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ERISA's role and impact Key features of 401(k) plans Roles and responsibilities in 401(k) plans Governing documents Contributions, loans, and investments Distributions, expenses, and fee arrangements Financial reporting requirements Regulatory reporting and compliance

AICPA Fundamentals of ESG Certificate

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Sustainability fundamentals Expectations of investors, stakeholders, and shareholders The accounting and finance professional's role in sustainability Existing reporting requirements Frameworks that drive reporting Key global bodies that set the baseline for reporting and frameworks Recent standards and reporting requirements

AICPA Fundamentals of Forensic Accounting Certificate

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Bankruptcy, Insolvency and Reorganization Computer Forensic Analysis Economic Damages Calculations Family Law Financial Statement Misrepresentation Fraud Prevention, Detection and Response Valuation

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Accounting and Auditing for the Construction Industry

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Illustrative computations for revenue recognition Analysis of FASB revenue recognition standard and the anticipated impact on the construction industry Application of "risk-based" audit model to contractors The "Lookback" analysis and the contractor's estimating reliability Practical approach to auditing contracts completed and in progress Numerous computations and alternative approaches Independent Contractor qualifications

Add Cash Management to Your Fractional CFO Toolkit

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Leveraging cash management services Importance of cash management for business Identifying your target cash clients Service models: Consulting, Advisory, Implementation Harnessing modern cloud-based tools Pricing and packaging advisory services Strategic approaches to business development

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Business structure of the practice Practice management Marketing Technology Licensing and regulatory requirements Personal financial planning process

Advanced Excel Topics for Spreadsheet Power Users

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Using Excel for graphical output and dashboard reporting Data tools and the Data Analysis ToolPak Advanced functions and complex formulas Working with Excel tables and PivotTables

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Alternative work arrangements Telecommuting Organizational and supervisor support in public accounting Procedural justice Turnover intentions

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GASB changes SAS reporting requirements

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History of Qualified Property Categories CARES Act correction of QIP rules Apply CARES Act changes to returns QIP as Section 179 property indicator Integrate Section 179, Bonus, TPRs, Incentives Compare Bonus Depreciation vs. Section 179 Maximize savings using tax strategies

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Review of the appropriate audit and review standards Identifying appropriate analytical procedures in the circumstances Developing expectations Designing and performing analytical procedures Investigating results of the procedures performed Introduction to data analytics

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The strategy process Alternative approaches to strategy

Audit Challenge: Real-World Fraud Detection Scenarios

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Auditing and Balancing a 3-Statement Model

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Review Excel's formula auditing and error checking tools. Identify the most common errors and sources of imbalance in a 3-statement model. Apply techniques to ensure consistency and accuracy across financial models, including checking for column alignment, row differences, and proper referencing. Reconcile changes in balance sheet accounts with corresponding cash flow statement entries to identify and resolve discrepancies effectively.

Audits of HUD Assisted Projects

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Audit requirements Audit procedures Requirements under HUD Consolidated Audit Guide and the Uniform Guidance

Avoiding Tax Malpractice: Overview

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Technical definitions of tax malpractice Risk management techniques: quality control procedures and maintaining professional competence Aggressive tax strategies "War stories" dealing with tax-related claims against CPAs Insurance carrier experiences Substantive tax areas: tax-deferred exchanges, built-in gains, alternative minimum tax and overlooked tax elections

Bamboozled: Frauds & Schemes Against California Local Governments

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GASB changes SAS reporting requirements

Behavioral Skills for High Performing Finance Teams

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IRS compliance guidelines automation for accountants federal tax updates artificial intelligence in accounting internal controls audit report writing tax planning strategies

Best Practices for Tax Income and Expense Recognition

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Cash receipts and disbursements method of accounting, including history Cash method limitations, including tax shelters per IRC Sec. 448(d)(3), 461(i)(3) and 1256(e)(3) Cash method by small businesses, including Revenue Procedures 2001-10 and 2002-28 NAICS codes Accrual of income and expenses, including history Economic Performance and Recurring Item Exception, IRC Sec. 461(h) Deferral of Certain Advance Payments (Revenue Procedure 2004-34) Changes made to the above by the 2018 Tax Cuts and Jobs Act

Beyond Belonging: From Ideas to Action

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Belonging & Social Responsibility Belonging in the Workplace Cultural Awareness & Belonging Belonging Strategies for Leadership The Business Case for Belonging Building a Culture of Belonging

Beyond Following the Money: Use of Intelligence and Asset Searches

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Limitations of Traditional Forensic Accounting Methods Leveraging Public Records and Open Sources Intelligence and Asset Search Techniques Case Examples: Enhancing Investigations and Recoveries

