

CCH® CPELink Webinars — 2024

DATE	TITLE	TIME ALL TIMES CT	SPEAKER	FIELD OF STUDY	CPE CREDIT
May 20, 2024	Fraud Essentials: What is Tax Fraud and its Consequences?	11 am	Susan Harper	Taxes (2 hours)	2
May 20, 2024	GAAP Presentation of Financial Statements	1 pm	Lynn Fountain	Auditing (2 hours)	2
May 21, 2024	Fraud Trends for the Future - Need for Real-time Risk Assessment - Part 1	11 am	Lynn Fountain	Auditing (2 hours)	2
May 21, 2024	Regulatory Ethics Guidebook for CPAs: AICPA Code of Professional Conduct (Half-Day Webinar)	2 pm	Allison McLeod	Regulatory Ethics (4 hours)	4
May 22, 2024	Government Accounting & Auditing Update - 2023 Review & 2024 Preview	11 am	Robert Minniti	Auditing (Governmental) (2 hours)	2
May 22, 2024	IRS Audit Technique Guide - Exploring the Construction Industry	1 pm	Susan Harper	Taxes (2 hours)	2
May 23, 2024	Financial Statement Fraud	11 am	Susan Harper	Auditing (2 hours)	2
May 23, 2024	Form 1041 Reporting for Partnership Income and Sales	1 pm	Klaralee Charlton	Taxes (2 hours)	2
May 24, 2024	Fraud Trends for the Future - Need for Real-time Risk Assessment - Part 2	1 pm	Lynn Fountain	Accounting (1 hour), Auditing (1 hour)	2
May 24, 2024	Introduction to Power BI	11 am	David Ringstrom	Specialized Knowledge and Applications (2 hours)	2
May 28, 2024	RPA Implementation for Accountants: Best Practices and Case Studies	1 pm	Cory Campbell	Information Technology (2 hours)	2
May 29, 2024	Monthly Tax Update (May)	11 am	Annette Nellen	Taxes (2 hours)	2
May 29, 2024	The Dirty Dozen Tax Scams: What You Should Know to Protect Your Clients	1 pm	Susan Harper	Taxes (2 hours)	2
May 30, 2024	Cleaning Up Deceased Taxpayers' Tax Problems	11 am	Klaralee Charlton	Taxes (2 hours)	2
May 31, 2024	Disregarded Entities: Now You Don't See Them, Now You Do	11 am	Bradley Burnett	Taxes (2 hours)	2
May 31, 2024	ERTC: Updates on IRS Guidance, Withdrawal, Repayment, & Audits Plus New Claims	1 pm	Jane Ryder	Taxes (2 hours)	2
Jun 3, 2024	Turbo Charging Productivity With Artificial Intelligence	1 pm	Stephen Yoss	Information Technology (2 hours)	2
Jun 4, 2024	Everyday Tax Rules: Tax Tips from 38 Years in the Trenches	11 am	Greg White	Taxes (2 hours)	2
Jun 4, 2024	Real Estate for Financial and Tax Professionals - Part 1	3 pm	Daniel Johnson	Taxes (1 hour)	1
Jun 5, 2024	Automating Excel-based Financial Statements: Power BI	11 am	David Ringstrom	Specialized Knowledge and Applications (2 hours)	2
Jun 5, 2024	Avoiding the Most Common Missteps in Tax Problem Solving	2 pm	Jim Buttonow	Taxes (2 hours)	2
Jun 5, 2024	Charitable Contribution Deduction: Rules & Changes	1 pm	Susan Harper	Taxes (1 hour)	1
Jun 6, 2024	2024 Fraud Review (Half-Day Webinar)	10 am	Robert Minniti	Accounting (4 hours)	4
Jun 6, 2024	Employee Benefit Plans Audit Update: Accounting Principles and Auditing Considerations	1 pm	Lewis Fisher	Auditing (2 hours)	2

Jun 6, 2024	Real Estate for Financial and Tax Professionals - Part 2	3 pm	Daniel Johnson	Taxes (1 hour)	1
