

# CCH® CPELink Self-Study Courses — 2024

COURSE TITLE	FORMAT	AUTHOR	FIELD OF STUDY	COURSE LEVEL	CPE
22086 - 2022 Tax Software Update - CCH® Prosystems fx® Tax - Worksheet	Downloadable PDF	CPE Link	Taxes (1 hour)	Update	1
Introduction to Yellow Book	On-demand	Melisa Galasso	Auditing (Governmental) (2 hours)	Basic	2
Accounting for Software Sales	Downloadable PDF	Kelen Camehl	Accounting (1 hour)	Basic	1
Segregation of Duties for Core Business Processes	On-demand	Lynn Fountain	Business Management & Organization (2 hours)	Basic	2
Solving Tax Research Puzzles	On-demand	Jennifer Kowal	Taxes (4 hours)	Intermediate	4
International Considerations for Not-for-Profit Organizations	On-demand	Clark Nuber Jennifer Becker Harris Frances Olson	Taxes (2 hours)	Intermediate	2
Audit Horror Stories: What to Do When the IRS Audit Goes off the Rails	On-demand	Eric Green	Taxes (2 hours)	Basic	2
A Practical Approach to Quickly Filling Out Forms K-2 and K-3	On-demand	Greg White	Taxes (1 hour)	Update	1
2022 Revenue Recognition: Issues and Problems	On-demand	Pat Patterson	Accounting (2 hours)	Intermediate	2
Sampling for Single Audit	On-demand	Diane Edelstein	Auditing (Governmental) (2 hours)	Basic	2
2022 Governmental Entities and Cyber Frauds	On-demand	Robert Minniti	Accounting (Governmental) (1 hour), Auditing (Governmental) (1 hour)	Basic	2
State and Local Reporting: 1099 and SALT Issues	On-demand	Steven Mercatante	Taxes (2 hours)	Basic	2
Internal Audit Challenges During COVID Times	On-demand	Lynn Fountain	Auditing (2 hours)	Intermediate	2
Preparation vs. Compilation: What Is It?	On-demand	Pat Patterson	Accounting (1 hour), Auditing (1 hour)	Intermediate	2
2022 Estate & Financial Planning Quarterly Update (Winter)	On-demand	Klaralee Charlton	Taxes (2 hours)	Update	2
Value-Based Enterprise Management in Government	On-demand	Gary Cokins	Business Management & Organization (2 hours)	Overview	2
A Basic Ethics Guidebook for Oregon CPAs	On-demand	Allison McLeod	Regulatory Ethics (4 hours)	Basic	4
2022 Single Audit Update: What to Know and How to Prepare	On-demand	Troy Rector Kelly Rancourt Clark Nuber	Auditing (Governmental) (2 hours)	Intermediate	2
Maximizing the Employee Retention Credit	On-demand	Greg White	Taxes (1 hour)	Update	1
Taxability of Judgments and Settlements	On-demand	Allison McLeod	Taxes (2 hours)	Basic	2
Auditing for Waste in a Government Entity	On-demand	Robert Minniti	Auditing (Governmental) (2 hours)	Basic	2
Dynamic Arrays Formulas in Excel 2021 and Microsoft 365	On-demand	David Ringstrom	Computer Software &	Intermediate	2

			Applications (2 hours)		
Considering COVID-19 in Financial Statement Disclosures	On-demand	Robert Minniti	Auditing (2 hours)	Intermediate	2
Payroll Tax Train-Wreck: Resolving Your Client's Payroll Tax Nightmare	On-demand	Eric Green	Taxes (2 hours)	Intermediate	2
Cancellation of Indebtedness Income	On-demand	Jennifer Kowal	Taxes (2 hours)	Basic	2
Designing Effective KPIs and Performance Dashboards	On-demand	Miles Hutchinson	Business Management & Organization (2 hours)	Basic	2
Cryptocurrency Taxation Fundamentals and Open Issues	On-demand	Annette Nellen	Taxes (2 hours)	Basic	2
Special Gift Tax Issues	On-demand	Klaralee Charlton	Taxes (2 hours)	Basic	2
Business Valuations: Cost Approach	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
2021 S Corporation Update: Developments You Need to Know	On-demand	Greg White	Taxes (2 hours)	Update	2
New Partnership Reporting of Foreign Items: K-2 and K-3	On-demand	Adnan Islam	Taxes (1 hour)	Overview	1
California Tax Update: Part 2	On-demand	Eva Rosenberg	Taxes (2 hours)	Update	2
Recent Tax Developments (January 2022)	On-demand	Annette Nellen	Taxes (2 hours)	Update	2
Introduction to Business Valuations	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
Form 990PF: Overview of the Basics and Tax Return Walk thru	On-demand	Clark Nuber	Taxes (2 hours)	Basic	2
		Kathryn Okimoto			
		Lisa McCreedy			
Amending Form 1040: Filing 1040X	On-demand	Barbara Weltman	Taxes (1 hour)	Basic	1
		Sidney Kess			
Regulation S-K	On-demand	Kelen Camehl	Accounting (1 hour)	Overview	1
California Tax Update: Part 1	On-demand	Eva Rosenberg	Taxes (3 hours)	Update	3
Highlights for Passthrough Entities	On-demand	Greg White	Taxes (2 hours)	Basic	2
Obtaining Innocent Spouse Relief	On-demand	Eric Green	Taxes (2 hours)	Basic	2
COOPs: Federal Tax Issues	On-demand	Pat Patterson	Taxes (2 hours)	Intermediate	2
Coops: GAAP, GAAS, and SSARS Issues	On-demand	Pat Patterson	Accounting (1 hour), Auditing (1 hour)	Intermediate	2
Condos and HOAs: Federal Tax Issues	On-demand	Pat Patterson	Taxes (2 hours)	Intermediate	2
Condos and HOAs: GAAP, GAAS, & SSARS Issues	On-demand	Pat Patterson	Accounting (2 hours)	Intermediate	2
Artificial Intelligence (AI) and Robotics Process Automation (RPA)	On-demand	Cory Campbell	Information Technology (2 hours)	Intermediate	2
Developing a Well Trained Staff Using a Skills Based Approach	On-demand	Jennifer Kowal	Business Management & Organization (2 hours)	Basic	2
Tax Breaks, Tips, and Updates: Part 2	On-demand	Eva Rosenberg	Taxes (2 hours)	Update	2
The Impact of the Digital Revolution on the Accounting Profession	On-demand	Gary Cokins	Computer Software & Applications (2 hours)	Overview	2
Tax Breaks, Tips, and Updates: Part 1	On-demand	Eva Rosenberg	Taxes (2 hours)	Update	2
Obtaining and Understanding Your Client's IRS Account Information	On-demand	Jim Buttonow	Taxes (2 hours)	Basic	2
Disaster-Proofing Excel Spreadsheets	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
Advanced Secrets of Microsoft Power BI	On-demand	Stephen Yoss	Information Technology (2 hours)	Intermediate	2
Non-Profit Entity Financial Statements	On-demand	Pat Patterson	Accounting (3 hours)	Basic	3
2021 Accounting and Auditing Update	On-demand	Pat Patterson	Accounting (4 hours), Auditing (4 hours)	Update	8
Preparing Form 706: The Federal Estate Tax Return	On-demand	Steven Siegel	Taxes (2 hours)	Basic	2
Preparing Form 709: The Federal Gift Tax Return	On-demand	Steven Siegel	Taxes (2 hours)	Basic	2
FATCA: How to Comply with Minimal Withholding, Tax, & Penalty Impact	On-demand	Miles Hutchinson	Taxes (2 hours)	Basic	2
International Taxation of Intellectual Property (IP)	On-demand	Adnan Islam	Taxes (2 hours)	Intermediate	2

The Uses of Trusts and their Tax Consequences	On-demand	Steven Siegel	Taxes (8 hours)	Basic	8
Recent Tax Developments (December 2021)	On-demand	Annette Nellen	Taxes (2 hours)	Update	2
2021 Leases Update	On-demand	Pat Patterson	Accounting (1 hour), Auditing (1 hour)	Update	2
2021 Fraud Update	On-demand	Robert Minniti	Accounting (2 hours)	Update	2
Tax Updates for 2021 Individual Planning and Due Diligence	On-demand	Annette Nellen	Taxes (4 hours)	Update	4
Strategy Management with a Strategy Map and its Balanced Scorecard	On-demand	Gary Cokins	Business Management & Organization (2 hours)	Basic	2
Advanced Partnership Taxation Concepts	On-demand	Greg White	Taxes (4 hours)	Advanced	4
2021 International Tax Provisions Recap & Update	On-demand	Adnan Islam	Taxes (2 hours)	Update	2
Introduction to Power Query	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
S Corporation Taxation Concepts and Planning Strategies: Part 2	On-demand	James Hamill	Taxes (4 hours)	Intermediate	4
S Corporation Taxation Concepts and Planning Strategies: Part 1	On-demand	James Hamill	Taxes (4 hours)	Basic	4
2021-2022 Ethics for Washington CPAs	On-demand	Allison McLeod	Regulatory Ethics (4 hours)	Basic	4
Preparing Form 1065: Part 2	On-demand	Greg White	Taxes (4 hours)	Basic	4
2021 Year-End Tax Update for Not-for-Profits	On-demand	Clark Nuber Kathryn Okimoto Sarah Huang	Taxes (2 hours)	Update	2
Preparing Form 1065: Part 1	On-demand	Greg White	Taxes (4 hours)	Basic	4
Best Practices for 2021: W2 & W4 Update	On-demand	Miles Hutchinson	Taxes (2 hours)	Basic	2
Form 1099 Filing Update	On-demand	Steven Mercatante	Taxes (2 hours)	Update	2
Building a Data Warehouse: DIY Approach to Getting All Your Data in One Place	On-demand	Stephen Yoss	Information Technology (2 hours)	Basic	2
Accountants and Malpractice: Can We Get Sued for This?	On-demand	Allison McLeod	Regulatory Ethics (2 hours)	Basic	2
U.S. Source Withholding Tax Rules and Tax Treaty Application	On-demand	Adnan Islam	Taxes (2 hours)	Intermediate	2
QuickBooks/Excel Report Speed Tips Part 2	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
Taxation of the Family Home	On-demand	Klaralee Charlton	Taxes (2 hours)	Basic	2
2021 Form 1099 & W9 Annual Update	On-demand	Miles Hutchinson	Taxes (2 hours)	Update	2
Help Clients Deal with Tax Law Challenges: Using Practical Planning Strategies	On-demand	Steven Siegel	Taxes (2 hours)	Basic	2
Robotics Process Automation (RPA)	On-demand	Cory Campbell	Information Technology (2 hours)	Intermediate	2
Intermediate Partnership Taxation	On-demand	James Hamill	Taxes (4 hours)	Intermediate	4
How to Properly Tailor Your Audit Program	On-demand	Salvatore Collemi	Auditing (2 hours)	Intermediate	2
Best Practices in Board Governance	On-demand	Mitch Hansen Candi Avery Clark Nuber	Taxes (2 hours)	Intermediate	2
QuickBooks/Excel Report Speed Tips: Part 1	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
Sharing Economy: Tax Issues for the Gig Economy	On-demand	Sidney Kess Barbara Weltman	Taxes (1 hour)	Overview	1
Testing Internal Controls in a Single Audit	On-demand	Diane Edelstein	Auditing (Governmental) (2 hours)	Basic	2
OCBOA: Something Old, Something New	On-demand	Pat Patterson	Accounting (2 hours)	Intermediate	2

Handling Changes to W-8 and W-9	On-demand	Steven Mercatante	Taxes (2 hours)	Basic	2
Basic Partnership Taxation	On-demand	James Hamill	Taxes (4 hours)	Basic	4
ASC 606 Revenue Recognition: Identifying the Transaction Price	On-demand	Lynn Fountain	Accounting (2 hours)	Basic	2
Form 1099 MISC Explained	On-demand	Steven Mercatante	Taxes (2 hours)	Basic	2
Form 1042/1042-S Reporting	On-demand	Steven Mercatante	Taxes (2 hours)	Basic	2
Coming in From the Cold: How to Help Non-Filers	On-demand	Eric Green	Taxes (2 hours)	Basic	2
Top 7 Trends in Management Accounting	On-demand	Gary Cokins	Accounting (2 hours)	Overview	2
Fraud Roundup: Newer Frauds and How to Spot Them When Targeted	On-demand	Mary Schaeffer	Accounting (1 hour), Auditing (1 hour)	Basic	2
Multistate Sales Tax Issues in a Digital World	On-demand	Joseph Endres Hodgson Russ LLP	Taxes (2 hours)	Basic	2
Nonresident Alien Reporting: IRS Compliance	On-demand	Miles Hutchinson	Taxes (2 hours)	Basic	2
Payroll Fraud	On-demand	Robert Minniti	Accounting (1 hour), Auditing (1 hour)	Basic	2
Cross Border Finance	On-demand	William Seeger	Taxes (1 hour)	Basic	1
Small Business Issues in Today's Market	On-demand	David Osburn	Business Management & Organization (2 hours)	Basic	2
Top Federal Tax Issues for 2022 CPE Course: Module 3	Downloadable PDF	Robert Minniti Klaralee Charlton Greg White	Taxes (8 hours)	Basic	8
Top Federal Tax Issues for 2022 CPE Course: Module 2	Downloadable PDF	Jennifer Kowal	Taxes (4 hours)	Basic	4
Top Federal Tax Issues for 2022 CPE Course: Module 1	Downloadable PDF	Jim Buttonow Jennifer Kowal	Taxes (7 hours)	Basic	7
An Update of State Tax Issues for Corporations	On-demand	Hodgson Russ LLP Open Banks K. Craig Reilly Katherine Piazza	Taxes (2 hours)	Basic	2
Major Program Determination	On-demand	Diane Edelstein	Auditing (Governmental) (2 hours)	Basic	2
Recent Tax Developments (October 2021)	On-demand	Annette Nellen	Taxes (2 hours)	Update	2
Net Investment Income Tax	On-demand	Barbara Weltman	Taxes (1 hour)	Basic	1
2021 Form 1065 K-1s: IRS Throws Rocks at Hornets'™ Nest	On-demand	Bradley Burnett	Taxes (2 hours)	Update	2
Blockchain and Smart Contracts	On-demand	Cory Campbell	Information Technology (2 hours)	Intermediate	2
Form 1041: Advanced Concepts in Fiduciary Income Tax (Part 2)	On-demand	Klaralee Charlton	Taxes (6 hours)	Basic	6
Form 1041: Basic Trust & Estate Income Tax Preparation (Part 1)	On-demand	Klaralee Charlton	Taxes (6 hours)	Basic	6
2021 Business Federal Tax Update: Part 2	On-demand	Greg White	Taxes (4 hours)	Update	4
You Suspect Fraud? Now What?	On-demand	Robert Minniti	Accounting (1 hour), Auditing (1 hour)	Basic	2
New Audit Evidence Standard SAS 142: Good or Bad	On-demand	Pat Patterson	Auditing (2 hours)	Intermediate	2
2021 Business Federal Tax Update: Part 1	On-demand	Greg White	Taxes (4 hours)	Update	4
1040 Preparation and Planning 12: Figuring Tax Liability and Making Tax Payments (2022)	On-demand	Barbara Weltman Sidney Kess	Taxes (1 hour)	Basic	1
1040 Preparation and Planning 11: Tax Credits (2022)	On-demand	Barbara Weltman Sidney Kess	Taxes (2 hours)	Basic	2
1040 Preparation and Planning 8: Adjustments to Gross Income (2022)	On-demand	Barbara Weltman Sidney Kess	Taxes (1 hour)	Intermediate	1
1040 Preparation and Planning 7: Other Income and Exclusions (2022)	On-demand	Barbara Weltman	Taxes (2 hours)	Basic	2

