

CREDITS

THE GEORGIA SOCIETY OF CPAs EDUCATION & TRAINING CATALOG 2022

*Learn Your Way with GSCPA:
In-Person, Virtual and On-Demand
+ How to Access Online Event Catalog*

18 CONFERENCES

180+ SEMINARS

120+ LIVE STREAMS

600+ ON DEMAND EVENTS



**The Georgia Society
of CPAs**

GSCPA ANNUAL CONVENTION

June 5-8, 2022 | Event Code: 13500 | ac.gscpa.org
Samoset Resort on the Ocean | Camden-Rockport-Rockland, Maine

Annual Convention is a fun-filled, four-day event allowing attendees and guests to mix and mingle while enjoying beautiful waterfront views of the Penobscot Bay at one of New England's premier luxury resorts. Attendees will receive CPE on a variety of topics, hear what GSCPA has accomplished in the last year at the annual business meeting and explore the area through optional activities and dining.

This event is designed for CPAs in all areas of the profession and at any stage of their career. Whether you are in public practice or industry, the educational sessions offered will fit the ever-changing needs and requirements all CPAs face in today's professional environment.

Visit ac.gscpa.org or contact Callie Hammond at chammond@gscpa.org 800-330-8889, ext. 2953



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SEAS Southeastern Accounting Show

08 / 24 - 25 / 2022
Cobb Galleria Centre / Atlanta / Georgia
Event Code / 13085

We're back! Join us as we return to an in-person learning environment for SEAS 2022. The Southeastern Accounting Show (SEAS) is GSCPA's premier event, providing you with a high-quality education in multiple interest areas. Explore all of the newest standards, issues and questions at one event. Don't miss discussions with local and national leaders on everything from tax to auditing to technology to best business practices.

Customize your CPE experience based on multiple study tracks. Taught by leaders in their field, each session offers the training necessary to stay on top of issues affecting CPAs and accounting professionals in all areas of the profession.

SEAS is a fantastic opportunity to build your referral network, strengthen key business partnerships and gain exposure to the best products and services in the marketplace.



WAYS TO LEARN



Webinar

Webinars deliver seminars via the Internet with real-time audio and PowerPoint slides and are typically one to two hours in length. Participants have the opportunity to submit questions to the instructor and chat with other attendees. For additional webinar providers, please visit OLC.gscpa.org.

Team Stream

Do you have multiple staff members interested in learning the same topic? Bring education to your team with Team Stream, our group live stream option. With Team Stream, your organization can stream any GSCPA live stream program directly into your conference room for your team to watch and receive credit. For more information or to register, visit www.gscpa.org/content/TeamStream.aspx

Conferences

Join peers for top-notch conferences across Georgia while learning from experts in all areas of the profession. Conferences range from one to two days and often cover a variety of topics and speakers to enhance your role as a CPA.

In-Person Seminars

GSCPA offers a wide variety of seminars, ranging from four to 16 hours that typically focus on a single topic, developed and presented by experts in the field. GSCPA also presents seminar series from trending speakers, such as Don Farmer, Pat Garverick and Jim Martin. Seminars can be accessed from anywhere in-person across the state, at the GSCPA Learning Center in Atlanta, allowing you to attend events near where you live and work.

Live Stream Events

GSCPA's popular live stream option allows you to attend a conference or seminar from your home, office, or anywhere you can access the internet. You view the sessions in real-time as part of the audience and interact with other attendees via chat areas.

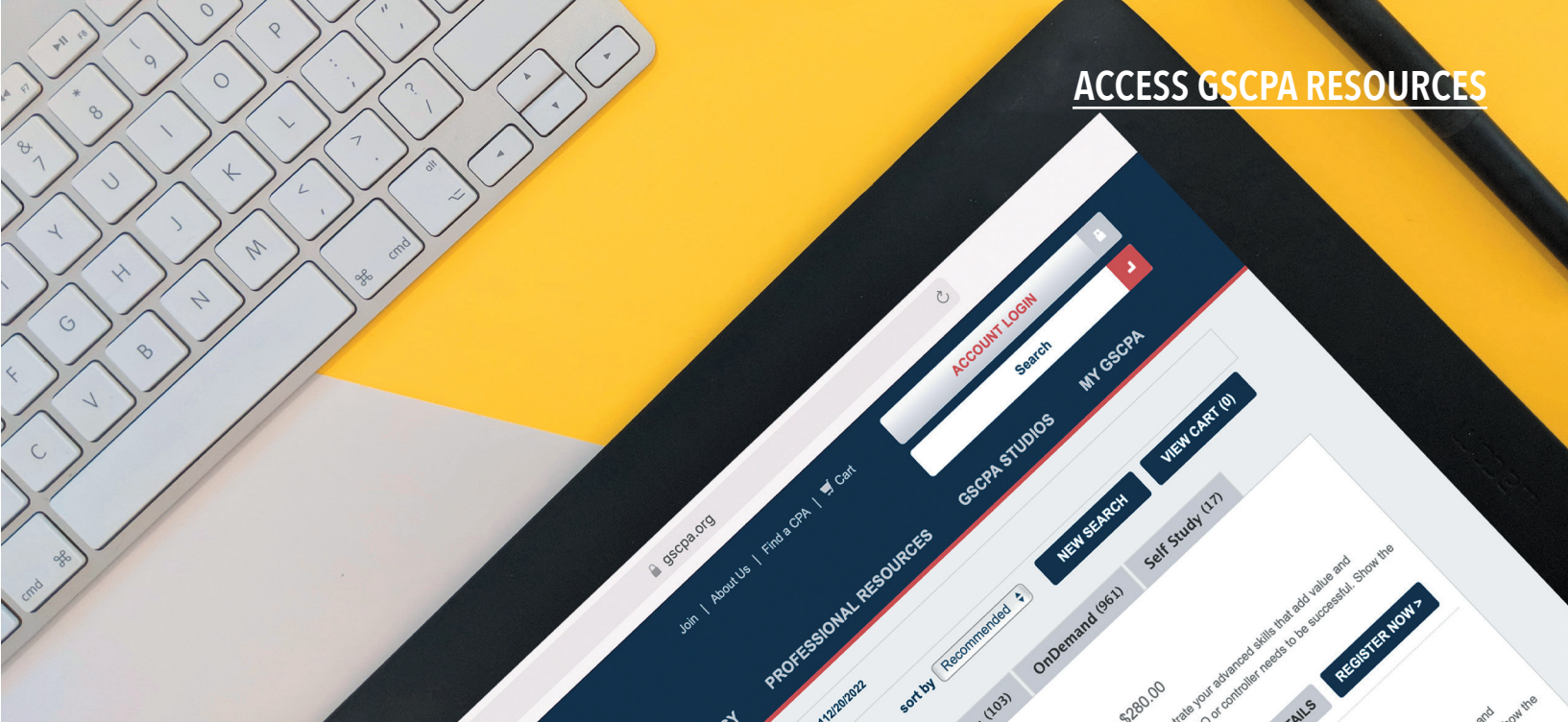
On-Demand

On-Demand is a quick way to get CPE all year long on your schedule. Over 600 offerings of previously recorded presentations from webinars, conference sessions and seminars are available 24/7. In addition, GSCPA offers exclusive on-demand series episodes, recorded often for the most up-to-date information in an easy format. You have the flexibility to stop and start presentations as needed. Sessions are available for 365 days from the date of purchase. Access GSCPA's online catalog at www.gscpa.org to view on demand options.

Self-Study

Taking the self-study exam in the back of each issue of *Current Accounts* is an easy, convenient two hours of CPE credit. Online exams are automated to grade as you go, providing you with your score upon completion. Exams are available for two years. Catch up on your self-study in half the time. In addition to *Current Accounts*, conferences and seminars offered by GSCPA, we have partnered with several other providers to bring you alternative forms of CPE. To view available self-study options, please visit www.gscpa.org.

ACCESS GSCPA RESOURCES



The Georgia Society of CPAs (GSCPA) recognizes that continuing education is crucial to advance you as an accounting professional and improve the profession. GSCPA's continuing education and training programs provide deep insights and breaking-news updates delivered by the top experts in the accounting profession. Earn CPE, expand your professional reach and challenge yourself through discussions of the timeliest topics and a broad range of subjects in a variety of formats that cater to your preferred style of learning.

ACCESSING THE ONLINE CATALOG

Registering for a GSCPA CPE event is quick and easy. You can search by specific event code or browse a list of events based on your particular needs - location, a field of study or date range.

VISIT WWW.GSCPA.ORG

1. Under the Continuing Education menu tab along the top, choose Event Catalog from drop down.
2. Enter a specific event code in the search box in the top left-hand corner or peruse a list of courses through the filter menus below the search bar on the left side of the page. Each menu has a blue arrow - click on that to expand the menu and select your filter options.
3. You can also filter by event type (in person, live stream, on demand, self study) by clicking the gray tabs above the event listing on the right-hand side of the page.
4. Click on the event title for more details and to register.
5. Event-specific registration details to follow.

CONFERENCE REGISTRATION

- To register - click the red "Register Now" button. You will need to log in to your GSCPA account if you have not already logged in.
- The next page will ask you to choose breakout sessions, if applicable.
- Once all sessions are selected, click the blue "Add to Cart" button. From there, you will be taken to your cart and have the option to continue shopping to add more events to your cart or proceed to checkout if your cart is complete.
- On this page, you will be asked a series of questions and payment information to complete your registration.

SEMINAR REGISTRATION

- To register, click the blue "Add to Cart" button.
- You will be taken to your cart where you have the option of adding more events or proceed to checkout if your cart is complete.
- From there, you will be asked a series of questions and payment information to complete your registration.

ADDITIONAL RESOURCES

The Continuing Education webpage has a variety of resources to assist you in completing your educational requirements. Find answers to frequently asked questions, directions to meeting facilities, credentialing information, speaking opportunities and self-study.

You are always welcome to call the GSCPA CPE Department during business hours, Monday-Friday 8 a.m. - 5 p.m. at 800-330-8889, opt. 3.

Conferences

Member Fees (One Day/Two Day)
Early (\$299/\$479) Standard (\$359/\$539) Late (\$399/\$579)

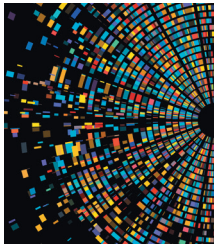
Nonmembers (One Day/Two Day)
Early (\$399/\$579) Standard (\$459/\$639) Late (\$499/\$679)



REAL ESTATE CONFERENCE

June 16 | GSCPA Learning Center, Atlanta | Event Codes: 13001 | LS13001

Local and global economic changes continue to shape the real estate industry. You need to know what’s in store and what information is necessary to protect your client’s holdings. Learn what is affecting this business sector and explore the economic, tax and legal developments impacting property owners. Discover new strategies and techniques to assist you in working with clients and accounting principles impacting the reporting of real estate development, operations and sales.



TECHNOLOGY CONFERENCE

July 21 | GSCPA Learning Center, Atlanta | Event Codes: 13040 | LS13040

Join GSCPA and K2 for one of the largest accounting technology conferences. Explore new technologies impacting accounting and finance and how to implement these approaches successfully. Stay ahead of the curve in technological development and sharpen your knowledge. Receive tools that you can immediately put into practice. Sessions are designed for a deep dive into a practical application of the information.



ESTATE PLANNING CONFERENCE

July 25-27 | Ritz-Carlton Reynolds, Greensboro | Event Code: LS13000

Don’t miss out on the 2022 Estate Planning Conference, back in person at the Ritz-Carlton Reynolds! Spend three days learning and networking with your peers in a serene setting. Maximize your understanding of current estate planning developments by examining resources and tactics designed for quick implementation to help you accommodate your client’s needs in achieving their goals. Led by national experts, discussed at the local level, attendees will receive an in-depth understanding of issues and trends, including the outlook for the future, current events, trusts as beneficiaries, family meetings, business succession and international tax issues. **Check online for updated pricing for this event **



SOUTHEASTERN ACCOUNTING SHOW

August 24-25 | Cobb Galleria Centre, Atlanta | Event Code: LS13085

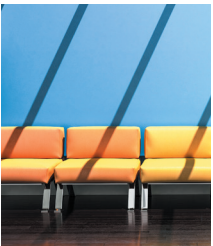
We’re back! Join us as we return to an in-person learning environment for SEAS 2022. The Southeastern Accounting Show (SEAS) is GSCPA’s premier event, providing you with a high-quality education in multiple interest areas. Explore all of the newest standards, issues and questions at one event. Don’t miss the CPE event of the year and discussions with local and national leaders on everything from tax to auditing to technology to best business practices. Customize your CPE experience based on multiple study tracks.



FRAUD AND FORENSIC ACCOUNTING CONFERENCE

September 22 | GSCPA Learning Center, Atlanta | Event Codes: 13020 | LS13020

Fraud costs businesses and individuals trillions each year. CPAs are responsible for detecting and preventing fraud by assessing accounting systems for weaknesses, creating and overseeing internal controls and managing the degree of organizational fraud risk. Join fraud experts providing the latest information on current trends, including cryptocurrency, fraud investigation reporting and emerging threats. Gain the knowledge, resources and connections you need to aid in the fight against fraud.



FINANCIAL INSTITUTIONS CONFERENCE

October 20 | GSCPA Learning Center, Atlanta | Event Codes: 13095 | LS13095

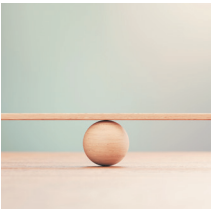
Plan for this year’s financial reporting periods and learn how to manage the disruptions and regulatory changes, including credit strategies, diversity and inclusion, tax updates and risk modeling. CPAs working in or with all banking industry segments will benefit from detailed discussions with industry leaders regarding recent developments affecting financial institutions, including legal updates, tax strategies, asset quality, safety and soundness updates, and economic updates.



PERSONAL FINANCIAL PLANNING CONFERENCE

October 25 | GSCPA Learning Center, Atlanta | Event Codes: 13050 | LS13050

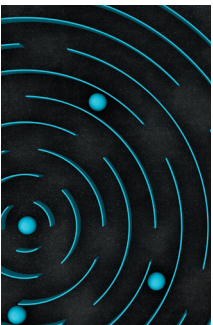
Your clients rely on you for estate, tax, retirement, risk management and investment planning guidance. Expand your knowledge to offer premier financial planning advice, discover the latest in-depth technical and practice management best practices, and receive the tools and direction on the latest laws and planning implications to assist your clients and make critical decisions effectively. Conference discussions will provide strategic thoughts from nationally recognized speakers, practical information and guidance on estate planning during uncertain times.



ACCOUNTING AND AUDITING CONFERENCE

October 27 | GSCPA Learning Center, Atlanta | Event Codes: 13035 | LS13035

The accounting and auditing landscape is continually changing. Thought leaders and experts will provide thorough updates on current issues and developing trends, including the audit quality, reporting assurance and recent FASB activity. CPAs need to stay sharp and get the most eminent updates from lease accounting to fraud to peer review and cybersecurity.



GEORGIA TAX FORUM

November 2-3 | GSCPA Learning Center, Atlanta | Event Codes: 13065 | LS13065

Georgia’s leading taxation event brings you up-to-date on changing tax legislation and critical issues impacting you and your clients, including DOR updates, cryptocurrency, SALT and estate planning updates. Day one will provide an update and lessons learned in the past year. Day two takes a deeper dive into trending topics to prepare you for the coming year. Participate in guided discussions you need to survive the upcoming tax season and insight and experience from local and national speakers to help you determine the best route in advising your clients.



BUSINESS AND INDUSTRY CONFERENCE

November 16-17 | GSCPA Learning Center, Atlanta | Event Codes: 13045 | LS13045

CPAs in business and industry help create the financial health of your business. Learn how to deliver value to your organization in a world where there is a new workforce structure. Respond as a leader with better, more strategic decisions to help your company adapt to the ever-changing business environment and plan for an uncertain future. Discuss technical and professional issues facing finance executives. Arm yourself with information and tools to stay on top of changing trends and issues to think fast, respond quickly, and be aware of the many changes ahead.



GOVERNMENTAL A&A CONFERENCE

December 8 | GSCPA Learning Center, Atlanta | Event Codes: 13070 | LS13070

Financial professionals working for and with government entities at the federal, state, and local levels continually address changes. Acquire in-depth technical guidance on auditing, reporting, financial management, and tax issues facing governments and their auditors. Receive the latest updates on accounting and auditing to ensure your organization complies with standards.

2023 Conferences

HEALTH CARE CONFERENCE

February 23, 2023
GSCPA Learning Center, Atlanta
Event Codes: 13010 | LS13010

SPRING GOVERNMENTAL WORKSHOP

May 12, 2023
GSCPA Learning Center, Atlanta
Event Codes: 13015 | LS13015

EMPLOYEE BENEFIT PLAN CONFERENCE

May 18, 2023 (Tentative)
GSCPA Learning Center, Atlanta
Event Codes: 13026 | LS13026

DECISION MAKERS CONFERENCE

April 19-20, 2023
GSCPA Learning Center, Atlanta
Event Codes: 13005 | LS13005

NOT-FOR-PROFIT CONFERENCE

May 16, 2023
GSCPA Learning Center, Atlanta
Event Codes: 13032 | LS13032

Speaking Opportunities

To meet the growing needs of the profession, The Georgia Society of CPAs (GSCPA) offers several learning events delivered in various formats. GSCPA's continuing education and training programs provide deep insights and breaking-news updates delivered by the top experts in the accounting profession.GSCPA is always happy to consider new speakers and topics to keep our programs fresh and relevant. If our topics below match your expertise, or if you have a new topic you feel the profession could benefit from, please use the form on our website (<https://bit.ly/SpeakersGSCPA>) to propose a session.

AUDIENCE DEMOGRAPHIC

The attendees are CPAs and other financial professionals working in either professional service firms or corporate finance/business.Fields of StudyGSCPA is always looking for new trending topics to supplement our traditional offerings.

FIELDS OF STUDY INCLUDE:

- A&A
- Consulting Services
- Estate & Financial Planning
- Government
- Healthcare
- Information Technology
- Management
- Personal Development
- Real Estate
- Taxation
- Valuation & Litigation

SPEAKER QUALIFICATIONS

Speakers should be senior management level. Our audiences have 10+ years of experience and expect to hear from someone at their level or higher. Speakers should have a proven track record of knowledge and presentation skills. We require ratings of 4.0 or higher (out of 5) in both categories from prior speaking engagements at the Society or other events.

SPEAKER EXPENSES

The Georgia Society of CPAs reimburses all travel and meal expenses, based on IRS guidelines. Hotel rooms, when needed, are reserved and paid for by GSCPA.

SPEAKING SUBMISSION

To be considered, please complete and submit the GSCPA Speaking Opportunities form on our website - <https://bit.ly/SpeakersGSCPA>. The GSCPA CPE Department will review your information, and we will contact you if there is an opportunity.

Atlanta

June

► ♦ **Single Audit Workshop: Performing Single Audits Under the Uniform Guidance for Federal Awards**

June 8, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: 06395 | Live Stream Code: LS06395

Applying one set of auditing standards is tough. Applying three sets of auditing standards is even harder, which is what the auditor does in applying GAAS, the Yellow Book, and the OMB requirements to a single audit. Receive hands-on skills needed to perform audits under the Uniform Guidance for Federal Awards. Materials utilize a highly illustrative and innovative format with over 40 focused exercises to provide an enhanced working knowledge of the single audit requirements.

Early Fee: \$299 M, \$399 NM (by 5/18)
Standard Fee: \$359 M, \$459 NM (5/19 - 6/5)
Late Fee: \$399 M, \$499 NM (after 6/5)

► **Live Stream: Audits of ERISA Plans, with a Focus on 401(k) Plans****

June 20, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: LS06010

Audit engagements for employee benefit plans (EBP) continue to be scrutinized by regulators and peer reviewers due to a history of noncompliance with applicable professional standards. Auditors require proper skills to perform EBP engagements effectively. Work through the plan audit process from engagement acceptance to reporting and completion. As the most common type of plans audited, take a deep dive into 401(k) plans. Tap into ways to plan and conduct effective risk-based plan audits to comply with professional standards while maximizing efficiency.

Early Fee: \$299 M, \$399 NM (by 5/30)
Standard Fee: \$359 M, \$459 NM (5/31 - 6/17)
Late Fee: \$399 M, \$499 NM (after 6/17)

Facility / *GSCPA Learning Center
6 Concourse Pkwy, Ste 800
Atlanta, GA 30328*

► **NEW Live Stream: Breaking Down the Auditor's Report for Non-ERISA Plan Private Entities**

June 21, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: LS06011

The Auditing Standards Board of the AICPA has recently completed a project to update its standards surrounding auditor reporting. With more than half a dozen new Statements on Auditing Standards affecting the entire 700 series of professional standards, there is much to learn about the new requirements. To ensure compliance, walk through the significant areas of Professional Standards, including the new areas and requirements. While retaining much of the familiar language, the audit report is much different under these new standards.

Early Fee: \$299 M, \$399 NM (by 5/31)
Standard Fee: \$359 M, \$459 NM (6/1 - 6/18)
Late Fee: \$399 M, \$499 NM (after 6/18)

► **Audits of 401(k) and Other Employee Benefit Plans for Experienced Auditors**

June 20, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: 06012 | Live Stream Code: LS06012

Explore the risk assessment process in-depth, along with best practices and pitfalls to avoid as we continue to navigate through all of the changes impacting employee benefit plans. Identify best practices for handling specific issues that arise during the audit related to sampling, payroll, compensation, participant loans, hardship distributions, investments and plan mergers/acquisitions. Receive an understanding of the requirements associated with more complex situations, including initial audits, terminating plans, tax compliance and Form 5539. Explore common issues related to the auditor's report, financial statement disclosures, concluding the audit, and other reporting requirements.

Early Fee: \$299 M, \$399 NM (by 5/30)
Standard Fee: \$359 M, \$459 NM (5/31 - 6/17)
Late Fee: \$399 M, \$499 NM (after 6/17)

July

► **NEW** **U.S. GAAP: Review of New Guidance and Hot Topics****
July 12, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: 07010 | Live Stream Code: LS07010

Review new guidance and hot topics, including pronouncements, exposure drafts and other guidance recently issued by FASB. Hot topics include major accounting standards updates such as revenue recognition, credit losses and leases, and critical issues such as fair value measurement.

Early Fee: \$299 M, \$399 NM (by 6/21)
Standard Fee: \$359 M, \$459 NM (6/22 - 7/9)
Late Fee: \$399 M, \$499 NM (after 7/9)

► **Annual Update for Accountants and Auditors****
July 14, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: 07011 | Live Stream Code: LS07011

Keep abreast of the fast-paced changes in accounting and auditing. Explore relevant pronouncements, exposure drafts and other guidance recently issued in the accounting, auditing, review, compilation and preparation engagement arenas. Sort through the complexities and identify and apply recently issued FASB, PCAOB, ARSC and ASB standards and guidance. With the rate of change in today's regulatory environment, you must stay current on the profession's topics.

Early Fee: \$299 M, \$399 NM (by 6/23)
Standard Fee: \$359 M, \$459 NM (6/24 - 7/11)
Late Fee: \$399 M, \$499 NM (after 7/11)

► **Advanced Accounting, Reporting, and Auditing for the Construction Industry**
July 25, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: 07008 | Live Stream Code: LS07008

Review more complex accounting and reporting issues for the construction industry, including related parties and variable interest entities, asset impairment, available financial reporting frameworks and their impact on financial statement presentation and disclosure. The material is designed to recognize and understand the increased risks and develop the accounting techniques and auditing procedures to deal with these high risks and uncertainties for construction contractors.

Early Fee: \$299 M, \$399 NM (by 7/4)
Standard Fee: \$359 M, \$459 NM (7/5 - 7/22)
Late Fee: \$399 M, \$499 NM (after 7/22)

► **Annual Update and Practice Issues for Preparation, Compilation and Review Engagements****
July 26, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: 07012 | Live Stream Code: LS07012

A go-to reference for training staff and managing your preparation, compilation and review engagements, learn how to comply with all of the professional standards surrounding engagements performed under Statements on Standards for Accounting and Review Services (SSARs). A practice-oriented review of the latest developments, cases, and lively discussion among the experienced participants.