Jun 7, 2024	Invoice Handling Best Practices to Prevent Duplicate and Fraudulent Payments	11 am	Mary Schaeffer	Accounting (2 hours)	2
Jun 7, 2024	The Future is Generative AI! What CPAs Need To Know	1 pm	Garth Sheriff	Information Technology (1 hour), Behavioral Ethics (1 hour)	2
Jun 10, 2024	Ethics Checklist for Tax Practitioners	11 am	Annette Nellen	Regulatory Ethics (2 hours)	2
Jun 10, 2024	Tax Planning for Purchases and Sales of Property: Part 1	11 am	Greg White	Taxes (2 hours)	2
Jun 10, 2024	The Intersection of Fiduciary Accounting and Taxation	1 pm	Klaralee Charlton	Accounting (2 hours)	2
Jun 11, 2024	Administering & Mitigating Tax Consequences for Retirement Plans Paid to Trusts	1 pm	Klaralee Charlton	Taxes (2 hours)	2
Jun 11, 2024	Auditing Crypto 2024	11 am	Robert Minniti	Auditing (2 hours)	2
Jun 11, 2024	State and Local 1099 Reporting Changes in 2024	1 pm	Steven Mercatante	Taxes (2 hours)	2
Jun 12, 2024	Business Analytics for the CFOs Function	11 am	Gary Cokins	Finance (2 hours)	2
Jun 12, 2024	Fraud Trends for The Future - Targeted Attacks	1 pm	Lynn Fountain	Accounting (2 hours)	2
Jun 13, 2024	Automating Excel-based Financial Statements: Dynamic Arrays	11 am	David Ringstrom	Specialized Knowledge and Applications (2 hours)	2
Jun 14, 2024	Opportunity Zones	11 am	James Hamill	Taxes (2 hours)	2
Jun 17, 2024	2024 GAAP, GAAS, SSARS, & Other Accounting Issues - Part 1	11 am	Pat Patterson	Accounting (2 hours), Auditing (2 hours)	4
Jun 17, 2024	Digging Deeper Into the IRS Dirty Dozen	11 am	Annette Nellen	Taxes (2 hours)	2
Jun 18, 2024	SSARS 25 - Updated Rules for Reviews & Compilations	11 am	Robert Minniti	Accounting (2 hours)	2
Jun 18, 2024	Tax Planning for Purchases and Sales of Property: Part 2	1 pm	Greg White	Taxes (2 hours)	2
Jun 19, 2024	2024 GAAP, GAAS, SSARS, & Other Accounting Issues - Part 2	11 am	Pat Patterson	Accounting (4 hours)	4
Jun 19, 2024	AI and Microsoft Excel	11 am	David Ringstrom	Specialized Knowledge and Applications (2 hours)	2
Jun 19, 2024	Tax Procedure	3 pm	Allison McLeod	Taxes (2 hours)	2
Jun 20, 2024	Basics of Nexus: Understanding State Tax Issues	11 am	Annette Nellen	Taxes (2 hours)	2
Jun 20, 2024	Theft of Data & Intellectual Property	1 pm	Susan Harper	Taxes (2 hours)	2
Jun 21, 2024	Excel Formula's Accountants & Financial Professionals Need to Know	1 pm	Stephen Yoss	Specialized Knowledge (2 hours)	2
Jun 21, 2024	Important Insights on Forms K2 and K3 and Other Timely and Significant IRS Campaigns and Initiatives	11 am	Richard Blumenthal	Taxes (2 hours)	2
Jun 24, 2024	Avoiding Procedural and Tax Complexities When Naming Minors in your Estate Plan	11 am	Klaralee Charlton	Taxes (2 hours)	2
Jun 24, 2024	Introduction to Audit Data Analytics	1 pm	Garth Sheriff	Auditing (1 hour), Information Technology (1 hour)	2
Jun 25, 2024	CPA's Guidebook for Ethical Behavior: Code of Professional Conduct	11 am	Allison McLeod	Regulatory Ethics (2 hours)	2
