

CCH® CPELink Webinars — 2024

DATE	TITLE	TIME ALL TIMES CT	SPEAKER	FIELD OF STUDY	CPE CREDIT
Apr 20, 2024	Excel 101: Introduction to Spreadsheets Part 2	11 am	David Ringstrom	Computer Software & Applications (2 hours)	2
Apr 20, 2024	Obtaining Innocent Spouse Relief	2 pm	Eric Green	Taxes (2 hours)	2
Apr 21, 2024	2021 Federal Tax Updates: Business Entities (Full-Day Webinar)	9 am	Allison McLeod	Taxes (8 hours)	8
Apr 21, 2024	Financial Analysis Using Data Mining and Data Modeling with Excel	11 am	Theodore Callahan	Specialized Knowledge and Applications (4 hours)	4
Apr 21, 2024	Highlights for Passthrough Entities	11 am	Greg White	Taxes (2 hours)	2
Apr 21, 2024	Open Source Business Tools for Accountants	11 am	Garrett Wasny	Specialized Knowledge and Applications (4 hours)	4
Apr 21, 2024	Section 1031 Exchanges: Qualification and Tax Reporting	2 pm	James Hamill	Taxes (2 hours)	2
Apr 22, 2024	American Recovery and Reinvestment Act of 2009	11 am	Annette Nellen	Taxes (2 hours)	2
Apr 22, 2024	Blockchain and Smart Contracts	11 am	Cory Campbell	Information Technology (2 hours)	2
Apr 22, 2024	E-Commerce Taxation: Helping Clients be Tax Compliant	11 am	Annette Nellen	Taxes (4 hours)	4
Apr 22, 2024	Form 1065 K-1s: IRS Throws Rocks at Hornetsâ€™ Nest	2 pm	Bradley Burnett	Taxes (2 hours)	2
Apr 23, 2024	Major Program Determination	2 pm	Diane Edelstein	Auditing (Governmental) (2 hours)	2
Apr 23, 2024	Monthly Tax Update (October)	11 am	Annette Nellen	Taxes (2 hours)	2
Apr 23, 2024	Only Financial Officer: Doing More with Less	10 am	John Daly	Business Management & Organization (2 hours)	2
Apr 23, 2024	Only Financial Officer: Strategic Cost Management	1 pm	John Daly	Accounting (2 hours)	2
Apr 24, 2024	1099 Reporting Payments for Middlemen, Agents, Liens, and Garnishments	11 am	Steven Mercatante	Taxes (2 hours)	2
Apr 24, 2024	An Update of State Tax Issues for Corporations	9 am	Hodgson Russ LLP Open Banks K. Craig Reilly Katherine Piazza	Taxes (2 hours)	2
Apr 24, 2024	Auditing Standards for CPAs: Fall Update	2 pm	Pat Patterson	Auditing (2 hours)	2
Apr 24, 2024	Best Practices in Board Governance	11 am	Clark Nuber Kelly Rancourt	Taxes (2 hours)	2
Apr 24, 2024	California Tax Update: Part 1	2 pm	Eva Rosenberg	Taxes (3 hours)	3
Apr 24, 2024	Monthly Tax Update (October)	11 am	Annette Nellen	Taxes (2 hours)	2
Apr 24, 2024	Social Security and Medicare Planning Quarterly Update (Winter 2022)	11 am	Steven Siegel	Specialized Knowledge and Applications (2 hours)	2

Apr 25, 2024	Cross Border Finance	1 pm	William Seeger	Taxes (1 hour)	1
Apr 25, 2024	Form 990PF: Overview of the Basics and Tax Return Walk thru	11 am	Clark Nuber	Taxes (2 hours)	2
			Kathryn Okimoto		
			Lisa McCreedy		
Apr 25, 2024	Introduction to Business Valuations	2 pm	Robert Minniti	Auditing (2 hours)	2
Apr 25, 2024	Taming Large Excel Spreadsheets	2 pm	David Ringstrom	Computer Software & Applications (2 hours)	2
Apr 26, 2024	International Tax Considerations per Biden Administration Proposals	11 am	Adnan Islam	Taxes (2 hours)	2