		Sidney Kess			
1040 Preparation and Planning 5: Gross Income: Capital Gains and Losses (2022)	On-demand	Barbara Weltman	Taxes (3 hours)	Basic	3
		Sidney Kess			
1040 Preparation and Planning 4: Gross Income: Interest, Dividends, and Other Ordinary Income (2022)	On-demand	Sidney Kess	Taxes (2 hours)	Basic	2
		Barbara Weltman			
1040 Preparation and Planning 3: Gross Income: Compensation and Fringe Benefits (2022)	On-demand	Sidney Kess	Taxes (1 hour)	Intermediate	1
		Barbara Weltman			
Nonresident Income Allocation and Resident Credits	On-demand	Hodgson Russ LLP	Taxes (2 hours)	Basic	2
		Timothy Noonan			
		Andrew Wright			
		Ariele Doolittle			
		Emma Savino			
Sec. 199A Cutting Edge Tax Strategies: The Ground Rules and Planning to Optimize the QBID	On-demand	Greg White	Taxes (2 hours)	Basic	2
1040 Preparation and Planning 10: Other Taxes (2022)	On-demand	Barbara Weltman	Taxes (2 hours)	Basic	2
		Sidney Kess			
1040 Preparation and Planning 9: Standard Deduction and Itemized Deductions (2022)	On-demand	Barbara Weltman	Taxes (2 hours)	Basic	2
		Sidney Kess			
1040 Preparation and Planning 2: Filing Status (2022)	On-demand	Barbara Weltman	Taxes (1 hour)	Basic	1
		Sidney Kess			
2021 Federal Tax Update	On-demand	Bradley Burnett	Taxes (8 hours)	Update	8
Not-for-Profit Reporting Model	On-demand	Diane Edelstein	Accounting (2 hours)	Basic	2
1040 Preparation and Planning 6: Gross Income: Business, Farm, and Rental Income (2022)	On-demand	Barbara Weltman	Taxes (4 hours)	Intermediate	4
		Sidney Kess			
Like-Kind Exchanges: Qualify as a Valid Section 1031 Exchange	On-demand	Jennifer Kowal	Taxes (2 hours)	Basic	2
Multistate Sales Tax Issues: Digital Products and Services	On-demand	Mark Klein	Taxes (2 hours)	Basic	2
		Joseph Endres			
		Daniel Kelly			
		Hodgson Russ LLP			
GAAP vs. IFRS: US vs. International Issues	On-demand	Pat Patterson	Accounting (6 hours)	Intermediate	6
2021 Federal Tax Update for Individuals	On-demand	Bradley Burnett	Taxes (8 hours)	Update	8
Sec. 199A Cutting Edge Tax Strategies for Wage, Property, and Other Limits	On-demand	Greg White	Taxes (2 hours)	Basic	2
2021 GAAP Update	On-demand	Lewis Fisher	Accounting (2 hours)	Update	2
Sec. 199A Cutting Edge Tax Strategies for Rental Real Estate	On-demand	Greg White	Taxes (2 hours)	Basic	2
Sec. 199A Cutting Edge Tax Strategies for Specified Service Trades or Businesses (SSTBs)	On-demand	Greg White	Taxes (2 hours)	Basic	2
1120S Preparation and Planning 4: Other Schedules and Tax Planning (2022 Edition)	On-demand	Barbara Weltman	Taxes (1 hour)	Basic	1
		Sidney Kess			
1120S Preparation and Planning 3: Schedule K (2022 Edition)	On-demand	Barbara Weltman	Taxes (1 hour)	Basic	1
		Sidney Kess			
1120S Preparation and Planning 2: Business Income, Deductions and Tax Payments (2022 Edition)	On-demand	Barbara Weltman	Taxes (2 hours)	Basic	2
		Sidney Kess			
1120S Preparation and Planning 1: Tax Fundamentals (2022 Edition)	On-demand	Barbara Weltman	Taxes (1 hour)	Basic	1
		Sidney Kess			
1040 Preparation and Planning 1: Fundamentals (2022)	On-demand	Barbara Weltman	Taxes (2 hours)	Basic	2
		Sidney Kess			
2021 Individual Federal Tax Update: Part 2	On-demand	Greg White	Taxes (4 hours)	Update	4

<a href="#">An Accountant's Guide to Cryptocurrency and Blockchain</a>	On-demand	Stephen Yoss	Information Technology (1 hour), Accounting (1 hour)	Basic	2
<a href="#">2021 Individual Federal Tax Update: Part 1</a>	On-demand	Greg White	Taxes (4 hours)	Update	4
<a href="#">A Comprehensive NFP GAAP Update: What's New and Upcoming</a>	On-demand	Deby MacLeod Candi Avery Clark Nuber	Accounting (1 hour), Auditing (1 hour)	Update	2
<a href="#">Estate Administration Process: A Practitioner's Guide</a>	On-demand	Klaralee Charlton	Taxes (2 hours)	Basic	2
<a href="#">Top Accounting and Auditing Issues for 2022 CPE Course: Module 2</a>	Downloadable PDF	Lynn Fountain Pat Patterson Robert Minniti Salvatore Collemi	Accounting (7 hours)	Basic	7
<a href="#">Top Accounting and Auditing Issues for 2022 CPE Course: Module 1</a>	Downloadable PDF	Lynn Fountain Pat Patterson Robert Minniti Salvatore Collemi	Accounting (7 hours)	Basic	7
<a href="#">Family Trusts: Planning to Preserve, Protect and Transfer Wealth for Your Clients</a>	On-demand	Steven Siegel	Taxes (2 hours)	Basic	2
<a href="#">2021 Federal Tax Update for Businesses</a>	On-demand	Bradley Burnett	Taxes (8 hours)	Update	8
<a href="#">Blockchain and Audit Assertions</a>	On-demand	Cory Campbell	Auditing (2 hours)	Intermediate	2
<a href="#">Repatriation after TCJA</a>	On-demand	William Seeger	Taxes (1 hour)	Basic	1
<a href="#">Mastering the AICPA SSARS Requirements</a>	On-demand	Salvatore Collemi	Auditing (2 hours)	Basic	2
<a href="#">Planning with Intentionally Defective Grantor Trusts</a>	On-demand	Steven Siegel	Taxes (2 hours)	Intermediate	2
<a href="#">Principles of Unrelated Business Income and Form 990-T Reporting Requirements</a>	On-demand	Sarah Huang Danielle Silva Clark Nuber	Taxes (2 hours)	Basic	2
<a href="#">Using the COSO Framework</a>	On-demand	Robert Minniti	Accounting (2 hours)	Basic	2
<a href="#">Financial Reporting Tips and Tricks</a>	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
<a href="#">2021 Top 10 Tax Problem Solving Tips</a>	On-demand	Jim Buttonow	Taxes (2 hours)	Basic	2
<a href="#">International Cross Border Transactions</a>	On-demand	Allison McLeod	Taxes (2 hours)	Basic	2
<a href="#">Form 1041 Basics</a>	On-demand	Klaralee Charlton	Taxes (2 hours)	Basic	2
<a href="#">Private Foundation Pitfalls: Self-Dealing, Taxable Expenditures, and More</a>	On-demand	Clark Nuber Sarah Huang Celia Davis	Taxes (2 hours)	Basic	2
<a href="#">2021's Biggest Security and Privacy Concerns</a>	On-demand	Stephen Yoss	Information Technology (2 hours)	Basic	2
<a href="#">Subrecipient Monitoring under Uniform Guidance</a>	On-demand	Diane Edelstein	Auditing (Governmental) (2 hours)	Basic	2
<a href="#">Tax Rules for Vehicles</a>	On-demand	Barbara Weltman	Taxes (1 hour)	Basic	1
<a href="#">1120 Preparation and Planning 6: Estimated Taxes and Special Topics (2022 Edition)</a>	On-demand	Barbara Weltman Sidney Kess	Taxes (1 hour)	Basic	1
<a href="#">1120 Preparation and Planning 5: Tax and Payments (2022 Edition)</a>	On-demand	Barbara Weltman Sidney Kess	Taxes (1 hour)	Basic	1
<a href="#">1120 Preparation and Planning 4: Deductions-Part 2 (2022 Edition)</a>	On-demand	Barbara Weltman Sidney Kess	Taxes (1 hour)	Basic	1
<a href="#">1120 Preparation and Planning 3: Deductions-Part 1 (2022 Edition)</a>	On-demand	Barbara Weltman Sidney Kess	Taxes (2 hours)	Basic	2



1120 Preparation and Planning 2: Income (2022 Edition)	On-demand	Barbara Weltman Sidney Kess	Taxes (1 hour)	Basic	1
1120 Preparation and Planning 1: Introduction to Form 1120 (2022 Edition)	On-demand	Barbara Weltman Sidney Kess	Taxes (1 hour)	Basic	1
Transactional Tax Basis Capital Reporting	On-demand	James Hamill	Taxes (2 hours)	Intermediate	2
How to Process an IRS B-Notice	On-demand	Steven Mercatante	Taxes (2 hours)	Basic	2
Maximizing Foreign Tax Credits: Planning and Compliance after Tax Cuts Jobs Act	On-demand	William Seeger	Taxes (1 hour)	Basic	1
Recent Tax Developments (August 2021)	On-demand	Annette Nellen	Taxes (2 hours)	Update	2
Expense Reimbursement Fraud	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
Mentoring to Increase Employee Retention and Diversity	On-demand	Jennifer Kowal	Business Management & Organization (2 hours)	Basic	2
Select Income Tax Considerations for Crypto and Blockchain Transactions	On-demand	Adnan Islam	Taxes (2 hours)	Intermediate	2
Cutting Edge Tax Strategies for Real Estate: Part 2	On-demand	Greg White	Taxes (4 hours)	Intermediate	4
Anti-deferral Regimes: Subpart F, PFIC, and GILTI after TCJA	On-demand	William Seeger	Taxes (1 hour)	Basic	1
Cutting Edge Tax Strategies for Real Estate: Part 1	On-demand	Greg White	Taxes (4 hours)	Intermediate	4
Developing a Digital Mindset	On-demand	Cory Campbell	Information Technology (2 hours)	Basic	2
The Balance Sheet: Reporting in Compliance with GAAP	On-demand	Lewis Fisher	Accounting (2 hours)	Basic	2
Condo Associations: Reserves and Accounting Issues	On-demand	Pat Patterson	Accounting (2 hours)	Intermediate	2
New Guidance on the Employee Retention Credit	On-demand	Greg White	Taxes (1 hour)	Update	1
Small Business Retirement Plans: Picking the Best Plan for Your Client	On-demand	Greg White	Taxes (2 hours)	Basic	2
How the Pandemic Changed FASB and ASB Effective Dates	On-demand	Pat Patterson	Accounting (2 hours)	Update	2
COVID-19 and Tax Fraud	On-demand	Robert Minniti	Taxes (2 hours)	Basic	2
Fiduciary Income & Estate Tax Issues with Foreign Beneficiaries of Estates & Trusts	On-demand	Klaralee Charlton	Taxes (2 hours)	Intermediate	2
2021 LLCs: Reducing Self-employment Tax and Maximizing the 20% Passthrough Deduction	On-demand	Greg White	Taxes (2 hours)	Intermediate	2
Automating Excel-Based Financial Statements	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
Passive Loss Rules and Real Estate Professionals	On-demand	Annette Nellen	Taxes (2 hours)	Basic	2
When Your Client Dies: Final Form 1040, Post-Death Elections and More	On-demand	Steven Siegel	Taxes (2 hours)	Intermediate	2
Unique Areas for Auditing of Not-for-Profit Organizations	On-demand	Diane Edelstein	Auditing (2 hours)	Basic	2
Money Laundering	On-demand	Robert Minniti	Accounting (1 hour), Auditing (1 hour)	Basic	2
Tax Practice Standards	On-demand	Allison McLeod	Taxes (2 hours)	Basic	2
The Schedule C Hobby Loss Exam	On-demand	Eric Green	Taxes (2 hours)	Basic	2
IRS Practice Series: Conflicts of Interest	On-demand	Eva Rosenberg	Regulatory Ethics (2 hours)	Intermediate	2
IRAs: What You Need to Know about Contributions, Conversions and Distributions	On-demand	Greg White	Taxes (2 hours)	Basic	2
Federal and State Taxation of Deferred Compensation	On-demand	Hodgson Russ LLP Ryan Murphy Amy Walters Andrew Wright	Taxes (2 hours)	Basic	2
How to Audit in a COVID-19 Environment	On-demand	Salvatore Collemi	Auditing (2 hours)	Update	2
IRS Practice Series: After SUCCESSFUL Collections or Audits	On-demand	Eva Rosenberg	Taxes (2 hours)	Intermediate	2
Procurement Standards under Uniform Guidance	On-demand	Diane Edelstein	Auditing (Governmental)	Basic	2