Jun 25, 2024	Professional Ethics: An FTX Story	1 pm	Garth Sheriff	Information Technology (1 hour), Behavioral Ethics (1 hour)	2
Jun 26, 2024	Monthly Tax Update (June)	11 am	Annette Nellen	Taxes (2 hours)	2
Jun 26, 2024	Understanding Forfeitures for CPAs	1 pm	Randall Andreozzi	Taxes (2 hours)	2

Jun 27, 2024	Business Performance: KPIs and KRIs	11 am	Cory Campbell	Information Technology (2 hours)	2
Jun 27, 2024	Correcting S Corp & Partnership Basis for ERC, Prior Year PPP Loans & Other Issues	1 pm	Jane Ryder	Taxes (2 hours)	2
Jun 28, 2024	Basis: S Corp Shareholders Form 7203 and Partnership Basis	1 pm	Jane Ryder	Taxes (2 hours)	2
Jun 28, 2024	Introduction to Python in Excel	11 am	David Ringstrom	Statistics (2 hours)	2
Jul 1, 2024	Review, Compilation & Preparation: The Differences?	11 am	Pat Patterson	Accounting (2 hours)	2
Jul 8, 2024	Form 4797, A Deep Dive, Sale of Business Property	12 pm	A.J. Reynolds	Taxes (2 hours)	2
Jul 9, 2024	Planning for the Estate Tax Exemption Cliff	11 am	Klaralee Charlton	Taxes (2 hours)	2
Jul 10, 2024	Virtual Currency: A Simple Approach and Overview	12 pm	A.J. Reynolds	Taxes (1 hour)	1
Jul 11, 2024	2023 Form 990 Schedules: A Deeper Dive into Common Schedules	1 pm	Clark Nuber Lisa McCreedy Ben Kone	Taxes (2 hours)	2
Jul 16, 2024	Client Representation Before the IRS Collection Division	11 am	Gary Bluestein	Taxes (2 hours)	2
Jul 16, 2024	Single Audit Update: What to Know and How to Prepare	1 pm	Clark Nuber Troy Rector Kelly Rancourt	Auditing (2 hours)	2
Jul 17, 2024	Accounting Standards for CPAs: Summer Update	1 pm	Pat Patterson	Accounting (2 hours)	2
Jul 17, 2024	Reporting Generation Skipping Transfers on Form 706	11 am	Klaralee Charlton	Taxes (2 hours)	2
Jul 18, 2024	Fraud in Today's Workplace: What Accountants Need to Know	1 pm	Stephen Yoss	Accounting (2 hours)	2
Jul 18, 2024	Issues on Quality Management Standards	11 am	Pat Patterson	Auditing (2 hours)	2
Jul 19, 2024	IRS Audit Technique Guide: Exploring the Entertainment Industry	1 pm	Susan Harper	Taxes (1 hour), Auditing (1 hour)	2
Jul 22, 2024	Quality Management Issues vs Quality Control	11 am	Pat Patterson	Auditing (2 hours)	2
Jul 23, 2024	Reporting Generation Skipping Transfers on Form 709	11 am	Klaralee Charlton	Taxes (2 hours)	2
Jul 24, 2024	Personal Financial Statement Preparation Issues	11 am	Pat Patterson	Accounting (2 hours)	2
Jul 25, 2024	Auditing Standards for CPAs: Summer Update	1 pm	Pat Patterson	Auditing (2 hours)	2
Jul 29, 2024	Master Important S Corp Tax & Compliance Issues	11 am	Jane Ryder	Taxes (2 hours)	2
Jul 30, 2024	Divorce and the Tax Implications	1 pm	A.J. Reynolds	Taxes (1 hour)	1
Jul 31, 2024	Embracing Transformation: Change Management in the Accounting World	11 am	Cory Campbell	Information Technology (2 hours)	2
Jul 31, 2024	Successful Schedule C Audits	1 pm	Jane Ryder	Taxes (2 hours)	2
