

CCH® CPELink Self-Study Courses — 2024

COURSE TITLE	FORMAT	AUTHOR	FIELD OF STUDY	COURSE LEVEL	CPE
1040 Preparation and Planning 10: Other Taxes (2024)	On-demand	Barbara Weltman Sidney Kess Greg White	Taxes (2 hours)	Basic	2
1040 Preparation and Planning 11: Tax Credits (2024)	On-demand	Barbara Weltman Sidney Kess Greg White	Taxes (2 hours)	Basic	2
1040 Preparation and Planning 12: Figuring Tax Liability and Making Tax Payments (2024)	On-demand	Barbara Weltman Greg White Sidney Kess	Taxes (1 hour)	Basic	1
1040 Preparation and Planning 1: Fundamentals (2024)	On-demand	Greg White Barbara Weltman Sidney Kess	Taxes (2 hours)	Basic	2
1040 Preparation and Planning 2: Filing Status (2024)	On-demand	Barbara Weltman Sidney Kess Greg White	Taxes (1 hour)	Basic	1
1040 Preparation and Planning 3: Gross Income: Compensation and Fringe Benefits (2024)	On-demand	Barbara Weltman Sidney Kess Greg White	Taxes (2 hours)	Intermediate	2
1040 Preparation and Planning 4: Gross Income: Interest, Dividends, and Other Ordinary Income (2024)	On-demand	Barbara Weltman Sidney Kess Greg White	Taxes (2 hours)	Basic	2
1040 Preparation and Planning 5: Gross Income: Capital Gains and Losses (2024)	On-demand	Barbara Weltman Sidney Kess Greg White	Taxes (5 hours)	Basic	5
1040 Preparation and Planning 6: Gross Income: Business, Farm, and Rental Income (2024)	On-demand	Barbara Weltman Sidney Kess Greg White	Taxes (6 hours)	Intermediate	6
1040 Preparation and Planning 7: Other Income and Exclusions (2024)	On-demand	Barbara Weltman Sidney Kess Greg White	Taxes (2 hours)	Basic	2
1040 Preparation and Planning 8: Adjustments to Gross Income (2024)	On-demand	Barbara Weltman Sidney Kess Greg White	Taxes (2 hours)	Intermediate	2
1040 Preparation and Planning 9: Standard Deduction and Itemized Deductions (2024)	On-demand	Barbara Weltman Sidney Kess Greg White	Taxes (3 hours)	Basic	3
1099 Attorney and Settlement Reporting for AP and Tax Professionals	On-demand	Steven Mercatante	Taxes (2 hours)	Basic	2