W-8/1042-S Compliance When Making Payments to Non-U.S. Persons	On-demand	Steven Mercatante	(2 hours) Taxes (2 hours)	Basic	2
IRS Practice Series: Computing or Recalculating IRS Assessments for Interest & Penalties	On-demand	Eva Rosenberg	Taxes (2 hours)	Intermediate	2
How to Handle the Top 10 Issues in an IRS Small Business Audit	On-demand	Jim Buttonow	Taxes (2 hours)	Basic	2
Mastering Audit Sampling	On-demand	Salvatore Collemi	Auditing (2 hours)	Intermediate	2
Transfer Pricing and the OECD Base Erosion Profit Shifting Initiative	On-demand	William Seeger	Taxes (1 hour)	Basic	1
Fringe Benefits	On-demand	Barbara Weltman	Taxes (1 hour)	Basic	1
		Sidney Kess			
2021 Fraud Review	On-demand	Robert Minniti	Accounting (4 hours)	Basic	4
Beyond Excel's VLOOKUP Function	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
Form 990: Governance, Transparency, and Transactions with Interested Persons	On-demand	Clark Nuber Lisa McCreedy Kathryn Okimoto	Taxes (2 hours)	Intermediate	2
Telecommuting and Beyond: Tax Issues for the Employer	On-demand	Hodgson Russ LLP Elizabeth Pascal Emma Savino	Taxes (2 hours)	Basic	2
IRS Practice Series: Representing Your Client at a 1040 Audit	On-demand	Eva Rosenberg	Taxes (2 hours)	Intermediate	2
Taxation of Life Insurance Proceeds	On-demand	Klaralee Charlton	Taxes (2 hours)	Basic	2
Basics of Fraud Investigations	On-demand	Robert Minniti	Accounting (2 hours)	Basic	2
Innocent Spouse Relief from Joint Liability	On-demand	Eric Green	Taxes (2 hours)	Intermediate	2
New York City State and New York City Tax Update with an Update on New York Trusts and Estates	On-demand	Hodgson Russ LLP Mark Klein Andrew Wright Katherine Cauley Ariele Doolittle	Taxes (2 hours)	Update	2
Choice of Entity & Tax Issue Entity Formations	On-demand	Jennifer Kowal	Taxes (4 hours)	Basic	4
IRS Practice Series: Circular 230 Considerations and Requirements	On-demand	Eva Rosenberg	Taxes (2 hours)	Basic	2
Staff Training Part 6: S & C Corporations	On-demand	Greg White	Taxes (4 hours)	Basic	4
Staff Training Part 5: Partnerships	On-demand	Greg White	Taxes (5 hours)	Basic	5
Basics of Nexus: Understanding State Tax Issues	On-demand	Annette Nellen	Taxes (2 hours)	Basic	2
State Taxation of Passthrough Entities and the Federal Deduction	On-demand	Hodgson Russ LLP Christopher Doyle Elizabeth Pascal William Turkovich	Taxes (2 hours)	Basic	2
How to Resolve the Most Common IRS Notices	On-demand	Jim Buttonow	Taxes (2 hours)	Basic	2
Staff Training Part 4: Individuals	On-demand	Greg White	Taxes (4 hours)	Basic	4
Staff Training Part 3: Individuals	On-demand	Greg White	Taxes (5 hours)	Basic	5
Payroll Tax Returns Deluged with Change	On-demand	Bradley Burnett	Taxes (2 hours)	Basic	2
Form 5471 Compliance after Tax Reform	On-demand	John Samtoy	Taxes (2 hours)	Basic	2
More Excel Speed Tips	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
Preparation of State Level Estate Tax Returns	On-demand	Klaralee Charlton	Taxes (2 hours)	Intermediate	2
Nexus in the Post-Wayfair/Post-COVID World	On-demand	Christopher Doyle Joseph Endres K. Craig Reilly Hodgson Russ LLP	Taxes (2 hours)	Basic	2



Getting Ahead of the Emerging Technology Curve: Blockchain, AI & Big Data	On-demand	Stephen Yoss	Information Technology (2 hours)	Basic	2
Employee Benefit Plans Update: Accounting Principles & Auditing Considerations	On-demand	Lewis Fisher	Auditing (2 hours)	Update	2
S Corporations Part 4: Ordinary Losses on Stock Sales, Exit Strategies, and K-1 Conformity	On-demand	Greg White	Taxes (2 hours)	Basic	2
How to Properly Perform an Agreed-Upon Procedures Engagement	On-demand	Salvatore Collemi	Auditing (2 hours)	Intermediate	2
The Statement of Cash Flows: Compliance and Presentation Update	On-demand	Lewis Fisher	Accounting (2 hours)	Update	2
Staff Training Part 2: Individuals	On-demand	Greg White	Taxes (4 hours)	Basic	4
Staff Training Part 1: Individuals	On-demand	Greg White	Taxes (5 hours)	Basic	5
IRS Practice Series: The Un-agreed Collection Alternatives and Appeals	On-demand	Eva Rosenberg	Taxes (2 hours)	Intermediate	2
CPA's Guidebook for Ethical Behavior: Code of Professional Conduct	On-demand	Allison McLeod	Regulatory Ethics (2 hours)	Basic	2
How to Build Strong Client Communication Skills for Tax Practice	On-demand	Jennifer Kowal	Communications & Marketing (2 hours)	Basic	2
How to Avoid Common Peer Review Pitfalls	On-demand	Salvatore Collemi	Auditing (2 hours)	Intermediate	2
Cryptocurrency and Taxes	On-demand	Robert Minniti	Taxes (2 hours)	Basic	2
Form 990:Exempt Organization Fundraising, Donor Acknowledgement, Gifts in Kind, Special Events,Galas	On-demand	Celia Davis	Taxes (2 hours)	Intermediate	2
		Kathryn Okimoto			
		Clark Nuber			
Post Death IRA Transactions	On-demand	Klaralee Charlton	Taxes (2 hours)	Basic	2
Sales Tax Update: Digital Products and Services	On-demand	Hodgson Russ LLP	Taxes (2 hours)	Basic	2
		Joseph Endres			
		Daniel Kelly			
		Katherine Piazza			
Auditing Internal Controls for Governments	On-demand	Robert Minniti	Auditing (Governmental) (2 hours)	Intermediate	2
S Corporations Part 3: Maximizing the Â§199A QBID and Other Planning Insights	On-demand	Greg White	Taxes (2 hours)	Basic	2
IRS Practice Series: 6 Simple Steps to an Offer-in-Compromise: Completing Form 656	On-demand	Eva Rosenberg	Taxes (2 hours)	Advanced	2
Like Kind Exchanges	On-demand	Allison McLeod	Taxes (2 hours)	Basic	2
Auditing and Internal Control Issues	On-demand	Pat Patterson	Auditing (2 hours)	Intermediate	2
How to Bring a Whistleblower Claim	On-demand	Eric Green	Taxes (2 hours)	Basic	2
Major Audit Issues: SAS 141, 142, and 143	On-demand	Pat Patterson	Auditing (2 hours)	Basic	2
Residency Part II: A Multistate (and Multinational) Perspective	On-demand	Hodgson Russ LLP	Taxes (2 hours)	Basic	2
		Timothy Noonan			
		James Bandoblu, Jr.			
		Daniel Kelly			
S Corporations Part 2: Determining Reasonable Compensation	On-demand	Greg White	Taxes (2 hours)	Basic	2
IRS Practice Series: Hands-on Collections Workshop	On-demand	Eva Rosenberg	Taxes (2 hours)	Basic	2
Reporting for US Beneficiaries and Grantors of Foreign Trusts: Forms 3520 and 3520-A	On-demand	John Samtoy	Taxes (2 hours)	Basic	2
1099 Essentials	On-demand	Steven Mercatante	Taxes (2 hours)	Basic	2
Managing Millennials	On-demand	Jennifer Kowal	Business Management & Organization (2 hours)	Basic	2
Residency Part I: New York Issues	On-demand	Hodgson Russ LLP	Taxes (2 hours)	Basic	2
		Andrew Wright			

Ethics Checklist for Tax Practitioners	On-demand	Kristine Bly K. Craig Reilly Annette Nellen	Regulatory Ethics (2 hours)	Basic	2
S Corporations Part 1: Converting C Corps to S Corps	On-demand	Greg White	Taxes (2 hours)	Basic	2
A Basic Ethics Guidebook for Florida CPAs	On-demand	Allison McLeod	Regulatory Ethics (4 hours)	Basic	4
S Corporation Taxation Strategies	On-demand	Greg White	Taxes (8 hours)	Basic	8
Global Intangible Low-Taxed Income and Form 8992	On-demand	William Seeger	Taxes (1 hour)	Basic	1
IRS Practice Series: 10 Steps to Resolving Collection Issues	On-demand	Eva Rosenberg	Taxes (2 hours)	Basic	2
Settling Your Tax Bill for Less: Myths vs. Reality	On-demand	Jim Buttonow	Taxes (2 hours)	Basic	2
Corporate Controller in Today's Environment: Part 2	On-demand	Miles Hutchinson	Business Management & Organization (2 hours)	Basic	2
Corporate Controller in Today's Environment: Part 1	On-demand	Miles Hutchinson	Business Management & Organization (2 hours)	Basic	2
Revenue Recognition: What CPAs Need to Know	On-demand	Pat Patterson	Accounting (2 hours)	Basic	2
General Ethics for CPAs	On-demand	Allison McLeod	Regulatory Ethics (3 hours)	Basic	3
Self Employment Tax: Today's World of Sharing, LLCs & Tax Reform	On-demand	Annette Nellen	Taxes (2 hours)	Basic	2
Income in Respect of a Decedent	On-demand	Klaralee Charlton	Taxes (2 hours)	Basic	2
Small Business Tax Frauds	On-demand	Robert Minniti	Accounting (1 hour), Auditing (1 hour)	Basic	2
IRS Practice Series: 10 Steps to Release IRS Levies on Paychecks or Bank Accounts	On-demand	Eva Rosenberg	Taxes (2 hours)	Basic	2
Income Taxation of Trusts and Estates	On-demand	Steven Siegel	Taxes (2 hours)	Basic	2
Tax Issues Involving Distressed Debt	On-demand	Jennifer Kowal	Taxes (2 hours)	Basic	2
Partnership and LLC Taxation: Entities Taxed as Partnerships	On-demand	Greg White	Taxes (8 hours)	Basic	8
Fundamentals of Hedge Fund NAV Accounting	On-demand	Rita BasuMallick	Accounting (2 hours)	Intermediate	2
Ethical and Audit Considerations of Cryptocurrency	On-demand	Blair Cook Jennifer Nicholson	Auditing (1 hour)	Basic	1
Mastering the Six Traits of Executive You	On-demand	Blair Cook Jennifer Nicholson	Personnel/HR (5 hours)	Basic	5
Corporate Finance Principles	On-demand	Blair Cook	Finance (1 hour)	Basic	1
How to Analyze Financial Statements	On-demand	Miles Hutchinson	Accounting (2 hours)	Basic	2
When Is 1099 Back-Up Backup Withholding Required?	On-demand	Steven Mercatante	Taxes (2 hours)	Basic	2
How to Deal with Difficult People	On-demand	Lynn Fountain	Business Management & Organization (2 hours)	Basic	2
Schedule C of Form 1040	On-demand	Allison McLeod	Taxes (2 hours)	Basic	2
IRS Enforcement in 2021 and Beyond: A Review of the IRS's Priorities and Enforcement Programs	On-demand	Eric Green	Taxes (2 hours)	Basic	2
S Corporation and Shareholder Tax Reporting	On-demand	James Hamill	Taxes (2 hours)	Intermediate	2
2021 GAAP, GAAS, & SSARS Update	On-demand	Pat Patterson	Accounting (1 hour), Auditing (1 hour)	Update	2
Benefits and Hazards of Excel Office 365	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Basic	2
S Corporation Exit Strategies	On-demand	Jennifer Kowal	Taxes (2 hours)	Intermediate	2
Change Management: Being A Catalyst CFO	On-demand	Blair Cook	Management Services (1 hour)	Basic	1

Thinking and Acting Strategically as CFO	On-demand	Blair Cook	Business Management & Organization (1 hour)	Basic	1
Understanding the Federal Gift Tax	On-demand	Steven Siegel	Taxes (2 hours)	Overview	2
Regulatory Ethics Guidebook for CPAs: AICPA Code of Professional Conduct	On-demand	Allison McLeod	Regulatory Ethics (4 hours)	Basic	4
Capital Budgeting: Analysis that Improves Long-term ROI	On-demand	Blair Cook	Finance (1 hour)	Intermediate	1
Presentation Skills for Finance Professionals and Executives that Make an Impact	On-demand	Blair Cook	Management Services (1 hour)	Basic	1
Five Ways COVID-19 Will Change Risk Thinking	On-demand	Blair Cook Jennifer Nicholson	Management Services (1 hour)	Basic	1
Form 5472 Compliance for U.S. Corporations, Foreign Corporations, and Disregarded Entities	On-demand	John Samtoy	Taxes (2 hours)	Basic	2
Tax Credits for Individuals	On-demand	Barbara Weltman Sidney Kess	Taxes (1 hour)	Basic	1
Intermediate Excel Pivot Table Techniques	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
Cybersecurity for Employees Working from Home	On-demand	Robert Minniti	Information Technology (2 hours)	Basic	2
Recent Tax Developments (April 2021)	On-demand	Annette Nellen	Taxes (2 hours)	Update	2
New COVID-19 Frauds and Scams	On-demand	Robert Minniti	Accounting (2 hours)	Basic	2
Tax Implications in a New Remote Work Environment: State Tax Nexus and Income Tax Issues	On-demand	Timothy Noonan	Taxes (2 hours)	Basic	2
Social Security and Medicare Planning Update	On-demand	Steven Siegel	Specialized Knowledge and Applications (2 hours)	Update	2
SEC Financial Reports: Focus on Form 10K and 10Q	On-demand	Lynn Fountain	Accounting (2 hours)	Basic	2
Tax Treatment of Individual Retirement Arrangements	On-demand	PCS Instructor	Taxes (2 hours)	Basic	2
SEC Rulemaking and Enforcement	On-demand	Lynn Fountain	Accounting (2 hours)	Basic	2
The American Rescue Plan of 2021: COVID-19 Pandemic Recovery	On-demand	Jennifer Kowal	Taxes (2 hours)	Update	2
Working with the Cloud During Tough Times	On-demand	Stephen Yoss	Information Technology (2 hours)	Basic	2
2020 Form 990 Overview: A Walk thru of Form 990 and Common Schedules	On-demand	Clark Nuber Carolyn Fjelstad Sara Elizabeth Hyre	Taxes (2 hours)	Overview	2
The American Rescue Plan of 2021: COVID-19 Pandemic Recovery	On-demand	Jennifer Kowal	Taxes (4 hours)	Update	4
The Art of Being A Good Manager: Part 2: Generational and Cultural Considerations	On-demand	Lynn Fountain	Personnel/HR (2 hours)	Basic	2
Accounting and Financial Reporting Considerations Related to COVID and The Economic Downturn	On-demand	Lynn Fountain	Accounting (1 hour), Auditing (1 hour)	Basic	2
COVID-19 Stimulus Plans: What You Need to Know	On-demand	Robert Minniti	Accounting (1 hour), Auditing (1 hour)	Basic	2
Introduction to Cost Accounting	On-demand	Robert Minniti	Accounting (2 hours)	Basic	2
Credit Card & Cash Frauds	On-demand	Robert Minniti	Accounting (1 hour), Auditing (1 hour)	Basic	2
The Art of Being A Good Manager: Part 1: Traits and Skills in the New Normal	On-demand	Lynn Fountain	Personnel/HR (2 hours)	Basic	2
SEC Filing and Reporting Requirements: Regulation S-X, S-K and 8K	On-demand	Lynn Fountain	Accounting (2 hours)	Basic	2
SEC Mandates and Programs	On-demand	Lynn Fountain	Accounting (2 hours)	Basic	2

