules reviewed by the IRS and what it looks for as an indicator of unreported income 	1 Eric Green	Premium	✓
23095/26597	Expatriation - Individuals and corporations	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * U.S. tax provisions related to U.S. individuals working abroad * U.S. tax provisions related to U.S. individuals relinquishing citizenship * U.S. tax provisions related to U.S. companies that become expatriated entities 	2 Tara Fisher	Foundation	✓
23052/26554	Federal Corporate Tax: Section 351 Overview	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The general rules of property exchanges * The basic requirements of Section 351 * Receipt of boot * Assumption of liabilities * Investment companies and "busting" Section 351 	2.5 Julie McGinty	Foundation	✓
26659/31044	Federal Corporate Tax: Distributions (Dividends, Redemptions and Liquidations)	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The tax rules and regulations governing dividends, redemptions, and liquidations 	2 Stephanie Morris	Foundation	✓
24164/28301	Federal corporate tax: Overview of reorganizations	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * IRC Section 368 reorganizational structures * The tax benefits afforded by IRC Section 368 * Statutory and non-statutory reorganization requirements 	2.5 Stephanie Morris	Foundation	✓
12961/14148	Federal tax implications for the trucking industry	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The trucking industry overall * Applicable deductions * Entity type considerations * Excise tax * Fuel tax 	1.5 Timothy F. Gearty	Foundation	✓

31679/36872	Federal Taxation of Bitcoin and Virtual Currencies	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The virtual currency Bitcoin * The federal tax treatment of Bitcoin transactions * New and proposed authorities and issues affecting Bitcoin * Current developments 	1.5 Timothy F. Gearty	Foundation
16129/18142	Filing Form 1041 – reporting income tax of trusts and estates	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Trust and estate formation and purposes * Form 1041 filing requirements * Choice of filing period * Common types of income and deductions reported on Form 1041 * The impact and benefit of making certain elections (e.g., Sections 645 and 663(b) elections) * Section 1041 basis adjustment reporting 	2.5 Julie McGinty	Foundation
29390/34108	Filing Form 709: How to Report Federal Gift Tax	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Gift tax basics, including transfers and individuals subject to the gift tax * Specific gift tax exclusions, including the medical and educational exclusions * Valuation of gifts for tax purposes, with special note of carryover basis * Form 709 to report and calculate the gift tax 	1.5 Julie McGinty	Foundation
33753/39186	Filing Form 990	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Purpose of Form 990 * Form 990 Schedules * Form 990 filing requirements for higher education institutions * Best practices for preparing Form 990 	1.5 Ricardo Buenrostro	Foundation
32181/37397	Foreign Account Tax Compliance Act (FATCA)	Taxes	In this course students will be informed about the background and technical requirements set forth with the passage of the Foreign Account Tax Compliance Act.	1 Tara Fisher	Foundation
35246/41140	Foreign Currency Transactions	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Foreign currency translation rules * Foreign currency transactions * Virtual currency transactions 	1 Tara Fisher	Foundation
33003/38406	Foreign Derived Intangible Income (FDII) Rules	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Overview of the international tax provisions under TCJA * FDII rules and regulations * FDII filing requirements 	2.5 Tara Fisher	Foundation
17652/20017	Foreign tax credit (final regulations 2020)	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Worldwide Tax System v. Territorial Tax System * Foreign Tax Credit * Interaction with Other International Tax Rules 	2 Tara Fisher	Foundation
31506/36674	Foreign Tax Credit and Foreign-Source Dividend Received Deduction	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Worldwide Tax System v. Territorial Tax System * Foreign Tax Credit * Foreign-Source Dividend Received Deduction 	3 Tara Fisher	Foundation
31525/36693	Fundamentals of Consolidated Returns	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Corporate motivations for filing a consolidated return * Requirements for electing to file a consolidated return * Computations of consolidated groups including taxable income, intercompany transactions, and net operating loss limitations 	2 Janelle Wilson	Foundation
35225/41119	Fundamentals of International Tax	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Policies applicable to outbound taxation * Policies introduced under the Tax Cuts and Jobs Act (TCJA) * Policies applicable to inbound taxation 	3.5 Tara Fisher	Foundation
30955/35905	Fundamentals of Sales and Use Tax in the United States	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The nature and purpose of sales and use tax * Implications of U.S. constitutional issues on sales and use tax * General principals of nexus and the related Supreme Court cases * Nexus based on economic presence * The Streamlined Sales Tax Agreement 	2.5 Heather Luttrell	Foundation