Apr 26, 2024	Monthly Tax Update (January)	11 am	Annette Nellen	Taxes (2 hours)	2
Apr 26, 2024	Regulatory Ethics Guidebook for CPAs: AICPA Code of Professional Conduct (Half-Day Webinar)	10 am	Allison McLeod	Regulatory Ethics (4 hours)	4
Apr 26, 2024	Taxation of Business Entities	2 pm	Allison McLeod	Taxes (2 hours)	2
Apr 27, 2024	California Tax Update: Part 2	2 pm	Eva Rosenberg	Taxes (2 hours)	2
Apr 27, 2024	Lightning Fast Depreciation: The World of Depreciation (Updated for CARES Act) (Half-Day Webinar)	10 am	Greg White	Taxes (4 hours)	4
Apr 27, 2024	Tips and Tools for Training Online	10 am	DO NOT USE Vetter	Specialized Knowledge and Applications (2 hours)	2
Apr 28, 2024	1099 Attorney and Settlement Reporting for AP and Tax Professionals	2 pm	Steven Mercatante	Taxes (2 hours)	2
Apr 28, 2024	New Partnership Reporting of Foreign Items: K-2 and K-3	10 am	Adnan Islam	Taxes (1 hour)	1
Apr 28, 2024	S Corporation Update: Developments You Need to Know	11 am	Greg White	Taxes (2 hours)	2
Apr 28, 2024	The CFO's Role in Banking and Financing	10 am	John Daly	Business Management & Organization (2 hours)	2
Apr 28, 2024	The CFO's Role in Operational Control	1 pm	John Daly	Accounting (2 hours)	2
Apr 28, 2024	The Ultimate Compilation and Review Standards Course	11 am	Thad Scott	Accounting (4 hours)	4
Apr 29, 2024	2021 Federal Tax Update for Business (Full-Day Webinar)	9 am	Bradley Burnett	Taxes (8 hours)	8
Apr 29, 2024	Data Government and Privacy for Organizations: GDPR and CCPA	11 am	Stephen Yoss	Information Technology (2 hours)	2
Apr 29, 2024	Efficiencies of the Internet - Focus on Secure File Transfers	11 am	Wyatt Christman	Specialized Knowledge and Applications (1 hour)	1
			Brian O'Connell		
Apr 29, 2024	Major Program Determination	11 am	Diane Edelstein	Auditing (Governmental) (2 hours)	2
Apr 29, 2024	Payroll Fraud	2 pm	Robert Minniti	Accounting (1 hour), Auditing (1 hour)	2
Apr 29, 2024	Tax Benefits of Cost Segregation for the CPA	12 pm	James Reid	Taxes (2 hours)	2
Apr 30, 2024	Analyzing Financial Efficiency and Performance Ratios	2 pm	Lynn Fountain	Auditing (2 hours)	2
Apr 30, 2024	ASC 606 Revenue Recognition: Identifying Performance Obligations	11 am	Lynn Fountain	Accounting (2 hours)	2
Apr 30, 2024	Form 1099-MISC Explained	11 am	Steven Mercatante	Taxes (2 hours)	2
Apr 30, 2024	How Being Overwhelmed Hurts Your Business	11 am	Linda Hardenstein	Business Management & Organization (1 hour)	1
Apr 30, 2024	Nonresident Alien Reporting: IRS Compliance	2 pm	Miles Hutchinson	Taxes (2 hours)	2
May 1, 2024	Form 1099 MISC Explained	11 am	Steven Mercatante	Taxes (2 hours)	2
May 1, 2024	Funding the Marital Share	11 am	Klaralee Charlton	Taxes (2 hours)	2
May 1, 2024	How to Onboard the New IRS Representation Client	2 pm	Eric Green	Taxes (2 hours)	2
May 1, 2024	Multistate Sales Tax Issues in a Digital World	2 pm	Joseph Endres	Taxes (2 hours)	2
			Hodgson Russ LLP		
May 1, 2024	Tax Updates for Individuals	10 am	Barbara Weltman	Taxes (1 hour)	1
May 2, 2024	Business Valuations: Cost Approach	11 am	Robert Minniti	Auditing (2 hours)	2