SEC Structure and Responsibility	On-demand	Lynn Fountain	Accounting (2 hours)	Basic	2
Education Tax Benefits	On-demand	PCS Instructor	Taxes (2 hours)	Basic	2
Introduction to Cyber Fraud	On-demand	Robert Minniti	Accounting (1 hour), Auditing (1 hour)	Basic	2
Tax Implications of Cryptocurrency	On-demand	Allison McLeod	Taxes (2 hours)	Basic	2
Tax Treatment of Retirement Plans, Pensions, and Annuities	On-demand	PCS Instructor	Taxes (2 hours)	Basic	2
American Rescue Plan Act of 2021	On-demand	Annette Nellen	Taxes (1 hour)	Update	1
Building Your Professional Presence	On-demand	Annette Nellen	Personnel/HR (2 hours)	Basic	2
Common Estate Planning Mistakes and How to Avoid Them	On-demand	Steven Siegel	Taxes (2 hours)	Basic	2
Excel 101: Pivot Tables	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Basic	2
Economic Stimulus: Federal Response to the Coronavirus Pandemic: Including the American Rescue Plan	Downloadable PDF	PCS Instructor	Taxes (2 hours)	Update	2
2021 Annual Government Accounting & Auditing Quarterly Update: Winter	On-demand	Robert Minniti	Accounting (Governmental) (1 hour), Auditing (Governmental) (1 hour)	Update	2
Partnership Tax Allocations under Sections 704(b) and 704(c)	On-demand	James Hamill	Taxes (2 hours)	Intermediate	2
Phishing, Vishing, & Smishing: Protecting your Organization from Frauds	On-demand	Robert Minniti	Accounting (2 hours)	Basic	2
Gift Tax Biggest Reporting Issues & Mistakes	On-demand	Klaralee Charlton	Taxes (2 hours)	Basic	2
Tax Ethics and Circular 230	On-demand	Jennifer Kowal	Regulatory Ethics (2 hours)	Basic	2
The U.S. Contributions to BEPS: GILTI and BEAT	On-demand	William Seeger	Taxes (1 hour)	Basic	1
Love and Marriage: The "Hard Talk" with Clients Getting Married	On-demand	Eva Rosenberg	Taxes (2 hours)	Basic	2
Tax Checklist for Knotty Divorces	On-demand	Eva Rosenberg Armand D'Alo Robbin D'Alo	Taxes (2 hours)	Intermediate	2
Charitable Remainder Trusts and Preparing Form 5227	On-demand	Steven Siegel	Taxes (2 hours)	Intermediate	2
Creative Grantmaking Strategies for Private Foundations	On-demand	Sarah Huang Kathryn Okimoto Clark Nuber	Taxes (2 hours)	Intermediate	2
Amending Form 1040: Filing 1040X	On-demand	Barbara Weltman Sidney Kess	Taxes (1 hour)	Basic	1
Taxation of Trusts and Estates and Preparing Form 1041*	On-demand	Steven Siegel	Taxes (8 hours)	Intermediate	8
The Unified Solution to BEPS Challenges in the New Economy: Update on Pillar One and Two	On-demand	William Seeger	Taxes (1 hour)	Basic	1
Special Gift Tax Issues	On-demand	Klaralee Charlton	Taxes (2 hours)	Basic	2
Going Concerns: New Issues 2021	On-demand	Pat Patterson	Accounting (1 hour), Auditing (1 hour)	Update	2
Going Concern: SAS 132	On-demand	Pat Patterson	Auditing (2 hours)	Basic	2
Everyday Tax Rules: Tax Tips from 38 Years in the Trenches	On-demand	Greg White	Taxes (2 hours)	Basic	2
ASC 606 Revenue Recognition: Allocating Transaction Price to Performance Obligations	On-demand	Lynn Fountain	Accounting (2 hours)	Basic	2
Payroll Protection Program and Forgiveness Calculation Update	On-demand	Lynn Fountain	Accounting (1 hour), Auditing (1 hour)	Update	2
You CAN Fix the IRS: Resolving IRS Systemic Problems	On-demand	Eva Rosenberg	Taxes (2 hours)	Basic	2
Year-End Accounting and Tax Considerations for Not-for-Profits	On-demand	Sarah Huang Andrew Prather	Taxes (2 hours)	Basic	2

FBAR FinCEN Form 114 vs. IRS Form 8938-SFFA	On-demand	Marc Strohl	Taxes (1 hour)	Intermediate	1
Tax Issues Involving Troubled Borrowers	On-demand	Jennifer Kowal	Taxes (2 hours)	Intermediate	2
Partnership Tax Filing Issues	On-demand	James Hamill	Taxes (2 hours)	Intermediate	2
2021 Estate & Financial Planning Quarterly Update (Winter)	On-demand	Klaralee Charlton	Taxes (2 hours)	Update	2
Accounting for Managers	On-demand	Robert Minniti	Accounting (2 hours)	Basic	2
Financial Instruments: What CPAs Need to Know for 2021	On-demand	Pat Patterson	Accounting (2 hours)	Basic	2
Identity Theft	On-demand	Robert Minniti	Accounting (1 hour), Auditing (1 hour)	Basic	2
Auditing for Revenue Recognition	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
Lightning Fast Depreciation: The World of Depreciation (Updated for CARES Act)	On-demand	Greg White	Taxes (4 hours)	Intermediate	4
Audit Issues in a Pandemic	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
Auditing PPP & EIDL Loans	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
Consolidated Appropriations Act 2021: Tax Changes Galore	On-demand	Annette Nellen	Taxes (2 hours)	Update	2
Tax Issues for Nonresident Aliens Workers: Forms 1040NR	On-demand	Marc Strohl	Taxes (2 hours)	Intermediate	2
Fair Value Option for Financial Instruments	On-demand	Pat Patterson	Accounting (2 hours)	Intermediate	2
Impact on Reasonable Compensation for S Corp Shareholder: Employees	On-demand	Greg White	Taxes (2 hours)	Intermediate	2
Accounting for Financial Instruments with Characteristics of Both Liabilities and Equity	On-demand	Pat Patterson	Accounting (2 hours)	Intermediate	2
Accounting for Intangibles and Research and Development Costs	On-demand	Pat Patterson	Accounting (2 hours)	Intermediate	2
How 2020 Impacted Estate Planning	On-demand	Klaralee Charlton	Taxes (2 hours)	Basic	2
Partnership Debt Sharing Under Section 752	On-demand	James Hamill	Taxes (2 hours)	Intermediate	2
Compilation, Preparation, and COVID-19	On-demand	Pat Patterson	Accounting (2 hours)	Intermediate	2
ASC 606 Revenue Recognition: Complying with the Revenue Recognition Standards	On-demand	Lynn Fountain	Accounting (2 hours)	Basic	2
ASC 606 Revenue Recognition: Identify Performance Obligations	On-demand	Lynn Fountain	Accounting (2 hours)	Basic	2
Fair Value Measurements	On-demand	Pat Patterson	Accounting (2 hours)	Intermediate	2
Crucial Changes Affecting Real Estate Taxation	On-demand	Greg White	Taxes (2 hours)	Intermediate	2
Worker Classification: Dealing with Current Rules and What Might Lie Ahead	On-demand	Annette Nellen	Taxes (2 hours)	Basic	2
A Deep Dive into Depreciation Changes	On-demand	Greg White	Taxes (2 hours)	Intermediate	2
PPP Loans: Update and Completing Forgiveness Applications	On-demand	Greg White	Taxes (2 hours)	Update	2
Tax Updates for Businesses	On-demand	Barbara Weltman	Taxes (1 hour)	Update	1
Accounting Standards for CPAs: Winter Update	On-demand	Pat Patterson	Accounting (2 hours)	Update	2
Advanced Staff Training: Accepting New Clients & Client Review	On-demand	Robert Minniti	Auditing (2 hours)	Advanced	2
Section 1031 Exchanges: Qualification and Tax Reporting	On-demand	James Hamill	Taxes (2 hours)	Basic	2
Foreign Earned Income: Form 2555 Exclusion Reporting and Other Tax Issues for Expat Workers	On-demand	Marc Strohl	Taxes (2 hours)	Intermediate	2
Preparing Personal Financial Statements Update	On-demand	Pat Patterson	Accounting (2 hours)	Basic	2
Tax Updates for Individuals	On-demand	Barbara Weltman	Taxes (1 hour)	Update	1
Tax Reform in the 117th Congress	On-demand	Annette Nellen	Taxes (2 hours)	Update	2
Marketing the CPA in Public Practice	On-demand	David Osburn	Personnel/HR (2 hours)	Basic	2
PPP Deductions, PPP Loans, EIDLs and Recovery Rebates	On-demand	Greg White	Taxes (1 hour)	Update	1
Sec. 199A A to Z: A Comprehensive Approach to the Biggest Tax Break in Decades	On-demand	Greg White	Taxes (8 hours)	Update	8
Disaster Recovery and Business Continuity for Accountants and Financial Professionals	On-demand	Stephen Yoss	Information Technology (2 hours)	Basic	2
Reporting in a Single Audit	On-demand	Diane Edelstein	Auditing (Governmental)	Basic	2

Minimizing Data Entry in Excel	On-demand	David Ringstrom	(2 hours) Computer Software & Applications (2 hours)	Basic	2
Elder Care and Taxes	On-demand	Barbara Weltman Sidney Kess	Taxes (1 hour)	Basic	1
New Form 1065 Requirement: Computing Tax Basis Capital Accounts	On-demand	Greg White	Taxes (1 hour)	Update	1
Tax Return Identity Theft	On-demand	Robert Minniti	Taxes (2 hours)	Basic	2
Travel & Entertainment Best Practices: Prevent Fraud and Comply with IRS Regs	On-demand	Mary Schaeffer	Accounting (2 hours)	Basic	2
Corporate Tax: Formation and Operation	On-demand	Jennifer Kowal	Taxes (2 hours)	Basic	2
Accounts Payable Best Practices for Financial Professionals	On-demand	Mary Schaeffer	Accounting (2 hours)	Basic	2
ASC 740 Part 2: Practical Application for Income Taxes Based on Income	On-demand	Lynn Fountain	Accounting (2 hours)	Intermediate	2
Getting Started with CCH CPELink - Administrator On Boarding	On-demand	CPE Link		Overview	0
Recognizing Accounting Method Changes & Effects	On-demand	Jennifer Kowal	Taxes (2 hours)	Intermediate	2
ASC 740 Part 1: Practical Application for Accounting for Income Taxes Based on Income	On-demand	Lynn Fountain	Accounting (2 hours)	Basic	2
Master the Latest IRS Standards for Tax Practice under Circular 230	On-demand	Michael Goller	Taxes (2 hours)	Basic	2
W-9 Best Practices	On-demand	Steven Mercatante	Taxes (2 hours)	Basic	2
Fixed Asset Accounting	On-demand	Robert Minniti	Accounting (2 hours)	Basic	2
2020 Estate & Financial Planning Update	On-demand	Klaralee Charlton	Taxes (2 hours)	Update	2
How to Avoid the Most Common Errors in Tax Problem Solving	On-demand	Jim Buttonow	Taxes (2 hours)	Basic	2
What You Need to Know About the IFAC Standards	On-demand	Salvatore Collemi	Auditing (2 hours)	Basic	2
Cybersecurity for Tax Professionals	On-demand	Robert Minniti	Taxes (2 hours)	Basic	2
Nonresident Income Allocation and Withholding Issues During and after COVID	On-demand	Elizabeth Pascal Ariele Doolittle Hodgson Russ LLP	Taxes (2 hours)	Basic	2
A Closer Look Into Installment Sales	On-demand	Jennifer Kowal	Taxes (2 hours)	Intermediate	2
Athletes and Entertainers: Multistate Tax Issues	On-demand	Timothy Noonan	Taxes (2 hours)	Intermediate	2
Excel 101: Introduction to Spreadsheets Part 2	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Basic	2
Audits of Cash Businesses	On-demand	Eric Green	Taxes (2 hours)	Basic	2
2020 Annual Government Accounting & Auditing Update	On-demand	Robert Minniti	Accounting (Governmental) (1 hour), Auditing (Governmental) (1 hour)	Update	2
Top Federal Tax Issues for 2021 CPE Course: Module 4	Downloadable PDF	Klaralee Charlton	Taxes (3 hours)	Basic	3
Top Federal Tax Issues for 2021 CPE Course: Module 3	Downloadable PDF	Jennifer Kowal Greg White	Taxes (4 hours)	Basic	4
Top Federal Tax Issues for 2021 CPE Course: Module 2	Downloadable PDF	Greg White Jennifer Kowal Annette Nellen	Taxes (6 hours)	Basic	6
Top Federal Tax Issues for 2021 CPE Course: Module 1	Downloadable PDF	Annette Nellen James Hamill	Taxes (6 hours)	Basic	6
ASC 606 Revenue Recognition: Determining Transaction Price	On-demand	Lynn Fountain	Accounting (2 hours)	Basic	2
Capital Gain or Ordinary Income?	On-demand	Jennifer Kowal	Taxes (2 hours)	Intermediate	2
Excel 101: Introduction to Spreadsheets Part 1	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Basic	2
The Criminal Investigation Process	On-demand	Eric Green	Taxes (2 hours)	Basic	2