28932/33495	Fundamentals of State and Local Taxation	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The basics of state and local taxation and common types of state and local taxes * State nexus requirements and factor presence in nexus * The basics of the voluntary disclosure agreement offered by most states * State apportionment, including apportionment factors and apportionment methods * Federal and state tax differences for income tax purposes * State filing requirements for pass-through entities including pass-through entity tax 	2 Janelle Wilson	Foundation
31854/37047	Generation-skipping transfer (GST) tax	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The generation-skipping transfer tax 	1 Timothy F. Gearty	Foundation
17032/19256	GILTI final regulations (2020)	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Background and Policy * Methodology and Computations * Filing Requirements 	2 Tara Fisher	Foundation
31467/36632	Global Tax Policy - Rules Targeting Base Erosion and Profit Shifting (BEPS)	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * OECD formation and mission * New proposals to limit base erosion and profit shifting * Existing provisions to limit base erosion and profit shifting 	2.5 Tara Fisher	Foundation
33094/38501	How to Successfully Change Your State Residency to Reduce Taxes	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * State tax rates and overall tax burden * The process of changing state residency * Part-year and nonresidency issues * Potential issues when changing residence 	1.5 Stan Pollock	Foundation
31526/36694	How to Understand Subchapter K	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Basic structure of Subchapter K * Sections covering determination of tax liability for a partnership * Sections covering contributions, distributions and transfers involving a partnership * Other definitions and legislation contained in Subchapter K 	2 Stan Pollock	Foundation
20245/23282	Impact of Section 199A Regulations on Forms 1065 and 1120S	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Provisions contained in the Section 199A final regulations and related revenue procedures * Safe harbor election under Section 199A * Decisions the preparer must make and the decisions the preparer and client must make when applying Section 199A 	2 Stan Pollock	Foundation
34735/40430	Inbound Taxation	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Taxation of foreign persons' business income * Taxation of foreign persons' nonbusiness income * Special inbound tax provisions-FIRPTA and branch profits tax * Base erosion and anti-abuse tax (BEAT) 	2.5 Tara Fisher	Foundation
29616/34341	Individual Alternative Minimum Tax: What Every Practitioner Needs to Know	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The history of the alternative minimum tax (AMT) in modern taxation * The reasoning behind the AMT and its justification * The impacts of the most current law changes and rules for AMT * Which adjustments are made to regular income to determine alternative minimum taxable income (AMTI) 	2 Heather Luttrell	Foundation
31151/36104	Individual Taxation Deductions and Credits (2023)	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Rules for determining adjustments in arriving at adjusted gross income * Rules for determining itemized deductions and their related limitations * Refundable and nonrefundable tax credits * Calculation of other taxes (e.g., alternative minimum tax) 	2 Timothy F. Gearty	Foundation
30977/35927	Individual Taxation Filing Status and Income (2023)	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Hierarchy of authority in tax law * Filing status and dependency definitions * Inclusions and exclusions from gross income * Classifying, netting, and reporting capital gains and losses 	2.5 Timothy F. Gearty	Foundation

34326/40010	Innocent Spouse Cases (Part 5 Certified Tax Representation Consultant)	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Innocent spouse relief: Background * Types of innocent spouse relief * Making the request * RCP analysis * Appeals and US Tax Court * Strategies 	4 Eric Green	Premium	✗
31490/36658	Internal Revenue Service practices and procedures – Gain a fundamental edge	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The fundamentals of IRS requirements, practices, and procedures * Relevant examples and critical definitions related to IRS rules 	1.5 Jenni McAllister	Foundation	✓
28890/33453	Intro to International: BEAT	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Background and Policy * Methodology and Computations * Filing Requirements 	1 Tara Fisher	Foundation	✓
25828/30051	Intro to International: Controlled Foreign Corporations (CFCs)	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Definitions impacting controlled foreign corporation status * Impact of controlled foreign corporation status * Components of income tied to controlled foreign corporation status 	1 Tara Fisher	Foundation	✓
23485/27424	Intro to International: Foreign Tax Credit	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Mitigating double taxation through credit or exemption * Income eligible for the foreign tax credit * Foreign tax credit limitation calculation 	1 Tara Fisher	Foundation	✓