Aug 5, 2024	Practical Advice for Preventing Organizational Data Breaches	1 pm	Stephen Yoss	Information Technology (2 hours)	2
Aug 5, 2024	Tax Planning for State PTET SALT Workaround	11 am	Jane Ryder	Taxes (2 hours)	2
Aug 6, 2024	Email Disclaimers	1 pm	Susan Harper	Regulatory Ethics (1 hour)	1
Aug 6, 2024	GIG Economy Tax Compliance & Tax Savings and Form 1099-K	11 am	Jane Ryder	Taxes (2 hours)	2
Aug 7, 2024	Alternative investments for NFPs	11 am	Clark Nuber Jennifer Becker Harris Frances Olson	Taxes (2 hours)	2
Aug 8, 2024	Estate Tax Issues for Taxpayers with Non-Citizen Spouses	11 am	Klaralee Charlton	Taxes (2 hours)	2
Aug 9, 2024	Hands On With QuickBooks Online Accountant (QBOA) for Public Accounting	1 pm	Stephen Yoss	Specialized Knowledge and Applications (2 hours)	2
Aug 12, 2024	Reasonable Compensation	1 pm	Susan Harper	Taxes (1 hour)	1
Aug 14, 2024	Attest Engagements and Quality Risk Assessments	11 am	Pat Patterson	Auditing (2 hours)	2
Aug 14, 2024	Utilizing the IRS Offer in Compromise Program for your Financially	2 pm	Jim Buttonow	Taxes (2 hours)	2

	Distressed Client				
Aug 15, 2024	Accounts Payable Best Practices for Financial Professionals	11 am	Mary Schaeffer	Accounting (2 hours)	2
Aug 15, 2024	The Balance Sheet: Reporting in Compliance with GAAP	1 pm	Lewis Fisher	Accounting (2 hours)	2
Aug 16, 2024	Taxation of Life Insurance Proceeds	11 am	Klaralee Charlton	Taxes (2 hours)	2
Aug 20, 2024	Overview of Uniform Guidance	11 am	Diane Edelstein	Auditing (Governmental) (2 hours)	2
Aug 21, 2024	2024's Biggest Security and Privacy Concerns Under IRS Tax Rules	1 pm	Stephen Yoss	Information Technology (1 hour)	2
Aug 21, 2024	Estate Administration Process: A Practitioner's Guide	11 am	Klaralee Charlton	Taxes (2 hours)	2
Aug 22, 2024	Equity Compensation - Tax Reporting	11 am	Daniel Johnson	Taxes (1 hour)	1
Aug 26, 2024	Partnership Basis: Inside & Outside	11 am	Jane Ryder	Taxes (2 hours)	2
Aug 26, 2024	Project Management Tools and Techniques	1 pm	Garth Sheriff	Personal Development (2 hours)	2
Aug 27, 2024	Business Development and Networking	1 pm	Garth Sheriff	Personal Development (2 hours)	2
Aug 28, 2024	Monthly Tax Update (August)	11 am	Annette Nellen	Taxes (2 hours)	2
Aug 28, 2024	Providing Effective Feedback To Your Staff	1 pm	Garth Sheriff	Personal Development (2 hours)	2
Aug 29, 2024	Review, Compilation & Preparation: Q&A	11 am	Pat Patterson	Accounting (2 hours)	2
Aug 29, 2024	Time Management Tools	1 pm	Garth Sheriff	Personal Development (2 hours)	2
Aug 30, 2024	Developing a Digital Mindset	11 am	Cory Campbell	Information Technology (2 hours)	2
Sep 4, 2024	Professional Standards for Preparation and Compilation Engagements	11 am	Pat Patterson	Accounting (2 hours)	2
Sep 10, 2024	Master Vendor File Best Practices to Protect Against Fraud and Ensure Regulatory Compliance	11 am	Mary Schaeffer	Accounting (2 hours)	2
Sep 11, 2024	Pen to Paper PTET for Form 1065 & Form 1120-S	11 am	Jane Ryder	Taxes (2 hours)	2