1099 Corrections, B-Notice Processing, and Backup Withholding Tips for 2024	On-demand	Steven Mercatante	Taxes (2 hours)	Basic	2
1099 Essentials	On-demand	Steven Mercatante	Taxes (2 hours)	Basic	2
1099 Reporting Attorney and Settlement Payments	On-demand	Steven Mercatante	Taxes (2 hours)	Basic	2
1099 Reporting Payments for Middlemen, Agents, Liens, and Garnishments	On-demand	Steven Mercatante	Taxes (2 hours)	Basic	2
1120 Preparation and Planning 1: Introduction to Form 1120 (2024 Edition)	On-demand	Greg White	Taxes (1 hour)	Basic	1
1120 Preparation and Planning 2: Income (2024 Edition)	On-demand	Barbara Weltman Greg White	Taxes (2 hours)	Basic	2
1120 Preparation and Planning 3: Deductions-Part 1 (2024 Edition)	On-demand	Barbara Weltman Greg White	Taxes (2 hours)	Basic	2
1120 Preparation and Planning 4: Deductions-Part 2 (2024 Edition)	On-demand	Barbara Weltman Greg White	Taxes (2 hours)	Basic	2
1120 Preparation and Planning 5: Tax and Payments (2024 Edition)	On-demand	Barbara Weltman Greg White	Taxes (1 hour)	Basic	1
1120 Preparation and Planning 6: Estimated Taxes and Special Topics (2024 Edition)	On-demand	Barbara Weltman Greg White	Taxes (2 hours)	Basic	2
1120-S Preparation and Planning 1: Tax Fundamentals (2023 Edition)	On-demand	Barbara Weltman Sidney Kess Greg White	Taxes (1 hour)	Basic	1
1120-S Preparation and Planning 2: Business Income, Deductions and Tax Payments (2023 Edition)	On-demand	Barbara Weltman Sidney Kess	Taxes (2 hours)	Basic	2
1120-S Preparation and Planning 3: Schedule K (2023 Edition)	On-demand	Barbara Weltman Sidney Kess Greg White	Taxes (1 hour)	Basic	1
1120-S Preparation and Planning 4: Other Schedules and Tax Planning (2023 Edition)	On-demand	Barbara Weltman Sidney Kess	Taxes (1 hour)	Basic	1
20 Essential Tax Problem Solving Tips	On-demand	Jim Buttonow	Taxes (2 hours)	Basic	2
2021 Form 990 Overview: A Deeper Dive into Common Schedules	On-demand	Kathryn Okimoto Clark Nuber	Taxes (2 hours)	Intermediate	2
2021 Form 990 Overview: A Walk thru of Form 990 and Common Schedules	On-demand	Carolyn Fjelstad Clark Nuber Sara Elizabeth Jones	Taxes (2 hours)	Overview	2
2021 Leases Update	On-demand	Pat Patterson	Accounting (1 hour), Auditing (1 hour)	Update	2
2022 Business Tax Practice Update	On-demand	Jennifer Kowal	Taxes (2 hours)	Update	2
2022 Estate & Financial Planning Quarterly Update (Winter)	On-demand	Klaralee Charlton	Taxes (2 hours)	Update	2
2022 FASB Developments	On-demand	Pat Patterson	Accounting (2 hours)	Update	2
2022 GAAP Update	On-demand	Lewis Fisher	Accounting (2 hours)	Update	2
2022 Individual Tax Update	On-demand	Bradley Burnett	Taxes (8 hours)	Update	8
2022 Inflation Reduction Act and CHIPS Act Highlights	On-demand	Annette Nellen	Taxes (1 hour)	Update	1
2022 Revenue Recognition: Issues and Problems	On-demand	Pat Patterson	Accounting (2 hours)	Intermediate	2
2022 Revenue Recognition: What CPAs Need to Know	On-demand	Pat Patterson	Accounting (2 hours)	Basic	2
2022 Tax Legislation: Inflation Reduction Act and CHIPS Act	On-demand	Allison McLeod	Taxes (2 hours)	Update	2
2023 - Individual Planning and Due Diligence	On-demand	Annette Nellen	Taxes (4 hours)	Update	4
2023 Accounting & Auditing Mid-Year Tune-Up	On-demand	Pat Patterson	Accounting (1 hour), Auditing (1 hour)	Update	2
2023 Accounting and Auditing Update	On-demand	Lewis Fisher	Accounting (2 hours)	Update	2

2023 Best Practices: W2 and W4 Update	On-demand	Miles Hutchinson	Taxes (2 hours)	Basic	2
2023 Business Federal Tax Update	On-demand	Greg White	Taxes (4 hours)	Update	4
2023 Business Tax Update	On-demand	Bradley Burnett	Taxes (9 hours)	Update	9
2023 C Corporations Update	On-demand	Bradley Burnett	Taxes (2 hours)	Update	2
2023 Cryptocurrency and Taxes Update	On-demand	Robert Minniti	Taxes (2 hours)	Basic	2
2023 Estate & Financial Planning Quarterly Update (Fall)	On-demand	Klaralee Charlton	Taxes (2 hours)	Update	2
2023 Estate & Financial Planning Quarterly Update (Spring)	On-demand	Klaralee Charlton	Taxes (2 hours)	Update	2
2023 Estate & Financial Planning Quarterly Update (Summer)	On-demand	Klaralee Charlton	Taxes (2 hours)	Update	2
2023 Federal Tax Update	On-demand	Bradley Burnett	Taxes (8 hours)	Update	8
2023 Form 1041: Advanced Concepts in Fiduciary Income Tax (Part 2)	On-demand	Klaralee Charlton	Taxes (4 hours)	Basic	4
2023 Form 1041: Basic Trust & Estate Income Tax Preparation (Part 1)	On-demand	Klaralee Charlton	Taxes (4 hours)	Basic	4
2023 Form 1099 & W9 Annual Update	On-demand	Miles Hutchinson	Taxes (2 hours)	Update	2
2023 Form 1099 Filing Update	On-demand	Steven Mercatante	Taxes (2 hours)	Update	2
2023 Fraud Review	On-demand	Robert Minniti	Accounting (4 hours)	Basic	4
2023 Fraud Update	On-demand	Robert Minniti	Accounting (2 hours)	Update	2
2023 GAAP, GAAS, & SSARS Update	On-demand	Pat Patterson	Accounting (1 hour), Auditing (1 hour)	Update	2
2023 Governmental Entities and Cyber Frauds	On-demand	Robert Minniti	Accounting (Governmental) (1 hour), Auditing (Governmental) (1 hour)	Basic	2
2023 Individual Federal Tax Update	On-demand	Greg White	Taxes (4 hours)	Update	4
2023 LLCs: Reducing Self-employment Tax and Maximizing the 20% Passthrough Deduction	On-demand	Greg White	Taxes (2 hours)	Intermediate	2
2023 Partnership Update: Developments You Need to Know	On-demand	Greg White	Taxes (1 hour)	Update	1
2023 S Corporation Update: Developments You Need to Know	On-demand	Greg White	Taxes (2 hours)	Update	2
2023 Social Security and Medicare Planning Update (Fall)	On-demand	Steven Siegel	Specialized Knowledge and Applications (2 hours)	Update	2
2023 Social Security and Medicare Planning Update (Summer)	On-demand	Steven Siegel	Specialized Knowledge and Applications (2 hours)	Update	2
2023 Standards for Tennessee CPAs: State Specific Ethics	On-demand	Perry Moore	Regulatory Ethics (2 hours)	Basic	2
2023 Tax Updates for Businesses	On-demand	Barbara Weltman	Taxes (1 hour)	Update	1
2023 Tax Updates for Individuals	On-demand	Barbara Weltman	Taxes (1 hour)	Update	1
2023's Biggest Security and Privacy Concerns	On-demand	Stephen Yoss	Information Technology (2 hours)	Basic	2
2023's Hot Tech Tools, Apps, & Services for Your Practice	On-demand	Stephen Yoss	Computer Software & Applications (2 hours)	Basic	2
2023-2024 Ethics for Washington CPAs	On-demand	Allison McLeod	Regulatory Ethics (4 hours)	Basic	4
2024 Accounting Standards for CPAs: Spring Update	On-demand	Pat Patterson	Accounting (2 hours)	Intermediate	2
2024 and the Auditing Standards Board	On-demand	Pat Patterson	Auditing (2 hours)	Update	2
2024 Auditing and Attestation Standards for CPAs: Spring Update	On-demand	Pat Patterson	Auditing (2 hours)	Update	2
529 Plans, Coverdell ESAs, and ABLE Accounts	On-demand	Barbara Weltman	Taxes (2 hours)	Overview	2
A Back to Work Accounts Payable Plan	On-demand	Mary Schaeffer	Accounting (1 hour)	Basic	1
A Basic Ethics Guidebook for Arizona CPAs	On-demand	Allison McLeod	Regulatory Ethics (4	Basic	4