26658/31043	Intro to International: Global Intangible Low-taxed Income (GILTI)	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The background and policy tied to the GILTI rules * The methodology and computations of the GILTI rules * The filing requirements tied to the GILTI rules 	1 Tara Fisher	Foundation	✓
29723/34455	Introduction to International Foreign Tax Credit (Dynamic Format)	Taxes	<p>This course will be an overview of:</p> <p>Mitigating double taxation through credit or exemption</p> <p>Income eligible for the foreign tax credit</p>	1 Tara Fisher	Foundation	✓
28823/33283	Introduction to Preparing New York Income Tax Returns for Businesses	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The New York economy and income tax structure * Calculating New York taxable income using federal income and applicable state adjustments * The New York State apportionment factor * How to accurately prepare New York tax forms for both corporate and pass-through entities * The New York pass-through entity tax election * How to use New York State tax instructions to accurately prepare a business tax return 	3 Heather Luttrell	Foundation	✓
31847/37040	IRA Mastery	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * IRAs in general * Traditional IRAs * Roth IRAs * A comparison of traditional IRAs and Roth IRAs 	2.5 Stephanie Morris	Foundation	✓
31521/36689	IRC Sections - 465 and 469	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The issues involved in passive activities and the at risk rules of partnerships * The ordering process and the calculations needed to properly determine allowable losses and carryovers 	2 Stan Pollock	Foundation	✓
33934/39368	IRS Collection Process	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The IRS collection process * The tools for IRS enforcement * The various collection alternatives for resolving tax debts 	1 Eric Green	Premium	✓

34193/39858	IRS Collections (Part 1 Certified Tax Representation Consultant)	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The current landscape for IRS enforcement * The IRS collection process * Collection appeals * IRS enforcement tools * Calculating reasonable collection potential 	6 Eric Green	Premium	✗
33789/39222	IRS Examinations Individuals	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The IRS audit process * How a tax professional should prepare the client and records for the examination * Special issues that arise in the audits of partnership tax returns 	1 Eric Green	Premium	✓
34240/39924	IRS Exams (Part 3 Certified Tax Representation Consultant)	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * IRS exam basics * Correspondence exams * Hobby loss exams * Audits of cash-intensive businesses * Eggshell audits 	5.5 Eric Green	Premium	✗
28070/32516	K-1 analysis: Form 1065 and Form 1120S	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The purpose of each line of the Schedule K-1 * The nuances of the Form 1065 and 1120-S Schedule K-1s * The whats and whys of reporting to partners/shareholders, including loss limitations, Section 199A considerations, and other issues 	2 Stan Pollock	Foundation	✓
27404/31795	Key Tips on Reading Brokerage Statements	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The purpose of a consolidated 1099 * The composition of a consolidated 1099 * Definitions of terms used in a consolidated 1099 * Specific issues that can arise in connection with a consolidated 1099 	2 John Stevko	Foundation	✓
31914/37114	Maximizing Higher Education Tax Credits	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The general tax rules and definitions related to higher education tax credits * The eligibility rules for the American opportunity credit and how to calculate the credit * The eligibility rules for the lifetime learning credit and how to calculate the credit * Strategies for higher education tax planning 	1 Stephanie Morris	Foundation	✓
18892/21719	Meals and Entertainment	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The general deductibility of business M&E expenditures * The impact of the TCJA on the deductibility of M&E expenditures * The deductible percentages of various types of M&E expenditures * The exceptions to the nondeductibility of entertainment expenditures following the TCJA 	1 Stan Pollock	Foundation	✓
20192/23196	Multinational Entities	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Policies applicable to outbound taxation * Policies introduced under TCJA to curb base erosion and profit shifting * Provisions tied to transfer pricing * Provisions tied to expatriation 	3 Tara Fisher	Foundation	✓
31583/36765	Navigating M&A Transaction Costs from a Tax Perspective	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The type of transactions and costs contemplated by Treas. Reg. 1.263(a)-5 * The general rule for the tax treatment of transaction costs * The primary exceptions to the general rule * The special considerations for success-based fees 	2.5 Stephanie Morris	Foundation	✓
34237/39920	Navigating Schedules K-2 and K-3	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The purpose of Schedules K-2 and K-3 * Who must file Schedules K-2 and K-3 * Completion of Schedules K-2 and K-3 * What forms use the information from Schedule K-3 	2 Stan Pollock	Foundation	✓
33394/38820	Navigating the business loss limitations	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The basis of a partner's partnership interest * The stock and debt basis of an S corporation shareholder * The at-risk basis * Passive activity losses 	1 Seth Colwell	Foundation	✓