Early Fee: \$299 M, \$399 NM (by 7/5)
Standard Fee: \$359 M, \$459 NM (7/6 - 7/23)
Late Fee: \$399 M, \$499 NM (after 7/23)

► **Criminal Law and White Collar Crime**
July 27, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: 07005 | Live Stream Code: LS07005

Explore fraud from an accountant's perspective, with an emphasis on materials that would be relevant to the CFE exam. Review criminal theory and various types of white-collar crimes, including embezzlement, insider trading, theft of trade secrets, statutory fraud and RICO law. Also, cover the basics of several fraud schemes, including Ponzi schemes, skimming, phishing, reimbursement fraud schemes, check tampering, payroll schemes, and false vendor fraud. Cover case studies and updates on cases in the federal criminal system extensively.

Early Fee: \$299 M, \$399 NM (by 7/6)
Standard Fee: \$359 M, \$459 NM (7/7 - 7/24)
Late Fee: \$399 M, \$499 NM (after 7/24)

► **Melisa Galasso's Annual Update for Not-for-Profit A&A**
July 28, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: 07001 | Live Stream Code: LS07001

Not-for-profit entities are challenged with many unique accounting issues. Take a deep dive into accounting for COVID-19 related funding and review other ASUs directly or indirectly impacting nonprofit entities, including the new presentation and disclosure requirements for contributed nonfinancial assets, also referred to as gifts in kind. Look at recent changes in auditing and attestation standards that will impact NFPs, and the latest developments in single audit and Yellow Book requirements.

Early Fee: \$299 M, \$399 NM (by 7/7)
Standard Fee: \$359 M, \$459 NM (7/8 - 7/25)
Late Fee: \$399 M, \$499 NM (after 7/25)

► **Melisa Galasso's Annual Update for Governments and Not-for-Profits**
July 29, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: 07003 | Live Stream Code: LS07003

Examine the accounting standards issued by the Government Accounting Standards Board (GASB) that will be effective this year. Focus on nonprofit accounting, including discussing the new ASU for gifts in kind. Review the impact of COVID-19 on financial reporting and the changes to the audit report for nonprofits and governments. Look at what's going on in the world of the Yellow Book and single audit.

Early Fee: \$299 M, \$399 NM (by 7/8)
Standard Fee: \$359 M, \$459 NM (7/9 - 7/26)
Late Fee: \$399 M, \$499 NM (after 7/26)

August

► **NEW** **Live Stream: Topic 842: Implementing Leases Workshop**
August 17, 2022 | 8 - 11:30 a.m. | CPE: 4 A&A
Live Stream Code: LS08013

Take an in-depth look at Topic 842, Leases which is effective this year. The leases standard requires organizations to recognize lease assets and related lease liabilities on the balance sheet. Cover recognition, measurement, presentation and disclosure requirements, and focus on a key area of change, which is proper identification of a lease using a principles-based approach. Discuss implementation requirements from both the lessee and lessor accounting models and explore a variety of scenarios, including short-term leases, purchase options, variable lease payments and remeasurements.

Early Fee: \$180 M, \$230 NM (by 7/27)
Standard Fee: \$200 M, \$250 NM (7/28 - 8/14)
Late Fee: \$230 M, \$280 NM (after 8/14)

► **NEW** **Live Stream: Common Yellow Book and Single Audit Deficiencies**
August 17, 2022 | 8 - 11:30 a.m. | CPE: 4 A&A
Live Stream Code: LS08014

Learn how to determine appropriate sample sizes and select and evaluate those samples for audit procedures. Cover proper sampling techniques for both testing of internal controls over financial reporting and substantive testing. Also, discuss Monetary Unit Sampling as a statistical sampling method and how to automate sampling to improve audit effectiveness and efficiency.

Early Fee: \$180 M, \$230 NM (by 7/27)
Standard Fee: \$200 M, \$250 NM (7/28 - 8/14)
Late Fee: \$230 M, \$280 NM (after 8/14)

► **Annual Update and Practice Issues for Preparation, Compilation and Review Engagements****
August 30, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: 08017 | Live Stream Code: LS08017

A go-to reference for training staff and managing your preparation, compilation and review engagements, learn how to comply with all of the professional standards surrounding engagements performed under Statements on Standards for Accounting and Review Services (SSARs). A practice-oriented review of the latest developments, cases, and lively discussion among the experienced participants.

Early Fee: \$299 M, \$399 NM (by 8/9)
Standard Fee: \$359 M, \$459 NM (8/10 - 8/27)
Late Fee: \$399 M, \$499 NM (after 8/27)

► **Forensic Accounting: Fraud Investigations****
August 31, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: 08003 | Live Stream Code: LS08003

Forensic accounting has been a rapidly growing part of the accounting profession for some time. The rapid expansion of technology, growth in various sectors of business and industry, and the rise and increase in complexity of white-collar crimes contribute to this growth. A diverse range of clients as well as cases involving all types of fraud make this an attractive profession and one that is always in high demand. Whether you have an audit background, work within the public sector, or aspire to be a forensic accountant, this course will provide you with the foundational knowledge to identify, investigate, and communicate your findings.

Early Fee: \$299 M, \$399 NM (by 8/10)
Standard Fee: \$359 M, \$459 NM (8/11 - 8/28)
Late Fee: \$399 M, \$499 NM (after 8/28)

► **Annual Update for Accountants and Auditors****
August 31, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: 08020 | Live Stream Code: LS08020

Keep abreast of the fast-paced changes in accounting and auditing. Explore relevant pronouncements, exposure drafts and other guidance recently issued in the accounting, auditing, review, compilation and preparation engagement arenas. Sort through the complexities and identify and apply recently issued FASB, PCAOB, ARSC and ASB standards and guidance. With the rate of change in today's regulatory environment, you must stay current on the profession's topics.

Early Fee: \$299 M, \$399 NM (by 8/10)
Standard Fee: \$359 M, \$459 NM (8/11 - 8/28)
Late Fee: \$399 M, \$499 NM (after 8/28)

► **K2’s Excel Tips, Tricks, and Techniques for Accountants**

August 31, 2022 | 8 a.m. - 3:30 p.m. | CPE: 4 A&A/4 General
Event Code: 08021 | Live Stream Code: LS08021

Excel is the accountant's tool of choice for analyzing and reporting financial data. Unfortunately, many use time-consuming and error-prone processes to complete everyday tasks. Regardless of your experience, learn more efficient and effective ways to work with Excel and improve your utilization of Excel.

Early Fee: \$299 M, \$399 NM (by 8/10)

Standard Fee: \$359 M, \$459 NM (8/11 - 8/28)

Late Fee: \$399 M, \$499 NM (after 8/28)

September

► **Live Stream: Employee Benefit Plan Audits for Plan Sponsors**

September 13, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Live Stream Code: LS09001

It is more important than ever to ensure that your benefit plan complies with the rules and regulations. Receive an understanding of the rules and regulations governing 401(k) plans, including determining if an audit is required. Address internal control documentation and learn what to expect and prepare for the employee benefit plan audit. Identify the most common mistakes made by plan sponsors, along with recommended corrections.

Early Fee: \$299 M, \$399 NM (by 8/23)

Standard Fee: \$359 M, \$459 NM (8/24 - 9/10)

Late Fee: \$399 M, \$499 NM (after 9/10)

► **NEW Live Stream: Construction Contractors: Non-Revenue and Non-Lease Accounting Considerations****

September 13, 2022 | 8 - 11:30 a.m. | CPE: 4 A&A
Live Stream Code: LS09002

The construction industry is one of the most unique in complying with the various accounting standards. Examine the core knowledge necessary to succeed and the key issues impacting construction accounting. Find out what other new developments may mean for you, your company, or your clients. Explore the relationship between the contractor and the surety.

Early Fee: \$180 M, \$230 NM (by 8/23)

Standard Fee: \$200 M, \$250 NM (8/24 - 9/10)

Late Fee: \$230 M, \$280 NM (after 9/10)

► **K2’s Business Intelligence, Featuring Microsoft’s Power BI Tools**

September 15, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: 09003 | Live Stream Code: LS09003

Business Intelligence (BI) is perhaps the hottest topic in most professional circles in today's business climate. Increasingly, organizations of all sizes seek to take advantage of the data available to them to identify previously undiscovered insights and gain competitive advantages thought to be out-of-reach just a few short years ago. A growing array of tools - ranging from Excel add-ins to dedicated solutions such as Power BI - now allow you to leverage your existing knowledge and skills to create powerful, interactive dashboards and analyses.

Early Fee: \$299 M, \$399 NM (by 8/25)

Standard Fee: \$359 M, \$459 NM (8/26 - 9/12)

Late Fee: \$399 M, \$499 NM (after 9/12)

October

► **Restaurant Accounting and Controls**

October 11, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: 08004 | Live Stream Code: LS08004

Combine the practical knowledge of restaurant ownership and operations with your financial skills as a CPA. Cover weekly accounting controls and reporting procedures unique to the restaurant industry. Learn the ability to annualize restaurant financial statements to improve net profit by about five percent of sales.

Early Fee: \$299 M, \$399 NM (by 9/20)

Standard Fee: \$359 M, \$459 NM (9/21 - 10/8)

Late Fee: \$399 M, \$499 NM (after 10/8)

► **Accounting and Auditing Update for Small Business****

October 19, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: 10025 | Live Stream Code: LS10025

Receive an update on the new accounting, auditing, compilation and review standards, and other professional guidance impacting small businesses and their auditors. Materials include practical applications of the topics covered to help you understand and apply the standards to real-life scenarios. With the rate of change in today's regulatory environment, you must stay current on all topics impacting the profession.

Early Fee: \$299 M, \$399 NM (by 9/28)

Standard Fee: \$359 M, \$459 NM (9/29 - 10/16)

Late Fee: \$399 M, \$499 NM (after 10/16)

► **♦ Advanced Auditing of HUD-Assisted Projects****

October 20, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: 10001 | Live Stream Code: LS10001

Does your organization know what it takes to perform a HUD audit? Review pitfalls for HUD-assisted housing owners and managers. Assess and evaluate the latest changes in the federally-assisted housing industry and efficiently plan, execute and report a HUD-assisted engagement.

Early Fee: \$299 M, \$399 NM (by 9/29)

Standard Fee: \$359 M, \$459 NM (9/30 - 10/17)

Late Fee: \$399 M, \$499 NM (after 10/17)

► **Live Stream: Forensic Accounting: Fraud Investigations****

October 20, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: LS10005 | Live Stream Code: LS10005

Forensic accounting has been a rapidly growing part of the accounting profession for some time. The rapid expansion of technology, growth in various sectors of business and industry, and the rise and increase in complexity of white-collar crimes contribute to this growth. A diverse range of clients as well as cases involving all types of fraud make this an attractive profession and one that is always in high demand. Whether you have an audit background, work within the public sector, or aspire to be a forensic accountant, this course will provide you with the foundational knowledge to identify, investigate, and communicate your findings.

Early Fee: \$299 M, \$399 NM (by 9/29)

Standard Fee: \$359 M, \$459 NM (9/30 - 10/17)

Late Fee: \$399 M, \$499 NM (after 10/17)

► **♦ Live Stream: Advanced Topics in a Single Audit****

October 20, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: LS10006 | Live Stream Code: LS10006

Be prepared for planning, directing and reporting on a single audit engagement conducted under the Uniform Guidance. Receive insights into critical issues that are not covered in other courses, emphasizing advanced topics that require particular attention. Case studies are provided to highlight key compliance audit requirements and to help put the guidance into practice.

Early Fee: \$299 M, \$399 NM (by 9/29)

Standard Fee: \$359 M, \$459 NM (9/30 - 10/17)

Late Fee: \$399 M, \$499 NM (after 10/17)

► **NEW U.S. GAAP: Review of New Guidance and Hot Topics****

October 26, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: 10009 | Live Stream Code: LS10009

Review new guidance and hot topics, including pronouncements, exposure drafts and other guidance recently issued by FASB. Hot topics include major accounting standards updates such as revenue recognition, credit losses and leases, and critical issues such as fair value measurement.

Early Fee: \$299 M, \$399 NM (by 10/5)

Standard Fee: \$359 M, \$459 NM (10/6 - 10/23)

Late Fee: \$399 M, \$499 NM (after 10/23)

► **NEW Conquering the New Leasing Standard: It’s Finally Here**

October 28, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: 10012 | Live Stream Code: LS10012

The new leasing standard will become mandatory in calendar 2022 for non-public entities (adopted at the end of the year through retrospective adoption). Almost every entity leases something, which means nearly every entity will be impacted materially by this new standard. The emphasis of the discussion will be solely from the perspective of how a lessee applies the standard to typical leasing arrangements of non-publicly traded entities. Focus on A-Z examples of applying the standard to actual leases through footnote disclosures.

Early Fee: \$299 M, \$399 NM (by 10/7)

Standard Fee: \$359 M, \$459 NM (10/8 - 10/25)

Late Fee: \$399 M, \$499 NM (after 10/25)

► **Live Stream: What Fraud Schemes Exist in Your Organization****

October 31, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: LS10014 | Live Stream Code: LS10014

Many costly fraud schemes have occurred repeatedly throughout the past several decades, mostly due to the lack of implementation of internal controls and a fraud risk mitigation plan. The advancement of technology and the increased sophistication in committing fraud also impact organizations and affect their bottom line. Examine the framework and focus on the most prevalent fraud schemes affecting organizations.

Early Fee: \$299 M, \$399 NM (by 10/10)

Standard Fee: \$359 M, \$459 NM (10/11 - 10/28)

Late Fee: \$399 M, \$499 NM (after 10/28)

November

► **Live Stream: Construction Contractors: Auditing Considerations**
November 1, 2022 | 8 - 11:30 a.m. | CPE: 4 A&A
Live Stream Code: LS11011

The construction industry is one of the most unique in complying with the various auditing standards. Examine the core knowledge necessary to succeed and the critical auditing issues impacting construction accounting. Find out what other new developments may mean for you, your company or your clients. With construction comprising such a large portion of the economy and continually growing, it is more important than ever for you to be on top of the latest auditing changes and practice tips for the construction industry.

Early Fee: \$180 M, \$230 NM (by 10/11)
Standard Fee: \$200 M, \$250 NM (10/12 - 10/29)
Late Fee: \$230 M, \$280 NM (after 10/29)

► **K2’s QuickBooks for Accountants**
November 7, 2022 | 8 a.m. - 3:30 p.m.
CPE: 4 A&A/4 Computer Software & Applications
Event Code: 11020 | Live Stream Code: LS11020

QuickBooks is a powerful product with features and capabilities that many users are either not aware of or do not know how to utilize effectively. Get more out of QuickBooks and QuickBooks Online to resolve the issues that even experienced QuickBooks users often struggle with, such as locking down prior periods.

Early Fee: \$299 M, \$399 NM (by 10/17)
Standard Fee: \$359 M, \$459 NM (10/18 - 11/4)
Late Fee: \$399 M, \$499 NM (after 11/4)

► **K2’s Small Business Internal Controls, Security, and Fraud Prevention and Detection**
November 8, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: 11022 | Live Stream Code: LS11022

Although the IRS continues to lose its audit workforce due to budget cuts, it examines specific individuals and small business taxpayers. Now, more than ever, CPAs need clients to understand the need for documentation and procedures to substantiate what IRS examiners are pursuing. Learn the high audit risk areas and ways to help clients survive an IRS audit with little or no change. It is critical for CPAs in public accounting to understand the risk to clients and themselves in tax return preparation and planning.

Early Fee: \$299 M, \$399 NM (by 10/18)
Standard Fee: \$359 M, \$459 NM (10/19 - 11/5)
Late Fee: \$399 M, \$499 NM (after 11/5)

► **Jim Martin’s 2022 Preparation, Compilation and Review (SSARS) Update for the Local Firm**
November 10, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: 11027 | Live Stream Code: LS11027

Take an in-depth look at issues that practitioners have been having in implementing preparation, compilation and review engagements. Review 15-20 new cases for 2022 covering all aspects of SSARS application, including accounting, disclosure and reporting. Several accounting and disclosure standards are integrated into the recent cases, especially the new leasing standard.

Early Fee: \$299 M, \$399 NM (by 10/20)
Standard Fee: \$359 M, \$459 NM (10/21 - 11/7)
Late Fee: \$399 M, \$499 NM (after 11/7)

► **Jim Martin’s 2022 Accounting & Auditing Update for the Real World**
November 11, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: 11032 | Live Stream Code: LS11032

Cover the significant provisions of the most recent pronouncements and proposed pronouncements from the FASB, the Private Company Council, the Auditing Standards Board and the Accounting and Review Services Committee. Presented from the perspective of a small firm practitioner who services or works for non-publicly traded entities, discuss the standards that have the broadest application to the local practitioner. The new leasing standard will be covered extensively. The floor is always open to discussing whatever current accounting and auditing topics the class participants may want to cover.

Early Fee: \$299 M, \$399 NM (by 10/21)
Standard Fee: \$359 M, \$459 NM (10/22 - 11/8)
Late Fee: \$399 M, \$499 NM (after 11/8)

► **Live Stream: Melisa Galasso’s Annual Update for Accountants and Auditors**
November 14, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Live Stream Code: LS11033

Look at the recent activities of FASB and cover standards effective in the current year and those that will be effective in the future. Discuss standards issued by the Auditing Standards Board and the Accounting & Review Services Committees of the AICPA while looking at the impact of the new standards and how you can prepare to implement them practically.

Early Fee: \$299 M, \$399 NM (by 10/24)
Standard Fee: \$359 M, \$459 NM (10/25 - 11/11)
Late Fee: \$399 M, \$499 NM (after 11/11)

► ♦ **Live Stream: Latest Developments in Nonprofit Accounting and Auditing**
November 15, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: LS11037 | Live Stream Code: LS11037

This year is indeed another year of significant change in the world of nonprofit accounting and auditing. The materials utilize a highly illustrative and innovative format. Over 30 focused exercises are included to provide an enhanced working knowledge of the latest developments in nonprofit accounting and auditing.

Early Fee: \$299 M, \$399 NM (by 10/25)
Standard Fee: \$359 M, \$459 NM (10/26 - 11/12)
Late Fee: \$399 M, \$499 NM (after 11/12)

► **Criminal Law and White Collar Crime**
November 15, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: 11069 | Live Stream Code: LS11069

Explore fraud from an accountant’s perspective, with an emphasis on materials that would be relevant to the CFE exam. Review criminal theory and various types of white-collar crimes, including embezzlement, insider trading, theft of trade secrets, statutory fraud and RICO law. Also, cover the basics of several fraud schemes, including Ponzi schemes, skimming, phishing, reimbursement fraud schemes, check tampering, payroll schemes, and false vendor fraud. Cover case studies and updates on cases in the federal criminal system extensively.

Early Fee: \$299 M, \$399 NM (by 10/25)
Standard Fee: \$359 M, \$459 NM (10/26 - 11/12)
Late Fee: \$399 M, \$499 NM (after 11/12)

► **Current Issues in Accounting and Auditing: An Annual Update**
November 21, 2022 | 8 - 11:30 a.m. | CPE: 4 A&A
Event Code: CLA001 | Live Stream Code: LSCLA001

Accounting and attestation practitioners at all public accounting and business and industry levels will receive an overview of recent FASB and AICPA activity. Discussion includes recently issued and proposed Accounting Standards Updates (ASUs); the latest on the new lease accounting standard, Topic 842; other relevant ASUs; and soon-to-be-effective new auditing standards and the latest on new standards issued by the ARSC related to SSARS engagements.

Early Fee: \$180 M, \$230 NM (by 10/31)
Standard Fee: \$200 M, \$250 NM (11/1 - 11/18)
Late Fee: \$230 M, \$280 NM (after 11/18)

► **NEW Update on the AICPA’s New Ethics and Quality Control Standards**
November 21, 2022 | 12:30 - 4 p.m. | CPE: 4 A&A
Event Code: CLA004 | Live Stream Code: LSCLA004

Quality and ethics are the hallmark characteristics of the accounting profession. As CPAs, it is our responsibility to understand our professional responsibilities in these two key areas. Cover the details of the enacted and proposed changes to the AICPA Code of Professional Conduct (Code) and Quality Management standards, especially those that impact our communication of noncompliance with laws and regulations and other changes which will affect our independence. Review the new quality management standards proposed by the AICPA, which will significantly change how firms design and deploy their processes that ensure engagement quality and compliance with the Code.

Early Fee: \$180 M, \$230 NM (by 10/31)
Standard Fee: \$200 M, \$250 NM (11/1 - 11/18)
Late Fee: \$230 M, \$280 NM (after 11/18)

► **NEW K2’s Data Analytics for Accountants and Auditors**
November 21, 2022 | 8 - 11:30 a.m. | CPE: 4 A&A
Event Code: CLA006 | Live Stream Code: LSCLA006

In the world of “Big Data,” virtually all business professionals have become data analysts, at least to some extent. However, that is particularly true in the field of auditing, where internal and external auditors are increasingly turning to data analytics to identify situations requiring follow-up and investigation. Learn about various tools and techniques you can use for more thorough data analyses. The discussion includes Excel, various Excel add-ins, and Microsoft’s Power BI application.

Early Fee: \$180 M, \$230 NM (by 10/31)
Standard Fee: \$200 M, \$250 NM (11/1 - 11/18)
Late Fee: \$230 M, \$280 NM (after 11/18)

► **Guide and Update to Compilations, Reviews, and Preparations**

November 22, 2022 | 8 - 11:30 a.m. | CPE: 4 A&A
Event Code: CLA007 | Live Stream Code: LSCLA007

Designed explicitly for compilation, preparation, and review practitioners and their staff, receive an overview, update and hands-on application for performing compilation, preparation and review engagements. Learn the ins and outs of SSARS No. 21, Clarification and Recodification, and other recent releases from the AICPA that impact SSARS engagements. Study the essential provisions of the recently issued SSARS No. 25, effective for 2022 engagements. Receive practical examples and illustrations to help you effectively and efficiently perform compilation, preparation, and review engagements.

Early Fee: \$180 M, \$230 NM (by 11/1)
Standard Fee: \$200 M, \$250 NM (11/2 - 11/19)
Late Fee: \$230 M, \$280 NM (after 11/19)

► **Technology Trends and Hot Topics Impacting the Accounting Profession**
November 22, 2022 | 12:30 - 4 p.m. | CPE: 4 A&A
Event Code: CLA010 | Live Stream Code: LSCLA010

While CPAs’ commitment to ethics hasn’t changed, the environment in which CPAs operate has changed significantly over the past decade and will continue to change as rapidly, or even more so, over the next few years. Review the CPA’s ethical requirements with a specific focus on technology’s impact. Explore ethical data security and privacy challenges, investigate emerging technologies such as artificial intelligence and blockchain and discuss how technological advances impact how CPAs provide their services. Examine recent initiatives of the International Ethics Standards Board for Accountants (IESBA) to update its Code to provide guidance to assist accountants and auditors in navigating the more pressing ethics and independence challenges arising from evolving technologies.

Early Fee: \$180 M, \$230 NM (by 11/1)
Standard Fee: \$200 M, \$250 NM (11/2 - 11/19)
Late Fee: \$230 M, \$280 NM (after 11/19)

► **K2’s Advanced Excel**
December 7, 2022 | 8 a.m. - 3:30 p.m.
CPE: 4 A&A/4 Computer Software & Applications
Event Code: 12011 | Live Stream Code: LS12011

Experienced Excel users seeking to elevate their skills will benefit from over twenty-five years of experience delivering Excel training to accountants and other business professionals. As a result, you will find the content of this session to be both timely and relevant.

Early Fee: \$299 M, \$399 NM (by 11/16)
Standard Fee: \$359 M, \$459 NM (11/17 - 12/4)
Late Fee: \$399 M, \$499 NM (after 12/4)

► **Jim Martin’s Accounting and Auditing for Tax People Who Absolutely Detest Accounting and Auditing**
December 12, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: 12016 | Live Stream Code: LS12016

Recent pronouncements from the FASB, ASB, and ARSC are presented and discussed from a perspective that allows a non-A&A person to understand what’s coming on their way regarding financial statement treatment of items that may result in different tax treatment, including the new revenue standard and leasing changes. The content is designed for professionals who will never do accounting and auditing work in the remainder of their careers yet need to meet a regulatory burden. Tax professionals may actually have an educational and fun time meeting the regulatory requirements.

Early Fee: \$299 M, \$399 NM (by 11/21)
Standard Fee: \$359 M, \$459 NM (11/22 - 12/9)
Late Fee: \$399 M, \$499 NM (after 12/9)

► ♦ **Not-for-Profit Accounting and Auditing Update****
December 13, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: 12019 | Live Stream Code: LS12019

The best avenue to success is to be indispensable to your clients. The best way to become indispensable is to have a solid understanding of your client’s business. Review the latest developments affecting not-for-profits, such as requirements of FASB directed toward the organizations and information on the latest OMB and Yellow Book developments.