Nexus and Apportionment Issues During and After COVID	On-demand	Christopher Doyle K. Craig Reilly Hodgson Russ LLP	Taxes (2 hours)	Basic	2
2020 Federal Tax Update for Businesses	On-demand	Greg White	Taxes (8 hours)	Update	8
Section 951A (GILTI) Final High Tax Exception 2020 Regulations	On-demand	Adnan Islam	Taxes (2 hours)	Overview	2
2020 Federal Tax Update for Individuals	On-demand	Greg White	Taxes (8 hours)	Update	8
Trust Fundamentals: A Practical Primer for Tax Practitioners	On-demand	Steven Siegel	Taxes (2 hours)	Basic	2
Multistate Income Tax for Passthrough Entities	On-demand	Michael Bannasch	Taxes (2 hours)	Basic	2
How to Audit Under the New Leasing Standard	On-demand	Salvatore Collemi	Accounting (1 hour), Auditing (1 hour)	Intermediate	2
2020 Federal Tax Update for Businesses	On-demand	Bradley Burnett	Taxes (4 hours)	Update	4
New York Sales and Use Tax Update and Hot Topics	On-demand	Joseph Endres Daniel Kelly Hodgson Russ LLP	Taxes (2 hours)	Update	2
Basis Basics for S Corporation Shareholders	On-demand	James Hamill	Taxes (1 hour)	Basic	1
Final FDI (Section 250) Regulations	On-demand	Adnan Islam	Taxes (2 hours)	Intermediate	2
Taming Large Excel Spreadsheets	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
Interest Expense Deductions for Individuals and Businesses	On-demand	Barbara Weltman Sidney Kess	Taxes (1 hour)	Basic	1
New York Residency: Issues During COVID and Beyond	On-demand	Timothy Noonan Andrew Wright Hodgson Russ LLP	Taxes (2 hours)	Basic	2
Working with Small Businesses in Bankruptcy	On-demand	Robert Minniti	Finance (2 hours)	Basic	2
Advanced Cash Flow Analysis	On-demand	David Osburn	Accounting (2 hours)	Basic	2
Criminal Tax For Accountants: What Every Practitioner Needs to Know	On-demand	Eric Green	Taxes (2 hours)	Intermediate	2
Segment Reporting: A Detailed Review	Downloadable PDF	Kelen Camehl	Accounting (2 hours)	Basic	2
Segment Reporting Basics	Downloadable PDF	Kelen Camehl	Accounting (1 hour)	Basic	1
2020 Federal Tax Update	On-demand	Greg White	Taxes (8 hours)	Update	8
Creating Error-Proof Excel Spreadsheets	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Basic	2
Resolving Payroll Tax Issues	On-demand	Eric Green	Taxes (2 hours)	Basic	2
Top Accounting and Auditing Issues for 2021 CPE Course: Module 3	Downloadable PDF	Robert Minniti	Accounting (4 hours)	Basic	4
Top Accounting and Auditing Issues for 2021 CPE Course: Module 2	Downloadable PDF	Lynn Fountain Pat Patterson Robert Minniti	Auditing (7 hours)	Basic	7
Top Accounting and Auditing Issues for 2021 CPE Course: Module 1	Downloadable PDF	Kelen Camehl Lynn Fountain	Accounting (4 hours)	Basic	4
How to Perform An Effective Internal Inspection of Your Attest Practice	On-demand	Salvatore Collemi	Auditing (2 hours)	Basic	2
Goodwill Impairment Basics and Testing	Downloadable PDF	Kelen Camehl	Accounting (3 hours)	Basic	3
Base Erosion Profit Shifting (BEPS) in the Area of Digital Economy	On-demand	William Seeger	Taxes (1 hour)	Basic	1
Final Pay, Reimbursements, & Other Paycheck Administration Pitfalls	On-demand	Robert Minniti	Accounting (Governmental) (2 hours)	Basic	2
Taxation of Employee Stock & Stock Options	On-demand	Jennifer Kowal	Taxes (2 hours)	Intermediate	2
FASB's Big 3 Project Overview: Leases, Financial Instruments & Revenue Recognition	On-demand	Pat Patterson	Accounting (1 hour), Auditing (1 hour)	Overview	2
Cloud Computing for Accountants and Financial Professionals	On-demand	Stephen Yoss	Information Technology (2 hours)	Basic	2

Government Risk Assessments	On-demand	Robert Minniti	Accounting (Governmental) (1 hour), Auditing (Governmental) (1 hour)	Basic	2
External Reporting Decisions: CMA Exam 1 - Section A	On-demand	Tom Coghlan	Finance (6 hours)	Overview	6
Deferred Compensation	On-demand	Jennifer Kowal	Taxes (4 hours)	Basic	4
Basis Planning Opportunities in Estate Planning	On-demand	Jennifer Kowal	Taxes (2 hours)	Basic	2
Auditing Excel Spreadsheets	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
2020 Tax Legislation Economy vs. Pandemic: How Congress Continues to Respond	On-demand	Bradley Burnett	Taxes (4 hours)	Update	4
The Biggest Mistakes Made During Tax Season that Trigger IRS Enforcement!	On-demand	Eric Green	Taxes (2 hours)	Basic	2
Excess Business Losses - \$461(l) and Net Operating Losses (NOLs)	On-demand	Bradley Burnett	Taxes (2 hours)	Basic	2
Disasters and Taxes: Tax Treatment of Casualty Losses	On-demand	Steven Siegel	Taxes (2 hours)	Basic	2
SQL For Excel Users	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
Tax Consequences of Business Breakups	On-demand	Jennifer Kowal	Taxes (2 hours)	Basic	2
IRS Tax Problem Solving Fundamentals	On-demand	Jim Buttonow	Taxes (2 hours)	Basic	2
S Corporation Basis: How to Calculate the Stock Basis	On-demand	Jennifer Kowal	Taxes (2 hours)	Basic	2
State Tax Issues for Service Businesses	On-demand	Timothy Noonan	Taxes (2 hours)	Intermediate	2
Partnership and S Corporation Tax Filing Issues after Tax Reform	On-demand	James Hamill	Taxes (2 hours)	Basic	2
Hot Tech Tools, Apps, & Services for Accountants and Financial Professionals	On-demand	Stephen Yoss	Computer Software & Applications (2 hours)	Basic	2
Compilation & Review in the Red Zone	On-demand	Pat Patterson	Accounting (2 hours)	Intermediate	2
Documenting Economic Damages from Civil Unrest	On-demand	Robert Minniti	Accounting (1 hour)	Basic	1
Reporting Partnership Targeted Tax Allocations	On-demand	James Hamill	Taxes (2 hours)	Intermediate	2
Borrower Beware: Defending PPP Loans from After-the-Fact Government Scrutiny	On-demand	Jason Markel Reetuparna Dutta Benjamin Zuffranieri, Jr. Hodgson Russ LLP	Taxes (1 hour)	Update	1
What You Need to Know About the New Leasing Standard	On-demand	Salvatore Collemi	Accounting (2 hours)	Intermediate	2
Recent Tax Developments (August 2020)	On-demand	Annette Nellen	Taxes (2 hours)	Update	2
Documenting COVID-19 Economic Damages	On-demand	Robert Minniti	Accounting (2 hours)	Basic	2
COVID-19 Issues for Government Accountants and Auditors	On-demand	Robert Minniti	Accounting (Governmental) (1 hour), Auditing (Governmental) (1 hour)	Basic	2
Credit Analysis Basics: The ABCs of Underwriting	On-demand	David Osburn	Accounting (2 hours)	Basic	2
Tax Liens and Levies	On-demand	Eric Green	Taxes (2 hours)	Basic	2
Planning for the Death of the Majority Shareholder	On-demand	Klaralee Charlton	Taxes (2 hours)	Basic	2
Regulatory Review for California CPAs	On-demand	Pat Patterson	Regulatory Ethics (2 hours)	Overview	2
Small Business Taxes Made Easy: Special Considerations for Online Businesses	On-demand	Eva Rosenberg	Taxes (2 hours)	Basic	2
Proving Material Participation for the Passive Loss Rules	On-demand	James Hamill	Taxes (2 hours)	Intermediate	2
The Schedule of Expenditures of Federal Awards (SEFA)	On-demand	Diane Edelstein	Auditing (Governmental) (2 hours)	Basic	2

Charitable Contributions by Individuals and Businesses	On-demand	Barbara Weltman Sidney Kess	Taxes (1 hour)	Basic	1
A CPA's Guidebook to Ethical Behavior: A CPE Ethics Course for Texas CPAs	On-demand	Allison McLeod	Regulatory Ethics (4 hours)	Overview	4
Small Business Taxes Made Easy: Estimated Tax Payments	On-demand	Eva Rosenberg	Taxes (2 hours)	Basic	2
Debt or Equity?	On-demand	Jennifer Kowal	Taxes (2 hours)	Intermediate	2
Asset Protection for Pandemic Preparedness	On-demand	Klaralee Charlton	Taxes (2 hours)	Basic	2
Small Business Taxes Made Easy: Owners' Fringe Benefits, Retirement, and Tax Deferment	On-demand	Eva Rosenberg	Taxes (2 hours)	Basic	2
Why Estate Planning Is Still Alive for Those Not Subject to the Estate Tax	On-demand	Klaralee Charlton	Taxes (2 hours)	Basic	2
Crucial Real Estate Insights Part 3: 199A Deductions for Real Estate	On-demand	Greg White	Taxes (2 hours)	Basic	2
Crucial Real Estate Insights Part 4: Passive Loss Issues and Dispositions	On-demand	Greg White	Taxes (2 hours)	Basic	2
Small Business Taxes Made Easy: Employees and Independent Contractors	On-demand	Eva Rosenberg	Taxes (2 hours)	Basic	2
COVID-19: Accountant's Compilation Engagements	On-demand	Pat Patterson	Accounting (2 hours)	Intermediate	2
SBA PPP Loan Forgiveness Application: What Small Business Owners Need to Know	On-demand	Robert Minniti	Taxes (2 hours)	Update	2
Crucial Real Estate Insights Part 2: Depreciation and Partial Dispositions	On-demand	Greg White	Taxes (2 hours)	Basic	2
Small Business Taxes Made Easy: Vehicles	On-demand	Eva Rosenberg	Taxes (2 hours)	Basic	2
Income Tax Apportionment	On-demand	Michael Bannasch	Taxes (2 hours)	Basic	2
Crucial Real Estate Insights Part 1: Acquisition Strategies	On-demand	Greg White	Taxes (2 hours)	Basic	2
Accounting for Business Combinations	Downloadable PDF	Kelen Camehl	Accounting (4 hours)	Overview	4
Bad Debt Deductions and Debt Write Offs	On-demand	Jennifer Kowal	Taxes (2 hours)	Intermediate	2
Collecting Bad Debts and the Fair Debt Collections Practices Act (FDCPA)	On-demand	Robert Minniti	Accounting (2 hours)	Basic	2
Code Sec. 83 and 83(b) Elections: Tax Planning for Closely Held Businesses	On-demand	Steven Siegel	Taxes (2 hours)	Intermediate	2
Topic 842: Implementing Leases Workshop	On-demand	Melisa Galasso	Accounting (4 hours)	Intermediate	4
Bankruptcy Basics	On-demand	Robert Minniti	Finance (2 hours)	Basic	2
AICPA Q&A	On-demand	Pat Patterson	Accounting (1 hour), Auditing (1 hour)	Basic	2
Handling an IRS Collection Case: From Initial Call to Offer Acceptance	On-demand	Eric Green	Taxes (2 hours)	Basic	2
Small Business Taxes Made Easy: Home Office	On-demand	Eva Rosenberg	Taxes (2 hours)	Basic	2
Advanced Staff Training: Reviewing Work Papers & Field Work	On-demand	Robert Minniti	Auditing (2 hours)	Advanced	2
Preparing Form 991 and Basis Consistency	On-demand	Klaralee Charlton	Taxes (2 hours)	Basic	2
Small Business Taxes Made Easy: Common Deductions	On-demand	Eva Rosenberg	Taxes (2 hours)	Basic	2
Determining Tax Basis of Property	On-demand	Jennifer Kowal	Taxes (4 hours)	Intermediate	4
Advanced Staff Training: Auditing Notes and Disclosures	On-demand	Robert Minniti	Auditing (2 hours)	Advanced	2
Critical Concepts to Understand Financial Statements in a For-Profit and Not-for-Profit Organization	On-demand	Lynn Fountain	Accounting (2 hours)	Basic	2
The Documents Matter: Watch the Documents!	On-demand	Jennifer Kowal	Taxes (2 hours)	Intermediate	2
Section 199A Passthrough Deductions	On-demand	Bradley Burnett	Taxes (4 hours)	Update	4
Managing Change in an Ever Changing Profession	On-demand	Melisa Galasso	Business Management & Organization (2 hours)	Basic	2
Employee Benefit Plans: Auditing Investments	On-demand	Lewis Fisher	Auditing (2 hours)	Basic	2
Multistate Taxes in a Post-Wayfair World: Update on Sales and Income Tax Nexus	On-demand	Christopher Doyle Joseph Endres Joshua Lawrence Hodgson Russ LLP	Taxes (2 hours)	Basic	2

Small Business Taxes Made Easy: Income	On-demand	Eva Rosenberg	Taxes (2 hours)	Basic	2
Qualified Improvement Property, Bonus & Tax Planning Post CARES Act	On-demand	Sumit Sharma	Taxes (1 hour)	Update	1
Employee Benefit Plans: Internal Controls and SOC 1 Reports	On-demand	Lewis Fisher	Auditing (2 hours)	Basic	2
Employee Benefit Plans: Contribution and Distribution Testing	On-demand	Lewis Fisher	Auditing (2 hours)	Basic	2
Introduction to Payroll Law	On-demand	Miles Hutchinson	Taxes (2 hours)	Basic	2
Tax Issues in Corporate Mergers & Acquisitions	On-demand	Jennifer Kowal	Taxes (4 hours)	Intermediate	4
Accounting Methods: Crucial Issues Many Tax Pros Are Missing	On-demand	Greg White	Taxes (8 hours)	Basic	8
Common Frauds in Small Businesses	On-demand	Robert Minniti	Accounting (1 hour), Auditing (1 hour)	Basic	2
Excel Speed Tips	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Basic	2
New York Residency: Hot Topics and Nuts and Bolts Audit Issues	On-demand	Timothy Noonan Andrew Wright Emma Savino Kristine Bly Hodgson Russ LLP	Taxes (2 hours)	Basic	2
2020 GAAP Update	On-demand	Pat Patterson	Accounting (2 hours)	Update	2
Advanced Staff Training: Writing Audit Reports	On-demand	Robert Minniti	Auditing (2 hours)	Advanced	2
Effective Spreadsheets, Databases, & Reporting Tools for Financial Professionals	On-demand	Stephen Yoss	Computer Software & Applications (2 hours)	Basic	2
Employment Law Issues Accountants Need to Know	On-demand	Robert Minniti	Business Law (2 hours)	Basic	2
Waking Up the Dead: How to Challenge an Assessed Tax	On-demand	Eric Green	Taxes (2 hours)	Basic	2
New York City Taxes and New York State Tax Credits Update	On-demand	Joseph Endres Debra Herman Elizabeth Pascal Hodgson Russ LLP	Taxes (2 hours)	Update	2
Small Business Taxes Made Easy: Recordkeeping	On-demand	Eva Rosenberg	Taxes (2 hours)	Basic	2
Accounting, Auditing, and COVID-19	On-demand	Pat Patterson	Accounting (1 hour), Auditing (1 hour)	Intermediate	2
COVID-19 Update: Payroll, Payroll Fraud, and the PPP Program	On-demand	Lynn Fountain	Accounting (1 hour)	Basic	1
Retirement Plan Changes by Congress and the IRS in Response to COVID-19	On-demand	Klaralee Charlton	Taxes (2 hours)	Update	2
Retirement Distributions Planning after the SECURE and CARES Act	On-demand	Klaralee Charlton	Taxes (2 hours)	Update	2
Disregarded Entities: Now You Don't See Them, Now You Do	On-demand	Bradley Burnett	Taxes (2 hours)	Basic	2
COVID-19 Employment Tax Changes for Employers and Self-Employed	On-demand	Annette Nellen	Taxes (2 hours)	Update	2
What's Changing in A&A for Governmental Entities	On-demand	Melisa Galasso	Accounting (Governmental) (3 hours), Auditing (Governmental) (2 hours)	Basic	5
What's Going on at GASB	On-demand	Melisa Galasso	Accounting (Governmental) (5 hours)	Basic	5
Reference Rate Reforms	On-demand	Pat Patterson	Accounting (2 hours)	Intermediate	2
A Back to Work Accounts Payable Plan	On-demand	Mary Schaeffer	Accounting (1 hour)	Basic	1
Dealing with Dates and Times in Excel	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Basic	2
New York State Business Tax Update: Draft Regulations and Beyond	On-demand	Christopher Doyle K. Craig Reilly Doran Gittelman	Taxes (2 hours)	Basic	2