31680/36873	Non-Qualified Deferred Compensation: The Impact of Section 409A	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * General rules and definitions of Section 409A * Requirements of nonqualified deferred compensation plans * Deferral elections and permissible payments under Section 409A * Authority relating to Section 409A and deferred compensation plans 	1 Timothy F. Gearty	Foundation	✓

34410/40100	Offer in Compromise (Part 2 Certified Tax Representation Consultant)	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The basics of the offer in compromise program * The various types of offers in compromise * The offer process and documents * Calculating reasonable collection potential * Strategies for making the offer more appealing to the IRS 	5 Eric Green	Premium	✗
31503/36671	Opportunity zones	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Creation of Opportunity Zones * The types of gains eligible for deferral through investment in an Opportunity Fund * Holding period of Qualified Opportunity Fund investment to recognize reduction in deferred gain * Qualification and definition of a Qualified Opportunity Fund and the related compliance 	2 John Stevko	Premium	✓
30499/35416	Organizing, Operating, and Closing a Partnership	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The basics of the life of a partnership, from start to finish * The process of forming, operating, and terminating the entity 	1 Stan Pollock	Foundation	✓
23411/27217	Outbound Reporting (Forms 5471, 8892, 8832, 8858 and 8865)	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * What it means to be a controlled foreign corporation (CFC) * Calculation of Subpart F income * Other tax implications of CFC status * Forms 5471 and 8992 (foreign corporations) 	3 Tara Fisher	Foundation	✓
31495/36663	Outbound Transactions	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Policies designed to achieve tax neutrality * Mechanisms to mitigate double taxation * Definitions and rules tied to controlled foreign corporations (CFCs) * Regimes to protect the U.S. tax base 	3 Tara Fisher	Foundation	✓
23301/27081	Overview of California State Taxes	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * California tax system * Main types of California business and individual taxes * Key California jurisdictional and sourcing rules * Specialty taxes 	2.5 Stephanie Morris	Foundation	✓
23362/27149	Overview of Illinois State Taxes	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Corporate tax liabilities in Illinois * Tax liabilities for individuals in Illinois * Inheritance and gift taxation in Illinois * Excise tax imposed in Illinois * Illinois property taxes * Sales and use taxes in Illinois * Taxation situations related to pass-through entities 	2 Stephanie Morris	Foundation	✓
31681/36874	Overview of the Federal Tax System	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Individual income tax * Corporate income tax * Estate, gift, and generation-skipping transfer taxes * Social insurance taxes 	2.5 Tara Fisher	Foundation	✓
33271/38697	Partnership audits	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The BBA centralized partnership audit regime and previous audit regimes * The rules for BBA partnership audits * Administrative adjustment requests under the BBA 	2.5 Stan Pollock	Foundation	✓
31529/36697	Partnerships and Multiple-Member LLCs: Taxation and Other Considerations	Taxes	<p>Small, closely held businesses that comprise the backbone of the U.S. economy are increasingly organized as Limited Liability Companies (LLCs). Multiple-member LLCs and other partnerships present a variety of appealing benefits along with important tax implications. Explore the differences between partnerships and other relationships, as well as the fundamentals of partnerships and LLCs.</p>	2 Charles Edward Falk, Timothy F. Gearty	Foundation	✓
31876/37069	Pass-through Entity Tax Update Q1 2024	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Legislative changes impacting pass-through entities * Tax rulings and court cases relating to partnerships, S corporations, and limited liability companies (LLCs) * Compliance issues and other considerations related to pass-through entities 	1 Stan Pollock	Premium	✓

30312/35198	Pass-through Entity Tax Update Q4 2023	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Legislative changes impacting pass-through entities * Tax rulings and court cases relating to partnerships, S corporations, and limited liability companies (LLCs) * Compliance issues and other considerations related to pass-through entities 	2 Stan Pollock	Premium	✔
34394/40078	Payroll Tax Debts (Part 4 Certified Tax Representation Consultant)	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Payroll tax enforcement landscape * Payroll tax basics * Personal liability * Payroll tax strategies 	5 Eric Green	Premium	✘
22206/25711	Planning for Foreign Operations	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Issues relevant to entering a foreign market * Definitions and key components of the Subpart F regime * Overview of the newly enacted tax reform provisions * Calculations tied to the foreign tax credit 	3 Tara Fisher	Foundation	✔