Early Fee: \$299 M, \$399 NM (by 11/22)
Standard Fee: \$359 M, \$459 NM (11/23 - 12/10)
Late Fee: \$399 M, \$499 NM (after 12/10)

December

► **Melisa Galasso’s Annual Update for Accountants and Auditors**
December 1, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: 12001 | Live Stream Code: LS12001

Look at the recent activities of FASB and cover standards effective in the current year and those that will be effective in the future. Discuss standards issued by the Auditing Standards Board and the Accounting & Review Services Committees of the AICPA while looking at the impact of the new standards and how you can prepare to implement them practically.

Early Fee: \$299 M, \$399 NM (by 11/10)
Standard Fee: \$359 M, \$459 NM (11/11 - 11/28)
Late Fee: \$399 M, \$499 NM (after 11/28)

► ♦ **Live Stream: Not-for-Profit Financial Reporting: Mastering the Unique Requirements****
December 1, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Live Stream Code: LS12002

Do you know what makes not-for-profit accounting and financial reporting different? Avoid the potholes of confusion and provide a financial picture that end users can truly understand. This course provides insight into what makes not-for-profits different through a combination of practical guidance and case studies.

Early Fee: \$299 M, \$399 NM (by 11/10)
Standard Fee: \$359 M, \$459 NM (11/11 - 11/28)
Late Fee: \$399 M, \$499 NM (after 11/28)

► **Live Stream: Breaking Down the Auditor’s Report for Non-ERISA Plan Private Entities****
December 2, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Live Stream Code: LS12003

The Auditing Standards Board of the AICPA has recently completed a project to update its standards surrounding auditor reporting. With more than half a dozen new Statements on Auditing Standards affecting the entire 700 series of professional standards, there is much to learn about the new requirements. To ensure compliance, walk through the significant areas of Professional Standards, including the new areas and requirements. While retaining much of the familiar language, the audit report is much different under these new standards.

Early Fee: \$299 M, \$399 NM (by 11/11)
Standard Fee: \$359 M, \$459 NM (11/12 - 11/29)
Late Fee: \$399 M, \$499 NM (after 11/29)

► Jim Martin’s 2022 Preparation, Compilation and Review (SSARS) Update for the Local Firm

December 15, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: 12028 | Live Stream Code: LS12028

Take an in-depth look at issues that practitioners have been having in implementing preparation, compilation and review engagements. Review 15-20 new cases for 2022 covering all aspects of SSARS application, including accounting, disclosure and reporting. Several accounting and disclosure standards are integrated into the recent cases, especially the new leasing standard.

Early Fee: \$299 M, \$399 NM (by 11/24)
Standard Fee: \$359 M, \$459 NM (11/25 - 12/12)
Late Fee: \$399 M, \$499 NM (after 12/12)

► Jim Martin’s 2022 Accounting & Auditing Update for the Real World

December 16, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: 12031 | Live Stream Code: LS12031

Cover the significant provisions of the most recent pronouncements and proposed pronouncements from the FASB, the Private Company Council, the Auditing Standards Board and the Accounting and Review Services Committee. Presented from the perspective of a small firm practitioner who services or works for non-publicly traded entities, discuss the standards that have the broadest application to the local practitioner. The new leasing standard will be covered extensively. The floor is always open to discussing whatever current accounting and auditing topics the class participants may want to cover.

Early Fee: \$299 M, \$399 NM (by 11/25)
Standard Fee: \$359 M, \$459 NM (11/26 - 12/13)
Late Fee: \$399 M, \$499 NM (after 12/13)

► Live Stream: Winning the Fraud Battle in the 21st Century: Prevention and Detection

December 19, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Live Stream Code: LS12035

Our focus is to reduce the overall risk of fraud. Focus on what factors contribute to turning honest employees into fraudsters. The discussion will include integrity and ethics, as well as how people may react in certain situations. We will also touch upon what lurks in the darknet, along with cryptocurrency fraud.

Early Fee: \$299 M, \$399 NM (by 11/28)
Standard Fee: \$359 M, \$459 NM (11/29 - 12/16)
Late Fee: \$399 M, \$499 NM (after 12/16)

► FASB Update for Small and Medium-Sized Businesses: A Practical Implementation Guide

December 20, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: 12036 | Live Stream Code: LS12036

Focus on recent ASUs issued by the FASB, concentrating on most accounting practitioners’ issues of greatest significance. Specifically, review recently issued FASB standards on leases, financial instruments, and update ASC 606 implementation status and other hot button accounting issues. Participate in a comprehensive review of recent Private Company Standard-Setting activities and FASB’s technical agenda. Cover any accounting implications of current events, such as COVID-19 stimulus legislation and other tax-law changes

Early Fee: \$299 M, \$399 NM (by 11/29)
Standard Fee: \$359 M, \$459 NM (11/30 - 12/17)
Late Fee: \$399 M, \$499 NM (after 12/17)

January 2023

► **NEW** K2’s Excel Essentials for Staff Accountants
January 24, 2023 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: 01003 | Live Stream Code: LS01003

Staff accountants have specific needs when working with Excel, which are often not met by their existing Excel knowledge. Chief among these are the needs to quickly summarize data, prepare accurate and aesthetically pleasing reports, and create accounting-centric calculations for elements such as depreciation, amortization and interest. Gain the essential skills to maximize efficiency and accuracy when working with Excel. Review Excel best practices and address items such as PivotTables, sophisticated formulas, Tables, formatting and working with dates in Excel.

Early Fee: \$299 M, \$399 NM (by 1/3)
Standard Fee: \$359 M, \$459 NM (1/4 - 1/21)
Late Fee: \$399 M, \$499 NM (after 1/21)

May 2023

► **NEW** K2’s Case Studies in Fraud and Technology Controls
May 16, 2023 | 12:30 - 4 p.m. | CPE: 4 A&A
Event Code: CLB004 | Live Stream Code: LSCLB004

Fraud continues to plague businesses at epidemic levels, and technology control failures are largely why fraud occurs. Using a case study approach, learn about the pervasiveness of fraud, the control failures that contribute to fraud, and what you can do to mitigate fraud risk. A specific focus is the application of information technology general and application controls. Examine numerous reported fraud cases and identify the general control and application control failures that contributed to each of these frauds.

Early Fee: \$180 M, \$230 NM (by 4/25)
Standard Fee: \$200 M, \$250 NM (4/26 - 5/13)
Late Fee: \$230 M, \$280 NM (after 5/13)

► Critical Issues That CPAs in Industry Will Need to Face This Year

May 17, 2023 | 8 - 11:30 a.m. | CPE: 4 A&A
Event Code: CLB006 | Live Stream Code: LSCLB006

Tackle pressing issues at a “need to know” level and discuss the practical implications. You will come away armed with the “big picture.” Preparedness is half the battle, so do not miss this critical briefing.

Early Fee: \$180 M, \$230 NM (by 4/26)
Standard Fee: \$200 M, \$250 NM (4/27 - 5/14)
Late Fee: \$230 M, \$280 NM (after 5/14)

► Financial Statement Disclosures: A Guide for Small and Medium-Sized Businesses

May 17, 2023 | 12:30 - 4 p.m. | CPE: 4 A&A
Event Code: CLB008 | Live Stream Code: LSCLB008

A clear and concise set of proper financial statement disclosures can make or break an entity’s financial statements. Focus on the key balance sheet and income statement disclosure as well as those relating to the adoption of new accounting standards related to revenue (ASC 606) and leases (ASC 842), accounting policies, changes in accounting estimates and errors, subsequent events, going concern and related party disclosures. Course materials will use illustrations, examples based on private company financial statement disclosures and real-world excerpts.

Early Fee: \$180 M, \$230 NM (by 4/26)
Standard Fee: \$200 M, \$250 NM (4/27 - 5/14)
Late Fee: \$230 M, \$280 NM (after 5/14)



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7. Periodic checkpoints will pop up to monitor attendance. At the end of the program, your attendance will be reconciled and you will have the ability to download a certificate of attendance.

For help accessing On-Demand sessions, contact the CPE Department at 404-504-2985 or 800-330-8889, Opt. 3.

May

► CFO Series: Preparing for Change

May 23, 2022 | 8 a.m. - 3:30 p.m.
CPE: 6 Management & Organization/2 Auditing Business
Event Code: 05004 | Live Stream Code: LS05004

Review the complex issues involved with change and risk management to take advantage of the never-ending changes that occur daily. Explore the everyday root causes that increase risk and cause systems to fail. Discuss that all employees need an effective review from their supervisor and effectively communicate, deliver messages, achieve better performance and reduce turnover. Understand a process to identify why an individual is not performing well and address the situation so each party is better off.

Early Fee: \$299 M, \$399 NM (by 5/2)
Standard Fee: \$359 M, \$459 NM (5/3 - 5/20)
Late Fee: \$399 M, \$499 NM (after 5/20)

June

► CFO Series: Preparing for Growth

June 23, 2022 | 8 a.m. - 3:30 p.m.
CPE: 2 Accounting /2 Auditing/2 Finance
Event Code: 06013 | Live Stream Code: LS06013

Understand how to develop capital budgets in a growing company environment and gain new ideas for managing your organization's working capital. Explore how to better prepare for an uncertain future, minimize risk, and perform your month-end closing faster, better, and cheaper.

Early Fee: \$299 M, \$399 NM (by 6/2)
Standard Fee: \$359 M, \$459 NM (6/3 - 6/20)
Late Fee: \$399 M, \$499 NM (after 6/20)

Early Fee: \$299 M, \$399 NM (by 6/2)

Standard Fee: \$359 M, \$459 NM (6/3 - 6/20)

Late Fee: \$399 M, \$499 NM (after 6/20)

Early Fee: \$299 M, \$399 NM (by 6/2)

Standard Fee: \$359 M, \$459 NM (6/3 - 6/20)

Late Fee: \$399 M, \$499 NM (after 6/20)

Early Fee: \$299 M, \$399 NM (by 6/2)

Standard Fee: \$359 M, \$459 NM (6/3 - 6/20)

Late Fee: \$399 M, \$499 NM (after 6/20)

Early Fee: \$299 M, \$399 NM (by 6/2)

Standard Fee: \$359 M, \$459 NM (6/3 - 6/20)

Late Fee: \$399 M, \$499 NM (after 6/20)

Early Fee: \$299 M, \$399 NM (by 6/2)

Standard Fee: \$359 M, \$459 NM (6/3 - 6/20)

Late Fee: \$399 M, \$499 NM (after 6/20)

Early Fee: \$299 M, \$399 NM (by 6/2)

► Corporate Finance Checkup: Renovate Your Analytical Toolbox

June 24, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 Finance
Event Code: 06009 | Live Stream Code: LS06009

Understanding how to use common corporate finance tools is a skill that separates those who will become Chief Financial Officers from those who will always remain accountants. This seminar provides a refresher on corporate finance skills for those who work or aspire to work at the CFO level.

Early Fee: \$299 M, \$399 NM (by 6/3)
Standard Fee: \$359 M, \$459 NM (6/4 - 6/21)
Late Fee: \$399 M, \$499 NM (after 6/21)

July

► Business Law for Accountants

July 26, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 Business Law
Event Code: 07006 | Live Stream Code: LS07006

The law can be your best friend as an accountant-or your worst enemy. The difference between the two is knowledge - do you possess it or not? Discuss the basics of legal procedure, evidence, torts, employment law, constitutional law, criminal law, contracts, bankruptcies and the Uniform Commercial Code. Each subject is taught from the accounting profession's perspective, emphasizing practical application to the field and tips and tricks for using the law to your advantage.

Early Fee: \$299 M, \$399 NM (by 7/5)
Standard Fee: \$359 M, \$459 NM (7/6 - 7/23)
Late Fee: \$399 M, \$499 NM (after 7/23)

September

► CFO Series: Creating Competitive Advantage

September 16, 2022 | 8 a.m. - 3:30 p.m.
CPE: 4 Management & Organization /4 Accounting Business
Event Code: 09004 | Live Stream Code: LS09004

Examine practices and strategies that will give your organization a competitive advantage. Understand how to improve profit through involvement with your organization's pricing process and why superior cost knowledge will provide your company a competitive edge. Create models that ensure your organization sells its products at a profitable price.

Early Fee: \$299 M, \$399 NM (by 8/26)
Standard Fee: \$359 M, \$459 NM (8/27 - 9/13)
Late Fee: \$399 M, \$499 NM (after 9/13)

Early Fee: \$299 M, \$399 NM (by 8/26)

Standard Fee: \$359 M, \$459 NM (8/27 - 9/13)

Late Fee: \$399 M, \$499 NM (after 9/13)

Early Fee: \$299 M, \$399 NM (by 8/26)

Standard Fee: \$359 M, \$459 NM (8/27 - 9/13)

Late Fee: \$399 M, \$499 NM (after 9/13)

► Employer's Handbook: Legal, Tax, and Health Care Issues

September 20, 2022 | 8 a.m. - 3:30 p.m.
CPE: 5 Business Law/3 Tax
Event Code: 09007 | Live Stream Code: LS09007

The employer-employee relationship strains both sides in uncertain times. Businesses need CPAs, controllers, and other advisors to understand the complicated legal, tax, and health care issues associated with all aspects of employment, especially now. Receive in-depth coverage of this critical area. Updated and supplemented throughout the year for breaking developments.

Early Fee: \$299 M, \$399 NM (by 8/30)
Standard Fee: \$359 M, \$459 NM (8/31 - 9/17)
Late Fee: \$399 M, \$499 NM (after 9/17)

October

► CFO Series: Financial Communications

October 18, 2022 | 8 a.m. - 3:30 p.m.
CPE: 4 Accounting/4 Communications & Marketing
Event Code: 10003 | Live Stream Code: LS10003

Understand how to communicate your organization's performance better and use metrics to improve performance. Learn how to cut your writing time in half and double your impact to make your presentations more effective. Discuss how to connect with your stakeholders who do not have a financial background.

Early Fee: \$299 M, \$399 NM (by 9/27)
Standard Fee: \$359 M, \$459 NM (9/28 - 10/15)
Late Fee: \$399 M, \$499 NM (after 10/15)

► Advanced Controller and CFO Skills**

October 26, 2022 | 8 a.m. - 3:30 p.m.
CPE: 8 Business Management & Organization
Event Code: 10010 | Live Stream Code: LS10010

Examine best practices of leading-edge controllers and CFOs. Demonstrate your advanced skills that add value and contribute to the organization's success. Learn specific skills every CFO or controller needs to be successful. Show the company's leadership how vital you are to their profitability.

Early Fee: \$299 M, \$399 NM (by 10/5)
Standard Fee: \$359 M, \$459 NM (10/6 - 10/23)
Late Fee: \$399 M, \$499 NM (after 10/23)

Early Fee: \$299 M, \$399 NM (by 10/5)

Standard Fee: \$359 M, \$459 NM (10/6 - 10/23)

Late Fee: \$399 M, \$499 NM (after 10/23)

Early Fee: \$299 M, \$399 NM (by 10/5)

Standard Fee: \$359 M, \$459 NM (10/6 - 10/23)

Late Fee: \$399 M, \$499 NM (after 10/23)

► **NEW** Live Stream: Finance Business Partnering: Successful Business Models and Strategic Choices

October 31, 2022 | 8 - 11:30 a.m.
CPE: 4 Business Management & Organization
Event Code: LS10015

Receive an application-based approach to finance business partnering. Not only will you acquire essential problem-solving skills, but you will also learn how to leverage analytics tools and techniques to aid in decision-making.

Early Fee: \$180 M, \$230 NM (by 10/10)
Standard Fee: \$200 M, \$250 NM (10/11 - 10/28)
Late Fee: \$230 M, \$280 NM (after 10/28)

November

► **NEW** Live Stream: Finance Business Partnering: The Changing Finance Function and Technology Impacts

November 3, 2022 | 8 - 11:30 a.m.
CPE: 4 Business Management & Organization
Event Code: LS11015

Receive an introduction to finance business partnering and an appreciation of the growing importance of this role in management accounting. Build on your current knowledge and experience to successfully navigate and drive value for your business during a time of disruptive, technology-led change. See how technology is changing the role of the traditional management accountant and how best to embrace this digital revolution.

Early Fee: \$180 M, \$230 NM (by 10/13)
Standard Fee: \$200 M, \$250 NM (10/14 - 10/31)
Late Fee: \$230 M, \$280 NM (after 10/31)



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►Project Management for Finance Professionals

November 9, 2022 | 8 a.m. - 3:30 p.m.

CPE: 8 Management Services

Event Code: 11025 | Live Stream Code: LS11025

This past year has shown us the need for numerous projects and uniquely managing those projects. Project management is an essential part of every organization; however, often, companies do not differentiate between project management and operations management. Sometimes, the finance professional is called upon to serve on a project team or is in a position to manage a project within the finance or accounting department. Finance professionals of small- and medium-sized organizations will benefit from examples born from projects needed due to our experiences with COVID-19.

Early Fee: \$299 M, \$399 NM (by 10/19)

Standard Fee: \$359 M, \$459 NM (10/20 - 11/6)

Late Fee: \$399 M, \$499 NM (after 11/6)

►CFO Series: Fine Tune Your Finances

November 14, 2022 | 8 a.m. - 3:30 p.m.

CPE: 6 Business Management & Organization/2 Auditing

Event Code: 07002 | Live Stream Code: LS07002

Learn ways to manage your cash better and improve your organization's profitability. Discuss strategies for long-term success with cash management and the issues involved with effectively managing cash. Discover ten ways to improve your organization's bottom line and do more with less.

Early Fee: \$299 M, \$399 NM (by 10/24)

Standard Fee: \$359 M, \$459 NM (10/25 - 11/11)

Late Fee: \$399 M, \$499 NM (after 11/11)

►Live Stream: Employer's Handbook: Legal, Tax and Health Care Issues

November 29, 2022 | 8 a.m. - 3:30 p.m.

CPE: 5 Business Law/3 Tax

Event Code: LS11050

The employer-employee relationship strains both sides in uncertain times. Businesses need CPAs, controllers, and other advisors to understand the complicated legal, tax, and health care issues associated with all aspects of employment, especially now. Receive in-depth coverage of this critical area. Updated and supplemented throughout the year for breaking developments.

Early Fee: \$299 M, \$399 NM (by 11/8)

Standard Fee: \$359 M, \$459 NM (11/9 - 11/26)

Late Fee: \$399 M, \$499 NM (after 11/26)

December

►Annual Update for Controllers**

December 14, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 Finance

Event Code: 12025 | Live Stream Code: LS12025

Strengthen your abilities as a controller and help your management team understand current economic issues through the latest accounting, finance, human resources, treasury management, and business systems trends. This course will discuss leading-edge topics in managerial accounting and finance in a session packed with valuable tips and practical guidance that you can apply immediately.

Early Fee: \$299 M, \$399 NM (by 11/23)

Standard Fee: \$359 M, \$459 NM (11/24 - 12/11)

Late Fee: \$399 M, \$499 NM (after 12/11)

►CFO Series: 360 Degree Budgeting

December 19, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 Accounting

Event Code: 12034 | Live Stream Code: LS12034

Discuss the complex issues involved in the annual budgeting process and the best practices towards providing improvements with a solutions-based approach. Through hands-on learning, explore the advantages and value of building a flexible budget model. Better understand the issues that complicate every budget process and how successful budgets are communicated.

Early Fee: \$299 M, \$399 NM (by 11/28)

Standard Fee: \$359 M, \$459 NM (11/29 - 12/16)

Late Fee: \$399 M, \$499 NM (after 12/16)

►The Strategic CFO

December 20, 2022 | 8 a.m. - 3:30 p.m.

CPE: 2 Business Management & Organization/2 Finance/4 A&A

Event Code: 12037 | Live Stream Code: LS12037

Your financial accounting credentials do not automatically qualify you for a CFO role. Today's CFOs have skills that go far beyond financial accounting. Come share ideas with veteran CFOs and learn new techniques that will make you more effective now and long into the future.

Early Fee: \$299 M, \$399 NM (by 11/29)

Standard Fee: \$359 M, \$459 NM (11/30 - 12/17)

Late Fee: \$399 M, \$499 NM (after 12/17)

May 2023

►Advanced Financial Skills

May 16, 2023 | 8 - 11:30 a.m.

CPE: 4 Business Management & Organization

Event Code: CLB001 | Live Stream Code: LSCLB001

Is your finance department seen as a cost-center? Are you under-utilized and under-appreciated? You can change that paradigm and transform into a value-added, highly sought-after partner in your organization. The traditional cost center is focused on the past, preparing historical financial statements and budget-to-actual analysis. The value-adding finance department focuses on the future, helping to guide strategy, protect against risk, implement change effectively, and become a trusted organizational adviser.

Early Fee: \$180 M, \$230 NM (by 4/25)

Standard Fee: \$200 M, \$250 NM (4/26 - 5/13)

Late Fee: \$230 M, \$280 NM (after 5/13)

►NEW Finance Business Partnering: Successful Business Models and Strategic Choices

May 16, 2023 | 12:30 - 4 p.m.

CPE: 4 Business Management & Organization

Event Code: CLB003 | Live Stream Code: LSCLB003

Receive an application-based approach to finance business partnering. Not only will you acquire essential problem-solving skills, but you will also learn how to leverage analytics tools and techniques to aid in decision-making.

Early Fee: \$180 M, \$230 NM (by 4/25)

Standard Fee: \$200 M, \$250 NM (4/26 - 5/13)

Late Fee: \$230 M, \$280 NM (after 5/13)

►Forecasting for Improved Profits, Working Capital, and Decision Analysis

May 17, 2023 | 8 - 11:30 a.m. | CPE: 4 Finance

Event Code: CLB005 | Live Stream Code: LSCLB005

A successful organization has a vision that describes the direction and overriding goal. The vision must be evaluated, critiqued and measured. Forecasting and projections will be an integral part of determining viability. Explore tools and techniques for CPAs to learn and improve forecasting and projection methodologies to help their company reach its goals.

Early Fee: \$180 M, \$230 NM (by 4/26)

Standard Fee: \$200 M, \$250 NM (4/27 - 5/14)

Late Fee: \$230 M, \$280 NM (after 5/14)

►Developing Your Alternative Workforce (GIG) Strategy

May 17, 2023 | 12:30 - 4 p.m.

CPE: 4 Business Management & Organization

Event Code: CLB007 | Live Stream Code: LSCLB007

The accounting and finance profession is seeing a seismic change because of new technologies, which are developing and launching ahead of the profession's ability and willingness to adapt to them and take advantage of their benefits. Discuss what it means to develop a digital mindset, including concepts related to agility, constant learning, thriving in ambiguity, curiosity and innovation. Through tangible examples, learn about the competencies needed to thrive in today's disruptive world, enhance employability, accelerate company performance and manage the accelerating and relentless pace of change.

Early Fee: \$180 M, \$230 NM (by 4/26)

Standard Fee: \$200 M, \$250 NM (4/27 - 5/14)

Late Fee: \$230 M, \$280 NM (after 5/14)

DON FARMER'S TAX SEMINARS

Review current year developments, recurring problems and planning ideas. Focus on tax developments that affect 2022 tax return preparation for individuals and businesses.

►⌘ Don Farmer's 2022 Federal Tax Update

November 17, 2022 | Duluth

►⌘ Don Farmer's 2022 Federal Tax Update

December 5, 2022 | Atlanta

►⌘ Don Farmer's 2022 Individual Income Tax Workshop

December 6, 2022 | Atlanta

►⌘ Don Farmer's 2022 Corporate/Business Income Tax Workshop

December 7, 2022 | Atlanta

⌘ Don Farmer's 2022 Federal Tax Update

December 8, 2022 | Tifton



July

► Tax Issues of Real Estate Development Estate Development and Home Building

July 15, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: 07009 | Live Stream Code: LS07009

Taxation of homebuilding contractors has been subject to IRS scrutiny, particularly in complying with cost capitalization issues and revenue recognition and costing out units sold. Discuss precise approaches to comply with the costing rules, avoid IRS audit adjustments and the most beneficial tax result for the home builder/developer. An in-depth analysis of the tax accounting methods for homebuilding activities will be provided, including applying IRC Section 263A - uniform capitalization requirements and IRC Section 461 - economic performance.