May 2, 2024	CPA Practice Development Opportunities in Estate Planning	2 pm	Owen Fiore	Taxes (2 hours)	2
May 2, 2024	Reviewing Partnership Agreements to Identify Key Tax Issues	2 pm	James Hamill	Taxes (2 hours)	2
May 3, 2024	2021 Federal Tax Updates: Individuals (Full-Day Webinar)	9 am	Allison McLeod	Taxes (8 hours)	8
May 3, 2024	Revenue Recognition (ASC Topic 606) Standard Overview	2 pm	Lynn Fountain	Accounting (2 hours)	2
May 3, 2024	Special Gift Tax Issues	11 am	Klaralee Charlton	Taxes (2 hours)	2
May 4, 2024	Cryptocurrency Taxation Fundamentals and Open Issues	11 am	Annette Nellen	Taxes (2 hours)	2
May 4, 2024	Designing Effective KPIs and Performance Dashboards	2 pm	Miles Hutchinson	Business Management & Organization (2 hours)	2
May 4, 2024	Introduction to 1031 Exchanges	11 am	Anthony Phillips	Taxes (3 hours)	3
May 4, 2024	Preparing Form 1065: Part 1 (Half-Day Webinar)	10 am	Greg White	Taxes (4 hours)	4
May 5, 2024	Preparing Form 1065: Part 2 (Half-Day Webinar)	10 am	Greg White	Taxes (4 hours)	4
May 8, 2024	Financial Instruments: What CPAs Need to Know for 2022	2 pm	Pat Patterson	Accounting (2 hours)	2
May 8, 2024	Maximizing Itemized Deductions under Current Tax Law	11 am	Greg White	Taxes (2 hours)	2
May 9, 2024	Considering COVID-19 in Financial Statement Disclosures	2 pm	Robert Minniti	Auditing (2 hours)	2
May 9, 2024	Everyday Tax Rules: Tax Tips from 38 Years in the Trenches	11 am	Greg White	Taxes (2 hours)	2
May 10, 2024	2021 Federal Tax Updates: Business Entities (Full-Day Webinar)	9 am	Allison McLeod	Taxes (8 hours)	8
May 10, 2024	Cancellation of Indebtedness Income	11 am	Jennifer Kowal	Taxes (2 hours)	2
May 11, 2024	American Recovery and Reinvestment Act of 2009	11 am	Annette Nellen	Taxes (2 hours)	2
May 11, 2024	Partnership Tax Filing Issues	11 am	James Hamill	Taxes (2 hours)	2
May 11, 2024	Payroll Tax Train-Wreck: Resolving Your Client's Payroll Tax Nightmare	2 pm	Eric Green	Taxes (2 hours)	2
May 12, 2024	Dynamic Arrays Formulas in Excel 2021 and Microsoft 365	2 pm	David Ringstrom	Computer Software & Applications (2 hours)	2
May 12, 2024	Effective Retirement Plan Strategies - Part 1	11 am	Mark Clark	Administrative Practice (4 hours)	4
May 12, 2024	Income Taxation of Trusts and Estates: Preparing Form 1041 (Full-Day Webinar)	9 am	Steven Siegel	Taxes (8 hours)	8
May 12, 2024	Quarterly Audit and Accounting Update: Part 4	11 am	Thomas Noce	Auditing (2 hours)	2
May 12, 2024	Using QuickBooks to Manage Your Office	11 am	Marlissa Phillips	Business Management & Organization (4 hours)	4
May 13, 2024	Playing the Valuation Game	11 am	Owen Fiore	Taxes (4 hours)	4
May 16, 2024	Auditing for Waste in a Government Entity	11 am	Robert Minniti	Auditing (Governmental) (2 hours)	2
May 16, 2024	Maximizing the Employee Retention Credit	1 pm	Greg White	Taxes (1 hour)	1
May 16, 2024	Taxability of Judgments and Settlements	2 pm	Allison McLeod	Taxes (2 hours)	2
May 17, 2024	2022 Single Audit Update: What to Know and How to Prepare	2 pm	Clark Nuber Kelly Rancourt Troy Rector	Auditing (Governmental) (2 hours)	2