26525/30890	Preparing for a Tax Audit	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The audit selection process * Types of audits * Responses to an audit * Common audit issues * Professional standards for tax preparers 	1 Stephanie Morris	Foundation	✔
28071/32517	Preparing Form 1065	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Partnership taxation concepts, including formation, basis, flow-through of items, allocations, and distributions * Form 1065 filing requirements * Form 1065 preparation and reporting requirements, with an emphasis on book-to-tax reconciliations * Maintaining and reporting capital account balances and the new tax-basis capital account reporting requirement 	2.5 Stephanie Morris	Foundation	✔
19729/22636	Preparing Form 4797 - Sale of Business Property	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Transactions reported on Form 4797 * Types of property included on Form 4797 * Tour of Form 4797 * Best practices in completing Form 4797 	1.5 Stephanie Morris	Foundation	✔
23318/27099	Preparing Texas Franchise Tax Returns for Businesses	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The Texas tax structure. * Calculating taxable Texas revenue and total franchise tax. * Calculating the Texas apportionment factor. * How to accurately prepare Texas franchise tax forms. * How to use Texas tax instructions to accurately prepare franchise tax returns. * The filing requirements for different taxes due and which forms to use when filing a 	1.5 Skye Moench, CPA	Foundation	✔
32841/38238	Quarterly Estimates for Corporations	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Corporate estimated tax payment requirements * Methods available for computing estimated tax payments * Special issues which may arise for corporations making estimated tax payments 	1.5 Julie McGinty	Foundation	✔
32492/37830	Quarterly Estimates for Individuals	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The requirements for making estimated tax payments for individuals * Methods and resources available for computing estimated tax payments * Special issues that may arise when making estimated tax payments 	1.5 Julie McGinty	Foundation	✔
31849/37042	Real estate investment trusts: Taxation basics	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The purpose of a real estate investment trust (REIT) * Various types of REITs and associated benefits * Requirements and considerations to qualify as a REIT * How to invest in a REIT 	1 John Stevko	Premium	✔
33040/38447	Real Estate Tax Update Foreclosures and § 199A	Taxes	<p>After completing this course, the learner should be able to:</p> <ul style="list-style-type: none"> * Understand the tax rules for real estate concerning the cancellation of debt and the Section 199A deduction 	1 John Stevko	Premium	✔

33002/38405	Real Estate Tax Update Home Ownership	Taxes	<p>After completing this course, the learner should be able to:</p> <ul style="list-style-type: none"> * Understand the tax rules for home mortgage interest, sale of a principal residence, vacation homes, escrow costs, and tax credits 	1 John Stevko	Premium	✓
33014/38421	Real Estate Tax Update Rentals and Home Office	Taxes	<p>After completing this course, the learner should be able to:</p> <ul style="list-style-type: none"> * Understand the tax rules for real estate as they pertain to passive activities, self-employment tax, rentals, home office deductions, Schedule C and D activities, Schedule E, and capitalization and expensing. 	1 John Stevko	Premium	✓
348/363	Real Estate Taxation Involuntary Conversions, Character of Dispositions, and Rentals	Taxes	<p>Although real estate transactions are governed by an excessive number of specific rules and regulations, the untrained eye may see a lot of gray. But make no mistake—the rules are precise and must be followed. Whether it's knowing the subtle differences between Sections 1033 and 1031, or how the IRS interprets critical requirements, compliance requires an understanding of the letter of both statutory and case law.</p>	1 Patrice Johnson	Premium	✓
33933/39367	Reasonable Compensation Horror Stories	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Key court cases on reasonable compensation for S corporation owners * IRS guidance regarding determining what is reasonable compensation * Preparer penalties and cases where tax professionals failed to advise clients properly * Tools the IRS has put in place to help taxpayers 	1 Eric Green	Premium	✓
18957/21784	Recordkeeping for small businesses	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The importance of recordkeeping for small businesses * Key small business record and retention guidelines * Consequences of not keeping key records * Manual and software recordkeeping system considerations for small businesses * Small business recordkeeping systems and considerations 	2 Stan Pollock	Foundation	✓
19220/22126	Repair Regulations	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The differences between the Final Repair Regulations and the Proposed and Temporary Regulations issued prior to the Final Repair Regulations. * The current rules applicable to general asset accounts, betterments, restorations, safe harbor routine maintenance and dispositions. * The de minimis rule and applicable threshold. * The relief available to small businesses. 	2 Timothy F. Gearty	Foundation	✓