Early Fee: \$299 M, \$399 NM (by 6/24)
Standard Fee: \$359 M, \$459 NM (6/25 - 7/12)
Late Fee: \$399 M, \$499 NM (after 7/12)

August

► Hottest Tax Topics for 2021**

August 10, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 Tax
Event Code: 08002 | Live Stream Code: LS08002

Learn the hottest tax topics created by current tax legislation. Recognize the latest tax legislation and IRS guidance affecting your individual and business clients and how to use this information to benefit your client base effectively. Understand how key tax provisions of the SECURE Act, CARES Act, Consolidated Appropriations Act (CAA) and the American Rescue Plan affect business entities and individual taxpayers. Use your knowledge of the hottest tax topics coming out of tax reform and continuing IRS guidance to revise current tax plans and implement tax-saving strategies for new and existing clients.

Early Fee: \$299 M, \$399 NM (by 7/20)
Standard Fee: \$359 M, \$459 NM (7/21 - 8/7)
Late Fee: \$399 M, \$499 NM (after 8/7)

► Live Stream: Tax Research 1

August 16, 2022 | 8 - 11:30 a.m. | CPE: 4 Tax
Event Code: LS08011

Receive a working knowledge of the methodology of implementation-based tax research, drawing on the latest developments in online research. Learn how to ask the right questions, organize the facts, locate and assess pertinent authority and communicate clearly.

Early Fee: \$180 M, \$230 NM (by 7/26)
Standard Fee: \$200 M, \$250 NM (7/27 - 8/13)
Late Fee: \$230 M, \$280 NM (after 8/13)

► ☒ Business Entity Tax Tune-Up

August 30-31, 2022 | 8 a.m. - 3:30 p.m. | CPE: 16 Tax
Event Code: 08019 | Live Stream Code: LS08019

Take a deep dive into the various forms of business entities and review the many changes brought about by recent COVID-19 legislation that will impact business clients. Address this year's key revenue rulings, procedures and case law. Receive a working knowledge of the methodology of implementation-based tax research, drawing on the latest developments in online research. Learn how to ask the right questions, organize the facts, locate and assess pertinent authority and communicate clearly.

Early Fee: \$459 M, \$579 NM (by 8/9)
Standard Fee: \$539 M, \$639 NM (8/10 - 8/27)
Late Fee: \$579 M, \$679 NM (after 8/27)

October

► Live Stream: Partnership and LLC Core Tax Issues From Formation Through Liquidation

October 24, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 Tax
Event Code: LS10007

This course is designed to be a stepping stone for staff interested in pursuing more advanced partnership and LLC issues than mere preparation, via more in-depth life-cycle study into critical areas of formation, special allocations of income and deductions, basis calculations and implications of recourse and nonrecourse debt, basis step-up under 754 on the transfer of an ownership interest, distributions, self-employment tax issues, and termination/liquidation of the LLC.

Early Fee: \$299 M, \$399 NM (by 10/3)
Standard Fee: \$359 M, \$459 NM (10/4 - 10/21)
Late Fee: \$399 M, \$499 NM (after 10/21)

► Buying and Selling a Business: Critical Tax and Structuring Issues

October 25, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 Tax
Event Code: 10008 | Live Stream Code: LS10008

One of the significant transactions CPA clients enter into is a purchase or disposition of a business. Examine a comprehensive analysis of the business and tax aspects of buying and selling a business to advise clients. All CPAs, including controllers and executives in the industry, should understand how difficult buying and selling a business has become.

Early Fee: \$299 M, \$399 NM (by 10/4)
Standard Fee: \$359 M, \$459 NM (10/5 - 10/22)
Late Fee: \$399 M, \$499 NM (after 10/22)

► ⌘ Live Stream: The Complete Trust Workshop

October 31, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 Tax
Event Code: LS10013

The use of trusts will continue to change in the current year. Clients need to be informed why planning is essential in these changing times. Explore the many practical issues of trusts, a vital element for estate planning. Receive insights and practical pointers concerning trusts of every shape and size after tax reform. Clients will be eager to review their estate plans, as the SECURE Act eliminated the popular "stretch IRA" estate planning strategy.

Early Fee: \$299 M, \$399 NM (by 10/10)
Standard Fee: \$359 M, \$459 NM (10/11 - 10/28)
Late Fee: \$399 M, \$499 NM (after 10/28)

November

► ⌘ ☒ This Year's Best Income Tax, Estate Tax, and Financial-Planning Ideas

November 1, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 Tax
Event Code: 11002 | Live Stream Code: LS11002

With different tax rates for individuals and trusts, tax planning takes on more importance. The new legislation, including the SECURE Act and CARES Act, increases the importance of generating new financial planning ideas and saving for retirement. Explore practical tax-planning ideas that practitioners can use to assist clients with their needs. The material is continually updated for legislative developments.

Early Fee: \$299 M, \$399 NM (by 10/11)
Standard Fee: \$359 M, \$459 NM (10/12 - 10/29)
Late Fee: \$399 M, \$499 NM (after 10/29)

► **Pat Garverick's Federal Tax Update:**
Individual and Business Current Developments
November 4, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 Tax
Event Code: 11003 | Live Stream Code: LS11003

With the increasing complexity and ever-changing nature of tax laws and issues, today's accountant needs a one-day fast-paced update course focusing on the hottest Federal income tax topics affecting individuals, businesses and owners.

Early Fee: \$299 M, \$399 NM (by 10/14)
Standard Fee: \$359 M, \$459 NM (10/15 - 11/1)
Late Fee: \$399 M, \$499 NM (after 11/1)

► **Live Stream: IRS Disputes**
November 4, 2022 | 8 - 11:30 a.m. | CPE: 4 Tax
Event Code: LS11018

Want to help your client save money and avoid potential trouble with the IRS? Determine what may trigger an IRS audit, how to negotiate, settle on appeal, qualify for an IRS collection program and evaluate your client's best options for dealing with the IRS. Also, learn about IRS audit techniques and how to handle requests and appeal rights so you can represent your clients with confidence.

Early Fee: \$180 M, \$230 NM (by 10/14)
Standard Fee: \$200 M, \$250 NM (10/15 - 11/1)
Late Fee: \$230 M, \$280 NM (after 11/1)

► **Live Stream: Introduction to Business Acquisitions****
November 7, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 Tax
Event Code: LS11019

Become a key adviser to your client or employer who is interested in buying or selling a business. Receive a foundation of knowledge about the most common types of business acquisitions that a business owner may utilize or be a party to during business life. Gain a working knowledge sufficient to prepare basic tax models for business acquisitions and obtain data necessary to complete an analysis/comparison and recommendation for a course of action.

Early Fee: \$299 M, \$399 NM (by 10/17)
Standard Fee: \$359 M, \$459 NM (10/18 - 11/4)
Late Fee: \$399 M, \$499 NM (after 11/4)

► **Hot IRS Tax Examination Issues for Individuals and Businesses**
November 8, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 Tax
Event Code: 11021 | Live Stream Code: LS11021

Now, more than ever, CPAs need clients to understand the need for documentation and procedures to substantiate what IRS examiners are pursuing. Learn the high audit risk areas and ways to help clients survive an IRS audit with little or no change. It is critical for CPAs in public accounting to understand the risk to clients and themselves in tax return preparation and planning.

Early Fee: \$299 M, \$399 NM (by 10/18)
Standard Fee: \$359 M, \$459 NM (10/19 - 11/5)
Late Fee: \$399 M, \$499 NM (after 11/5)

► **Securing a Comfortable Retirement in the Age of Spending**
November 9, 2022 | 8 a.m. - 3:30 p.m.
CPE: 4 Tax/4 Specialized Knowledge
Event Code: 11024 | Live Stream Code: LS11024

Receive the knowledge to help your clients plan for retirement by evaluating how much retirement income they will require and how to reach their retirement goals.

Early Fee: \$299 M, \$399 NM (by 10/19)
Standard Fee: \$359 M, \$459 NM (10/20 - 11/6)
Late Fee: \$399 M, \$499 NM (after 11/6)

► **Live Stream: Surgent's Comprehensive Guide to Tax Depreciation, Expensing, and Property Transactions**
November 10, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 Tax
Event Code: LS11028

With a greater-than-ever §179 deduction boosted by 100 percent additional first-year depreciation, and pandemic-related business-friendly provisions, these are unprecedented times for businesses to make significant asset investments. From the most up-to-date depreciation regulations to inflation adjustments and technical corrections, this material will help you navigate the complex maze of rules dealing with depreciation, amortization and sale of property. The reference manual contains many case types and examples, covering common and less commonly encountered situations to illustrate the most critical points.

Early Fee: \$299 M, \$399 NM (by 10/20)
Standard Fee: \$359 M, \$459 NM (10/21 - 11/7)
Late Fee: \$399 M, \$499 NM (after 11/7)

► **The Best S Corporation, Limited Liability, and Limited Liability, and Partnership Update**
November 14, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 Tax
Event Code: 11034 | Live Stream Code: LS11034

This year, practitioners need to keep abreast of tax changes affecting pass-through entities used by their business clients and employers, and this enlightening course delivers that information. You will learn invaluable strategies, techniques, innovation tax-planning concepts, income-generating ideas, and other planning opportunities available to S corporations, partnerships, LLCs, and LLPs. Material is continually updated for developments.

Early Fee: \$299 M, \$399 NM (by 10/24)
Standard Fee: \$359 M, \$459 NM (10/25 - 11/11)
Late Fee: \$399 M, \$499 NM (after 11/11)

► **The Best Individual Income Tax Update**
November 18, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 Tax
Event Code: 11045 | Live Stream Code: LS11045

Cover all the latest tax law developments, focus on individual taxation, and discuss the planning opportunities practitioners need to understand to help clients respond effectively. You will come away with the up-to-date knowledge to educate your tax clients and implement tax-saving ideas that will serve their ever-evolving needs. This course is continually updated to reflect enacted legislation.

Early Fee: \$299 M, \$399 NM (by 10/28)
Standard Fee: \$359 M, \$459 NM (10/29 - 11/15)
Late Fee: \$399 M, \$499 NM (after 11/15)

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► **Surgent's Individual Income Tax Update**
November 21, 2022 | 8 - 11:30 a.m. | CPE: 4 Tax
Event Code: CLA002 | Live Stream Code: LSCLA002

Get up-to-speed on the latest in individual tax law developments and the corresponding or responsive planning opportunities available to your clients. Be ready to educate your tax clients and implement tax-savings ideas that will serve their ever-evolving needs.

Early Fee: \$180 M, \$230 NM (by 10/31)
Standard Fee: \$200 M, \$250 NM (11/1 - 11/18)
Late Fee: \$230 M, \$280 NM (after 11/18)

► **Select Estate and Life Planning Issues for the Middle-Income Client**
November 21, 2022 | 12:30 - 4 p.m. | CPE: 4 Tax
Event Code: CLA005 | Live Stream Code: LSCLA005

Clients think that estate planning only applies to the very rich. In truth, there are many issues of critical concern for which the middle-income client needs to plan. Explore ways to provide additional quality services to your middle-income clients. Material is updated for developments relative to estate tax changes.

Early Fee: \$180 M, \$230 NM (by 10/31)
Standard Fee: \$200 M, \$250 NM (11/1 - 11/18)
Late Fee: \$230 M, \$280 NM (after 11/18)

► **The Top Five Tax Issues in Dealing with LLCs and Partnerships**
November 22, 2022 | 8 - 11:30 a.m. | CPE: 4 Tax
Event Code: CLA008 | Live Stream Code: LSCLA008

Partnerships and LLCs involve unique problems that require careful attention. Covers selected critical tax issues that practitioners need to know when working with partnerships and limited liability companies, focusing on planning opportunities and pitfalls.

Early Fee: \$180 M, \$230 NM (by 11/1)
Standard Fee: \$200 M, \$250 NM (11/2 - 11/19)
Late Fee: \$230 M, \$280 NM (after 11/19)

► Succession Planning for the Small Business Owner:

Finding the Exit Ramp

November 22, 2022 | 12:30 - 4 p.m. | CPE: 4 Tax

Event Code: CLA011 | Live Stream Code: LSCLA011

The small business's life cycle has three phases: 1) starting the business, 2) operating the business, and 3) getting out of the business. Focus on getting out of the business in this seminar. Discuss tools and concepts to advise the small business owner and assist them in developing the right exit strategy and exit strategies related to third-party sales and succession planning within a family.

Early Fee: \$180 M, \$230 NM (by 11/1)

Standard Fee: \$200 M, \$250 NM (11/2 - 11/19)

Late Fee: \$230 M, \$280 NM (after 11/19)

► ☒ Live Stream: Surgent's Top 10 Tax Topics This Year

November 29, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 Tax

Event Code: LS11049

Join us for our annual expedition through the harbors and swamps on the tax landscape this season. Uncover the top issues with broad applicability and importance this year and explore the practical implications, potential pitfalls and planning opportunities.

Early Fee: \$299 M, \$399 NM (by 11/8)

Standard Fee: \$359 M, \$459 NM (11/9 - 11/26)

Late Fee: \$399 M, \$499 NM (after 11/26)

► ⚡ ☒ Estate and Life Planning Issues for the Middle-Income Client

November 30, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 Tax

Event Code: 11053 | Live Stream Code: LS11053

Clients think that estate planning only applies to the very rich. In truth, there are many issues of critical concern for which the middle-income client needs to plan. This course is designed for CPAs who work with middle-income clients and look for ways to provide additional quality services-continually updated with the latest guidance.

Early Fee: \$299 M, \$399 NM (by 11/9)

Standard Fee: \$359 M, \$459 NM (11/10 - 11/27)

Late Fee: \$399 M, \$499 NM (after 11/27)

December

► Live Stream: Multistate Tax Update

December 1, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 Tax

Event Code: LS12004

With the most significant overhaul of the federal income tax code in 30 years and the repeal of the physical presence nexus standards for sales tax in the Wayfair case, the states are working fast and furious to overhaul their tax laws. In addition to having unique tax laws, states have been more focused on enforcement. Cover developing topics in state taxation, ranging from individuals to pass-through entities to corporate taxpayers. Focus on issues of small and middle-market companies and offer guidance for minimizing tax liability and negotiating the treacherous waters of compliance.

Early Fee: \$299 M, \$399 NM (by 11/10)

Standard Fee: \$359 M, \$459 NM (11/11 - 11/28)

Late Fee: \$399 M, \$499 NM (after 11/28)

► Live Stream: Annual Tax Update: Individuals and Sole Proprietors**

December 2, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 Tax

Event Code: LS12006

Explore what's new and what has changed in the federal individual income tax arena. It brings you up-to-the-minute guidance on the latest tax legislation, court decisions and IRS pronouncements. Gain practical insights and valuable tax-saving strategies from AICPA's seasoned tax professionals who know what the new laws, rules and court rulings can mean for real-world taxpayers.

Early Fee: \$299 M, \$399 NM (by 11/11)

Standard Fee: \$359 M, \$459 NM (11/12 - 11/29)

Late Fee: \$399 M, \$499 NM (after 11/29)

► ☒ Live Stream: Form 1040 Return Review Boot Camp for New and Experienced Reviewers

December 8, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 Tax

Event Code: LS12014

Most review techniques developed by professionals are self-taught and fine-tuned via experience. Yet, how does one start? Receive additional and advanced procedures via a multitude of checklists to more thoroughly review various tax returns. The emphasis is not planning; instead, it is to develop a strategy to review a return effectively, thoroughly and properly. Included are dozens of practice tips for new reviewers and are updated for impacts of newly enacted legislation.

Early Fee: \$299 M, \$399 NM (by 11/17)

Standard Fee: \$359 M, \$459 NM (11/18 - 12/5)

Late Fee: \$399 M, \$499 NM (after 12/5)

► ⚡ ☒ Live Stream: Tax Forms Boot Camp: LLCs, Partnerships, and S Corporations

December 12, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 Tax

Event Code: LS12018

Examine a comprehensive, hands-on understanding of the preparation of both S corporation and partnership/LLC tax returns, along with the underlying laws and regulations. Instruction uses the basic concepts underlying the two main types of business returns: 1120S and 1065, as building blocks for the more complex concepts. Theoretical concepts are illustrated through comprehensive examples incorporating the most up-to-date law changes and provisions, including the CARES Act, Tax Relief Act, and ARPA as they apply to Forms 1065 and 1120S.

Early Fee: \$299 M, \$399 NM (by 11/21)

Standard Fee: \$359 M, \$459 NM (11/22 - 12/9)

Late Fee: \$399 M, \$499 NM (after 12/9)

► AICPA's Annual Federal Tax Update**

December 13, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 Tax

Event Code: 12020 | Live Stream Code: LS12020

Cover all legislative, judicial, and IRS developments of the past year, focusing on implementation and compliance. Discover how to effectively and confidently complete tax planning and compliance engagements. Discuss current developments affecting individuals (including income, deductions and losses, tax calculations, individual credits, filing matters), business entities (including S Corporations and their shareholders, C Corporations, partnerships), estates and trusts, and retirement plans.

Early Fee: \$299 M, \$399 NM (by 11/22)

Standard Fee: \$359 M, \$459 NM (11/23 - 12/10)

Late Fee: \$399 M, \$499 NM (after 12/10)

► Hottest Tax Topics for 2021**

December 14, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 Tax

Event Code: 12023 | Live Stream Code: LS12023

Learn the hottest tax topics created by current tax legislation. Recognize the latest tax legislation and IRS guidance affecting your individual and business clients and how to use this information to benefit your client base effectively. Understand how key tax provisions of the SECURE Act, CARES Act, Consolidated Appropriations Act (CAA) and the American Rescue Plan affect business entities and individual taxpayers. Use your knowledge of

the hottest tax topics coming out of tax reform and continuing IRS guidance to revise current tax plans and implement new tax-saving strategies for clients.

Early Fee: \$299 M, \$399 NM (by 11/23)

Standard Fee: \$359 M, \$459 NM (11/24 - 12/11)

Late Fee: \$399 M, \$499 NM (after 12/11)

► The Complete Guide to Payroll Taxes and 1099 Issues

December 14, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 Tax

Event Code: 12024 | Live Stream Code: LS12024

Employment taxes are often overlooked as an area where more planning may be effective. Payroll taxes have become an increasing burden for the average business, and IRS penalties for noncompliance have risen dramatically in recent years. They have also been subject to employer incentives. The Service has announced that uncovering noncompliance by employers ranks high on its audit list. Receive a comprehensive overview of federal payroll taxes, Form 1099 and related compliance issues.

Early Fee: \$299 M, \$399 NM (by 11/23)

Standard Fee: \$359 M, \$459 NM (11/24 - 12/11)

Late Fee: \$399 M, \$499 NM (after 12/11)

► ⚡ Social Security and Medicare: Planning for You and Your Clients

December 15, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 Tax

Event Code: 12029 | Live Stream Code: LS12029

The leading edge of the baby boomer generation has already reached retirement age. Financial and tax planners can expect increased demand for strategies that dovetail Social Security with other retirement and estate planning objectives. Examine background information on the Social Security system and the strategies clients will need in dealing with Social Security and other related retirement planning issues.

Early Fee: \$299 M, \$399 NM (by 11/24)

Standard Fee: \$359 M, \$459 NM (11/25 - 12/12)

Late Fee: \$399 M, \$499 NM (after 12/12)

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► Income Tax Planning**

December 16, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 Tax
Event Code: 12032 | Live Stream Code: LS12032

Congress's frequent legislative changes to the Internal Revenue Code have many individuals and closely-held businesses highly focused on the impact of taxes and tax rates on their financial well-being. Become up-to-date on tax law changes, Tax Court decisions, and the latest IRS guidance, as well as the latest tax-planning strategies to help preserve your clients' wealth and ensure your role as a trusted adviser. Receive the technical knowledge and expertise to respond to the needs of new and existing clients.

Early Fee: \$299 M, \$399 NM (by 11/25)

Standard Fee: \$359 M, \$459 NM (11/26 - 12/13)

Late Fee: \$399 M, \$499 NM (after 12/13)

► Live Stream: International Taxation**

December 16, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 Tax
Event Code: LS12033

Get a solid understanding of international tax terminology and regulations that apply to a U.S. entity involved in global operations or for a foreign entity doing business in the U.S. Whether your organization is contemplating a global move or is already engaged in international business, learn about the activities that create multijurisdictional tax exposure and the required tax reporting for each relevant jurisdiction. Course materials include the impact of the Tax Cuts and Jobs Act of 2017 (TCJA) tax reform law and the subsequent regulations.

Early Fee: \$299 M, \$399 NM (by 11/25)

Standard Fee: \$359 M, \$459 NM (11/26 - 12/13)

Late Fee: \$399 M, \$499 NM (after 12/13)

January 2023

► 1040 Individual Tax Tune-Up

January 10-11, 2023 | 8 a.m. - 3:30 p.m. | CPE: 16 Tax
Event Code: 01001 | Live Stream Code: LS01001

In the cacophony of pandemic-related economic changes, filter out the noise and walk through the most significant tax changes of the past 18 months. Address this year's key revenue rulings, procedures and case law with practical tips and insights to help you have your most successful season ever.

Early Fee: \$459 M, \$579 NM (by 12/20)

Standard Fee: \$539 M, \$639 NM (12/21 - 1/7)

Late Fee: \$579 M, \$679 NM (after 1/7)

► Live Stream: Surgent's Advanced Individual Income Tax Return Issues

January 24, 2023 | 8 a.m. - 3:30 p.m. | CPE: 8 Tax
Event Code: LS01004

Most CPAs have been preparing individual income tax returns

for years. While many of the returns are easy, several issues come up in the busy season of which experienced practitioners wish they had more knowledge. Explore the tough tax issues for experienced practitioners and help them provide better planning strategies and results for their higher-income clients.

Early Fee: \$299 M, \$399 NM (by 1/3)

Standard Fee: \$359 M, \$459 NM (1/4 - 1/21)

Late Fee: \$399 M, \$499 NM (after 1/21)

► Preparing Individual Tax Returns for New Staff and Para-Professionals

January 25, 2023 | 8 a.m. - 3:30 p.m. | CPE: 8 Tax
Event Code: 01005 | Live Stream Code: LS01005

Train new staff accountants, data processing employees, para-professionals, and bookkeepers to prepare a complicated federal individual income tax return. Over the years, thousands of new staff have received practical, hands-on experience to become familiar with tax forms. Cover the latest tax law changes, making it essential for your new staff

Early Fee: \$299 M, \$399 NM (by 1/4)

Standard Fee: \$359 M, \$459 NM (1/5 - 1/22)

Late Fee: \$399 M, \$499 NM (after 1/22)

► Live Stream: Forms 1120S and 1065 Return Review Boot Camp for New and Experienced Reviewers

January 26, 2023 | 8 a.m. - 3:30 p.m. | CPE: 8 Tax
Event Code: LS01006

Receive additional and advanced procedures via a multitude of checklists to more thoroughly review S corporation and partnership tax returns. The emphasis is not planning; instead, it is to develop a strategy to properly review a return effectively and thoroughly. Discussion includes dozens of "practice tips for new reviewers" and updated for impacts of newly enacted legislation.

Early Fee: \$299 M, \$399 NM (by 1/5)

Standard Fee: \$359 M, \$459 NM (1/6 - 1/23)

Late Fee: \$399 M, \$499 NM (after 1/23)

August

► **K2's Technology for CPAs - Don't Get Left Behind**

August 30, 2022 | 8 a.m. - 3:30 p.m.

CPE: 8 Computer Software & Applications

Event Code: 08018 | Live Stream Code: LS08018

How good are you with the technology you use daily? What new technology tools are available that could save you time and make you more effective? Technology continues to accelerate rapidly, and the need to keep pace is essential. This technology update will help the non-information technology expert maintain and improve essential skills so that you can serve your companies and clients more efficiently.

Early Fee: \$299 M, \$399 NM (by 8/9)

Standard Fee: \$359 M, \$459 NM (8/10 - 8/27)

Late Fee: \$399 M, \$499 NM (after 8/27)

November

► **K2's Biggest Security And Privacy Concerns**

November 21, 2022 | 8 - 11:30 a.m.

CPE: 4 Information Technology

Event Code: CLA003 | Live Stream Code: LSCLA003

Interruption to an organization's ability to use its information system poses a significant risk to its viability. Data breaches, cyber-attacks, and ransomware are examples of the most significant existential risks facing businesses today. There are threat actors worldwide that focus on stealing organizational data, stealing economic resources, and disrupting commerce. They use complex social engineering attacks, pervasive phishing messages, intricate malware and other highly effective techniques. These breaches result in releasing the personal information of millions of people worldwide, billions of dollars of compromised organizational assets and putting countless people in harm's way.