Beyond the Headlines: The One Big Beautiful Bill - Part I

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Board Risk Oversight and Corporate Tax-Planning Practices

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Tax Planning

Building Productivity: Creating Your Stress Reduction Tool Bag

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Recognizing and Managing Workplace Stress Strategies for Preventing Burnout and Fatigue Enhancing Focus and Productivity Through Stress Management

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Building Trust: SOC 2 Compliance and Managing Third-Party Risks

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Building a Better CPA Firm for the Future

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Business Plans That Get Results

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Key Components of a Successful Business Plan Financial Forecasting and Assumptions Market Analysis and Strategic Positioning Communicating Business Plans to Stakeholders

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Bytes, Bias, and Balance: Data Ethics for Tech-Savvy Accountants- Self- Study

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Charitable Giving Strategies

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Gifts of cash and property Percentage limitations and substantiation requirements Gifts of partial interests in property and transfers in trust Community foundations, donor advised funds, and private foundations

Charting the Course: ASU Updates for the Year Ahead

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Common Nonprofit Financial Statement Errors

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Identifying Common Nonprofit Reporting Errors Compliance and Regulatory Impact of Mistakes Effects on Transparency and Credibility Preventative Financial Procedures and Policies Corrective Actions and Best Practices Building Stakeholder Trust Through Accuracy Strengthening Nonprofit Financial Health Overall

Communications Skills Training for the CPA

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Becoming a stronger communicator The communication process Improving oral and written communications "Empathy, ego and needs," personality types and their influence on communications Case studies to summarize the webinar concepts

Conflict Management

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Sources and effects of, and managing, conflict Mediating Positive conflict

Considerations of Fraud- Self-Study

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Construction Contracts: Mitigating Financial Risks & Improving Transparency

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Identifying Financial Risks in Construction Contracts Contract Negotiation Strategies Delivery Method Selection and Risk Allocation Preconstruction Services and Subcontractor Vetting Change Orders Management Retainage Policies and Cash Flow Management

Corporate Finance Competency: Analytical Toolbox

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Forecasting as a valuation tool Bank/banker selection Ten hints for toolbox success Seven cases

Corporate Finance Competency: Three Basic Tool Categories

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Financial statement analysis Integrated strategic and financial planning Action-oriented business metrics Activity-based management Five cases

Corporate Finance Fundamentals

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Understand what capital investment is and why it increases a company's assets Learn common metrics used by companies to evaluate various investments Learn the business life cycle and how it impacts the funding life cycle Understand the types & sources of equity & debt available to companies Learn how to minimize a company's weighted average cost of capital (WACC) Understand the advantages & disadvantages of the different ways a company can return capital

Corporate Fraud Risk & Investigations

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Types of Corporate Fraud Introduction to fraud risk Fraud risk prevention programs Fraud investigations

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Corporate Income Tax Return Fundamentals

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Corporate structure entity choice comparisons Form 1120 and Schedule M-1 or M-3 Items for book-tax differences Tax accounting methods Uniform capitalization rules, overview Minor discussion on depreciation: capitalization, gain, loss and recapture Carrybacks, carryforwards and credit Case Study and presentation in return Mergers and Acquisitions impact on the returns

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Corporate Sustainability: A Model Uncertainty Analysis of Materiality

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Materiality Social and financial performance Research methods Epistemology Model uncertainty Replication

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Costing Strategies

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Target costing Life cycle costing Learning curves, learning rate and learning index

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Create Measures in Power BI that Define Your Metrics

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Introduction to DAX: Understanding the fundamentals of DAX and its role in Power BI. Advanced DAX Formulas: Delving into complex DAX functions and formulas for creating sophisticated measures. Time Intelligence in DAX: Exploring time-based functions to analyze data over different periods. Validating Measures with DAX: Techniques for ensuring accuracy and reliability in your DAX measures. Using PivotTables for Measure Validation: Employing PivotTables in Power BI to test and confirm the effectiveness of DAX measures.

Create Paginated Reports with Power BI Report Builder

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Introduction to Power BI Report Builder: Overview of the tool, its interface, and integration with the Power BI ecosystem. Designing Report Layouts: Techniques for setting up professional layouts, including headers, footers, and managing pagination. Data Connection and Management: Connecting to various data sources and preparing data for reporting. Creating Visualizations: Utilizing Power BI's visualization tools for impactful data presentation. Advanced Report Features: Exploring sub-reports, drill-through capabilities, and dynamic expressions. Publishing and Sharing: Guidelines for publishing reports to the Power BI service and sharing them with relevant stakeholders.