		Hodgson Russ LLP			
Small Business Taxes Made Easy: Selecting Your Business Structure	On-demand	Eva Rosenberg	Taxes (2 hours)	Basic	2
Governmental Auditing Update: Yellow Book & Uniform Guidance What You Need to Know	On-demand	Melisa Galasso	Auditing (Governmental) (5 hours)	Update	5
How the <i>Wayfair</i> Decision is Transforming Nationwide Nexus Rules	On-demand	Timothy Noonan	Taxes (2 hours)	Basic	2
Tax Strategies for Partnerships Part 4: Maximizing the QBID and Minimizing Self-Employment Taxes	On-demand	Greg White	Taxes (2 hours)	Basic	2
PPP Loans: New Legislation and the Impact on Forgiveness	On-demand	Greg White	Taxes (2 hours)	Update	2
Driving Strategy & Delivering Results	On-demand	Amy McCormick Ken Polk	Business Management & Organization (1 hour)	Basic	1
New York Practice and Procedure: Handling a NY Tax Case from Start to Finish	On-demand	Timothy Noonan Daniel Kelly Ariele Doolittle Hodgson Russ LLP	Taxes (2 hours)	Basic	2
Small Business Taxes Made Easy: Business Plans	On-demand	Eva Rosenberg	Taxes (2 hours)	Basic	2
Source of Income Rules: Cross Border and Digital Transactions	On-demand	John Samtoy	Taxes (2 hours)	Basic	2
Management Discussion and Analysis (MD&A)	On-demand	Lynn Fountain	Auditing (2 hours)	Basic	2
Tax Strategies for Partnerships Part 3: Allocations, Partnership Audit Rules, and Self-Employment	On-demand	Greg White	Taxes (2 hours)	Basic	2
Data Breaches, What's My Risk?	On-demand	Robert Minniti	Accounting (1 hour), Auditing (1 hour)	Basic	2
The Impact of Lease Changes: ASU 2016-02	On-demand	Pat Patterson	Accounting (2 hours)	Basic	2
COVID-19 Part I: Federal and State Tax Law Responses to the Pandemic	On-demand	Mark Klein William Turkovich James Bandoblu, Jr. Hodgson Russ LLP	Taxes (2 hours)	Basic	2
COVID-19 Part II: New York Employment and Payroll Issues	On-demand	Christofer Fattey Peter Godfrey John Godwin Elizabeth Pascal Hodgson Russ LLP	Taxes (2 hours)	Basic	2
Time Management	On-demand	Amy McCormick Ken Polk	Business Management & Organization (1 hour)	Basic	1
COVID-19 CARES ACT: How to Get Help for Your Organization	On-demand	Steven Mercatante	Taxes (1 hour)	Update	1
Tax Strategies for Partnerships Part 2: Operating Issues	On-demand	Greg White	Taxes (2 hours)	Basic	2
Small Business Taxes Made Easy: Small Business Checklist	On-demand	Eva Rosenberg	Taxes (2 hours)	Basic	2
Tax Strategies for Passive Activities	On-demand	Greg White	Taxes (2 hours)	Basic	2
CCH Access - Install and Configuration	On-demand	CPE Link		Basic	0
Tax Strategies for Partnerships Part 1: Formation, Purchase, and Sales of Partnership Interests	On-demand	Greg White	Taxes (2 hours)	Basic	2
IRAs and Roth IRAs: Cradle to Grave	On-demand	Bradley Burnett	Taxes (8 hours)	Update	8
Real Estate: State of the Art Tax Planning Strategies	On-demand	Greg White	Taxes (8 hours)	Basic	8
Small Business Guide to Survival and Growth	On-demand	Lynn Fountain	Auditing (2 hours)	Basic	2
Understanding Risk-Based Auditing	On-demand	Lynn Fountain	Auditing (2 hours)	Basic	2
Tax Research: Judicial Sources of Authority	On-demand	Jennifer Kowal	Taxes (2 hours)	Basic	2
Tax Research: Legislative Sources of Authority	On-demand	Jennifer Kowal	Taxes (2 hours)	Basic	2
Tax Research: Administrative Sources of Authority	On-demand	Jennifer Kowal	Taxes (2 hours)	Basic	2
Medical Related Tax Changes for Individuals and Businesses	On-demand	Barbara Weltman	Taxes (1 hour)	Basic	1

		Sidney Kess			
Leases and Credit Losses: Post Implementation and Lessons Learned	On-demand	Kelen Camehl	Accounting (2 hours)	Basic	2
Paycheck Protection Program (PPP) Loans: A Game Plan Under Cares 2	On-demand	Greg White	Taxes (1 hour)	Update	1
Getting Rid of Tax Penalties	On-demand	Eric Green	Taxes (2 hours)	Basic	2
Individual Retirement Accounts for 2020	On-demand	Andrew Clark	Taxes (4 hours)	Basic	4
Government Auditing Standards and Performing Audits	On-demand	Andrew Clark	Auditing (Governmental) (5 hours)	Basic	5
Government Auditing Standards and Foundations	On-demand	Andrew Clark	Auditing (Governmental) (2 hours)	Basic	2
Payroll Tax Changes in the CARES Act	On-demand	Annette Nellen	Taxes (1 hour)	Update	1
S Corp. Distributions: Determining the Taxability	On-demand	Jennifer Kowal	Taxes (2 hours)	Basic	2
Principles of Taxation: Ideas and Planning	On-demand	Greg White	Taxes (8 hours)	Basic	8
How to Manage Your Remote Employees	On-demand	Amy McCormick	Business Management & Organization (1 hour)	Basic	1
COVID-19 Impact on Payroll and Payroll Fraud	On-demand	Lynn Fountain	Accounting (1 hour)	Basic	1
Not-for-Profit Issues: Accounting and Auditing Update	On-demand	Pat Patterson	Accounting (1 hour), Auditing (1 hour)	Update	2
SSARS 25 and Materiality Changes to Preparation, Compilation and Review Engagements	On-demand	Pat Patterson	Accounting (2 hours)	Intermediate	2
Develop Skills and Add Value Using Data Analytics: A Step by Step Approach for Any Auditor	On-demand	CPE Link	Auditing (1 hour)	Basic	1
Finding the Leader Within	On-demand	Lynn Fountain	Personnel/HR (2 hours)	Basic	2
Common Frauds in Governmental Entities	On-demand	Robert Minniti	Accounting (Governmental) (1 hour), Auditing (Governmental) (1 hour)	Basic	2
Materiality Changes	On-demand	Pat Patterson	Accounting (2 hours)	Intermediate	2
Schedule E of Form 1040 or 1040-SR	On-demand	Barbara Weltman	Taxes (1 hour)	Basic	1
Sale of Closely Held Businesses	On-demand	Jennifer Kowal	Taxes (4 hours)	Intermediate	4
Impact of COVID-19 on Business, Accounting and Financial Reporting	On-demand	Lynn Fountain	Accounting (1 hour), Auditing (1 hour)	Basic	2
Section 199A Qualified Business Income	On-demand	James Hamill	Taxes (4 hours)	Intermediate	4
IRS Serves Us New Guidance on Food and Fun	On-demand	Annette Nellen	Taxes (2 hours)	Update	2
Conducting Remote Audits in Uncertain Times	On-demand	Lynn Fountain	Auditing (1 hour)	Basic	1
Opportunities for Small Business in the CARES Act of 2020	On-demand	Russell Sullivan Harold Hancock Nancy Strelau Radha Mohan Reese Goldsmith	Taxes (1 hour)	Update	1
Marijuana's Tax Paradox (or the Uncanny Cannabis Controversy)	On-demand	Eva Rosenberg	Taxes (2 hours)	Basic	2
IRS Audits and Appeals: A Practical and Technical Approach	On-demand	Greg White	Taxes (2 hours)	Intermediate	2
Employee Management and Communication Processes During Trying Times	On-demand	Lynn Fountain	Business Management & Organization (1 hour)	Basic	1
Handling Your Accounts Payable Function in Times of Crisis	On-demand	Mary Schaeffer	Accounting (1 hour)	Basic	1
Advanced Staff Training: Auditing Payroll	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
A Basic Ethics Guidebook for Delaware CPAs	On-demand	Allison McLeod	Regulatory Ethics (4 hours)	Basic	4
Audits of State and Local Government	On-demand	Eric Berman	Auditing (Governmental)	Basic	8



		Kurt Schlicker	(8 hours)		
Keys to Managing an Effective Internal Audit Function	On-demand	Lynn Fountain	Auditing (2 hours)	Basic	2
Top Skills for Internal Audit Management	On-demand	Lynn Fountain	Business Management & Organization (2 hours)	Basic	2
A Basic Ethics Guidebook for Utah CPAs	On-demand	Allison McLeod	Regulatory Ethics (4 hours)	Basic	4
A Basic Ethics Guidebook for New York CPAs	On-demand	Allison McLeod	Regulatory Ethics (4 hours)	Basic	4
A Basic Ethics Guidebook for Mississippi CPAs	On-demand	Allison McLeod	Regulatory Ethics (4 hours)	Basic	4
A Basic Ethics Guidebook for Minnesota CPAs	On-demand	Allison McLeod	Regulatory Ethics (4 hours)	Basic	4
A Basic Ethics Guidebook for Connecticut CPAs	On-demand	Allison McLeod	Regulatory Ethics (4 hours)	Basic	4
A Basic Ethics Guidebook for Arizona CPAs	On-demand	Allison McLeod	Regulatory Ethics (4 hours)	Basic	4
XBRL and Compliance with Sarbanes-Oxley: Internal Controls	On-demand	Lynn Fountain	Accounting (2 hours)	Intermediate	2
XBRL (eXtensible Business Reporting Language) Basics	On-demand	Lynn Fountain	Accounting (2 hours)	Basic	2
Sec. 199A Planning Insights	On-demand	Greg White	Taxes (2 hours)	Basic	2
Business Law Basics for the CPA	On-demand	David Osburn	Business Law (2 hours)	Basic	2
Using Data Analytics in an Audit	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
Considering Business Continuity in the World of COVID-19	On-demand	Lynn Fountain	Business Management & Organization (1 hour)	Basic	1
COVID-19 New Cyber Frauds and Cybersecurity Internal Controls	On-demand	Robert Minniti	Information Technology (1 hour)	Basic	1
Families First Coronavirus Response Act: How to Calculate Tax Credits	On-demand	Greg White	Taxes (2 hours)	Update	2
Key to Maintaining Objectivity and Professional Skepticism	On-demand	Lynn Fountain	Regulatory Ethics (2 hours)	Basic	2
Tax Changes and the Consolidated Appropriations Act, 2020	On-demand	Annette Nellen	Taxes (1 hour)	Update	1
Bonus Depreciation Update	On-demand	Sumit Sharma	Taxes (1 hour)	Update	1
Tax Treatment of Life Insurance Proceeds	On-demand	PCS Instructor	Taxes (2 hours)	Basic	2
Reviewing Partnership Agreements to Identify Key Tax Issues	On-demand	James Hamill	Taxes (2 hours)	Intermediate	2
Homeownersâ€™ Association: Federal Tax Issues	On-demand	Pat Patterson	Accounting (1 hour), Taxes (1 hour)	Intermediate	2
Homeownersâ€™ Association: GAAP, GAAS, and SSARS Issues	On-demand	Pat Patterson	Accounting (2 hours)	Intermediate	2
Condos: Federal Tax Issues	On-demand	Pat Patterson	Taxes (2 hours)	Intermediate	2
Preparing U.S. Personal Tax Returns for Cross Border Persons: Common Cross-border Tax Issues	On-demand	Mohammad Ahmad	Taxes (2 hours)	Overview	2
Preparing U.S. Personal Tax Returns for Cross Border Persons: Basic Issues	On-demand	Mohammad Ahmad Debra Lewis-Mahon	Taxes (2 hours)	Basic	2
New Effective Date Philosophy from the FASB for 2020	On-demand	Pat Patterson	Accounting (2 hours)	Intermediate	2
Bold New Auditing Standards for 2020 in SAS 135	On-demand	Pat Patterson	Auditing (2 hours)	Intermediate	2
Assets and Liabilities: State and Local Governments	On-demand	Eric Berman	Accounting (Governmental) (5 hours)	Basic	5
Proper Documentation Methods for Internal Audit and Internal Controls	On-demand	Lynn Fountain	Auditing (2 hours)	Basic	2
Intermediate Staff Training: Auditing Internal Controls	On-demand	Robert Minniti	Auditing (2 hours)	Intermediate	2
Intermediate Staff Training: Auditing Inventory Expense or Capitalize?	On-demand	Robert Minniti	Auditing (2 hours)	Intermediate	2
	On-demand	Jennifer Kowal	Taxes (2 hours)	Intermediate	2

Private Foundation Update & Form 990-PF	On-demand	Jane Searing	Taxes (2 hours)	Update	2
New FASB Developments	On-demand	Pat Patterson	Accounting (2 hours)	Update	2
Commercial & Industrial (C&I) Lending and the CPA	On-demand	David Osburn	Finance (2 hours)	Basic	2
Financial Statement Analysis: Reading the Numbers Correctly	On-demand	David Osburn	Finance (2 hours)	Intermediate	2
Government Benefits Fraud	On-demand	Robert Minniti	Accounting (Governmental) (1 hour), Auditing (Governmental) (1 hour)	Basic	2
Basic Staff Training: Auditing for Corruption	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
Intermediate Staff Training: Auditing Revenue Recognition	On-demand	Robert Minniti	Auditing (2 hours)	Intermediate	2
Tangible Property Repair Regulations	On-demand	Sumit Sharma	Taxes (2 hours)	Basic	2
Funding the Marital Share	On-demand	Klaralee Charlton	Taxes (2 hours)	Basic	2
Internal Control and COSO Essentials for Financial Managers, Accountants and Auditors	On-demand	Lynn Fountain	Auditing (2 hours)	Basic	2
Key Ratio Analysis: Calculating the Numbers Correctly	On-demand	David Osburn	Accounting (2 hours)	Intermediate	2
Purchases and Sale Agreements	On-demand	Jennifer Kowal	Taxes (2 hours)	Basic	2
How Accounting Works and Reporting Guidelines	On-demand	Miles Hutchinson	Accounting (2 hours)	Basic	2
Tax Cuts and Jobs Act: State Tax Update	On-demand	Timothy Noonan	Taxes (2 hours)	Intermediate	2
Conducting a Successful Audit: Risk Assessment Factors and Internal Control Considerations	On-demand	Lynn Fountain	Auditing (2 hours)	Basic	2
Categorizing Workers and Overtime Rules	On-demand	Robert Minniti	Accounting (1 hour), Taxes (1 hour)	Basic	2
What Do You Mean I Have to File in That State? Nexus for the Perplexed	On-demand	Timothy Noonan	Taxes (1 hour)	Basic	1
The CPA's Role in Negotiating Loan Covenants	On-demand	David Osburn	Accounting (2 hours)	Basic	2
Nonprofit Financial Statements	On-demand	Diane Edelstein	Accounting (5 hours)	Basic	5
Single Audit Nuts & Bolts	On-demand	Diane Edelstein	Auditing (Governmental) (10 hours)	Basic	10
Overview of the SECURE Act	On-demand	Klaralee Charlton	Taxes (2 hours)	Update	2
Worker Classification in Light of California's AB 5	On-demand	Annette Nellen	Taxes (2 hours)	Basic	2
Taxation of Real Estate Professionals: Passive Loss Rules	On-demand	Greg White	Taxes (2 hours)	Intermediate	2
Specific New Auditing Standards in SAS 134 for 2020	On-demand	Pat Patterson	Auditing (2 hours)	Intermediate	2
Filtering Techniques for Excel Data	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
Excel's XLOOKUP Function	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Basic	2
Basic Staff Training: Auditing Fixed Assets	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
Complying with the Revenue Recognition Standards	On-demand	Lynn Fountain	Accounting (2 hours)	Basic	2
Sale of a Principal Residence	On-demand	Annette Nellen	Taxes (2 hours)	Basic	2
Compilation, Review, and Preparation: Preparation Engagements	On-demand	Salvatore Collemi	Auditing (2 hours)	Basic	2
Compilation, Review, and Preparation: Practice Issues	On-demand	Salvatore Collemi	Auditing (2 hours)	Basic	2
Office 365 New Dynamic Arrays	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Basic	2
Planning for the 99%: Persons with Estates Below the Transfer Tax Exclusions	On-demand	Steven Siegel	Taxes (2 hours)	Basic	2
2018 Yellow Book: Changes are Coming	On-demand	Diane Edelstein	Auditing (Governmental) (2 hours)	Basic	2
Ethics for Ohio CPAs	On-demand	Pat Patterson	Regulatory Ethics (3 hours)	Basic	3