Early Fee: \$180 M, \$230 NM (by 10/31)

Standard Fee: \$200 M, \$250 NM (11/1 - 11/18)

Late Fee: \$230 M, \$280 NM (after 11/18)

► **K2's Artificial Intelligence for Accounting and Financial Professionals**

November 22, 2022 | 8 - 11:30 a.m.

CPE: 4 Information Technology

Event Code: CLA009 | Live Stream Code: LSCLA009

Artificial Intelligence (AI) is no longer just a theoretical concept but a practical tool available to help you address and solve real-world problems. Learn about the fundamentals of AI and how you can put this unique technology to work immediately to help you and your team work more efficiently and effectively. Discuss the fundamentals of AI, specific types of problems AI can help you address, and AI features available in everyday applications – including Excel. Explore how you can use these features in situations such as detecting fraud and identifying potential errors in transactions.

Early Fee: \$180 M, \$230 NM (by 11/1)

Standard Fee: \$200 M, \$250 NM (11/2 - 11/19)

Late Fee: \$230 M, \$280 NM (after 11/19)

► **K2's An Accountant's Guide to Blockchain and Cryptocurrency**

November 22, 2022 | 12:30 - 4 p.m.

CPE: 4 Information Technology

Event Code: CLA012 | Live Stream Code: LSCLA012

Blockchain technology offers the promise of digital truth. It provides a transparent, permanent, immutable, and high-speed record-keeping system when properly implemented. Review a detailed and in-depth look at this technology, including a detailed overview of the underlying technology, the benefits, the risks, the major players and many practical applications. Gain a deeper understanding of the inner workings of this technology and recommendations on getting started.

Early Fee: \$180 M, \$230 NM (by 11/1)

Standard Fee: \$200 M, \$250 NM (11/2 - 11/19)

Late Fee: \$230 M, \$280 NM (after 11/19)

May 2023

► **K2's Biggest Security And Privacy Concerns**

May 16, 2023 | 8 - 11:30 a.m. | CPE: 4 Information Technology

Event Code: CLB002 | Live Stream Code: LSCLB002

Interruption to an organization's ability to use its information system poses a significant risk to its viability. Data breaches, cyber-attacks, and ransomware are examples of the most significant existential risks facing businesses today. There are threat actors worldwide that focus on stealing organizational data, stealing economic resources, and disrupting commerce. They use complex social engineering attacks, pervasive phishing messages, intricate malware and other highly effective techniques. These breaches result in releasing the personal information of millions of people worldwide, billions of dollars of compromised organizational assets and putting countless people in harm's way.

Early Fee: \$180 M, \$230 NM (by 4/25)

Standard Fee: \$200 M, \$250 NM (4/26 - 5/13)

Late Fee: \$230 M, \$280 NM (after 5/13)

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ACCOUNTING AND AUDITING

► ⌘ Don Farmer's 2022 Federal Tax Update

December 5, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 Tax
Event Code: 12054 | Live Stream Code: LS12054

Review significant developments in federal income taxation for individuals, corporations and other businesses that have the greatest impact on participants, their clients and their companies. Emphasis will be on developments affecting 2022 returns and tax planning, including any new 2022 legislation, essential regulations, rulings and court cases. The seminar is designed to update participants concerning 2022 tax developments emphasizing practical solutions to problems and tax planning opportunities.

Early Fee: \$299 M, \$399 NM (by 11/14)

Standard Fee: \$359 M, \$459 NM (11/15 - 12/2)

Late Fee: \$399 M, \$499 NM (after 12/2)

► ⌘ Don Farmer's 2022 Individual Income Tax Workshop

December 6, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 Tax
Event Code: 12064 | Live Stream Code: LS12064

Review explanations and planning ideas relating to the latest 2022 individual income tax developments, including the most recent guidance on new tax law provisions; prepare for "tax season" and focus on tax developments affecting 2022 individual income tax planning and return preparation.

Early Fee: \$299 M, \$399 NM (by 11/15)

Standard Fee: \$359 M, \$459 NM (11/16 - 12/3)

Late Fee: \$399 M, \$499 NM (after 12/3)

► ⌘ Don Farmer's 2022 Corporate/Business Income Tax Workshop

December 7, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 Tax
Event Code: 12065 | Live Stream Code: LS12065

Review explanations and planning ideas relating to the latest 2022 corporate and business tax developments, including the most recent guidance on new tax law provisions; prepare for "tax season" and focus on tried-and-true traditional tax planning opportunities. Cover basic rules, selected items of interest and a listing of related IRS forms and publications.

Early Fee: \$299 M, \$399 NM (by 11/16)

Standard Fee: \$359 M, \$459 NM (11/17 - 12/4)

Late Fee: \$399 M, \$499 NM (after 12/4)

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Athens

ACCOUNTING AND AUDITING

Annual Accounting and Auditing Update

November 8, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: 11023

Accounting and attestation practitioners at all levels in public accounting and business and industry will receive a comprehensive review of recent standard-setting activities of the FASB and AICPA, including the implementation of Topic 842, Leases and FASB and AICPA standards issued over the past few years. Discuss what you will need to do as you adopt new audit standards 134-140 for your 2021 audits, including a detailed review of the new audit requirements related to audits of employee benefit plans which are found in SAS 136. Cover the key changes needed to implement adopting SSARS No. 25 on upcoming review, compilation and preparation engagements and critical aspects of audit quality, such as frequent peer review findings and what you can do to avoid them. Many hands-on examples and illustrations to help you apply the guidance in practice.

Early Fee: \$299 M, \$399 NM (by 10/18)
Standard Fee: \$359 M, \$459 NM (10/19 - 11/5)
Late Fee: \$399 M, \$499 NM (after 11/5)

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TAXATION

AICPA's Annual Federal Tax Update**

November 30, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 Tax
Event Code: 11055

Cover all legislative, judicial, and IRS developments of the past year, focusing on implementation and compliance. Discover how to effectively and confidently complete tax planning and compliance engagements. Discuss current developments affecting individuals (including income, deductions and losses, tax calculations, individual credits, filing matters), business entities (including those regarding S Corporations and their shareholders, C Corporations, partnerships), estates and trusts, and retirement plans.

Early Fee: \$299 M, \$399 NM (by 11/9)
Standard Fee: \$359 M, \$459 NM (11/10 - 11/27)
Late Fee: \$399 M, \$499 NM (after 11/27)

Augusta

ACCOUNTING AND AUDITING

Annual Accounting and Auditing Update

November 9, 2022
Event Code: 11026 | 8 a.m. - 3:30 p.m. | CPE: 5 A&A

Accounting and attestation practitioners at all levels in public accounting and business and industry will receive a comprehensive review of recent standard-setting activities of the FASB and AICPA, including the implementation of Topic 842, Leases and FASB and AICPA standards issued over the past few years. Discuss what you will need to do as you adopt new audit standards 134-140 for your 2021 audits, including a detailed review of the new audit requirements related to audits of employee benefit plans which are found in SAS 136. Cover the key changes needed to implement adopting SSARS No. 25 on upcoming review, compilation and preparation engagements and critical aspects of audit quality, such as frequent peer review findings and what you can do to avoid them. Many hands-on examples and illustrations to help you apply the guidance in practice.

Early Fee: \$299 M, \$399 NM (by 10/19)
Standard Fee: \$359 M, \$459 NM (10/20 - 11/6)
Late Fee: \$399 M, \$499 NM (after 11/6)

Compilations, Review, and Preparations: Engagement Performance and Annual Update

November 10, 2022
Event Code: 11030 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A

Review a hands-on application for performing financial statement preparation, compilation and review engagements. Learn the ins and outs of applying SSARS No. 21, Clarification and Recodification, and the additional guidance related to SSARS engagements through the issuance of SSARS Nos. 22 and 23 by the ARSC of the AICPA. Examine the key provisions of the recently issued SSARS No. 24, Omnibus Statement on Standards for Accounting and Review Services – 2018, including reporting in a review when going concern considerations exist. Discuss what accountants must do differently in 2021 with the effective date of SSARS No. 25.

Early Fee: \$299 M, \$399 NM (by 10/20)
Standard Fee: \$359 M, \$459 NM (10/21 - 11/7)
Late Fee: \$399 M, \$499 NM (after 11/7)

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TAXATION

AICPA's Annual Federal Tax Update**

November 17, 2022
Event Code: 11041 | 8 a.m. - 3:30 p.m. | CPE: 8 Tax
Cover all legislative, judicial, and IRS developments of the past year, focusing on implementation and compliance. Discover how to effectively and confidently complete tax planning and compliance engagements. Discuss current developments affecting individuals (including income, deductions and losses, tax calculations, individual credits, filing matters), business entities (including those regarding S Corporations and their shareholders, C Corporations, partnerships), estates and trusts, and retirement plans.

Early Fee: \$299 M, \$399 NM (by 10/27)
Standard Fee: \$359 M, \$459 NM (10/28 - 11/14)
Late Fee: \$399 M, \$499 NM (after 11/14)



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ACCOUNTING AND AUDITING

Annual Accounting and Auditing Update

November 10, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: 11031

Accounting and attestation practitioners at all levels in public accounting and business and industry will receive a comprehensive review of recent standard-setting activities of the FASB and AICPA, including the implementation of Topic 842, Leases and FASB and AICPA standards issued over the past few years. Discuss what you will need to do as you adopt new audit standards 134-140 for your 2021 audits, including a detailed review of the new audit requirements related to audits of employee benefit plans which are found in SAS 136. Cover the key changes needed to implement adopting SSARS No. 25 on upcoming review, compilation and preparation engagements and critical aspects of audit quality, such as frequent peer review findings and what you can do to avoid them. Many hands-on examples and illustrations to help you apply the guidance in practice.

Early Fee: \$299 M, \$399 NM (by 10/20)
Standard Fee: \$359 M, \$459 NM (10/21 - 11/7)
Late Fee: \$399 M, \$499 NM (after 11/7)

TAXATION

AICPA's Annual Federal Tax Update**

December 13, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 Tax
Event Code: 12021

Cover all legislative, judicial, and IRS developments of the past year, focusing on implementation and compliance. Discover how to effectively and confidently complete tax planning and compliance engagements. Discuss current developments affecting individuals (including income, deductions and losses, tax calculations, individual credits, filing matters), business entities (including those regarding S Corporations and their shareholders, C Corporations, partnerships), estates and trusts, and retirement plans.

Early Fee: \$299 M, \$399 NM (by 11/22)
Standard Fee: \$359 M, \$459 NM (11/23 - 12/10)
Late Fee: \$399 M, \$499 NM (after 12/10)

Dalton

Facility / *Hilton Garden Inn
879 College Dr
Dalton, GA 30720*

ACCOUNTING AND AUDITING

Annual Update for Accountants and Auditors**

November 14, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: 11035

Keep abreast of the fast-paced changes in accounting and auditing. Explore relevant pronouncements, exposure drafts and other guidance recently issued in the accounting, auditing, review, compilation and preparation engagement arenas. Sort through the complexities and identify and apply recently issued FASB, PCAOB, ARSC and ASB standards and guidance. With the rate of change in today's regulatory environment, you must stay current on the profession's topics.

Early Fee: \$299 M, \$399 NM (by 10/24)
Standard Fee: \$359 M, \$459 NM (10/25 - 11/11)
Late Fee: \$399 M, \$499 NM (after 11/11)

TAXATION

AICPA's Annual Federal Tax Update**

December 1, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 Tax
Event Code: 12005

Cover all legislative, judicial, and IRS developments of the past year, focusing on implementation and compliance. Discover how to effectively and confidently complete tax planning and compliance engagements. Discuss current developments affecting individuals (including income, deductions and losses, tax calculations, individual credits, filing matters), business entities (including those regarding S Corporations and their shareholders, C Corporations, partnerships), estates and trusts, and retirement plans.

Early Fee: \$299 M, \$399 NM (by 11/10)
Standard Fee: \$359 M, \$459 NM (11/11 - 11/28)
Late Fee: \$399 M, \$499 NM (after 11/28)

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Dawsonville

Facility / Amicalola Falls Park Lodge
418 Amicalola Falls State Park Rd
Dawsonville, GA 30534

ACCOUNTING AND AUDITING

CLUSTERS: Current Issues in Accounting and Auditing: An Annual Update

October 24, 2022 | 8 - 11:30 a.m. | CPE: 4 A&A
Event Code: CLM001

Accounting and attestation practitioners at all public accounting and business and industry levels will receive an overview of recent FASB and AICPA activity. Discussion includes recently issued and proposed Accounting Standards Updates (ASUs); the latest on the new lease accounting standard, Topic 842; other relevant ASUs; and soon-to-be-effective new auditing standards and the latest on new standards issued by the ARSC related to SSARS engagements.

Early Fee: \$180 M, \$230 NM (by 10/3)
Standard Fee: \$200 M, \$250 NM (10/4 - 10/21)
Late Fee: \$230 M, \$280 NM (after 10/21)

NEW CLUSTERS: Update on the AICPA's New Ethics and Quality Control Standards

October 24, 2022 | 12:30 - 4 p.m. | CPE: 4 Auditing
Event Code: CLM003

Quality and ethics are the hallmark characteristics of the accounting profession. As CPAs, it is our responsibility to have a firm understanding of our professional responsibilities in these two key areas. Cover the details of the enacted and proposed changes to the AICPA Code of Professional Conduct (Code) and Quality Management standards, especially those that impact our communication of noncompliance with laws and regulations and other changes which will affect our independence. Review the new quality management standards proposed by the AICPA, which will significantly change how firms design and deploy their processes that ensure engagement quality and compliance with the Code.

Early Fee: \$180 M, \$230 NM (by 10/3)
Standard Fee: \$200 M, \$250 NM (10/4 - 10/21)
Late Fee: \$230 M, \$280 NM (after 10/21)

CLUSTERS: Guide and Update to Compilations, Reviews, and Preparations

October 25, 2022 | 8 - 11:30 a.m. | CPE: 4 Auditing
Event Code: CLM005

Designed explicitly for compilation, preparation, and review practitioners and their staff, receive an overview, update and hands-on application for performing compilation, preparation and review engagements. Learn the ins and outs of SSARS No. 21, Clarification and Recodification, and other recent releases from the AICPA that impact SSARS engagements. Study the essential provisions of the recently issued SSARS No. 25, effective for 2022 engagements. Receive practical examples and illustrations to help you effectively and efficiently perform compilation, preparation, and review engagements.

Early Fee: \$180 M, \$230 NM (by 10/4)
Standard Fee: \$200 M, \$250 NM (10/5 - 10/22)
Late Fee: \$230 M, \$280 NM (after 10/22)

CLUSTERS: Technology Trends and Hot Topics Impacting the Accounting Profession

October 25, 2022 | 12:30 - 4 p.m. | CPE: 4 Regulatory Ethics
Event Code: CLM007

While CPAs’ commitment to ethics hasn’t changed, the environment in which CPAs operate has changed significantly over the past decade and will continue to change as rapidly, or even more so, over the next few years. Review the CPA’s ethical requirements with a specific focus on technology’s impact. Explore ethical data security and privacy challenges, investigate emerging technologies such as artificial intelligence and blockchain and discuss how technological advances impact how CPAs provide their services. Examine recent initiatives of the International Ethics Standards Board for Accountants (IESBA) to update its Code to provide guidance to assist accountants and auditors in navigating the more pressing ethics and independence challenges arising from evolving technologies.

Early Fee: \$180 M, \$230 NM (by 10/4)
Standard Fee: \$200 M, \$250 NM (10/5 - 10/22)
Late Fee: \$230 M, \$280 NM (after 10/22)

TAXATION

CLUSTERS: This Year’s Top Tax and Financial-Planning Ideas

October 24, 2022 | 8 - 11:30 a.m. | CPE: 4 Tax
Event Code: CLM002

With tax rates for individuals, estates and trusts changing, tax planning has become more critical. CPAs must consider new ideas for financial planning and retirement. Explore practical tax-planning ideas that practitioners can use to assist clients with their needs. Seminar content is continually updated for items regarding tax reform, including the 2021 stimulus bill(s).

Early Fee: \$180 M, \$230 NM (by 10/3)
Standard Fee: \$200 M, \$250 NM (10/4 - 10/21)
Late Fee: \$230 M, \$280 NM (after 10/21)

CLUSTERS: Securing a Comfortable Retirement

October 24, 2022 | 12:30 - 4 p.m. | CPE: 4 Taxation
Event Code: CLM004

Receive needed knowledge to help your clients plan for retirement by evaluating how much retirement income they will require and plan for how to reach their retirement goals.

Early Fee: \$180 M, \$230 NM (by 10/3)
Standard Fee: \$200 M, \$250 NM (10/4 - 10/21)
Late Fee: \$230 M, \$280 NM (after 10/21)

☒ CLUSTERS: The Top Five Tax Issues in Dealing with LLCs and Partnerships

October 25, 2022 | 8 - 11:30 a.m. | CPE: 4 Tax
Event Code: CLM006

Partnerships and LLCs involve unique problems that require careful attention. Cover selected critical tax issues that practitioners need to know when working with partnerships and limited liability companies, focusing on planning opportunities and pitfalls.

Early Fee: \$180 M, \$230 NM (by 10/4)
Standard Fee: \$200 M, \$250 NM (10/5 - 10/22)
Late Fee: \$230 M, \$280 NM (after 10/22)



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CLUSTERS: Employer’s Handbook: Health Care, Retirement, and Fringe Benefit Tax Issues

October 25, 2022 | 12:30 - 4 p.m. | CPE: 4 Taxation
Event Code: CLM008

The employer-employee relationship strains both sides in uncertain times, and businesses need CPAs, controllers and other advisors to provide an understanding of the complex legal and tax issues associated with all aspects of employment, especially now. Explore in-depth coverage of this critical area, including recent legislative changes.

Early Fee: \$180 M, \$230 NM (by 10/4)
Standard Fee: \$200 M, \$250 NM (10/5 - 10/22)
Late Fee: \$230 M, \$280 NM (after 10/22)

Duluth

ACCOUNTING AND AUDITING

Financial Reporting Update for Tax Practitioners

November 16, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: 11038

Replenish your accounting and reporting tank with an update of recent standard-setting activities at the FASB and AICPA. Review the significant new financial accounting, auditing and accounting services guidance issued over the past few years. Focus on unique income tax reporting (ASC 740) implications of recently issued accounting standards, such as revenue recognition (ASC 606) and leases (ASC 842) and those of COVID-19 stimulus and other tax-related legislation. Discuss recently issued standards and the recent activity of the AICPA focusing on how the new standards will impact tax practitioners. Dive into the unique income tax accounting considerations which arise from certain types of transactions, such as stock-based compensation, and review the presentation and disclosure requirements of ASC 740.

Early Fee: \$299 M, \$399 NM (by 10/26)
Standard Fee: \$359 M, \$459 NM (10/27 - 11/13)
Late Fee: \$399 M, \$499 NM (after 11/13)

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Compilations, Reviews, and Preparations:
Engagement Performance and Annual Update
December 8, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 Auditing
Event Code: 12013

Receive a comprehensive review and hands-on application for performing financial statement preparation, compilation and review engagements. Learn the ins and outs of applying SSARS No. 21, Clarification and Recodification, as well as the additional guidance related to SSARS engagements through the issuance of SSARS Nos. 22 and 23 by the ARSC of the AICPA. Explore a detailed review of the key provisions of the recently issued SSARS No. 24, Omnibus Statement on Standards for Accounting and Review Services – 2018, including reporting in a review when going concern considerations exist. Also, look at what accountants must do differently in 2021 with the effective date of SSARS No. 25.

Early Fee: \$299 M, \$399 NM (by 11/17)
Standard Fee: \$359 M, \$459 NM (11/18 - 12/5)
Late Fee: \$399 M, \$499 NM (after 12/5)

Jim Martin’s 2022 Accounting & Auditing Update for the Real World
December 13, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: 12067

Cover the significant provisions of the most recent pronouncements and proposed pronouncements from the FASB, the Private Company Council, the Auditing Standards Board and the Accounting and Review Services Committee. Presented from the perspective of a small firm practitioner who services or works for non-publicly traded entities, discuss the standards that have the broadest application to the local practitioner. The new leasing standard will be covered extensively. The floor is always open to discussing whatever current accounting and auditing topics the class participants may want to cover.

Early Fee: \$299 M, \$399 NM (by 11/22)
Standard Fee: \$359 M, \$459 NM (11/23 - 12/10)
Late Fee: \$399 M, \$499 NM (after 12/10)

MANAGEMENT

Annual Update for Controllers**
August 18, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 Finance
Event Code: 08016

Strengthen your abilities as a controller and help your management team understand current economic issues through the latest trends in accounting, finance, human resources, treasury management and business systems. This course will discuss leading-edge topics in managerial accounting and finance in a session that is packed with useful tips and practical guidance that you can apply immediately.

Early Fee: \$299 M, \$399 NM (by 7/28)
Standard Fee: \$359 M, \$459 NM (7/29 - 8/15)
Late Fee: \$399 M, \$499 NM (after 8/15)

TAXATION

► ⚡ **Don Farmer’s 2022 Federal Tax Update**
November 17, 2022 | 8 a.m. - 4 p.m. | CPE: 8 Tax
Event Code: 12027 | Live Stream Code: LS12027

Review significant developments in federal income taxation for individuals, corporations and other businesses that have the greatest impact on participants, their clients and their companies. Emphasis will be on developments affecting 2022 returns and tax planning, including any new 2022 legislation, essential regulations, rulings and court cases. The seminar is designed to update participants concerning 2022 tax developments emphasizing practical solutions to problems and tax planning opportunities.

Early Fee: \$299 M, \$399 NM (by 10/27)
Standard Fee: \$359 M, \$459 NM (10/28 - 11/14)
Late Fee: \$399 M, \$499 NM (after 11/14)

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Gainesville

ACCOUNTING AND AUDITING

Annual Accounting and Auditing Update

November 18, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: 11047

Accounting and attestation practitioners at all levels in public accounting and business and industry will receive a comprehensive review of recent standard-setting activities of the FASB and AICPA, including the implementation of Topic 842, Leases and FASB and AICPA standards issued over the past few years. Discuss what you will need to do as you adopt new audit standards 134-140 for your 2021 audits, including a detailed review of the new audit requirements related to audits of employee benefit plans which are found in SAS 136. Cover the key changes needed to implement adopting SSARS No. 25 on upcoming review, compilation and preparation engagements and critical aspects of audit quality, such as frequent peer review findings and what you can do to avoid them. Many hands-on examples and illustrations to help you apply the guidance in practice.

Early Fee: \$299 M, \$399 NM (by 10/28)
Standard Fee: \$359 M, \$459 NM (10/29 - 11/15)
Late Fee: \$399 M, \$499 NM (after 11/15)

Facility / *Gainesville Civic Center
830 Green St NE
Gainesville, GA 30501*

MANAGEMENT

Advanced Controller and CFO Skills**

August 17, 2022 | 8 a.m. - 3:30 p.m.
CPE: 8 Business Management & Organization
Event Code: 08015

Examine best practices of leading-edge controllers and CFOs. Demonstrate your advanced skills that add value and contribute to the success of the organization. Learn specific skills every CFO or controller needs to be successful. Show the company's leadership how vital you are to their profitability

Early Fee: \$299 M, \$399 NM (by 7/27)
Standard Fee: \$359 M, \$459 NM (7/28 - 8/14)
Late Fee: \$399 M, \$499 NM (after 8/14)

TAXATION

☞ ☒ The Best Federal Tax Update Course by Sargent

December 13, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 Tax
Event Code: 12022

Tax advisors will be fully updated on the most recent legislation and IRS guidance, and significant trends on the horizon with a view toward planning considerations. The material is continually updated to reflect enacted legislation.

Early Fee: \$299 M, \$399 NM (by 11/22)
Standard Fee: \$359 M, \$459 NM (11/23 - 12/10)
Late Fee: \$399 M, \$499 NM (after 12/10)

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Jekyll Island

ACCOUNTING AND AUDITING

CLUSTERS: Current Issues in Accounting and Auditing: An Annual Update

June 9, 2022 | 8 - 11:30 a.m. | CPE: 4 A&A
Event Code: CLJ001

Accounting and attestation practitioners at all public accounting and business and industry levels will receive an overview of recent FASB and AICPA activity. Discussion includes recently issued and proposed Accounting Standards Updates (ASUs); the latest on the new lease accounting standard, Topic 842; other relevant ASUs; and soon-to-be-effective new auditing standards and the latest on new standards issued by the ARSC related to SSARS engagements.