Sep 12, 2024	The Statement of Cash Flows: Compliance & Presentation Update	11 am	Lewis Fisher	Accounting (2 hours)	2
Sep 16, 2024	IRS Collection Trends and the 4 Alternatives When Your Clients Owe Back Taxes	2 pm	Jim Buttonow	Taxes (2 hours)	2
Sep 17, 2024	Overview of Yellow Book	11 am	Diane Edelstein	Auditing (Governmental) (2 hours)	2
Sep 18, 2024	Audits A-Z Practices and Procedures for Audit Representation	1 pm	Jane Ryder	Taxes (2 hours)	2
Sep 18, 2024	Self-Dealing: Tales from the Trenches	11 am	Clark Nuber Sarah Huang Celia Davis	Taxes (2 hours)	2
Sep 19, 2024	2024 Major Audit Issues	11 am	Pat Patterson	Auditing (2 hours)	2
Sep 19, 2024	Ten Tech Productivity Life Hacks to Save Time	1 pm	Stephen Yoss	Information Technology (2 hours)	2
Sep 20, 2024	Intro to Nonqualified Deferred Compensation (NQDC)	11 am	Daniel Johnson	Taxes (1 hour)	1
Sep 23, 2024	How to Train Your Clients - Engage	1 pm	Susan Harper	Taxes (1 hour)	1
Sep 24, 2024	Equity Compensation - Stock Options Pt. 1	11 am	Daniel Johnson	Finance (1 hour)	1
Sep 25, 2024	IRS Compliance by Notice: How to Resolve the Most Common IRS Notices	2 pm	Jim Buttonow	Taxes (2 hours)	2
Sep 25, 2024	Unleashing The Power Of Microsoft AI – A Comprehensive Guide	12 pm	Stephen Yoss	Information Technology (2 hours)	2
Sep 26, 2024	Equity Compensation - Stock Options Pt. 2	11 am	Daniel Johnson	Taxes (1 hour)	1
Sep 26, 2024	Monthly Tax Update (September)	12 pm	Annette Nellen	Taxes (2 hours)	2
Sep 30, 2024	Blockchain-Based Audit Trails: A Paradigm Shift in Accounting	11 am	Cory Campbell	Information Technology	2

				(2 hours)	
Sep 30, 2024	How To Train Your Clients - Maintain	1 pm	Susan Harper	Taxes (1 hour)	1
Oct 2, 2024	2024 Accounting Standards for CPAs: Fall Update	11 am	Pat Patterson	Accounting (2 hours)	2
Oct 4, 2024	Navigating the Hobby Loss Rules IRC 183	1 pm	Susan Harper	Taxes (2 hours)	2
Oct 7, 2024	Dealerships: Accounting & Auditing Update	11 am	Lewis Fisher	Accounting (1 hour), Auditing (1 hour)	2
Oct 7, 2024	How to Train Your Clients - Terminate	1 pm	Susan Harper	Taxes (1 hour)	1
Oct 8, 2024	Equity Compensation - Alternatives Pt. 1	11 am	Daniel Johnson	Taxes (1 hour)	1
Oct 9, 2024	Fundamentals of the Business Tax Balance Sheet	11 am	Jane Ryder	Taxes (2 hours)	2
Oct 9, 2024	Harnessing ChatGPT – Unlocking Professional Efficiency	11 am	Stephen Yoss	Information Technology (2 hours)	2
Oct 10, 2024	Equity Compensation - Alternatives Pt. 2	11 am	Daniel Johnson	Taxes (1 hour)	1
Oct 11, 2024	Fraud Essentials: What is Tax Fraud and its Consequences?	1 pm	Susan Harper	Taxes (2 hours)	2
Oct 14, 2024	10 Actions You Must Take in an IRS Field Audit	2 pm	Jim Buttonow	Taxes (2 hours)	2
Oct 16, 2024	2024 Auditing Standards for CPAs: Fall Update	1 pm	Pat Patterson	Auditing (2 hours)	2
Oct 17, 2024	Digital Asset Broker Reporting Update	11 am	Annette Nellen	Taxes (2 hours)	2