Cultivating Your Authentic Brand

Available Until Friday, April 30 Online 0.00 Credits $ Member Price: $49

Uncover what makes your firm different Develop magnetic and authentic brand messaging Bring your authentic brand to life Attract the right audience

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Culture Dash: How Workplace Culture Drives Fraud Risk

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Embracing differences and unique contributions Ethical decision-making in business transactions Critical thinking skills Complex problem-solving

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Current and Emerging Issues in Specialized Tax Planning

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Customer and Portfolio Analysis

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Customer value analysis Portfolio analysis using BCG matrix

Cybersecurity for Not-for-Profits

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Core cybersecurity risks for nonprofit organizations Executive leadership in cybersecurity management Cybersecurity challenges unique to NFPs Advancing cybersecurity maturity in nonprofits Proven frameworks for cybersecurity programs Responding to cybersecurity incidents effectively Importance of an incident response plan

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Cybersecurity: Protecting Organizations from Cybercrime

Available Until Friday, April 30 Online 0.00 Credits Member Price: $49

Emerging cyber threats in CPA and government sectors Case studies of recent cybersecurity breaches Offensive security strategies for threat prevention Defensive measures to strengthen cyber resilience

Data Analysis Certificate

Available Until Friday, April 30 Online 0.00 Credits Member Price: $90

Introduction to Analytics What is analytics — The three types of analytics: descriptive, predictive, prescriptive Analytics maturity benchmarking for CPAs and client organizations Descriptive Analytics Identifying insights with text mining Using multidimensional clustering to uncover patterns Detecting anomalies with statistical outlier methods Predictive Analytics Fundamentals of forecasting: making and evaluating forecasts statistically Forecasting simple time series (e.g., staffing needs for an office) Forecasting complex time series (e.g., product revenue trends) Forecasting nonlinear targets with CART trees for market segmentation Prescriptive Analytics Understanding data analytics optimization Formulating and solving optimization problems Optimizing capital investment decisions with decision trees Improving inventory management using reorder points and safety stock

Data Driven Finance Decisions Without Analysis Paralysis

Available Until Friday, April 30 Online 0.00 Credits Member Price: $69

Data Protection and IRS Compliance: Crafting an Effective WISP

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tax planning strategies SEC reporting updates automation for accountants IRS compliance guidelines financial disclosure requirements

Data Visualization & Dashboards - The Basics

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Define the purpose and audience for your visualization. Select the appropriate visual to tell the story or communicate the message. Focus attention on the key message using data viz best practices. Design professional and accessible visuals and dashboards to build trust. Create meaningful dashboards that tell stories and inspire decision-making. Identify examples of bad data visualization and dashboarding.

Data Visualization for Audits

Available Until Friday, April 30 Online 0.00 Credits Member Price: $69

Common data sets How to visualize data sets and interpret results How to replace manual audit procedures with technology

Data-Driven Decisions for Finance: Strategy, Governance and Practical Insights

Available Until Friday, April 30 Online 0.00 Credits Member Price: $89

Deal Structure for Mergers and Acquisitions

Available Until Friday, April 30 Online 0.00 Credits Member Price: $199

Mechanics and timelines of M&A deals Structures of taxable asset acquisitions and stock acquisitions Triangular and reverse triangular mergers Structuring and pricing an acquisition Tax-free reorganizations Tax planning for divestitures Key sections of purchase and sale documents Case studies with schedules Tax return forms and elections to be aware of

Dealing with Underperforming Employees

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Goals Sources of performance deviations Successful interventions

Decision Making Analytics

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Decision trees - preparation Decision trees - value of information Sensitivity analysis

Defining Where and Why Internal Controls are Needed

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Control design basics Areas or segments of an enterprise to control Controls to reduce risk Controls to drive operations

Designing a Work Program for Your Financial Planning Practice

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Cash flow management and budgeting Planning for insurance, investments, education, income tax, employee benefits, retirement and estate planning. Implications for various specialty groups, such as closely-held business owners, highly compensated employees, Baby Boomers, newly retired individuals and those who are suddenly single due to divorce or being widowed.