Early Fee: \$180 M, \$230 NM (by 5/19)
Standard Fee: \$200 M, \$250 NM (5/20 - 6/6)
Late Fee: \$230 M, \$280 NM (after 6/6)

NEW CLUSTERS: Update on the AICPA's New Ethics and Quality Control Standards

June 9, 2022 | 12 - 3:30 p.m. | CPE: 4 A&A
Event Code: CLJ003

Quality and ethics are the hallmark characteristics of the accounting profession. As CPAs, it is our responsibility to have a firm understanding of our professional responsibilities in these two key areas. Cover the details of the enacted and proposed changes to the AICPA Code of Professional Conduct (Code) and Quality Management standards, especially those that impact our communication of noncompliance with laws and regulations and other changes which will affect our independence. Review the new quality management standards proposed by the AICPA, which will significantly change how firms design and deploy their processes that ensure engagement quality and compliance with the Code.

Early Fee: \$180 M, \$230 NM (by 5/19)
Standard Fee: \$200 M, \$250 NM (5/20 - 6/6)
Late Fee: \$230 M, \$280 NM (after 6/6)

Facility / Westin Jekyll Island
110 Ocean Way
Jekyll Island, GA 31527

CLUSTERS: Guide and Update to Compilations, Reviews, and Preparations

June 10, 2022 | 8 - 11:30 a.m. | CPE: 4 A&A
Event Code: CLJ005

Designed explicitly for compilation, preparation, and review practitioners and their staff, receive an overview, update and hands-on application for performing compilation, preparation and review engagements. Learn the ins and outs of SSARS No. 21, Clarification and Recodification, and other recent releases from the AICPA that impact SSARS engagements. Study the essential provisions of the recently issued SSARS No. 25, effective for 2022 engagements. Receive practical examples and illustrations to help you effectively and efficiently perform compilation, preparation, and review engagements.

Early Fee: \$180 M, \$230 NM (by 5/20)
Standard Fee: \$200 M, \$250 NM (5/21 - 6/7)
Late Fee: \$230 M, \$280 NM (after 6/7)

Annual Accounting and Auditing Update

November 16, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: 11039

Accounting and attestation practitioners at all levels in public accounting and business and industry will receive a comprehensive review of recent standard-setting activities of the FASB and AICPA, including the implementation of Topic 842, Leases and FASB and AICPA standards issued over the past few years. Discuss what you will need to do as you adopt new audit standards 134-140 for your 2021 audits, including a detailed review of the new audit requirements related to audits of employee benefit plans which are found in SAS 136. Cover the key changes needed to implement adopting SSARS No. 25 on upcoming review, compilation and preparation engagements and critical aspects of audit quality, such as frequent peer review findings and what you can do to avoid them. Many hands-on examples and illustrations to help you apply the guidance in practice.

Early Fee: \$180 M, \$230 NM (by 10/26)
Standard Fee: \$200 M, \$250 NM (10/27 - 11/13)
Late Fee: \$230 M, \$280 NM (after 11/13)

MANAGEMENT

CLUSTERS: Technology Trends and Hot Topics Impacting the Accounting Profession

June 10, 2022 | 12 - 3:30 p.m.
CPE: 2 Auditing/2 Information Technology
Event Code: CLJ007

While CPAs’ commitment to ethics hasn’t changed, the environment in which CPAs operate has changed significantly over the past decade and will continue to change as rapidly, or even more so, over the next few years. Review the CPA’s ethical requirements with a specific focus on technology’s impact. Explore ethical data security and privacy challenges, investigate emerging technologies such as artificial intelligence and blockchain and discuss how technological advances impact how CPAs provide their services. Examine recent initiatives of the International Ethics Standards Board for Accountants (IESBA) to update its Code to provide guidance to assist accountants and auditors in navigating the more pressing ethics and independence challenges arising from evolving technologies.

Early Fee: \$180 M, \$230 NM (by 5/20)
Standard Fee: \$200 M, \$250 NM (5/21 - 6/7)
Late Fee: \$230 M, \$280 NM (after 6/7)

CLUSTERS: Employer’s Handbook: Health Care, Retirement, and Fringe Benefit Tax Issues

June 10, 2022 | 12 - 3:30 p.m. | CPE: 2 Business Law/2 Tax
Event Code: CLJ008

The employer-employee relationship strains both sides in uncertain times, and businesses need CPAs, controllers and other advisors to provide an understanding of the complex legal and tax issues associated with all aspects of employment, especially now. Explore in-depth coverage of this critical area, including recent legislative changes.

Early Fee: \$180 M, \$230 NM (by 5/20)
Standard Fee: \$200 M, \$250 NM (5/21 - 6/7)
Late Fee: \$230 M, \$280 NM (after 6/7)

TAXATION

CLUSTERS: This Year’s Top Tax and Financial-Planning Ideas

June 9, 2022 | 8 - 11:30 a.m. | CPE: 4 Tax
Event Code: CLJ002

With tax rates for individuals, estates and trusts changing, tax planning has become more critical. CPAs must consider new

ideas for financial planning and retirement. Explore practical tax-planning ideas that practitioners can use to assist clients with their needs. Seminar content is continually updated for items regarding tax reform, including the 2021 stimulus bill(s).

Early Fee: \$180 M, \$230 NM (by 5/19)
Standard Fee: \$200 M, \$250 NM (5/20 - 6/6)
Late Fee: \$230 M, \$280 NM (after 6/6)

CLUSTERS: Securing a Comfortable Retirement

June 9, 2022 | 12 - 3:30 p.m. | CPE: 2 Tax/2 Specialized Knowledge
Event Code: CLJ004

Receive needed knowledge to help your clients plan for retirement by evaluating how much retirement income they will require and plan for how to reach their retirement goals.

Early Fee: \$180 M, \$230 NM (by 5/19)
Standard Fee: \$200 M, \$250 NM (5/20 - 6/6)
Late Fee: \$230 M, \$280 NM (after 6/6)

☒ CLUSTERS: The Top Five Tax Issues in Dealing with LLCs and Partnerships

June 10, 2022 | 8 - 11:30 a.m. | CPE: 4 Tax
Event Code: CLJ006

Partnerships and LLCs involve unique problems that require careful attention. Cover selected critical tax issues that practitioners need to know when working with partnerships and limited liability companies, focusing on planning opportunities and pitfalls.

Early Fee: \$180 M, \$230 NM (by 6/28)
Standard Fee: \$200 M, \$250 NM (6/29 - 7/16)
Late Fee: \$230 M, \$280 NM (after 7/16)

AICPA’s Annual Federal Tax Update**

December 13, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 Tax
Event Code: 12068

Cover all legislative, judicial, and IRS developments of the past year, focusing on implementation and compliance. Discover how to effectively and confidently complete tax planning and compliance engagements. Discuss current developments affecting individuals (including income, deductions and losses, tax calculations, individual credits, filing matters), business entities (including those regarding S Corporations and their shareholders, C Corporations, partnerships), estates and trusts, and retirement plans.

Early Fee: \$299 M, \$399 NM (by 11/22)
Standard Fee: \$359 M, \$459 NM (11/23 - 12/10)
Late Fee: \$399 M, \$499 NM (after 12/10)

Macon

ACCOUNTING AND AUDITING

Annual Accounting and Auditing Update

November 17, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: 11042

Accounting and attestation practitioners at all levels in public accounting and business and industry will receive a comprehensive review of recent standard-setting activities of the FASB and AICPA, including the implementation of Topic 842, Leases and FASB and AICPA standards issued over the past few years. Discuss what you will need to do as you adopt new audit standards 134-140 for your 2021 audits, including a detailed review of the new audit requirements related to audits of employee benefit plans which are found in SAS 136. Cover the key changes needed to implement adopting SSARS No. 25 on upcoming review, compilation and preparation engagements and critical aspects of audit quality, such as frequent peer review findings and what you can do to avoid them. Many hands-on examples and illustrations to help you apply the guidance in practice.

Early Fee: \$299 M, \$399 NM (by 10/27)
Standard Fee: \$359 M, \$459 NM (10/28 - 11/14)
Late Fee: \$399 M, \$499 NM (after 11/14)

Annual Update and Practice Issues for Preparation, Compilation and Review Engagements**

December 12, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: 12017

A go-to reference for training staff and managing your preparation, compilation and review engagements, learn how to comply with all of the professional standards surrounding engagements performed under Statements on Standards for Accounting and Review Services (SSARSs). A practice-oriented review of the latest developments, cases, and lively discussion among the experienced participants.

Early Fee: \$299 M, \$399 NM (by 11/21)
Standard Fee: \$359 M, \$459 NM (11/22 - 12/9)
Late Fee: \$399 M, \$499 NM (after 12/9)

Facility / Central Georgia Technical College
3300 Macon Tech Dr
Macon, GA 31206

MANAGEMENT

Advanced Controller and CFO Skills**

October 12, 2022 | 8 a.m. - 3:30 p.m.
CPE: 8 Business Management & Organization
Event Code: 11068

Examine best practices of leading-edge controllers and CFOs. Demonstrate your advanced skills that add value and contribute to the success of the organization. Learn specific skills every CFO or controller needs to be successful. Show the company's leadership how vital you are to their profitability.

Early Fee: \$299 M, \$399 NM (by 9/21)
Standard Fee: \$359 M, \$459 NM (9/22 - 10/9)
Late Fee: \$399 M, \$499 NM (after 10/9)

TAXATION

Pat Garverick's Federal Tax Update: Individual and Business Current Developments

November 3, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 Tax
Event Code: 11016

With the increasing complexity and ever-changing nature of tax laws and issues, today's accountant needs a one-day fast-paced update course focusing on the hottest Federal income tax topics affecting individuals, businesses and owners.

Early Fee: \$299 M, \$399 NM (by 10/13)
Standard Fee: \$359 M, \$459 NM (10/14 - 10/31)
Late Fee: \$399 M, \$499 NM (after 10/31)

Savannah

ACCOUNTING AND AUDITING

Annual Accounting and Auditing Update

November 17, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: 11043

Accounting and attestation practitioners at all levels in public accounting and business and industry will receive a comprehensive review of recent standard-setting activities of the FASB and AICPA, including the implementation of Topic 842, Leases and FASB and AICPA standards issued over the past few years. Discuss what you will need to do as you adopt new audit standards 134-140 for your 2021 audits, including a detailed review of the new audit requirements related to audits of employee benefit plans which are found in SAS 136. Cover the key changes needed to implement adopting SSARS No. 25 on upcoming review, compilation and preparation engagements and critical aspects of audit quality, such as frequent peer review findings and what you can do to avoid them. Many hands-on examples and illustrations to help you apply the guidance in practice.

Early Fee: \$299 M, \$399 NM (by 10/27)
Standard Fee: \$359 M, \$459 NM (10/28 - 11/14)
Late Fee: \$399 M, \$499 NM (after 11/14)

Facility / Savannah State University
3219 College St
Savannah, GA 31404

TAXATION

Pat Garverick's Federal Tax Update: Individuals (Form 1040)

December 8, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 Tax
Event Code: 12009

With the increasing complexity and ever-changing nature of tax laws and issues, today's accountant needs a one-day update course focusing on business income tax issues. Review the current Federal business income tax laws and new tax forms, changes to existing tax forms, and tax planning opportunities and pitfalls.

Early Fee: \$299 M, \$399 NM (by 11/17)
Standard Fee: \$359 M, \$459 NM (11/18 - 12/5)
Late Fee: \$399 M, \$499 NM (after 12/5)

Pat Garverick's Federal Tax Update: C & S Corporations, Partnerships, & LLCs (Forms 1120, 1120S & 1065)

December 9, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 Tax
Event Code: 12010

With the increasing complexity and ever-changing nature of tax laws and issues, today's accountant needs a one-day update course focusing on individual income tax issues. Review the current Federal individual income tax laws and new tax forms, changes to existing tax forms, and tax planning opportunities and pitfalls.

Early Fee: \$299 M, \$399 NM (by 11/18)
Standard Fee: \$359 M, \$459 NM (11/19 - 12/6)
Late Fee: \$399 M, \$499 NM (after 12/6)



Tifton

ACCOUNTING AND AUDITING

Annual Update and Practice Issues for Preparation, Compilation and Review Engagements
November 3, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: 11064

A go-to reference for training staff and managing your preparation, compilation and review engagements, learn how to comply with all of the professional standards surrounding engagements performed under Statements on Standards for Accounting and Review Services (SSARs). A practice-oriented review of the latest developments, cases, and lively discussion among the experienced participants.

Early Fee: \$299 M, \$399 NM (by 10/13)
Standard Fee: \$359 M, \$459 NM (10/14 - 10/31)
Late Fee: \$399 M, \$499 NM (after 10/31)

Jim Martin’s 2022 Accounting & Auditing Update for the Real World
December 9, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: 12015

Cover the significant provisions of the most recent pronouncements and proposed pronouncements from the FASB, the Private Company Council, the Auditing Standards Board and the Accounting and Review Services Committee. Presented from the perspective of a small firm practitioner who services or works for non-publicly traded entities, discuss the standards that have the broadest application to the local practitioner. The new leasing standard will be covered extensively. The floor is always open to discussing whatever current accounting and auditing topics the class participants may want to cover.

Early Fee: \$299 M, \$399 NM (by 11/18)
Standard Fee: \$359 M, \$459 NM (11/19 - 12/6)
Late Fee: \$399 M, \$499 NM (after 12/6)

*Facility / UGA Tifton Campus Conference Center
15 R D C Rd
Tifton, GA 31794*

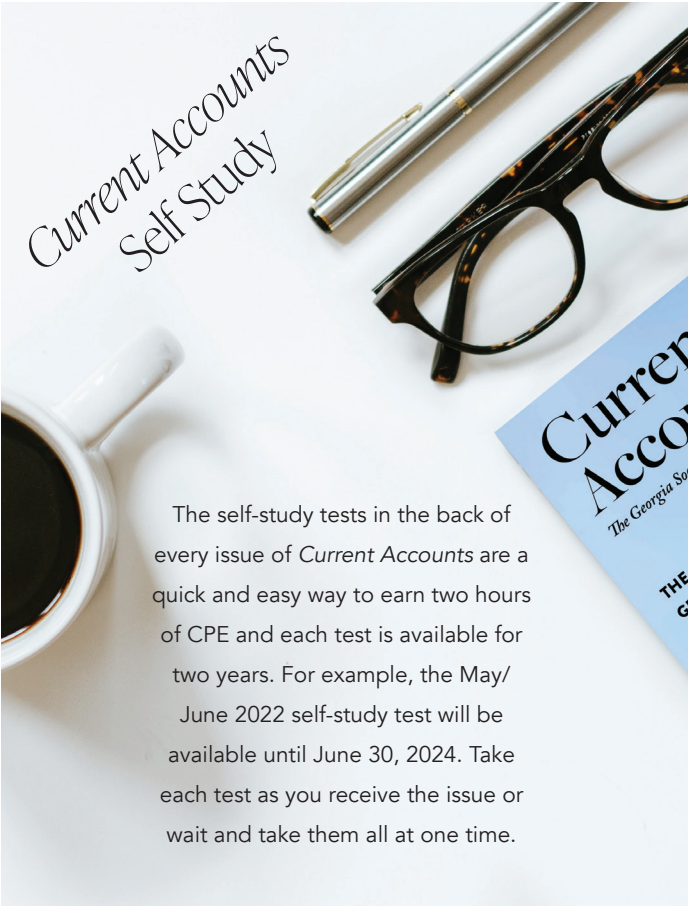
TAXATION

⌘ Don Farmer’s 2021 Federal Tax Update
December 8, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 Tax
Event Code: 11045

Review significant developments in federal income taxation for individuals, corporations and other businesses that have the greatest impact on participants, their clients and their companies. Emphasis will be on developments affecting 2022 returns and tax planning, including any new 2022 legislation, essential regulations, rulings and court cases. The seminar is designed to update participants concerning 2022 tax developments emphasizing practical solutions to problems and tax planning opportunities.

Early Fee: \$299 M, \$399 NM (by 11/17)
Standard Fee: \$359 M, \$459 NM (11/18 - 12/5)
Late Fee: \$399 M, \$499 NM (after 12/5)

*Current Accounts
Self Study*



The self-study tests in the back of every issue of *Current Accounts* are a quick and easy way to earn two hours of CPE and each test is available for two years. For example, the May/June 2022 self-study test will be available until June 30, 2024. Take each test as you receive the issue or wait and take them all at one time.

Valdosta

ACCOUNTING AND AUDITING

Annual Update and Practice Issues for Preparation, Compilation and Review Engagements**
November 4, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: 11014

A go-to reference for training staff and managing your preparation, compilation and review engagements, learn how to comply with all of the professional standards surrounding engagements performed under Statements on Standards for Accounting and Review Services (SSARs). A practice-oriented review of the latest developments, cases, and lively discussion among the experienced participants.

Early Fee: \$299 M, \$399 NM (by 10/14)
Standard Fee: \$359 M, \$459 NM (10/15 - 11/1)
Late Fee: \$399 M, \$499 NM (after 11/1)

Jim Martin’s 2022 Accounting & Auditing Update for the Real World
December 8, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 A&A
Event Code: 12012

Cover the significant provisions of the most recent pronouncements and proposed pronouncements from the FASB, the Private Company Council, the Auditing Standards Board and the Accounting and Review Services Committee. Presented from the perspective of a small firm practitioner who services or works for non-publicly traded entities, discuss the standards that have the broadest application to the local practitioner. The new leasing standard will be covered extensively. The floor is always open to discussing whatever current accounting and auditing topics the class participants may want to cover.

Early Fee: \$299 M, \$399 NM (by 11/17)
Standard Fee: \$359 M, \$459 NM (11/18 - 12/5)
Late Fee: \$399 M, \$499 NM (after 12/5)

*Facility / James H. Rainwater Conference Center
1 Meeting Pl
Valdosta, GA 31601*

TAXATION

Pat Garverick’s Federal Tax Update: Individuals (Form 1040)
December 6, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 Tax
Event Code: 12007

With the increasing complexity and ever-changing nature of tax laws and issues, today’s accountant needs a one-day update course focusing on business income tax issues. Review the current Federal business income tax laws and new tax forms, changes to existing tax forms, and tax planning opportunities and pitfalls.

Early Fee: \$299 M, \$399 NM (by 11/15)
Standard Fee: \$359 M, \$459 NM (11/16 - 12/3)
Late Fee: \$399 M, \$499 NM (after 12/3)

Pat Garverick’s Federal Tax Update: C & S Corporations, Partnerships, & LLCs (Forms 1120, 1120S & 1065)
December 7, 2022 | 8 a.m. - 3:30 p.m. | CPE: 8 Tax
Event Code: 12008

With the increasing complexity and ever-changing nature of tax laws and issues, today’s accountant needs a one-day update course focusing on individual income tax issues. Review the current Federal individual income tax laws and new tax forms, changes to existing tax forms, and tax planning opportunities and pitfalls.

Early Fee: \$299 M, \$399 NM (by 11/16)
Standard Fee: \$359 M, \$459 NM (11/17 - 12/4)
Late Fee: \$399 M, \$499 NM (after 12/4)

Three Easy Ways to Register for a GSCPA Event

You may pay by check, Visa, MasterCard, Discover or American Express. Credit card payments may be submitted online at www.gscpa.org and click on Continuing Education. Payment must be made when registering for events. Please register early to ensure we have enough program materials available and sufficient people registered to hold the event.

- ONLINE** registration available at www.gscpa.org
- CALL** the GSCPA CPE Department at 404-504-2985 or 800-330-8889, Opt. 3 to place a credit card order.
- MAIL** your completed registration form with credit card information or a check made payable to The Georgia Society of CPAs to: GSCPA, 6 Concourse Parkway, Suite 800, Atlanta, Ga. 30328
We ask that you mail registrations at least one month in advance of the course date to avoid mail delays.

SEMINAR FEES (HALF DAY FEE)

	Early	Standard	Late
Members	\$180	\$200	\$230
Nonmembers	\$230	\$250	\$280

Exceptions apply, see specific event information for more details.

SEMINAR FEES (ONE DAY FEE/TWO DAY FEE)

	Early	Standard	Late
Members	\$299/\$479	\$359/\$539	\$399/\$579
Nonmembers	\$399/\$579	\$459/\$639	\$499/\$679

Exceptions apply, see specific event information for more details.

CONFERENCE FEES (ONE DAY FEE/TWO DAY FEE)

	Early	Standard	Late
Members	\$299/\$479	\$359/\$539	\$399/\$579
Nonmembers	\$399/579	\$459/\$639	\$499/\$679

Exceptions apply, see specific event information for more details.

ON-DEMAND FEES

1 Hour	1.5 Hour	2 Hour	4 Hour	8 Hour
\$45 M	\$55 M	\$65 M	\$190 M	\$310 M
\$65 NM	\$75 NM	\$85 NM	\$240 NM	\$410 NM

Exceptions apply, see specific event information for more details.

Early Registration Discount: Register early and save money! The early registration fee is applicable if GSCPA receives your registration with payment 21 calendar days prior to the date of the event.

Standard: Begins after the early registration deadline expires and ends three business days before the date of the event.

Late: Effective for registrations received within three days of an event.

AICPA REGISTRATION DISCOUNT

In order to qualify for this discount your AICPA member number must be included on your registration form. AICPA members who register for an AICPA developed program will receive a \$30 per day discount off the applicable event fee. This fee is applicable to all AICPA events with the exception of 1-hour, 2-hour and 4-hour events. This discount is available until the date of the event and cannot be applied retroactively. AICPA events that qualify for this discount will be identified with a double asterisk (**) in all marketing pieces.

REGISTRATION CONFIRMATION

Registrations for a GSCPA event will be confirmed by email. Make sure to add our domain, gscpa.org, to your address book to ensure you receive your emailed confirmations.

If you have not received a confirmation from GSCPA within 48 hours for all telephone or online registrations or one week for registrations that were mailed in, please contact the GSCPA CPE Department. To expedite the on-site registration process, please bring your confirmation with you to the event and turn it in to the registration attendant. Review your confirmation carefully. Occasionally, there may be a date or location change, which will be communicated by email.

If you have any questions about your registration status, please call 404-504-2985 or 800-330-8889 Opt. 3. We can also answer your questions by email: cpe@gscpa.org.

Registrations submitted by email within one business day of the event date do not guarantee a reservation in the class. Event materials and lunch may not be available for late or walk-in registrations. Walk-in registrations are welcome as long as space is available.

In the event your registration has not been received by GSCPA upon check-in at the event, payment must be presented in order to attend.

GSCPA reserves the right to cancel an event for insufficient enrollment. If your event is cancelled, we will notify you at least five days before the scheduled date and refund your fee. You have the option to transfer your fee to another event, to keep your funds in Money on Account, or to receive a refund. Please allow at least 14 days for refund processing.

INCLEMENT WEATHER

If inclement weather warrants any concern for participants’ travel safety, we will leave a message on the CPE Department voice mail instructing participants on the status and what to do (404-504-2985 or 800-330-8889 Opt. 3). If we have any information to suspect inclement weather, we will notify the participants for the next day’s classes by email and also by phone.

CANCELLATION POLICY

Seminars, Conferences and Live Streams: Cancellations/transfers made up to three weeks before a seminar or conference will not incur an administration fee. Cancellations/transfers made within the three weeks and up to three business days before a seminar or conference are subject to a \$50 administration fee. Cancellations/transfers made within three business days before an event are subject to a \$100 administration fee for members; \$150 administration fee for nonmembers.Cancellations/no shows on the date of the event forfeit the entire registration fee. No refunds or transfers of event fee will be made after the date of the event.

MONEY ON ACCOUNT (MOA)

Money on Account allows you to cancel your registration and have credit available for future event fees. The credit goes to the account of the firm or the individual who paid for the registration and will be the amount of the payment less any administration fees. If GSCPA cancels an event, you have the option of refunding the fee in the same form of the initial payment, transferring to another event, or placing the credit in your MOA. This credit may be used towards any future GSCPA-sponsored event. You may leave your money on account as long as you like.

SOLD-OUT EVENTS

In the event that an event is sold-out with respect to space, a wait list is available. If space becomes available, you will be added to the event on a first come, first served basis.

NO SHOWS

Those who register for an event and are a “no-show” are entitled to receive the program material for that event. Please request program materials no later than 48 hours after the date of the event.