Oct 21, 2024	What's Coming Next: Technology Strategies for CPAs	11 am	Stephen Yoss	Information Technology (2 hours)	2
Oct 23, 2024	Audit Update	1 pm	Garth Sheriff	Auditing (2 hours)	2
Oct 24, 2024	Monthly Tax Update (October)	11 am	Annette Nellen	Taxes (2 hours)	2
Oct 24, 2024	Representing Your Client in an IRS Audit	2 pm	Jim Buttonow	Taxes (2 hours)	2
Oct 25, 2024	Cybersecurity 2024: Proactive Defense for CPAs	11 am	Stephen Yoss	Information Technology (2 hours)	2
Oct 30, 2024	Embracing Technology Change in Accounting	11 am	Cory Campbell	Information Technology (2 hours)	2
Oct 30, 2024	Not-for-Profits and Common Mistakes on Financials	1 pm	Pat Patterson	Accounting (1 hour), Auditing (1 hour)	2
Nov 5, 2024	Corporate Transparency Act Compliance and BOI Reporting	11 am	Jane Ryder	Taxes (2 hours)	2
Nov 5, 2024	Examination of Income	1 pm	Susan Harper	Taxes (2 hours)	2
Nov 7, 2024	2024 Accounting and Auditing Update	11 am	Lewis Fisher	Accounting (1 hour), Auditing (1 hour)	2
Nov 8, 2024	Automation For Increasing Personal Efficiency and Effectiveness	11 am	Stephen Yoss	Information Technology (2 hours)	2
Nov 12, 2024	IRS Compliance Enforcement Update and Trends	2 pm	Jim Buttonow	Taxes (2 hours)	2
Nov 13, 2024	2024 GAAP, GAAS, & SSARS Update	11 am	Pat Patterson	Accounting (1 hour), Auditing (1 hour)	2
Nov 14, 2024	Audits-Real Life Examples of Audit Trouble Shooting, Audit Negotiations, & Successful Audit	1 pm	Jane Ryder	Taxes (2 hours)	2
Nov 14, 2024	Hot Tech Tools and Services for Financial Professionals	11 am	Stephen Yoss	Specialized Knowledge and Applications (2 hours)	2
Nov 15, 2024	Building Your Professional Presence	12 pm	Annette Nellen	Personal Development (2 hours)	2
Nov 19, 2024	2024 Leases Update	2 pm	Pat Patterson	Accounting (1 hour), Auditing (1 hour)	2
Nov 20, 2024	Intelligent Accounting: Exploring AI and RPA Applications	11 am	Cory Campbell	Information Technology (2 hours)	2
Nov 21, 2024	The Dirty Dozen Tax Scams: What You Should Know to Protect Your	1 pm	Susan Harper	Taxes (2 hours)	2

Clients

Nov 22, 2024	Monthly Tax Update (November)	11 am	Annette Nellen	Taxes (2 hours)	2
Dec 4, 2024	2024 New Quality Management Issues and Updates	12 pm	Pat Patterson	Accounting (1 hour), Auditing (1 hour)	2
Dec 6, 2024	Integration and Sharing Data for Financial Professionals	11 am	Stephen Yoss	Information Technology (2 hours)	2
Dec 10, 2024	Annual Exempt Organization Tax Update	11 am	Clark Nuber Jennifer Becker Harris Frances Olson	Taxes (2 hours)	2
Dec 11, 2024	Getting Rid of Penalties	1 pm	Susan Harper	Taxes (2 hours)	2
Dec 16, 2024	Hot Tax Topics at Year End for 2024	11 am	Annette Nellen	Taxes (2 hours)	2
Dec 16, 2024	How to Handle the Top 10 Issues in an IRS Small Business Audit	2 pm	Jim Buttonow	Taxes (2 hours)	2
Dec 18, 2024	Accounting Oversight: Recognizing and Addressing Blind Spots	11 am	Cory Campbell	Information Technology (2 hours)	2
Dec 20, 2024	Monthly Tax Update (December)	11 am	Annette Nellen	Taxes (2 hours)	2