32487/37821	Reporting Book-Tax Differences—Understanding Schedules M-1 and M-3	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Why differences exist * Book-tax differences * Schedules M-1 and M-3 * The effect of reporting timing differences 	1 Timothy F. Gearty	Foundation	✓
33737/39170	Research and Development Tax Credit Basics	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The history and purpose of the R&D tax credit * The general requirements to qualify for the credit * The methods of utilizing the credit * Calculations and filing requirements 	2 Stan Pollock	Foundation	✓
19300/22206	Reviewing tax returns for accuracy and efficiency	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The job of the reviewer * Tools needed by the reviewer * Steps in the review * Specific procedures for the review * Finishing up the review 	1 Stephanie Morris	Foundation	✓
34699/40394	S Corporation Stock and Debt Basis	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Stock basis in S corporations * Debt basis in S corporations * Form 7203 	1 Seth Colwell	Foundation	✓
31982/37182	S corporations from A to Z: Getting ready to prepare the S corp return	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * S corporation basics, including qualification and tax requirements * Form 1120-S, the S corporation annual tax return * Unique aspects of S corporation taxes (including separately stated items and deduction limitations) 	2.5 Julie McGinty	Foundation	✓

31518/36686	Section 338 Elections: An Overview	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The basic transaction types in an M&A context * The section 338(g) election * The section 338(g) election in the context of a foreign acquisition * The section 338(h)(10) election * Section 336(a) elections, section 197, and other miscellaneous related concepts and 	1 Mike Shumann	Foundation	✓
31516/36684	Section 355 Spin-offs: An Overview	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Corporate divisions * The different types of corporate divisions * The U.S. federal income tax consequences of corporate divisions * The requirements for a corporate division to qualify as a Section 355 transaction. 	1 Mike Shumann	Foundation	✓
29885/34737	Section 382	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The history and underpinnings of Section 382 * What constitutes an ownership change and the key variables for determining when one occurs * The base Section 382 limitation and the main adjustments to that base limitation * Net unrealized built-in gains and losses and recognized built-in gains and losses 	1.5 Timothy F. Gearty	Foundation	✓
31513/36681	Section 754 Elections: Tax Implications of Partnership Step-ups	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Code Sections 754, 743 and 734 * How to make a 754 election * When are code sections 734 and 743 applicable * Defining inside basis and outside basis 	2 Stan Pollock	Foundation	✓
35039/40907	Social Security and Medicare Tax Update 2024	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Explanation of Social Security retirement benefits, tax issues, and planning strategies * Details of Social Security disability, survivor, and family benefits * Explanation of Medicare benefits 	2.5 John Stevko	Premium	✓
33340/38766	Sources of Income in Retirement	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Reasons to save for retirement * Sources of income in retirement and how to withdraw * Basics of Social Security * Tax planning for retirement 	2.5 Ricardo Buenostro	Foundation	✓
32493/37831	Special Valuation Rules, Part 1: See Clearly Through the Clutter	Taxes	<p>With a history that includes continued tinkering from Congress, rules governing partial or split interests created as part of estate-planning strategies have provided more than their share of misunderstanding, consternation and even hysteria. Cut through the clutter and obtain a practical understanding that will allow you to appropriately and effectively apply Chapter 14's Special Valuation Rules today. Gain the additional advantage that comes from understanding the full context of the rules, including the reasons they were enacted and what they are</p>	1.5 Timothy F. Gearty	Foundation	✓
31580/36760	State Tax Highlights Q1 2024	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Recent and proposed federal tax laws * State conformity * Significant trends in multistate tax concepts (nexus, sourcing, etc.) * Quarterly changes to state tax law 	1 Timothy F. Gearty	Premium	✓
22195/25695	Tackling Tax Depreciation Issues	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Depreciable property. * Various methods of cost recovery for tangible property including MACRS, bonus depreciation, Section 179, and straight-line. * Special issues in depreciation such as listed property and frequent changes in tax law. * Differences between book and tax depreciation methods and objectives and the relevance 	2 Stephanie Morris	Foundation	✓
33918/39352	Tax Audit Horror Stories	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Dealing with a client whose records have been lost or destroyed * Handling clients who have paid cash and failed to maintain receipts * When the auditors fail to properly utilize their audit techniques and therefore make bad assessments 	1 Eric Green	Premium	✓