EVENT TIMES

Events are held between 8 a.m. - 3:30 p.m. with registration beginning at 7:30 a.m. Lunch is provided during a 30 minute lunch break for all full day events. Half-day classes are held between 8 - 11:30 a.m. or 12:30 - 4 p.m. with registration beginning at 7:30 a.m. for morning events, and 12 p.m. for afternoon events. Exceptions apply; see specific event information for more details.

ON-SITE ADMINISTRATORS

Members are eligible to receive a significantly discounted registration fee by volunteering to provide on-site administration support at CPE events held outside of Atlanta. Individuals interested in volunteering to serve as On-Site Administrators can apply online. To access the application, and for more details regarding OSA responsibilities, go to www.gscpa.org and select “Seminars” listed under the Continuing Education menu. For more information contact the CPE Department at 404-504-2985.

IN-PERSON CONFERENCES

In-person conferences generally begin at 8 a.m. with registration starting at 7:30 a.m. Lunch and ending times vary due to conference schedule. Consult the program schedule (website/ brochure) for specific times.

LUNCH

Lunch is provided for all full-day in-person seminars and conferences. Lunch is NOT provided for half-day events. If you have a specific dietary requirement, please contact GSCPA CPE Department at least a week before the class a 404-504-2985 or cpe@gscpa.org.

WHAT TO WEAR

Business casual attire is recommended. Meeting room temperatures are difficult to control; please dress in layers to ensure comfort (i.e., bring a sweater or light jacket.)

CPE CREDIT

CPE credit forms are included in the materials for conferences. In order to receive credit for attending a conference these forms must be completed and submitted at the end of the event.

If it is necessary to leave an event early, notify the CPE Department or the instructor. It is permissible to claim less than the total number of credit hours offered. CPE programs are measured by program length with one 50-minute period equaling one CPE credit. Participants must round down, not up. Please remember to adjust the number of hours you claim according to the time you were in the classroom.

HOW TO FIND THE GSCPA LEARNING CENTER

The GSCPA Learning Center, is located in the King Building in the Concourse Office Park, at 6 Concourse Pkwy, Ste 800, Atlanta, GA 30328.

The Concourse Office Park has a complimentary shuttle that will pick up participants from the Dunwoody MARTA station every 15 minutes beginning at 6 a.m. The shuttle stop is located in front of the King Building, Building Six.

Many questions such as hotel information, directions to our office and conference information can be found on our website, www.gscpa.org, click on the Continuing Education menu and then “Travel and Facility Information.” Elevators are locked to the public until 7 a.m.

CONCOURSE PARKING GARAGE DIRECTIONS

GSCPA has designated parking on the top floor (the 9th and 10th level) of the parking deck for all seminar and conference guests attending a course at the GSCPA Learning Center. Directions to elevator and staircase access points are listed as follows:

Elevator Access - Follow signs up to level 9 and make an immediate right at the uncovered floor opening to find parking by the elevators labeled 9 East Elevators. (the station is marked in blue). Take the elevator down to the main level (Level 3). Make a left from the elevators and follow covered walkway signs to the Concourse 6 building.

Stairway Access - Follow signs up to level 10 and look for stairway entrance marked in blue and labeled 10. You can reach the elevators from this floor by taking the stairs down one flight and entering the elevators from level 9. Take the stairs/elevators down to the main level (level 3) and follow signs to Concourse 6 building.

The parking deck is located directly across from the GSCPA Learning Center in the Concourse 6/King Building, Suite 800.

Parking in undesignated areas, reserved spots or 2-hour visitor parking will result in your vehicle being booted.

GSCPA is not liable for booting fees due to failure to follow instructions or breaking parking policies

BUILDING POLICY

The Concourse Office Park is a smoke-free facility. Designated smoking areas are available outside of the building.

OBTAINING TRANSCRIPTS - GSCPA MEMBERS ONLY

Members of GSCPA can check their CPE history (transcript) at any time on the website at www.gscpa.org. From the home page, click on “My GSCPA,” then “My CPE Transcript.”

Should you note any discrepancies please email cpe@gscpa.org If the discrepancy is on hours you received at a chapter event, contact your chapter president to make sure they have submitted the event to GSCPA.

HOW EVENTS ARE APPROVED FOR CPE CREDIT

The Georgia State Board of Accountancy rules stipulate that a event must increase the professional competency of a CPA in order to receive credit. The CPA must make this determination. GSCPA is not the regulatory body that sets the rules. The Georgia State Board of Accountancy does not pre-approve any providers or events for continuing professional education.

The responsibility for determining if the event meets the requirements of Chapter 20-11--Continuing Professional Education (Requirements, Programs which qualify, Controls and Reporting and Calculation of Hours of Credit) rests solely upon the provider and the licensee. Board Rules are available for downloading at the following website: sao.georgia.gov/gsba or call 404-463-0635.

REPORTING PERIODS

After the first renewal period, the CPE requirement is 80 hours every two years, 16 hours (20 percent) of which must be in auditing and accounting subjects. A minimum of 20 hours must be earned in each year.

If licensed less than one year, no CPE is required for your first license renewal. If licensed one year but less than two years prior to your first renewal date, 40 hours of CPE (20% in A&A) is required. If CPE requirements are not completed by the end of the renewal period, the license will expire and the licensee will be

GEORGIA STATE BOARD OF ACCOUNTANCY			
		Jan. 1, 2022 - Dec. 31, 2023	
		80 hours/2 years	
		(16 of the 80 hours must be in A&A subjects)	
		20 hours/year minimum	
AICPA		GAO YELLOW BOOK	
Reporting period begins calendar year after joining		Jan. 1, 2022 – Dec. 31, 2023	
120 hours/3 years		80 hours/2 years	
Retired, unemployed and members who have temporarily left the workplace are exempt from CPE. Members who place their licenses/certificate on inactive status with their state board of accountancy AND do not hold themselves out as CPAs are exempt from the CPE requirement as long as their state board does not require CPE while on inactive status.		(24 of the 80 hours must be in Government Environment & Government Auditing) 20 hours/year minimum	
		Member firms may, with peer review approval, select other two year reporting periods.	

required to reinstate in order to bring the license back to an active status. Please note: Reinstatement is at the discretion of the Board. See Board Rule Chapter 20-11.

GEORGIA STATE BOARD OF ACCOUNTANCY

<https://gsba.georgia.gov/>

UNITED STATES GENERAL ACCOUNTING OFFICE

www.gao.gov/govaud/cpe.pdf

RECORD RETENTION

CPE records must be retained for at least five years.

COMPLAINT RESOLUTION

Attendees who have a comment or complaint regarding any program offered by GSCPA are directed to the Director, Education & Training, Jennifer Oleksa, joleksa@gscpa.org, 404-504-2950.

DISCLAIMER

The information and suggestions presented at the seminars and conferences sponsored by The Georgia Society of CPAs are subject to constant change and, therefore, should only serve as a foundation for further investigation and study. Further, any forms presented at such seminars or conferences are samples only and are not necessarily authoritative. All information, procedures, and forms contained or used in such seminars or conferences should be carefully reviewed and should serve as a guide for use in specific

situations. Speakers and discussion leaders are expressing their own views, or those of program authors. Such views and opinions have not been approved or endorsed by GSCPA.

GSCPA reserves the right to make changes to prices, dates, locations, and speakers at any time without notice. GSCPA reserves the right to cancel an event because of an insufficient number of registrations. On the occasion that GSCPA must cancel a program, participants will be notified not less than one week prior to the program. Early registration helps avoid program cancellations.

GSCPA does not assume financial responsibility for penalties or expenses incurred by registrants who must cancel travel arrangements due to event cancellation.

GSCPA advises its members that vendors offering computer programming are instructed to complete a thorough check of all computer hardware on a regular basis to reduce the potential for spreading computer viruses. Members should be advised that commercially available programs to detect viruses are not foolproof. The association accepts no responsibility for the inadvertent spread of a computer virus, and members enrolling in GSCPA computer events acknowledge the risk involved and agree to hold the association harmless.

Georgia State Board of Accountancy

200 PIEDMONT AVE., SUITE 1604, WEST TOWER, ATLANTA, GA 30334 | 404-463-0365 | SAO.GEORGIA.GOV/GSCBA

Rule 20-11-.01 Introduction

(1) CPAs by virtue of their training have been certificated or licensed by the Board and, therefore, are eligible to provide the public with needed professional services not otherwise available. In furnishing these services, the CPA occupies a unique position of public trust. It is essential in maintaining this trust that each accountant continuously strive to increase his or her technical skills and his or her understanding of the whole accounting body of knowledge.

(2) Pursuant to the provision of Section 43-3-19 of this Act, the Board prescribes the following regulations establishing requirements of continuing professional education to be met from time to time by CPAs and registered foreign accountants in order to demonstrate that they are continuing their professional education as a condition to continuing to practice as public accountants.

Rule 20-11-.02 Requirements

(1) An applicant for renewal of his or her individual license to practice as a CPA must have completed 80 hours of acceptable continuing professional education, of which 16 hours shall be in accounting and auditing subjects, during the two-year period immediately preceding each biennial renewal date as a condition for renewal, except as provided under paragraphs (2) and (4) below. A minimum of 20 of the 80 hours will be earned in each year.

(2) An applicant for renewal of his or her individual license to practice as a CPA who has been initially certified by this state for one year, but less than two, will have completed 40 hours of acceptable continuing professional education after the date of licensure but prior to the expiration date of his or her first license, of which at least 8 hours of continuing professional education reported shall be in accounting and auditing subjects, as a condition for renewal. An applicant who has been initially licensed as a CPA by this state for less than one year at the date of expiration of his or her first license shall not be required to have completed any hours of continuing professional education prior to that first expiration date as a condition for renewal.

(3) "Accounting and auditing courses" for purposes of this section shall be defined as follows:

- (a) Accounting-related courses shall include, but not be limited to courses which enhance or develop understanding of generally accepted accounting principles, particularly as they relate to presentation of financial statements, as promulgated by authoritative literature in the United States and pronouncements of the Financial Accounting Standards Board and the Governmental Accounting Standards Board.

- (b) Auditing-related courses shall include, but not be limited to, courses which enhance or develop understanding of generally accepted auditing standards, particularly as they relate to reporting on financial statements (including related standards for compilation and review services) as promulgated by authoritative literature in the United States, including the Statement on Auditing Standards and the Statement on Standards for Accounting and Review Services issued by the American Institute of Certified Public Accountants and standards issued by the Public Company Accounting Oversight Board as well as courses related to auditing in specialized industries (e.g., governmental auditing requirements) and environments (e.g., computer systems).

(4) Up to fifteen hours of acceptable education completed during the period immediately preceding the renewal date of a license in excess of the requirements for such preceding period may be applied to satisfy the continuing professional

education requirements of the following period. No carryover hours can be used to satisfy the accounting and auditing hours requirement provided for in this section.

(5) Any licensee who has attained 70 years of age is exempt from the continuing professional education requirement for renewal of his or her individual license to practice public accountancy.

(6) The Board may relax or suspend the requirements of continuing professional education for reasons of individual hardship or health of the applicant.

Rule 20-11-.03 Programs Which Qualify

(1) The overriding consideration in determining whether a specific program qualifies as acceptable continuing education is that it be a formal program of learning which contributes directly to the professional competence of an individual licensed to practice as a CPA or a foreign accountant by this state, and which meets the minimum standards of quality of development and presentation and of measurement and reporting of credits set forth in the Statement on Standards for Continuing Professional Education Programs published by the National Association of State Boards of Accountancy, or such other educational standards as may be established from time to time by the Board.

(2) Subject Matter: The following general subject matters are acceptable so long as they meet the standards specified in subsection (1):

- (a) Accounting and auditing;
- (b) Taxation;
- (c) Management services;
- (d) Computer sciences;
- (e) Oral and written communications;
- (f) Mathematics and statistics;
- (g) Economics;
- (h) Business law;
- (i) Functional fields of business (e.g., finance, production, marketing, personnel relations, business management, and organization);
- (j) Specialized industries (e.g., real estate, agriculture, construction and financial institutions); and
- (k) Administration of an accounting practice.

(3) Subjects of study other than those listed above will be acceptable if the applicant can demonstrate to the Board that they contribute directly to his or her professional competence. The responsibility for substantiating that a particular program is acceptable and meets the requirements rests solely upon the applicant.

(4) Continuing education programs requiring class or meeting attendance:

- (a) General requirements:
 - 1. An outline of the program is prepared in advance by the program director and retained by the student;
 - 2. The program is conducted by an individual whose formal training and experience qualify him or her as a competent instructor;
 - 3. Hours of continuing professional education shall be calculated in one-half continuing professional education credit hour increments after the first credit hour has been earned in a given learning activity;
 - 4. A record of registration and attendance through substantially the entire program is maintained, a copy of which is retained by the student.

(b) The following programs will qualify provided the above are met:

- 1. Professional development programs of recognized national and state accounting organizations;

- 2. Technical sessions at meetings of recognized national and state accounting organizations and their chapters;
- 3. University or college courses, credit courses, each semester hour credit shall equal 15 hours toward the requirement. A quarter hour credit shall equal 10 hours;
- 4. Noncredit courses from a college or university. Each classroom hour shall be deemed to be one hour of continuing professional education;
- 5. Formal organized in-firm or multi-firm education programs. Portions of meetings devoted to administration and firm matters cannot be included;
- 6. Programs in other recognized organizations (accounting, industrial, professional, etc.);
- 7. Dinner, luncheon and breakfast meetings of recognized accounting organizations may qualify if they meet the requirements of subparagraphs 1. and 2. of this Section.

(5) Formal correspondence or other individual study programs may qualify provided that they are developed and conducted by qualified individuals, require registration, and provide evidence of satisfactory completion. Programs should be pre-tested to determine average completion time, and credit shall be calculated on the basis of the average completion time.

(6) Credit may be awarded for published articles and books provided they contribute to the professional competence of the applicant. Credit for preparation of such publications may be given on a self-declaration basis up to 25% of the total hours required. In exceptional circumstances, an applicant may request additional credit by submitting the article(s) or book(s) to the Board with an explanation of the circumstances which he or she feels justify a greater credit.

Rule 20-11-.04 Controls and Reporting

(1) An applicant for renewal of a license to practice public accountancy must provide a signed statement, under penalty of perjury, that all applicable continuing education requirements have been met.

(2) All licensees shall maintain their records confirming attendance at and completion of continuing education, including the following information:

- (a) School, firm or organization conducting the program;
- (b) Location of the program;
- (c) Title of program or description of content;
- (d) Program outline;
- (e) Dates attended;
- (f) Hours claimed; and
- (g) Evidence of satisfactory completion.

(3) If credit for published articles and books is claimed, the following information must be maintained:

- (a) Publisher;
- (b) Title of publication;
- (c) Description of content;
- (d) Dates of publication; and
- (e) Hours claimed.

(4) Records described in paragraph (2) and (3) of this section must be maintained by each licensee for five years after the completion of the program and must be submitted to the Board upon request.

(5) Evidence of satisfactory completion shall take the form of certificates of completion, attendance records, examination, transcripts, or other such independently verifiable evidence acceptable to the Board.

(6) The Board will verify on a test basis information submitted by applicants for licenses. In cases where the Board determines that the requirement is not met, the Board may grant an additional period of time in which the deficiencies may be cured.

Rule 20-11-.05 Calculation of Hours of Credit

The following standards will be used to measure the hours of credit to be given for acceptable continuing education programs completed by individual applicants:

(a) Programs requiring class or meeting attendance:

- 1. All programs will be measured in terms of twenty-five minute segments or one-half, contact hours. The shortest recognized program will consist of one contact hour. A contact hour is 50 minutes of continuous participation in a group program. For example, a group program lasting 75 minutes would count for one and one-half hours; however, one lasting between 50 and 75 minutes would count for only 1 hour. For continuous conferences and conventions, when individual segments are less than 50 minutes, the sum of the segments should be considered one total program. For example, five 30 minute presentations would equal 150 minutes and should be counted as 3 contact hours. Sponsors will be required to monitor group programs in order to accurately assign the appropriate number of credit hours for participants who arrive late or leave before a program is completed. Credit will be allowed for a question-and-answer period, but will not be allowed for introductions, announcements or other activity which may be a part of the program;

2. Only hours in class, or the equivalent, will be counted. No credit will be allowed for time devoted to preparation;

3. Each hour of service as a lecturer or discussion leader of an acceptable formal program allows additional credit based on actual preparation time of up to two hours of continuing professional education. However, no additional credit will be allowed for repetition of the same program;

4. Each semester hour of credit from a college or university shall be deemed to be fifteen hours, and each quarter hour of credit shall be deemed to be ten hours;

5. Each classroom hour of noncredit courses from a college or university shall be counted as one hour of continuing professional education;

6. Credit as an instructor, discussion leader or speaker will be allowed for any meeting or engagement provided that the session is one which would meet the continuing education requirements of those attending. The credit allowed for presentation by an instructor, discussion leader or a speaker will be on the basis of one hour of continuing education credit for each hour of teaching. No additional credit will be allowed for repetition of the same program.

(b) Correspondence and other individual study programs:

- 1. In determining the amount of credit to be allowed for specific correspondence and individual study programs, the Board will determine the equivalency of the program to a comparable seminar or comparable course for credit in an accredited educational institution;

2. Individuals claiming credit for such courses will be required to obtain evidence of satisfactory completion of the course from the program sponsor;

3. Credit will be allowed in the renewal period in which the course is completed.

(c) Preparation of articles and books:

- 1. Each hour devoted to preparation of articles and books shall be deemed to be one hour of continuing professional education, but limited to twenty-five percent of total hours required in any two year period unless additional credit is specifically approved by the Board.

Published/Effective as of March 2019

CHRONOLOGICAL EVENT LISTING

DATE	EVENT CODE	EVENT TITLE	CREDIT	LOCATION	MEMBER EARLY FEE	NM EARLY FEE	MEMBER STANDARD FEE	NM STANDARD FEE	MEMBER LATE FEE	NM LATE FEE	PAGE #
MAY											
5/23	05004/ LS05004	CFO Series: Preparing for Change	6 Business Management & Organization/ 2 A&A	Atlanta	299	399	359	459	399	499	20
JUNE											
6/8	06395/ LS06395	◆ Single Audit Workshop: Performing Single Audits Under the Uniform Guidance for Federal Awards	8 A&A	Atlanta	299	399	359	459	399	499	9
6/9	CLJ001	CLUSTERS: Current Issues in A&A and A&A: An Annual Update	4 A&A	Jekyll	180	230	200	250	230	280	46
6/9	CLJ002	CLUSTERS: This Year's Top Tax and Financial-Planning Ideas	4 Tax	Jekyll	180	230	200	250	230	280	47
6/9	CLJ003	NEW CLUSTERS: Update on the AICPA's New Ethics and Quality Control Standards	4 A&A	Jekyll	180	230	200	250	230	280	46
6/9	CLJ004	CLUSTERS: Securing a Comfortable Retirement	2 Tax/ 2 Specialized Knowledge	Jekyll	180	230	200	250	230	280	47
6/10	CLJ005	CLUSTERS: Guide and Update to Compilations, Reviews, and Preparations	4 A&A	Jekyll	180	230	200	250	230	280	46
6/10	CLJ006	☒ CLUSTERS: The Top Five Tax Issues in Dealing with LLCs and Partnerships	4 Tax	Jekyll	180	230	200	250	230	280	47
6/10	CLJ007	CLUSTERS: Technology Trends and Hot Topics Impacting the A&A Profession	2 Auditing/ 2 Information Technology	Jekyll	180	230	200	250	230	280	47
6/10	CLJ008	CLUSTERS: Employer's Handbook: Health Care, Retirement, and Fringe Benefit Tax Issues	2 Business Law/2 Tax	Jekyll	180	230	200	250	230	280	47
6/16	13001/ LS13001	REAL ESTATE CONFERENCE	8 GEN	ATLANTA	299	399	359	459	399	499	6
6/20	06012/ LS06012	Audits of 401(k) and Other Employee Benefit Plans for Experienced Auditors	8 A&A	Atlanta	299	399	359	459	399	499	9
6/21	LS06011	NEW Live Stream: Breaking Down the Auditor's Report for Non-ERISA Plan Private Entities	8 A&A	Live Stream	299	399	359	459	399	499	9
6/22	LS06010	Live Stream: Audits of ERISA Plans, with a Focus on 401(k) Plans**	8 A&A	Live Stream	299	399	359	459	399	499	9
6/23	06013/ LS06013	CFO Series: Preparing for Growth	4 A&A/ 4 Finance	Atlanta	299	399	359	459	399	499	20
6/24	06009/ LS06009	Corporate Finance Checkup: Renovate Your Analytical Toolbox	8 Finance	Atlanta	299	399	359	459	399	499	20
JULY											
7/12	07010/ LS07010	NEW U.S. GAAP: Review of New Guidance and Hot Topics**	8 A&A	Atlanta	299	399	359	459	399	499	10
7/14	07011/ LS07011	Annual Update for Accountants and Auditors**	8 A&A	Atlanta	299	399	359	459	399	499	10
7/15	07012/ LS07012	Annual Update and Practice Issues for Preparation, Compilation and Review Engagements**	8 A&A	Atlanta	299	399	359	459	399	499	10
7/21	13040/ LS13040	TECHNOLOGY CONFERENCE	8 GENERAL	ATLANTA	299	399	359	459	399	499	6
7/25	07008/ LS07008	Advanced A&A, Reporting, and A&A for the Construction Industry	8 A&A	Atlanta	299	399	359	459	399	499	10
7/25- 27	13000	ESTATE PLANNING CONFERENCE	16 GENERAL	GREENSBORO	699	799	759	859	799	899	6
7/26	07009/ LS07009	Tax Issues of Real Estate Development Estate Development and Home Building	8 Tax	Atlanta	299	399	359	459	399	499	24
7/26	07006/ LS07006	Business Law for Accountants	8 Business Law	Atlanta	299	399	359	459	399	499	20
7/27	07005/ LS07005	Criminal Law and White Collar Crime	8 A&A	Atlanta	299	399	359	459	399	499	10

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7/28	07001/ LS07001	Melisa Galasso's Annual Update for Not-for-Profit A&A	8 A&A	Atlanta	299	399	359	459	399	499	10
7/29	07003/ LS07003	Melisa Galasso's Annual Update for Governments and Not-for-Profits	8 A&A	Atlanta	299	399	359	459	399	499	11
AUGUST											
8/10	08002/ LS08002	Hottest Tax Topics for 2021**	8 Tax	Atlanta	299	399	359	459	399	499	24
8/11	08005/ LS08005	Tax Planning for Small Businesses	4 Tax	Atlanta	180	230	200	250	230	280	24
8/11	08006/ LS08006	Taxation of Property Transactions	4 Tax	Atlanta	180	230	200	250	230	280	24
8/15	08010/ LS08010	Mid-Year Tax Update	4 Tax	Atlanta	180	230	200	250	230	280	24
8/16	LS08011	Live Stream: Tax Research 1	4 Tax	Live Stream	180	230	200	250	230	280	25
8/17	LS08013	NEW Live Stream: Topic 842 - Implementing Leases Workshop	4 A&A	Live Stream	180	230	200	250	230	280	11
8/17	LS08014	NEW Live Stream: Common Yellow Book and Single Audit Deficiencies	4 A&A	Live Stream	180	230	200	250	230	280	11
8/17	08015	Advanced Controller and CFO Skills**	8 Business Management & Organization	Gainesville	299	399	359	459	399	499	44
8/18	08016	Annual Update for Controllers**	8 Finance	Duluth	299	399	359	459	399	499	43
8/24- 25	13085	SOUTHEASTERN ACCOUNTING SHOW: BOTH DAYS	16 GENERAL	ATLANTA	479	579	539	639	579	679	6
8/24	13086	SOUTHEASTERN ACCOUNTING SHOW: WEDNESDAY ONLY	8 GENERAL	ATLANTA	299	399	359	459	399	499	6
8/25	13087	SOUTHEASTERN ACCOUNTING SHOW: WEDNESDAY ONLY	8 GENERAL	ATLANTA	299	399	359	459	399	499	6
8/30	08017/ LS08017	Annual Update and Practice Issues for Preparation, Compilation and Review Engagements**	8 A&A	Atlanta	299	399	359	459	399	499	11
8/30	08018/ LS08018	K2's Technology for CPAs - Don't Get Left Behind	8 Computer Software & Applications	Atlanta	299	399	359	459	399	499	32
8/30- 31	08019/ LS08019	☒ Business Entity Tax Tune-Up	16 Tax	Atlanta	479	579	539	639	579	679	25
8/31	08003/ LS08003	Forensic A&A: Fraud Investigations**	8 A&A	Atlanta	299	399	359	459	399	499	11
8/31	08020/ LS08020	Annual Update for Accountants and Auditors**	8 A&A	Atlanta	299	399	359	459	399	499	12
8/31	08021/ LS08021	K2's Excel Tips, Tricks, and Techniques for Accountants	4 A&A/ 4 Computer Software & Applications	Atlanta	299	399	359	459	399	499	12
SEPTEMBER											
9/13	LS09001	Live Stream: Employee Benefit Plan Audits for Plan Sponsors	8 A&A	Live Stream	299	399	359	459	399	499	12
9/13	LS09002	NEW Live Stream: Construction Contractors: Non-Revenue and Non-Lease A&A Considerations**	4 A&A	Live Stream	180	230	200	250	230	280	12
9/15	09003/ LS09003	K2's Business Intelligence, Featuring Microsoft's Power BI Tools	8 A&A	Atlanta	299	399	359	459	399	499	12
9/16	09004/ LS09004	CFO Series: Creating Competitive Advantage	4 Business Management & Organization/ 4 A&A	Atlanta	299	399	359	459	399	499	20