Charitable Contribution Substantiation and Reporting	On-demand	Bradley Burnett	Taxes (1 hour)	Basic	1
Best Practices for Getting Paid Faster	On-demand	Mary Schaeffer	Accounting (2 hours)	Basic	2
Cost Segregation Tax Strategies	On-demand	Sumit Sharma	Taxes (2 hours)	Basic	2
Compilation, Review, and Preparation Series: Review Engagement Procedures	On-demand	Salvatore Collelli	Auditing (2 hours)	Basic	2
The Impact of the 2017 TCJA on Form 1041	On-demand	Klaralee Charlton	Taxes (2 hours)	Intermediate	2
Compilation, Review, and Financial Statement Preparation Series: Engagements Overview	On-demand	Salvatore Collelli	Auditing (2 hours)	Basic	2
Basic Staff Training: Auditing Cash Receipts	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
Employee Fraud: The Misappropriation of Assets	On-demand	Robert Minniti	Accounting (2 hours)	Basic	2
Intellectual Property: What Every Financial Professional Needs to Know	On-demand	Paul Jorgensen	Business Law (2 hours)	Basic	2
Understanding Contracts Better Than Your Lawyer	On-demand	Paul Jorgensen	Business Law (3 hours)	Basic	3
Information Technology in Today's Digital World: General Controls Primer	On-demand	Lynn Fountain	Information Technology (2 hours)	Basic	2
Basic Staff Training: Auditing Accounts Receivable	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
Basic Staff Training: Auditing Accounts Payable	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
Sales & Use Tax for Manufacturers	On-demand	Michael Bannasch	Taxes (2 hours)	Intermediate	2
A Practical Guide to Form 8865	On-demand	Rita Ryan	Taxes (2 hours)	Basic	2
		Tonya James			
International Tax Treaties	On-demand	Allison McLeod	Taxes (2 hours)	Basic	2
Predictive Accounting: Driver-Based Budgeting and Rolling Financial Forecasts	On-demand	Gary Cokins	Accounting (2 hours)	Overview	2
Basic Concepts of Individual Taxation	On-demand	Allison McLeod	Taxes (3 hours)	Basic	3
How Taxation of Life Insurance Affects Estate and Wealth Planning	On-demand	Steven Siegel	Taxes (2 hours)	Basic	2
Basic Staff Training: Inventory & Cost of Goods Sold Audit Concepts	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
ESBTs, QSSTs and Other S Corporation Allowed Trusts: How Trusts Can be Used as S Corp Shareholders	On-demand	Steven Siegel	Taxes (2 hours)	Intermediate	2
Governmental GAAP: Introduction to Government Accounting	On-demand	Diane Edelstein	Accounting (Governmental) (2 hours)	Basic	2
Basic Staff Training: Auditing Accounts Receivable & Revenue	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
The New 30% Business Interest Limitation of Section 163(j): A Practical Approach including Planning	On-demand	Greg White	Taxes (2 hours)	Update	2
Health Reimbursement Arrangements	On-demand	Barbara Weltman Sidney Kess	Taxes (1 hour)	Basic	1
IRS Practice Series: Curing the Addicted Tax Delinquent-A 12-Step Program	On-demand	Eva Rosenberg	Taxes (2 hours)	Intermediate	2
Inbound International Tax Issues Post-TCJA	On-demand	Adnan Islam	Taxes (2 hours)	Intermediate	2
Risks and Rewards of Excel in Office 365	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Basic	2
Government Auditing Standards: The Conceptual Framework Approach to Independence	On-demand	Diane Edelstein	Auditing (Governmental) (2 hours)	Basic	2
Financial Statement Audits for New Auditors: Further Procedures	On-demand	Salvatore Collelli	Auditing (1 hour)	Basic	1
Financial Statement Audits for New Auditors: Risk Assessment	On-demand	Salvatore Collelli	Auditing (2 hours)	Basic	2
Financial Statement Audits for New Auditors Series: Audit Planning	On-demand	Salvatore Collelli	Auditing (1 hour)	Basic	1
Compliance Audits under AICPA Professional Standards	On-demand	Salvatore Collelli	Auditing (2 hours)	Basic	2
Internal Controls in Accounts Payable: Creating a Strong Framework and Processes	On-demand	Mary Schaeffer	Accounting (2 hours)	Basic	2
Opportunity Zones: Part 2-Structure of Qualified Opportunity Funds	On-demand	James Hamill	Taxes (2 hours)	Intermediate	2

Information Technology (IT) Risks in Emerging Business Environments	On-demand	Lynn Fountain	Information Technology (1 hour), Auditing (1 hour)	Basic	2
Opportunity Zones: Part 1- Qualifications	On-demand	James Hamill	Taxes (2 hours)	Intermediate	2
Basic Staff Training: Accounts Payable, Expenditures, & Related Fraud Risks	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
Basic Staff Training: Cash & Related Fraud Risks Audit Concepts	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
Critical Audit Matters	On-demand	Lynn Fountain	Auditing (2 hours)	Basic	2
Measuring and Managing Customer Profitability	On-demand	Gary Cokins	Accounting (2 hours)	Basic	2
What You Need to Know About the Changes to Yellow Book	On-demand	Melisa Galasso	Auditing (Governmental) (2 hours)	Update	2
Select International Tax Reporting Considerations Post-Tax Cuts & Jobs Act	On-demand	Adnan Islam	Taxes (2 hours)	Intermediate	2
Section 965 Repatriation	On-demand	Rita Ryan	Taxes (2 hours)	Basic	2
WEP, GPO, Divorce, and other Social Security Nuances for Advanced Knowledge	On-demand	Tonya James			
	On-demand	Theodore Sarenski	Specialized Knowledge and Applications (1 hour)	Advanced	1
The Accounts Payable Function of Tomorrow: The Impact of New Technology	On-demand	Mary Schaeffer	Accounting (2 hours)	Basic	2
The Facts About Medicare: What Your Clients Need to Know	On-demand	Theodore Sarenski	Specialized Knowledge and Applications (2 hours)	Intermediate	2
Leases: Land Easements and Rights-of-Way	On-demand	Pat Patterson	Accounting (2 hours)	Intermediate	2
Unusual Lease Accounting Issues: Disclosures, Cancellations, Dispositions, & Statement Presentation	On-demand	Pat Patterson	Accounting (2 hours)	Intermediate	2
Leases: New and Existing Leases-Annual & Monthly Accounting	On-demand	Pat Patterson	Accounting (2 hours)	Basic	2
Leases: The Lessor Perspective	On-demand	Pat Patterson	Accounting (2 hours)	Basic	2
Implementing the Revenue Recognition Model: Case Scenarios Part Two	On-demand	Lynn Fountain	Auditing (2 hours)	Basic	2
Depreciation for Accounting and Tax Purposes	On-demand	Patrick Haggerty	Taxes (2 hours)	Basic	2
Implementing the Revenue Recognition Model: Case Scenarios Part One	On-demand	Lynn Fountain	Auditing (2 hours)	Basic	2
The Intersection of Fiduciary Accounting and Taxation	On-demand	Klaralee Charlton	Accounting (2 hours)	Intermediate	2
Electronic Data Analysis	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
Filing for Benefits: The How and Best Ideas	On-demand	Theodore Sarenski	Specialized Knowledge and Applications (1 hour)	Basic	1
Minimizing Expense Reimbursement Headaches Caused by the Traveler, the Manager, and Fraud	On-demand	Mary Schaeffer	Accounting (2 hours)	Basic	2
Understanding the Basics of Fiduciary Accounting	On-demand	Klaralee Charlton	Accounting (2 hours)	Basic	2
Disability Benefits For Qualifying Individuals	On-demand	Theodore Sarenski	Specialized Knowledge and Applications (1 hour)	Basic	1
Family Protection: How Social Security Assists Survivors	On-demand	Theodore Sarenski	Specialized Knowledge and Applications (1 hour)	Basic	1
Getting Up to Speed with Excel 2019	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Basic	2
Best Practices for Accounts Payable	Downloadable PDF	Mary Schaeffer	Accounting (13 hours)	Overview	13
Enhancing Audit Quality	On-demand	Salvatore Collemi	Auditing (2 hours)	Intermediate	2
Income Tax Combined & Consolidated Reporting	On-demand	Michael Bannasch	Taxes (2 hours)	Intermediate	2
Lessee Recording of Existing Leases: Finance of Operating	On-demand	Pat Patterson	Accounting (2 hours)	Basic	2
Â§199A SSTBâ€™s: Special Topics and Planning Ideas (Nano Course)	On-demand	Greg White	Taxes (0.2 hour)	Basic	0.2
Â§199A SSTBâ€™s: Definitions (Nano Course)	On-demand	Greg White	Taxes (0.2 hour)	Basic	0.2
Â§199A and Rentals: The Notice 2019-07 Safe Harbor (Nano Course)	On-demand	Greg White	Taxes (0.2 hour)	Basic	0.2

Â§199A and Rentals: Qualifying for the QBID Including Triple Net Leases (Nano Course)	On-demand	Greg White	Taxes (0.2 hour)	Basic	0.2
Â§199A and Aggregation: Advanced Planning Techniques (Nano Course)	On-demand	Greg White	Taxes (0.2 hour)	Basic	0.2
Â§199A and Aggregation: General Rules When a Client Has More Than One Business (Nano Course)	On-demand	Greg White	Taxes (0.2 hour)	Basic	0.2
Â§199A: The Wage and Property Limits (Nano Course)	On-demand	Greg White	Taxes (0.2 hour)	Basic	0.2
Â§199A and Entity Choice: When to Choose S Corporation, LLC, or Sole Proprietorship (Nano Course)	On-demand	Greg White	Taxes (0.2 hour)	Basic	0.2
Maximizing Section 199A: Planning for LLCs and Their Members (Nano Course)	On-demand	Greg White	Taxes (0.2 hour)	Basic	0.2
Maximizing Section 199A: Planning for S Corporations and Shareholders (Nano Course)	On-demand	Greg White	Taxes (0.2 hour)	Basic	0.2
Introduction to Â§199A: Fundamentals and Basic Concepts (Nano Course)	On-demand	Greg White	Taxes (0.2 hour)	Basic	0.2
History, Current Legislation, and Social Security Basics	On-demand	Theodore Sarenski	Specialized Knowledge and Applications (2 hours)	Basic	2
Analytics-Based Enterprise Performance Management (EPM)	On-demand	Gary Cokins	Finance (2 hours)	Basic	2
Basic Accounting Procedures: Part 2	On-demand	Robert Minniti	Accounting (2 hours)	Basic	2
Lessee Recording of New Leases: Finance and/or Operating	On-demand	Pat Patterson	Accounting (2 hours)	Intermediate	2
Form 1040NR: Non-Resident Alien U.S. Tax Filings	On-demand	Nancy Ortmeyer Kuhn	Taxes (2 hours)	Intermediate	2
GAAP Preparation of Financial Statements and Presentation in Accordance with ASC 205	On-demand	Lynn Fountain	Accounting (2 hours)	Basic	2
Simplifying the FASB Codification Research System	On-demand	Lynn Fountain	Accounting (2 hours)	Basic	2
Basic Accounting Procedures: Part 1	On-demand	Robert Minniti	Accounting (2 hours)	Basic	2
Cyber Risk Management Frameworks and Implementation	On-demand	Lynn Fountain	Information Technology (2 hours)	Basic	2
Emotional Intelligence & Leadership	On-demand	Melisa Galasso	Personnel/HR (1 hour)	Basic	1
Best Vendor Accounts Payable Policies and Practices	On-demand	Mary Schaeffer	Accounting (2 hours)	Basic	2
Understanding Blockchain: For CPAs, Accountants, & Auditors	On-demand	Salvatore Collemi	Auditing (1 hour), Information Technology (1 hour)	Basic	2
Confidence, Mindset, & Grit: Bringing It Together as a Successful Woman	On-demand	Melisa Galasso	Personal Development (1 hour)	Basic	1
Excel Pivot Tables: Columns (Nano Course)	On-demand	David Ringstrom	Computer Software & Applications (0.2 hour)	Basic	0.2
Cyber Risk Management Roles and Responsibilities	On-demand	Lynn Fountain	Information Technology (2 hours)	Basic	2
Sales & Use Tax Basics	On-demand	Michael Bannasch	Taxes (2 hours)	Basic	2
Managing Through Corporate Politics: The Achilles Heel of Executing Professional Skepticism	On-demand	Lynn Fountain	Personnel/HR (2 hours)	Basic	2
Filing Forms 5500 (Third Edition)	On-demand	Sidney Kess Barbara Weltman	Taxes (1 hour)	Basic	1
Fundamentals of Performance Management	On-demand	Tom Coghlan	Business Management & Organization (2 hours)	Basic	2
Innovation & Change: The Future of the CPA Profession	On-demand	Melisa Galasso	Accounting (1 hour)	Basic	1
Choosing the Business Entity: Help Clients Make the Right Decisions	On-demand	Steven Siegel	Taxes (2 hours)	Basic	2
Corporate Restructuring	On-demand	Tom Coghlan	Business Management & Organization (2 hours)	Basic	2