May 17, 2024	Cybersecurity: What do Accountants Really Need to Know?	11 am	Cory Campbell	Information Technology (2 hours)	2
May 18, 2024	Hot Topics in Estate Planning	11 am	Owen Fiore	Taxes (4 hours)	4
May 18, 2024	Preparation vs. Compilation: What Is It?	2 pm	Pat Patterson	Accounting (1 hour), Auditing (1 hour)	2
May 18, 2024	Value-Based Enterprise Management in Government	11 am	Gary Cokins	Business Management & Organization (2 hours)	2
May 19, 2024	A Practical Approach to Quickly Filling Out Forms K-2 and K-3	2 pm	Greg White	Taxes (1 hour)	1
May 19, 2024	Excel Tips and Tricks for Presenting Your Workbooks	11 am	Theodore Callahan	Specialized Knowledge and Applications (4 hours)	4

May 19, 2024	Quarterly Tax Update: Part 4	11 am	Annette Nellen	Taxes (2 hours)	2
May 20, 2024	Accounting and Auditing with Excel	11 am	Jeff Lenning	Auditing (4 hours)	4
May 20, 2024	Sales and Marketing During a Crisis	11 am	Mark Fowler	Marketing (2 hours)	2
May 22, 2024	2022 Estate & Financial Planning Quarterly Update (Winter)	11 am	Klaralee Charlton	Taxes (2 hours)	2
May 22, 2024	Internal Audit Challenges During COVID Times	2 pm	Lynn Fountain	Auditing (2 hours)	2
May 23, 2024	State and Local Reporting: 1099 and SALT Issues	11 am	Steven Mercatante	Taxes (2 hours)	2
May 24, 2024	2022 Governmental Entities and Cyber Frauds	2 pm	Robert Minniti	Accounting (Governmental) (1 hour), Auditing (Governmental) (1 hour)	2
May 24, 2024	Monthly Tax Update (February)	11 am	Annette Nellen	Taxes (2 hours)	2
May 25, 2024	2022 Revenue Recognition: Issues and Problems	2 pm	Pat Patterson	Accounting (2 hours)	2
May 25, 2024	Conducting Tax Research with Increased Confidence	11 am	Annette Nellen	Taxes (4 hours)	4
May 25, 2024	Sales and Marketing During a Crisis	11 am	Mark Fowler	Marketing (1 hour)	1
May 25, 2024	Sampling for Single Audit	11 am	Diane Edelstein	Auditing (Governmental) (2 hours)	2
May 25, 2024	Tax, Financial and Estate Planning for Family Business	11 am	Owen Fiore	Taxes (4 hours)	4
May 26, 2024	Social Media for Accountants	11 am	Garrett Wasny	Specialized Knowledge and Applications (4 hours)	4
May 26, 2024	Solving Tax Research Puzzles (Half-Day Webinar)	10 am	Jennifer Kowal	Taxes (4 hours)	4
May 26, 2024	What's New In QuickBooks 2009 for Accounting Professionals	11 am	Marlissa Phillips	Specialized Knowledge and Applications (4 hours)	4
May 27, 2024	The CFO's Role in Banking and Financing	10 am	John Daly	Business Management & Organization (2 hours)	2
May 27, 2024	The CFO's Role in Operational Control	1 pm	John Daly	Accounting (2 hours)	2
May 29, 2024	A Practical Approach to Quickly Filling Out Forms K-2 and K-3	2 pm	Greg White	Taxes (1 hour)	1
May 30, 2024	Audit Horror Stories: What to Do When the IRS Audit Goes off the Rails	11 am	Eric Green	Taxes (2 hours)	2
May 30, 2024	International Considerations for Not-for-Profit Organizations	2 pm	Clark Nuber	Taxes (2 hours)	2
			Jennifer Becker Harris		
			Frances Olson		
Jun 1, 2024	Auditing and Internal Control Issues	11 am	Pat Patterson	Auditing (2 hours)	2