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9/20	09007/ LS09007	Employer's Handbook: Legal, Tax, and Health Care Issues	5 Business Law/3 Tax	Atlanta	299	399	359	459	399	499	21
9/22	13020/ LS13020	FRAUD AND FORENSIC ACCOUNTING CONFERENCE	8 A&A	ATLANTA	299	399	359	459	399	499	6
OCTOBER											
10/11	08004/ LS08004	Restaurant A&A and Controls	8 A&A	Atlanta	299	399	359	459	399	499	11
10/12	11068	Advanced Controller and CFO Skills**	8 Business Management & Organization	Macon	299	399	359	459	399	499	48
10/18	10003/ LS10003	CFO Series: Financial Communications	4 A&A/4	Atlanta	299	399	359	459	399	499	21
10/19	10025/ LS10025	A&A and A&A Update for Small Business**	8 A&A	Atlanta	299	399	359	459	399	499	12
10/20	10001/ LS10001	◆ Advanced A&A of HUD-Assisted Projects**	8 A&A	Atlanta	299	399	359	459	399	499	13
10/20	13095/ LS13095	FINANCIAL INSTITUTIONS CONFERENCE	8 GENERAL	ATLANTA	299	399	359	459	399	499	6
10/24	CLM001	Current Issues in A&A and A&A: An Annual Update	4 A&A	Dawsonville	180	230	200	250	230	280	40
10/24	CLM002	This Year's Top Tax and Financial-Planning Ideas	4 Tax	Dawsonville	180	230	200	250	230	280	41
10/24	CLM003	NEW Update on the AICPA's New Ethics and Quality Control Standards	4 A&A	Dawsonville	180	230	200	250	230	280	40
10/24	CLM004	Securing a Comfortable Retirement	2 Tax/ 2 Specialized Knowledge	Dawsonville	180	230	200	250	230	280	41
10/20	LS10005	Live Stream: Forensic A&A: Fraud Investigations**	8 A&A	Live Stream	299	399	359	459	399	499	13
10/20	LS10006	◆ Live Stream: Advanced Topics in a Single Audit**	8 A&A	Live Stream	299	399	359	459	399	499	13
10/25	CLM005	Guide and Update to Compilations, Reviews, and Preparations	4 A&A	Dawsonville	180	230	200	250	230	280	40
10/25	CLM006	☒ The Top Five Tax Issues in Dealing with LLCs and Partnerships	4 Tax	Dawsonville	180	230	200	250	230	280	41
10/25	CLM007	Technology Trends and Hot Topics Impacting the A&A Profession	4 Regulatory Ethics	Dawsonville	180	230	200	250	230	280	40
10/25	CLM008	Employer's Handbook: Health Care, Retirement, and Fringe Benefit Tax Issues	2 Business Law/2 Tax	Dawsonville	180	230	200	250	230	280	41
10/24	LS10007	Live Stream: Partnership and LLC Core Tax Issues From Formation Through Liquidation	8 Tax	Live Stream	299	399	359	459	399	499	25
10/25	13050/ LS13050	PERSONAL FINANCIAL PLANNING CONFERENCE	8 GENERAL	ATLANTA	299	399	359	459	399	499	6
10/25	10008/ LS10008	Buying and Selling a Business: Critical Tax and Structuring Issues	8 Tax	Atlanta	299	399	359	459	399	499	25
10/26	10009/ LS10009	NEW U.S. GAAP: Review of New Guidance and Hot Topics**	8 A&A	Atlanta	299	399	359	459	399	499	13
10/26	10010/ LS10010	Advanced Controller and CFO Skills**	8 Business Management & Organization	Atlanta	299	399	359	459	399	499	21
10/27	13035/ LS13035	ACCOUNTING AND AUDITING CONFERENCE	8 A&A	ATLANTA	299	399	359	459	399	499	6
10/28	10012/ LS10012	NEW Conquering the New Leasing Standard: It's Finally Here	8 A&A	Atlanta	299	399	359	459	399	499	13
10/31	LS10013	⌘ Live Stream: The Complete Trust Workshop	8 Tax	Live Stream	299	399	359	459	399	499	25

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10/31	LS10014	Live Stream: What Fraud Schemes Exist in Your Organization**	8 A&A	Live Stream	299	399	359	459	399	499	13
10/31	LS10015	NEW Live Stream: Finance Business Partnering: Successful Business Models and Strategic Choices	4 Business Management & Organization	Live Stream	180	230	200	250	230	280	21
NOVEMBER											
11/1	11002/ LS11002	⌘ ☒ This Year's Best Income Tax, Estate Tax, and Financial-Planning Ideas	8 Tax	Atlanta	299	399	359	459	399	499	25
11/1	LS11011	Live Stream: Construction Contractors: A&A Considerations	4 A&A	Atlanta	180	230	200	250	230	280	14
11/2-3	13065/ LS13065	GEORGIA TAX FORUM	16 GENERAL	ATLANTA	479	579	539	639	579	679	6
11/2	13067	GEORGIA TAX FORUM THURSDAY ONLY	8 GENERAL	ATLANTA	299	399	359	459	399	499	6
11/3	11016	Pat Garverick's Federal Tax Update: Individual and Business Current Developments	8 Tax	Macon	299	399	359	459	399	499	48
11/3	11064	Annual Update and Practice Issues for Preparation, Compilation and Review Engagements	8 A&A	Tifton	299	399	359	459	399	499	50
11/3	LS11015	NEW Live Stream: Finance Business Partnering: The Changing Finance Function and Technology Impacts	4 Business Management & Organization	Live Stream	180	230	200	250	230	280	21
11/3	13068	GEORGIA TAX FORUM FRIDAY ONLY	8 GENERAL	ATLANTA	299	399	359	459	399	499	6
11/4	11003/ LS11003	Pat Garverick's Federal Tax Update: Individual and Business Current Developments	8 Tax	Atlanta	299	399	359	459	399	499	26
11/4	11014	Annual Update and Practice Issues for Preparation, Compilation and Review Engagements**	8 A&A	Valdosta	299	399	359	459	399	499	51
11/4	LS11018	Live Stream: IRS Disputes	4 Tax	Live Stream	180	230	200	250	230	299	26
11/7	LS11019	Live Stream: Introduction to Business Acquisitions**	8 Tax	Live Stream	299	399	359	459	399	499	26
11/7	11020/ LS11020	K2's QuickBooks for Accountants	4 A&A/ 4 Computer Software & Applications	Atlanta	299	399	359	459	399	499	14
11/8	11021/ LS11021	☒ Hot IRS Tax Examination Issues for Individuals and Businesses	8 Tax	Atlanta	299	399	359	459	399	499	26
11/8	11022/ LS11022	K2's Small Business Internal Controls, Security, and Fraud Prevention and Detection	8 A&A	Atlanta	299	399	359	459	399	499	14
11/8	11023	Annual Accounting & Auditing Update	8 A&A	Athens	299	399	359	459	399	499	36
11/9	11024/ LS11024	⌘ Securing a Comfortable Retirement in the Age of Spending	4 Tax/ 4 Specialized Knowledge	Atlanta	299	399	359	459	399	499	26
11/9	11025/ LS11025	Project Management for Finance Professionals	8 Management Services	Atlanta	299	399	359	459	399	499	22
11/9	11026	Annual Accounting & Auditing Update	8 A&A	Augusta	299	399	359	459	399	499	37
11/10	11027/ LS11027	Jim Martin's 2022 Preparation, Compilation and Review (SSARS) Update for the Local Firm	8 A&A	Atlanta	299	399	359	459	399	499	14
11/10	LS11028	☒ Live Stream: Surgent's Comprehensive Guide to Tax Depreciation, Expensing, and Property Transactions	8 Tax	Live Stream	299	399	359	459	399	499	26
11/10	11030	Compilations, Review, and Preparations: Engagement Performance and Annual Update	8 A&A	Augusta	299	399	359	459	399	499	37
11/10	11031	Annual Accounting & Auditing Update	8 A&A	Columbus	299	399	359	459	399	499	38
11/11	11032/ LS11032	Jim Martin's 2022 Accounting & Auditing Update for the Real World	8 A&A	Atlanta	299	399	359	459	399	499	14

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11/14	07002/ LS07002	CFO Series: Fine Tune Your Finances	6 Business Management & Organization/ 2 A&A	Atlanta	299	399	359	459	399	499	22
11/14	LS11033	Live Stream: Melisa Galasso's Annual Update for Accountants and Auditors	8 A&A	Atlanta	299	399	359	459	399	499	14
11/14	11034/ LS11034	☒ The Best S Corporation, Limited Liability, and Limited Liability, and Partnership Update	8 Tax	Atlanta	299	399	359	459	399	499	27
11/14	11035	Annual Update for Accountants and Auditors**	8 A&A	Dalton	299	399	359	459	399	499	39
11/15	LS11037	◆ Live Stream: Latest Developments in Nonprofit Accounting & Auditing	8 A&A	Live Stream	299	399	359	459	399	499	15
11/15	11069/ LS11069	Criminal Law and White Collar Crime	8 A&A	Atlanta	299	399	359	459	399	499	15
11/16	11038	Financial Reporting Update for Tax Practitioners	8 A&A	Duluth	299	399	359	459	399	499	42
11/16	11039	Annual Accounting & Auditing Update	8 A&A	Jekyll	299	399	359	459	399	499	46
11/16- 17	13045/ LS13045	BUSINESS AND INDUSTRY CONFERENCE: BOTH DAYS	16 GENERAL	ATLANTA	479	579	539	639	579	679	6
11/16	13046/ LS13046	BUSINESS AND INDUSTRY CONFERENCE: WEDNESDAY ONLY	8 GENERAL	ATLANTA	299	399	359	459	399	499	6
11/17	12027/ LS12027	Don Farmer's 2022 Federal Tax Update	8 Tax	Duluth	299	399	359	459	399	499	43
11/17	11041	AICPA's Annual Federal Tax Update**	8 Tax	Augusta	299	399	359	459	399	499	37
11/17	11042	Annual Accounting & Auditing Update	8 A&A	Macon	299	399	359	459	399	499	48
11/17	11043	Annual Accounting & Auditing Update	8 A&A	Savannah	299	399	359	459	399	499	49
11/17	13047/ LS13047	BUSINESS AND INDUSTRY CONFERENCE: THURSDAY ONLY	8 GENERAL	ATLANTA	299	399	359	459	399	499	6
11/18	11045/ LS11045	⚠ ☒ The Best Individual Income Tax Update	8 Tax	Atlanta	299	399	359	459	399	499	27
11/18	11047/ LS11047	Annual Accounting & Auditing Update	8 A&A	Gainesville	299	399	359	459	399	499	44
11/21	CLA001/ LSCLA001	Current Issues in Accounting & Auditing: An Annual Update	4 A&A	Atlanta	180	230	200	250	230	280	15
11/21	CLA002/ LSCLA002	☒ Surgent's Individual Income Tax Update	4 Tax	Atlanta	180	230	200	250	230	280	27
11/21	CLA003/ LSCLA003	NEW K2's Biggest Security And Privacy Concerns	4 Information Technology	Atlanta	180	230	200	250	230	280	32
11/21	CLA004/ LSCLA004	NEW Update on the AICPA's New Ethics and Quality Control Standards	4 A&A	Atlanta	180	230	200	250	230	280	15
11/21	CLA005/ LSCLA005	⚠ ☒ Select Estate and Life Planning Issues for the Middle-Income Client	4 Tax	Atlanta	180	230	200	250	230	280	27
11/21	CLA006/ LSCLA006	NEW K2's Data Analytics for Accountants and Auditors	4 A&A	Atlanta	180	230	200	250	230	280	15
11/22	CLA007/ LSCLA007	Guide and Update to Compilations, Reviews, and Preparations	4 A&A	Atlanta	180	230	200	250	230	280	16
11/22	CLA008/ LSCLA008	☒ The Top Five Tax Issues in Dealing with LLCs and Partnerships	4 Tax	Atlanta	180	230	200	250	230	280	27
11/22	CLA009/ LSCLA009	NEW K2's Artificial Intelligence for A&A and Financial Professionals	4 Information Technology	Atlanta	180	230	200	250	230	280	32
11/22	CLA010/ LSCLA010	Technology Trends and Hot Topics Impacting the Accounting Profession	4 A&A	Atlanta	180	230	200	250	230	280	16

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11/22	CLA011/ LSCLA011	Succession Planning for the Small Business Owner: Finding the Exit Ramp	4 Tax	Atlanta	180	230	200	250	230	280	28
11/22	CLA012/ LSCLA012	NEW K2's An Accountant's Guide to Blockchain and Cryptocurrency	4 Information Technology	Atlanta	180	230	200	250	230	280	32
11/29	LS11049	☒ Live Stream: Surgent's Top 10 Tax Topics This Year	8 Tax	Live Stream	299	399	359	459	399	499	28
11/29	LS11050	Live Stream: Employer's Handbook: Legal, Tax, and Health Care Issues	5 Business Law/3 Tax	Live Stream	299	399	359	459	399	499	22
11/29	LS11051	Live Stream: K2's Next Generation Excel Reporting	8 A&A	Live Stream	299	399	359	459	399	499	16
11/30	11053/ LS11053	⚠ ☒ Estate and Life Planning Issues for the Middle- Income Client	8 Tax	Atlanta	299	399	359	459	399	499	28
11/30	11054/ LS11054	Focus on Engagement Quality: How to Avoid Deficiencies in Peer Reviews	8 A&A	Atlanta	299	399	359	459	399	499	16
11/30	11055	AICPA's Annual Federal Tax Update**	8 Tax	Athens	299	399	359	459	399	499	36
DECEMBER											
12/1	12001/ LS12001	Melisa Galasso's Annual Update for Accountants and Auditors	8 A&A	Atlanta	299	399	359	459	399	499	17
12/1	LS12002	◆ Live Stream: Not-for-Profit Financial Reporting: Mastering the Unique Requirements**	8 A&A	Live Stream	299	399	359	459	399	499	17
12/1	LS12004	Live Stream: Multistate Tax Update	8 Tax	Live Stream	299	399	359	459	399	499	28
12/1	12005	AICPA's Annual Federal Tax Update**	8 Tax	Dalton	299	399	359	459	399	499	39
12/2	LS12003	Live Stream: Breaking Down the Auditor's Report for non-ERISA Plan Private Entities**	8 A&A	Live Stream	299	399	359	459	399	499	17
12/2	12006/ LS12006	Annual Tax Update: Individuals and Sole Proprietors**	8 Tax	Atlanta	299	399	359	459	399	499	28
12/5	12054/ LS12054	⚠ Don Farmer's 2022 Federal Tax Update	8 Tax	Atlanta-Cobb	299	399	359	459	399	499	35
12/6	12064/ LS12064	⚠ Don Farmer's 2022 Individual Income Tax Workshop	8 Tax	Atlanta-Cobb	299	399	359	459	399	499	35
12/6	12007	Pat Garverick's Federal Tax Update: Individuals (Form 1040)	8 Tax	Valdosta	299	399	359	459	399	499	51
12/7	12065/ LS12065	⚠ Don Farmer's 2022 Corporate/Business Income Tax Workshop	8 Tax	Atlanta-Cobb	299	399	359	459	399	499	35
12/7	12008	Pat Garverick's Federal Tax Update: C & S Corporations, Partnerships, & LLCs (Forms 1120, 1120S & 1065)	8 Tax	Valdosta	299	399	359	459	399	499	51
12/7	12011/ LS12011	K2's Advanced Excel	4 A&A/4 Computer Software & Applications	Atlanta	299	399	359	459	399	499	17
12/8	11045	⚠ Don Farmer's 2022 Federal Tax Update	8 Tax	Tifton	299	399	359	459	399	499	50
12/8	12009	Pat Garverick's Federal Tax Update: Individuals (Form 1040)	8 Tax	Savannah	299	399	359	459	399	499	49
12/8	12012	Jim Martin's 2022 Accounting & Auditing Update for the Real World	8 A&A	Valdosta	299	399	359	459	399	499	51
12/8	12013	Compilations, Reviews, and Preparations: Engagement Performance and Annual Update	8 A&A	Duluth	299	399	359	459	399	499	42
12/8	LS12014	☒ Live Stream: Form 1040 Return Review Boot Camp for New and Experienced Reviewers	8 Tax	Live Stream	299	399	359	459	399	499	28

CHRONOLOGICAL EVENT LISTING

DATE	EVENT CODE	EVENT TITLE	CREDIT	LOCATION	MEMBER EARLY FEE	NM EARLY FEE	MEMBER STANDARD FEE	NM STANDARD FEE	MEMBER LATE FEE	NM LATE FEE	PAGE #
12/8	13070/ LS13070	GOVERNMENTAL A&A CONFERENCE	8 A&A	ATLANTA	299	399	359	459	399	499	6
12/9	12010	Pat Garverick's Federal Tax Update: C & S Corporations, Partnerships, & LLCs (Forms 1120, 1120S & 1065)	8 Tax	Savannah	299	399	359	459	399	499	49
12/9	12015	Jim Martin's 2022 Accounting & Auditing Update for the Real World	8 A&A	Tifton	299	399	359	459	399	499	50
12/12	12016/ LS12016	Jim Martin's Accounting & Auditing Update for Tax People Who Absolutely Detest A&A and A&A	8 A&A	Atlanta	299	399	359	459	399	499	17
12/12	12017	Annual Update and Practice Issues for Preparation, Compilation and Review Engagements**	8 A&A	Macon	299	399	359	459	399	499	48
12/12	LS12018	☞ ☒ Live Stream:Tax Forms Boot Camp: LLCs, Partnerships, and S Corporations	8 Tax	Live Stream	299	399	359	459	399	499	29
12/13	12019/ LS12019	◆ Not-for-Profit Accounting & Auditing Update**	8 A&A	Atlanta	299	399	359	459	399	499	17
12/13	12020/ LS12020	AICPA's Annual Federal Tax Update**	8 Tax	Atlanta	299	399	359	459	399	499	29
12/13	12021	AICPA's Annual Federal Tax Update**	8 Tax	Columbus	299	399	359	459	399	499	38
12/13	12022	☞ ☒ The Best Federal Tax Update Course by Surgent	8 Tax	Gainesville	299	399	359	459	399	499	44
12/13	12067	Jim Martin's 2022 Accounting & Auditing Update for the Real World	8 A&A	Duluth	299	399	359	459	399	499	42
12/13	12068	AICPA's Annual Federal Tax Update**	8 Tax	Jekyll	299	399	359	459	399	499	47
12/14	12023/ LS12023	Hottest Tax Topics for 2021**	8 Tax	Atlanta	299	399	359	459	399	499	29
12/14	12024/ LS12024	The Complete Guide to Payroll Taxes and 1099 Issues	8 Tax	Atlanta	299	399	359	459	399	499	29
12/14	12025/ LS12025	Annual Update for Controllers**	8 Finance	Atlanta	299	399	359	459	399	499	22
12/15	12028/ LS12028	Jim Martin's 2022 Preparation, Compilation and Review (SSARS) Update for the Local Firm	8 A&A	Atlanta	299	399	359	459	399	499	18
12/15	12029/ LS12029	☞ Social Security and Medicare: Planning for You and Your Clients	8 Tax	Atlanta	299	399	359	459	399	499	29
12/16	12031/ LS12031	Jim Martin's 2022 Accounting & Auditing Update for the Real World	8 A&A	Atlanta	299	399	359	459	399	499	18
12/16	12032/ LS12032	Income Tax Planning**	8 Tax	Atlanta	299	399	359	459	399	499	31
12/16	LS12033	Live Stream: International Taxation**	8 Tax	Live Stream	299	399	359	459	399	499	31
12/19	12034/ LS12034	CFO Series: 360 Degree Budgeting	8 A&A	Atlanta	299	399	359	459	399	499	22
12/19	LS12035	Live Stream: Winning the Fraud Battle in the 21st Century: Prevention and Detection	8 A&A	Live Stream	299	399	359	459	399	499	18
12/20	12036/ LS12036	FASB Update for Small and Medium-Sized Businesses: A Practical Implementation Guide	8 A&A	Atlanta	299	399	359	459	399	499	18
12/20	12037/ LS12037	The Strategic CFO	2 Business Management & Organization/ 2 Finance/ 4 A&A	Atlanta	299	399	359	459	399	499	22
JANUARY 2023											
1/10-11	01001/ LS01001	1040 Individual Tax Tune-Up	16 Tax	Atlanta	479	579	539	639	579	679	31

CHRONOLOGICAL EVENT LISTING

DATE	EVENT CODE	EVENT TITLE	CREDIT	LOCATION	MEMBER EARLY FEE	NM EARLY FEE	MEMBER STANDARD FEE	NM STANDARD FEE	MEMBER LATE FEE	NM LATE FEE	PAGE #
1/24	01003/ LS01003	NEW K2's Excel Essentials for Staff Accountants	4 A&A/ 4 Computer Software & Applications	Atlanta	299	399	359	459	399	499	18
1/24	LS01004	☒ Live Stream: Surgent's Advanced Individual Income Tax Return Issues	8 A&A	Live Stream	299	399	359	459	399	499	31
1/25	01005/ LS01005	☒ Preparing Individual Tax Returns for New Staff and Para-Professionals	8 A&A	Atlanta	299	399	359	459	399	499	31
1/26	LS01006	☒ Live Stream: Forms 1120S and 1065 Return Review Boot Camp for New and Experienced Reviewers	8 A&A	Live Stream	299	399	359	459	399	499	31
MAY 2023											
5/16	CLB001/ LSCLB001	Advanced Financial Skills	4 Business Management & Organization	Atlanta	180	230	200	250	230	280	23
5/16	CLB002/ LSCLB002	NEW K2's Biggest Security And Privacy Concerns	4 Information Technology	Atlanta	180	230	200	250	230	280	33
5/16	CLB003/ LSCLB003	NEW Finance Business Partnering: Successful Business Models and Strategic Choices	4 Business Management & Organization	Atlanta	180	230	200	250	230	280	23
5/16	CLB004/ LSCLB004	NEW K2's Case Studies in Fraud and Technology Controls	4 A&A	Atlanta	180	230	200	250	230	280	19
5/17	CLB005/ LSCLB005	Forecasting for Improved Profits, Working Captial, and Decision Analysis	4 Finance	Atlanta	180	230	200	250	230	280	23
5/17	CLB006/ LSCLB006	Critical Issues That CPAs in Industry Will Need to Face This Year	4 A&A	Atlanta	180	230	200	250	230	280	19
5/17	CLB007/ LSCLB007	Developing Your Alternative Workforce (GIG) Strategy	2 A&A/ 2 Business Management & Organization	Atlanta	180	230	200	250	230	280	23
5/17	CLB008/ LSCLB008	Financial Statement Disclosures: A Guide for Small and Medium-Sized Businesses	4 A&A	Atlanta	180	230	200	250	230	280	19

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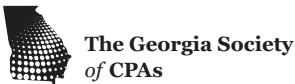
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ITEMS TO NOTE

If you have a specific dietary or other need, please contact the CPE Department at least one week prior to the conference at 404-504-2985 or 800-330-8889, Opt. 3.



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<input type="checkbox"/>	<input type="checkbox"/>				\$
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TOTAL					\$

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WAYS TO REGISTER

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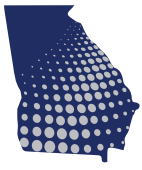
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