Developing and Documenting the Forensic Accounting Opinion in Litigation

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Forensic accounting methodology Litigation support and expert witness services Analytical reasoning in complex financial disputes Expert file documentation and organization Defense strategies for expert opinions Direct and cross-examination preparation

Don Farmer's Advanced A Planning SALT Caps, AMT, and Bunching Strategies -Self-Study

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Don Farmer's Corporate & Pass-Through Returns Forms-Self-Study

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Don Farmer's Crypto-Currency Taxation - Tracking, Reporting, and IRS Enforcement

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IRS classification of cryptocurrency as property Tax consequences of sales and exchanges Mining and staking income Hard forks and airdrops Form 1040 digital asset disclosure Form 8949 and Schedule D reporting Schedule C considerations Overview of broker reporting rules and Form 1099-DA developments Exchange reporting and John Doe summonses IRS compliance campaigns Civil penalties and potential criminal exposure Audit risk indicators Documentation and substantiation best practices Client interview strategies Ethical responsibilities in digital asset reporting

Don Farmer's Partnership Basis Deep Dive: Inside vs. Outside Basis -Self-Study

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Passive activity loss (PAL) rules under IRS 469 Passive versus nonpassive activity classification Material participation and real estate professional requirements Partnership K-1 reporting and common PAL pitfalls Coordination of PAL rules with basis, at-risk, and 461 (l) limitations Disposition rules and strategies for utilizing suspended passive losses

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Don Farmer's Passive Activity Losses: Navigating Real Estate and K-1 Limitations -Self-Study

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Passive activity loss (PAL) rules under IRS 469 Passive versus nonpassive activity classification Material participation and real estate professional requirements Partnership K-1 reporting and common PAL pitfalls Coordination of PAL rules with basis, at-risk, and 461 (l) limitations Disposition rules and strategies for utilizing suspended passive losses

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Don Farmer's Section 199A: Complex Ownership and Aggregation Rules

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• Overview of IRC §199A Framework; Application of the qualified business income (QBI) deduction to pass-through entities• Application of §199A rules to partnerships, S corporations, and tiered ownership arrangements• Treatment of QBI, REIT dividends, and publicly traded partnership income in complex structures• Requirements, elections, and limitations related to §199A aggregation• Impact of aggregation decisions on deduction optimization and compliance• Identification of SSTBs and application of income thresholds and phaseout rules• W-2 Wage and Qualified Property Limitations• Required disclosures, documentation standards, and reporting considerations to support §199A positions

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Don Farmer's Tax-Exempt & International Forms- Self-Study

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Overview of tax-exempt and international information reporting framework Form 990 reporting fundamentals Unrelated business income (UBI) reporting considerations Overview of selected international information returns Filing thresholds, disclosure requirements, and penalty considerations Common compliance risks and IRS examination focus areas

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Don Farmer's Top 10 Partnership Issues and How to Avoid Them- Self-Study

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Overview of Subchapter K and common partnership risk areas Partner capital accounts: tax basis vs. §704(b) capital vs. book basis Outside basis vs. inside basis calculations Allocation rules and substantial economic effect under §704(b) Partnership liabilities and debt allocation under §752 Disguised sales and related-party transactions

under §707 Partnership distributions (current and liquidating) and gain recognition rules Sale or exchange of partnership interests and §751 hot assets §754 elections and basis adjustments Overview of the centralized partnership audit regime (BBA) Best practices for documentation and compliance risk mitigation

Don Farmer's Trusts, Estates, & Gift Tax Forms- Self-Study

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Overview of fiduciary and gift tax reporting framework Form 1041 reporting fundamentals Basic fiduciary accounting income considerations Form 709 reporting fundamentals Common preparation errors and IRS examinations focus areas

ESG Integration & Financial Analysis

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Define ESG integration. Explain how ESG integration and ESG investing are different, as well as how they may complement one another. Analyze how ESG factors (or company initiatives) may impact its financial results. Translate company-provided sustainability information into model assumptions. Integrate a company's ESG initiatives into a financial model and see how they may affect company valuation. Explore advanced modeling techniques to improve your Excel skills and to create more dynamic models.

ESOP Series Module 1: Introduction To Employee Ownership

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Overview of employee ownership forms: ESOPs, worker cooperatives and EOTs Benefits and challenges of employee ownership Role of the Employee Ownership Advisor

ESOP Series Module 2: Employee Stock Ownership Plans (ESOPs)

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Structure, Purpose, Features of ESOPs Tax Advantages Legal Considerations

ESOP Series Module 3: Worker Cooperatives

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Structure, Purpose, Features of Co-Ops Tax Advantages Legal Considerations

ESOP Series Module 4: Employee Ownership Trusts (EOTs)

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Structure, Purpose, Features of EOTs Tax Advantages Legal Considerations

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ESOP Series Module 5: Analysis and Assessment

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Cost and timelines Financial analysis Buy-in from staff and clients.