30840/35789	Tax Consequences of Changing Business Entities	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The types of business entities * Sole proprietorship and partnership entity changes * Sole proprietorship and C corporation entity changes * Sole proprietorship and S corporation entity changes * Partnership and C corporation entity changes 	2 Stan Pollock	Foundation	✓

31226/36329	Tax Fraud Due to Identity Theft	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Identify theft basics, including defining tax fraud due to identity theft, warning signs, and why a criminal may want to commit identity theft * Common tax fraud schemes to commit identity theft * Steps to take if you encounter identity theft, either an attempted theft or a theft of your or your client's information * Best practices for guarding against identity theft 	2 Kelly Pope	Foundation
19276/22182	Tax implications for charities and charitable contributions	Taxes	<p>After completing this course, the learner should be able to:</p> <ul style="list-style-type: none"> * Recognize the definitions of and qualifications for tax-exempt charities, public charities, and private foundations * Recognize how to qualify as a public charity and when to file for tax-exempt status * Recognize what qualifies as a charitable contribution for income tax purposes * Calculate the amount of a charitable contribution or charitable contribution recapture 	2 Timothy F. Gearty	Foundation
31502/36670	Tax implications for members of the U.S. armed forces	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The market for tax advice services for members of the U.S. armed forces * How taxable income for members of the U.S. armed forces is determined * What adjustments to taxable income are available for members of the U.S. armed forces * Determination and treatment of combat pay for tax purposes * The special provisions for real estate transactions for income tax purposes for members of the U.S. armed forces 	1 Timothy F. Gearty	Premium
31499/36667	Tax implications for the oil and gas industry	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Issues related to the major phases of oil and gas taxation, including asset acquisition, exploration and development, production, disposition of assets, and special issues. 	1.5 Timothy F. Gearty	Foundation
19681/22588	Tax Implications Of A Change In Accounting Method	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Why accounting changes are made * When and how accounting method changes are triggered * The basic principles of Internal Revenue Code (IRC) Section 481 * Form 3115, Application for Change in Accounting Method 	2 Stan Pollock	Foundation
31678/36871	Tax Implications of Divorce	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Filing statuses and dependency issues * Alimony, retirement benefit allocations, and other issues * Applicable professional standards in divorce engagements 	2 Stan Pollock	Foundation
29780/34606	Tax in a Digital World: How to Excel During the Fourth Industrial Revolution (4IR)	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The fourth industrial revolution in context * Common aspects of the fourth industrial revolution for companies to know * Tax challenges arising as part of the fourth industrial revolution * Strategies for coping with such tax challenges * Strategies for coping with indirect issues associated with such challenges, especially 	2 Heather Luttrell	Foundation
34504/40197	Tax Planning Strategies for Individuals	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The importance of tax planning and related goals of tax planning * Basic tax planning strategies for individuals * Tax planning opportunities related to retirement, investments, healthcare, and education * Concepts related to gift and estate tax planning that can impact individuals 	2.5 Timothy F. Gearty	Foundation
19324/22230	Tax Policy	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Progressive, regressive, and proportional tax systems * Three main standards of tax equity---vertical, horizontal, and transitional * Inverse relationship between tax efficiency and fairness in the tax system 	3 Tara Fisher	Foundation
30975/35925	Tax Research Basics	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Conducting effective tax research, including utilizing primary and secondary research authority and tools * Documenting tax research for internal purposes * Preparing a client opinion letter based on internal research 	2 Tara Fisher	Foundation
31486/36654	Tax Treaties	Taxes	<p>After completing this course, the learner should be able to:</p> <ul style="list-style-type: none"> * Understand policy objectives of tax treaties and how to qualify for benefits * Understand taxation of business income under tax treaties * Understand taxation of nonbusiness income under tax treaties * Understand limitation on benefits provision 	2 Tara Fisher	Foundation

31155/36108	Tax Update for Individuals 2024 (for the 2023 Filing Season)	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * New issues in individual taxation * The best strategies to comply with the ever-changing tax laws used in preparing federal and state individual tax filings * Rulings, announcements, and court cases affecting individual and pass-through entity 	5 Stan Pollock	Premium	✔
31926/37126	Taxation of Clergy Members	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The history, purpose, and overview of clergy tax * The distinction between FICA and SECA for clergy * Income items for clergy members * Expense, deduction, and credit items for members of the clergy 	1 John Stevko	Foundation	✔