Insider's Guide to Information Security and Avoiding Identity Theft	On-demand	Stephen Yoss	Computer Software & Applications (2 hours)	Basic	2
Protect Your Company Against Payment Fraud	On-demand	Mary Schaeffer	Accounting (1 hour), Auditing (1 hour)	Basic	2
Sampling for Single Audit	On-demand	Melisa Galasso	Auditing (Governmental) (2 hours)	Basic	2
California Franchise Tax for Passthrough Entities with Nonresident Members	On-demand	Michael Bannasch	Taxes (2 hours)	Intermediate	2
Leveraging All Generations to Win the Leadership RACE	On-demand	Ed Robinson	Personnel/HR (2 hours)	Basic	2
Building a Book of Business with Staying Power	On-demand	Ed Robinson	Communications & Marketing (2 hours)	Basic	2
Winning the Leadership Race	On-demand	Ed Robinson	Personnel/HR (2 hours)	Basic	2
Business Analytics for the CFOs Function	On-demand	Gary Cokins	Finance (2 hours)	Overview	2
Internal Control Best Practices for Small to Medium Sized Entities and Not-For-Profit's	On-demand	Lynn Fountain	Auditing (2 hours)	Basic	2
Segregation of Duties for the Office of the CFO	On-demand	Lynn Fountain	Business Management & Organization (2 hours)	Basic	2
Introduction to Data Analytics	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
GASB Lease Changes	On-demand	Melisa Galasso	Accounting (Governmental) (2 hours)	Basic	2
Red Flags in Small Business Valuations	On-demand	Robert Minniti	Accounting (2 hours)	Basic	2
Sales & Use Tax for Construction Contractors	On-demand	Michael Bannasch	Taxes (2 hours)	Intermediate	2
Communication Skills Training for the CPA	On-demand	David Osburn	Personnel/HR (2 hours)	Basic	2
Cost Effective Internal Controls for Small Businesses	On-demand	Robert Minniti	Accounting (1 hour), Auditing (1 hour)	Intermediate	2
Business Succession Planning Update: Saving the Goose that Lays the Golden Egg	On-demand	Bradley Burnett	Taxes (4 hours)	Update	4
Objectives of the Independent Auditor and the Conduct of an Audit in Accordance with GAAS	On-demand	Lynn Fountain	Auditing (2 hours)	Basic	2
Topic 606: Revenue Recognition for Software and Technology	On-demand	Lynn Fountain	Accounting (2 hours)	Basic	2
QuickBooks Online Accountant Collaborating with Clients	On-demand	Laura Madeira	Computer Software & Applications (2 hours)	Intermediate	2
Basics of Risk Management	On-demand	Robert Minniti	Accounting (2 hours)	Basic	2
Amending Business Income Tax Returns	On-demand	Barbara Weltman Sidney Kess	Taxes (1 hour)	Basic	1
Performance Auditing: The Wave of the Future for Government?	On-demand	Eric Berman	Auditing (Governmental) (1 hour)	Basic	1
Sarbanes Oxley (SOX) Section 404	On-demand	Lynn Fountain	Accounting (1 hour), Auditing (1 hour)	Basic	2
Sarbanes Oxley (SOX) Overview	On-demand	Lynn Fountain	Auditing (2 hours)	Basic	2
Accounting for Transfers of Financial Assets	On-demand	Miles Hutchinson	Accounting (2 hours)	Basic	2
Fraud in the Financial Statements	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
How to Prepare for Your Upcoming AICPA Peer Review	On-demand	Salvatore Collemi	Auditing (2 hours)	Intermediate	2
FRF for SMEs and Special Purpose Frameworks	On-demand	Salvatore Collemi	Accounting (2 hours)	Basic	2
Excel Chart Speed Tips: Pivot Charts (Nano Course)	On-demand	David Ringstrom	Computer Software & Applications (0.2 hour)	Basic	0.2
Inside Excel's Conditional Formatting Feature	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2



R&D Tax Credits: Maximizing Tax Savings	On-demand	Chris Nguyen	Taxes (2 hours)	Basic	2
Project Management	On-demand	Melisa Galasso	Business Management & Organization (1 hour)	Basic	1
Nexus: Understanding Your Income/Franchise Tax and Sales/Use Tax Filing Obligations	On-demand	Michael Bannasch	Taxes (2 hours)	Basic	2
Excel Speed Tips: PDF Documents (Nano Course)	On-demand	David Ringstrom	Computer Software & Applications (0.2 hour)	Intermediate	0.2
Excel Lookup Functions: Function Wizard (Nano Course)	On-demand	David Ringstrom	Computer Software & Applications (0.2 hour)	Basic	0.2
Implementing Excel Spreadsheet Internal Controls	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
Enterprise Risk Management 101	On-demand	Lynn Fountain	Management Services (2 hours)	Basic	2
Save Your Practice: Form 8867 Landmines for Tax Pros	On-demand	Greg White	Taxes (1 hour)	Overview	1
Cash Flow Reporting Principles	On-demand	Kelen Camehl	Accounting (2 hours)	Basic	2
Accounting for Stock-Based Compensation	On-demand	Kelen Camehl	Accounting (2 hours)	Intermediate	2
Identity Theft & Data Security for Accountants	On-demand	Stephen Yoss	Computer Software & Applications (2 hours)	Overview	2
The New NPO Reporting Model	On-demand	Diane Edelstein	Accounting (2 hours)	Basic	2
Moving Your Public Accounting Firm to the Cloud	On-demand	Stephen Yoss	Computer Software & Applications (2 hours)	Basic	2
Foundations for a Strong Internal Audit Department	On-demand	Lynn Fountain	Auditing (2 hours)	Basic	2
Know All of Your Alternative Financial Reporting Options	On-demand	Salvatore Collemi	Accounting (2 hours)	Intermediate	2
Excel Chart Speed Tips	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Basic	2
Excel Nuances	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Basic	2
Excel Printing and Page Layouts	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Basic	2
Wayfair Update & Deep Dive	On-demand	Michael Bannasch	Taxes (2 hours)	Basic	2
Introduction to Excel Macros: Part 4	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Advanced	2
IRS Examinations of Cash Businesses	On-demand	Eric Green	Taxes (2 hours)	Intermediate	2
Introduction to Excel Macros: Part 3	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Basic	2
What's New with Microsoft Office 365, Zoho Docs, & G Suite by Google Cloud	On-demand	Stephen Yoss	Computer Software & Applications (2 hours)	Overview	2
Breaking Down Excel Formulas	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
Introduction to Excel Macros: Part 2	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Basic	2
Introduction to Excel Macros: Part 1	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Basic	2
Managing Your Tax Season	On-demand	Edward Mendlowitz	Taxes (2 hours)	Intermediate	2
Creating an Effective & Efficient Travel & Entertainment Expense Reimbursement Policy	On-demand	Mary Schaeffer	Accounting (2 hours)	Basic	2
529 Plans, Coverdell ESAs, and ABLE Accounts	On-demand	Barbara Weltman Sidney Kess	Taxes (2 hours)	Overview	2

Analyzing the Company's Liquidity Using the Cash Conversion Cycle	On-demand	David Osburn	Accounting (2 hours)	Basic	2
Executive Compensation Issues	On-demand	Jennifer Kowal	Taxes (2 hours)	Intermediate	2
Identifying & Implementing the Proper Balance of Internal Controls	On-demand	Lynn Fountain	Auditing (2 hours)	Basic	2
Uniform Guidance Overview	On-demand	Diane Edelstein	Auditing (Governmental) (2 hours)	Basic	2
FASB's New Not-for-Profit Financial Reporting Standard	On-demand	Andrew Prather	Auditing (2 hours)	Basic	2
Auditing Procedures & Practices: Audit Supervision	On-demand	Pat Patterson	Auditing (2 hours)	Intermediate	2
Market-Based Sourcing 101: A Review of New Apportionment Methods for Corporate Income Taxpayers	On-demand	Timothy Noonan	Taxes (2 hours)	Intermediate	2
Proposed NEW SAS & Auditor Reporting	On-demand	Pat Patterson	Auditing (2 hours)	Intermediate	2
Six Ways to Sum in Excel	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
Advanced IRS Examinations: What the IRS Will Look at and Why?	On-demand	Eric Green	Taxes (2 hours)	Advanced	2
Proposed Disclosures in Auditor Reporting	On-demand	Pat Patterson	Auditing (2 hours)	Intermediate	2
Introduction to Yellow Book	On-demand	Melisa Galasso	Auditing (Governmental) (2 hours)	Basic	2
Building Effective Budget Spreadsheets in Excel	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
Leadership Skill Training	On-demand	David Osburn	Personnel/HR (2 hours)	Basic	2
Internal Controls: What Every Financial and Accounting Professional Needs to Know	On-demand	Lynn Fountain	Auditing (2 hours)	Basic	2
Alternative Minimum Tax for Individuals	On-demand	Barbara Weltman Sidney Kess	Taxes (2 hours)	Basic	2
Internal Controls for Smaller Not-For-Profit and Governmental Entities	On-demand	Robert Minniti	Auditing (2 hours)	Intermediate	2
Ethics for Colorado CPAs	On-demand	Allison McLeod	Regulatory Ethics (4 hours)	Basic	4
Deciphering Excel Error Prompts	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Basic	2
Leveraging Linked Workbooks in Excel	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
What's New for QuickBooks 2018	On-demand	Laura Madeira	Computer Software & Applications (2 hours)	Intermediate	2
Section 199A Qualified Business Income and Latest IRS Guidance and Regs	On-demand	James Hamill	Taxes (2 hours)	Update	2
Mastering Excel's Custom Views Feature	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
Cohan or Bust: How to Reconstruct Missing Information	On-demand	Eva Rosenberg	Taxes (2 hours)	Basic	2
Auditing Procedures & Practices: Analytical Procedures	On-demand	Pat Patterson	Auditing (2 hours)	Intermediate	2
Dealing with Duplicate Data in Excel	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
Auditing Procedures & Practices: Audit Documentation	On-demand	Pat Patterson	Auditing (2 hours)	Intermediate	2
Tackling Excel's Table Feature	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Basic	2
Excel 101: Lookup Functions	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Basic	2
Using Excel What-If Analysis: When, Why, and How	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
Analyzing Payroll Data in Microsoft Excel	On-demand	David Ringstrom	Computer Software &	Intermediate	2

			Applications (2 hours)		
Innocent vs. Injured Spouse	On-demand	Eva Rosenberg	Taxes (2 hours)	Intermediate	2
Office 365: Excel's Opportunities and Obstacles	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Basic	2
Building Interactive Spreadsheets in Excel	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
Virtual Currency Overview	On-demand	Annette Nellen	Taxes (2 hours)	Overview	2
How to Become a Rock Star Auditor	On-demand	Edward Mendlowitz	Auditing (2 hours)	Basic	2
Tax Legislation Update: Tax Cuts and Jobs Act	On-demand	Mark Luscombe	Taxes (2 hours)	Update	2
Accounting for the Tax Cuts and Jobs Act	On-demand	Pat Patterson	Accounting (1 hour), Auditing (1 hour)	Update	2
Partnership Taxation Concepts and Planning Strategies*	On-demand	James Hamill	Taxes (9 hours)	Intermediate	9
Preparing & Reporting on OCBOA Financial Statements	On-demand	Jessie Kanter	Accounting (2 hours)	Overview	2
Cost Segregation Tax Strategies	On-demand	Gian Pazzia	Taxes (2 hours)	Overview	2
Advanced Social Security Topics: Mastering More Obscure Rules & Strategies	On-demand	Martha Shedden	Specialized Knowledge and Applications (2 hours)	Advanced	2
Advanced Excel Pivot Table Techniques	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Advanced	2
Social Security: Indispensable Information for Financial Professionals	On-demand	Martha Shedden	Specialized Knowledge (2 hours)	Basic	2
2017 Tax Cuts and Jobs Act: Impact on Financial and Estate Planning	On-demand	Steven Siegel	Taxes (2 hours)	Update	2
Excel Speed Tips: Recent Items Menu (Nano Course)	On-demand	David Ringstrom	Computer Software & Applications (0.2 hour)	Basic	0.2
Cash and Credit Management	On-demand	David Osburn	Accounting (2 hours)	Basic	2
Cash Flow Analysis: Personal, Business, and Real Estate	On-demand	David Osburn	Accounting (2 hours)	Overview	2
Choice of Entity & Tax Issue Entity Formations: Part 2	On-demand	Jennifer Kowal	Taxes (4 hours)	Intermediate	4
Choice of Entity & Tax Issue Entity Formations: Part 1	On-demand	Jennifer Kowal	Taxes (4 hours)	Basic	4
Uniform Guidance: New Single Audit Requirements	On-demand	Diane Edelstein	Auditing (Governmental) (2 hours)	Basic	2
Being a Tax Aware Gig Economy Worker	On-demand	Annette Nellen	Taxes (1 hour)	Basic	1
Professional Ethics: CMA Exam 2 - Section F	On-demand	Tom Coghlan	Regulatory Ethics (2 hours)	Overview	2
Investment Decisions: CMA Exam 2 - Section E	On-demand	Tom Coghlan	Finance (3 hours)	Overview	3
Enterprise Risk Management: CMA Exam 2 - Section D	On-demand	Tom Coghlan	Finance (1 hour)	Overview	1
Decision Analysis: CMA Exam 2 - Section C	On-demand	Tom Coghlan	Finance (5 hours)	Overview	5
Corporate Finance: CMA Exam 2 - Section B	On-demand	Tom Coghlan	Finance (10 hours)	Overview	10
Financial Statement Analysis: CMA Exam 2 - Section A	On-demand	Tom Coghlan	Finance (6 hours)	Overview	6
Expanding Your Use of Data Analytics for Audit	On-demand	Ken Petersen	Business Management & Organization (1 hour)	Basic	1
Internal Controls: CMA Exam Part 1 - Section E	On-demand	Tom Coghlan	Finance (3 hours)	Overview	3
Cost Management: CMA Exam Review Part 1 - Section D	On-demand	Tom Coghlan	Finance (6 hours)	Overview	6
Performance Management: CMA Exam Part 1 - Section C	On-demand	Tom Coghlan	Finance (6 hours)	Overview	6
Planning, Budgeting, and Forecasting: CMA Exam Part 1 -Section B	On-demand	Tom Coghlan	Finance (6 hours)	Overview	6
Master Vendor File Best Practices	On-demand	Mary Schaeffer	Accounting (2 hours)	Basic	2
Filtering and Formatting Excel Data	On-demand	David Ringstrom	Computer Software & Applications (3 hours)	Intermediate	3
The 10 Best (and 3 Worst) Features in Excel 2013	On-demand	David Ringstrom	Computer Software &	Overview	1

[Introduction to Microsoft Access](#)

On-demand

David Ringstrom

Applications (1 hour)  
Computer Software &  
Applications (4 hours)

Basic

4