Jun 1, 2024	Excel Tips and Tricks for Presenting Your Workbooks	11 am	Theodore Callahan	Specialized Knowledge and Applications (4 hours)	4
Jun 1, 2024	How to Resolve the Most Common IRS Notices	2 pm	Jim Buttonow	Taxes (2 hours)	2
Jun 1, 2024	The New Economics of the Rueschenberg Decision	10 am	Frank Pankow	Management Advisory Services (2 hours)	2
Jun 2, 2024	1099 Essentials	2 pm	Steven Mercatante	Taxes (2 hours)	2
Jun 2, 2024	More Excel Speed Tips	11 am	David Ringstrom	Computer Software & Applications (2 hours)	2
Jun 2, 2024	Solving Tax Research Puzzles (Half-Day Webinar)	10 am	Jennifer Kowal	Taxes (4 hours)	4
Jun 6, 2024	Form 1042/1042-S Reporting	11 am	Steven Mercatante	Taxes (2 hours)	2
Jun 6, 2024	Overview of Yellow Book	2 pm	Diane Edelstein	Auditing (Governmental) (2 hours)	2
Jun 6, 2024	S Corporations Part 1: Converting C Corps to S Corps	11 am	Greg White	Taxes (2 hours)	2
Jun 6, 2024	Segregation of Duties for Core Business Processes	2 pm	Lynn Fountain	Business Management &	2

					Organization (2 hours)	
Jun 7, 2024	Gift Tax Biggest Reporting Issues and Mistakes	11 am	Klaralee Charlton	Taxes (2 hours)	2	
Jun 7, 2024	S Corporations Part 2: Determining Reasonable Compensation	11 am	Greg White	Taxes (2 hours)	2	
Jun 7, 2024	Understanding the New K-2 and K-3 Filing Requirements	2 pm	Allison McLeod	Taxes (2 hours)	2	
Jun 7, 2024	Working with Whistleblowers Reporting Illegal Acts	2 pm	Robert Minniti	Regulatory Ethics (2 hours)	2	
Jun 8, 2024	Excel 101: Pivot Tables	11 am	David Ringstrom	Computer Software & Applications (2 hours)	2	
Jun 8, 2024	Going Concern: SAS 132	2 pm	Pat Patterson	Accounting (1 hour), Auditing (1 hour)	2	
Jun 8, 2024	Mindfulness at Work	2 pm	Amy Vetter	Personal Development (2 hours)	2	
Jun 8, 2024	S Corporations Part 3: Maximizing the Â§199A QBID and Other Planning Insights	11 am	Greg White	Taxes (2 hours)	2	
Jun 9, 2024	Effective Retirement Plan Strategies - Part 2	11 am	Mark Clark	Administrative Practice (4 hours)	4	
Jun 9, 2024	Managing Millennials	2 pm	Jennifer Kowal	Business Management & Organization (2 hours)	2	
Jun 9, 2024	S Corporations Part 4: Ordinary Losses on Stock Sales, Exit Strategies, and K-1 Conformity	11 am	Greg White	Taxes (2 hours)	2	
Jun 10, 2024	Crazy Tax Cases	2 pm	Eric Green	Taxes (2 hours)	2	
Jun 10, 2024	How to Attract, Develop and Retain Top Talent in Times of Crisis	11 am	Mark Fowler	Personnel/HR (2 hours)	2	
			Noal McDonald			
Jun 10, 2024	Tax Issues in Corporate Mergers & Acquisitions (Half-Day Webinar)	10 am	Jennifer Kowal	Taxes (4 hours)	4	
Jun 14, 2024	How to Build Strong Client Communication Skills for Tax Practice	2 pm	Jennifer Kowal	Communications & Marketing (2 hours)	2	
Jun 15, 2024	Business Valuations: Market Approach	2 pm	Robert Minniti	Auditing (2 hours)	2	
Jun 15, 2024	Introduction to Forensic Accounting	11 am	Lynn Fountain	Accounting (2 hours)	2	
Jun 15, 2024	Tax Ethics and Circular 230	11 am	Jennifer Kowal	Regulatory Ethics (2 hours)	2	
Jun 16, 2024	Employment Law Issues Accountants Need to Know	2 pm	Robert Minniti	Business Law (2 hours)	2	