26379/30603	Taxes and corporate strategies: Considerations for business operations	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Corporate federal tax reporting requirements and book-tax difference concepts * The corporate tax function's role in determining capital structure * Tax principles applying to corporate distributions and share repurchase initiatives * Corporate liquidations and the resulting tax impact on the corporation and shareholders 	2 Timothy F. Gearty	Premium	✔
31530/36698	The At Risk and Passive Activity Loss Rules – How they Impact You	Taxes	<p>For decades, so-called "At Risk" Rules (ARR) and Passive Activity Loss (PAL) legislation have sought to prevent the spread of tax shelters. ARR limits an investor's deductible losses to the amount he or she has "at risk," while PAL has attempted to take the motivation out of mass-marketed tax shelters. Each brings layers of complexities that pose serious challenges to financial professionals today.</p>	2 Charles Edward Falk, Timothy F. Gearty	Foundation	✔
30392/35278	The Corporate Transparency Act	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Learn about the background and purpose of the Corporate Transparency Act, the definitional rules, the reporting deadlines and requirements, and the penalties for failing to file the required beneficial ownership information report. 	1 Stan Pollock	Premium	✔
34229/39909	The Inside Secrets to Tax Liens	Taxes	<p>After completing this course, the learner should be able to:</p> <ul style="list-style-type: none"> * Recognize how tax liens work * Describe under what circumstances the IRS will discharge an asset from its lien * Identify when you can request a Notice of Federal Tax Lien be withdrawn 	1 Eric Green	Premium	✔
31509/36677	The Transition Tax-Section 965 and Final Treasury Regulations	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Worldwide Tax System vs. Territorial Tax System * Section 965 and the Final Treasury Department Regulations * Filing Requirements for the Transition Tax 	2 Tara Fisher	Foundation	✔
23382/27171	Transfer Pricing – Friend and Foe	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The "what's" and "why's" of transfer pricing * How transfer pricing relates to the U.S Tax Code and Regulations * Global policies tied to transfer pricing 	2 Tara Fisher	Foundation	✔
31852/37045	Trusts: Family Succession Basics	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Basic issues related to family business succession planning * Basic information involving trusts and how they may be used in family business succession planning * The basic unified transfer tax system 	2 Timothy F. Gearty	Foundation	✔
31845/37038	Understanding 1031 Exchanges	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Mechanics of Section 1031 exchanges * Section 1031 definitions and rules for exchanges * Issues related to Section 1031 exchanges * Depreciation of property received in Section 1031 exchanges 	1.5 Timothy F. Gearty	Foundation	✔
31500/36668	Understanding federal excise taxes	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Various types of federal excise taxes * Required forms for reporting excise taxes and credits * Frequency and methods used to pay and report federal excise taxes * Consequences of nonpayment or failure to report excise taxes 	1.5 Heather Luttrell	Foundation	✔
31498/36666	Understanding tax-favored health plans	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The different types of tax-favored health plans * The operational requirements for each of the tax-favored health plans * The qualification requirements for each of the tax-favored health plans * The annual compliance requirements for each of the tax-favored health plans 	1 Timothy F. Gearty	Foundation	✔

33993/39642	Understanding the Tax Implications of the Legal Marijuana Industry	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * The state of the legal marijuana industry in the United States * The dichotomy between federal and state law, including relevant case law as it relates to taxation of this industry * Considerations a CPA must weigh in deciding whether or not to provide services to this 	1.5 Timothy F. Gearty	Premium	✓
30881/35830	Utilizing enrolled agents in your firm	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Requirements, licensing, and process to obtain the enrolled agent designation * Examples of work an enrolled agent may do within a firm setting 	1 Stephanie Morris	Foundation	✓
22625/26132	Value Added Tax and Tax Systems	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Tax systems and tax equity * Major forms of consumption taxes * International impact of COVID-19 on consumption taxes 	2 Tara Fisher	Foundation	✓
34317/40001	What Every Tax Practitioner Needs to Know about Section 529 Plans	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * Section 529 plans * Eligibility * Qualified expenses * State requirements 	1 Ricardo Buenostro	Foundation	✓
31492/36660	Your go-to guide to S Corporations	Taxes	<p>This course will be an overview of:</p> <ul style="list-style-type: none"> * S corporations and the pros and cons of this entity type as compared to other choices (such as LLC's) * How to qualify as an S corporation * How to make the S election 	2 Stan Pollock	Foundation	✓