Jun 16, 2024	Ethics Checklist for Tax Practitioners	11 am	Annette Nellen	Regulatory Ethics (2 hours)	2	
Jun 16, 2024	Using QuickBooks to Manage Your Office	11 am	Marlissa Phillips	Business Management & Organization (4 hours)	4	
Jun 17, 2024	The Statement of Cash Flows: Compliance & Presentation Update	11 am	Lewis Fisher	Accounting (2 hours)	2	
Jun 19, 2024	Partnership Tax Allocations under Sections 704(b) and 704(c)	11 am	James Hamill	Taxes (2 hours)	2	
Jun 20, 2024	Accounting and Financial Reporting Considerations Related to COVID and the Economic Downturn	2 pm	Lynn Fountain	Accounting (1 hour), Auditing (1 hour)	2	
Jun 20, 2024	Building Your Professional Presence	11 am	Annette Nellen	Personnel/HR (2 hours)	2	
Jun 21, 2024	2022 Cryptocurrency and Taxes Update	2 pm	Robert Minniti	Taxes (2 hours)	2	
Jun 21, 2024	Basics of Nexus: Understanding State Tax Issues	11 am	Annette Nellen	Taxes (2 hours)	2	
Jun 21, 2024	Six Ways to Sum in Excel	11 am	David Ringstrom	Computer Software & Applications (2 hours)	2	
Jun 21, 2024	Understanding the New K-2 and K-3 Filing Requirements	2 pm	Allison McLeod	Taxes (2 hours)	2	
Jun 22, 2024	Becoming a Cherished Advisor: The Simple Sales Process	11 am	Amy Vetter	Business Management & Organization (2 hours)	2	
Jun 22, 2024	CPA's Guidebook for Ethical Behavior: Code of Professional Conduct	2 pm	Allison McLeod	Regulatory Ethics (2 hours)	2	

					hours)	
Jun 22, 2024	Helping Clients in Financial Distress	9 am	John Lawrence	Taxes (2 hours)	2	
Jun 22, 2024	Materiality Changes	2 pm	Pat Patterson	Auditing (2 hours)	2	
Jun 23, 2024	2021 Form 990 Overview: A Walk thru of Form 990 and Common Schedules	11 am	Clark Nuber	Taxes (2 hours)	2	
			Kathryn Okimoto			
			Lisa McCreedy			
Jun 23, 2024	2022 Accounting and Auditing Update (Full-Day Webinar)	9 am	Pat Patterson	Accounting (4 hours), Auditing (4 hours)	8	
Jun 23, 2024	Spreadsheet Skyscrapers vs. Spreadsheet Sprawl	2 pm	David Ringstrom	Computer Software & Applications (2 hours)	2	
Jun 24, 2024	Tax Benefits of Cost Segregation for the CPA	12 pm	James Reid	Taxes (2 hours)	2	
Jun 25, 2024	Monthly Tax Update (September)	11 am	Annette Nellen	Taxes (2 hours)	2	
Jun 25, 2024	Subrecipient Monitoring under Uniform Guidance	2 pm	Diane Edelstein	Auditing (Governmental) (2 hours)	2	
Jun 27, 2024	Common Estate Planning Mistakes and How to Avoid Them	2 pm	Steven Siegel	Taxes (2 hours)	2	
Jun 27, 2024	Employee Benefit Plans Audit Update: Accounting Principles and Auditing Considerations	11 am	Lewis Fisher	Auditing (2 hours)	2	
Jun 27, 2024	Getting Ahead of the Emerging Technology Curve: Blockchain, AI, and Big Data	2 pm	Stephen Yoss	Information Technology (2 hours)	2	
Jun 27, 2024	Governmental Accounting and Auditing Update: GASB-87, Leases: An Overview for Lessees and Lessors	11 am	Eric Berman	Accounting (Governmental) (1 hour), Auditing (Governmental) (1 hour)	2	
Jun 28, 2024	Preparing Personal Financial Statements Update	2 pm	Pat Patterson	Accounting (2 hours)	2	
Jun 29, 2024	Settling Your Tax Bill for Less: Myths vs. Reality	2 pm	Jim Buttonow	Taxes (2 hours)	2	