			hours)		
A Basic Ethics Guidebook for Connecticut CPAs	On-demand	Allison McLeod	Regulatory Ethics (4 hours)	Basic	4
A Basic Ethics Guidebook for Delaware CPAs	On-demand	Allison McLeod	Regulatory Ethics (4 hours)	Basic	4
A Basic Ethics Guidebook for Florida CPAs	On-demand	Allison McLeod	Regulatory Ethics (4 hours)	Basic	4
A Basic Ethics Guidebook for Minnesota CPAs	On-demand	Allison McLeod	Regulatory Ethics (4 hours)	Basic	4
A Basic Ethics Guidebook for Mississippi CPAs	On-demand	Allison McLeod	Regulatory Ethics (4 hours)	Basic	4
A Basic Ethics Guidebook for New York CPAs	On-demand	Allison McLeod	Regulatory Ethics (4 hours)	Basic	4
A Basic Ethics Guidebook for Oregon CPAs	On-demand	Allison McLeod	Regulatory Ethics (4 hours)	Basic	4
A Basic Ethics Guidebook for Utah CPAs	On-demand	Allison McLeod	Regulatory Ethics (4 hours)	Basic	4
A Basic Ethics Guidebook for Virginia CPAs - 2024	On-demand	Allison McLeod	Regulatory Ethics (2 hours)	Basic	2
A Closer Look Into Installment Sales	On-demand	Jennifer Kowal	Taxes (2 hours)	Intermediate	2
A Comprehensive NFP GAAP Update: What's New and Upcoming	On-demand	Clark Nuber Amy Hernandez Andrew Prather	Accounting (1 hour), Auditing (1 hour)	Update	2
A CPAs Guidebook to Ethical Behavior: A CPE Ethics Course for Texas CPAs	On-demand	Allison McLeod	Regulatory Ethics (4 hours)	Basic	4
A Deep Dive into Depreciation Changes	On-demand	Greg White	Taxes (2 hours)	Intermediate	2
A Practical Approach to Quickly Filling Out Forms K-2 and K-3	On-demand	Greg White	Taxes (1 hour)	Update	1
A Practical Guide to Form 8865	On-demand	Patrick McCormick	Taxes (2 hours)	Overview	2
A Review of AU-C Section 240 and the New NOCLAR Rules	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
A Review of Common Income Tax Treaty Provisions and Uses	On-demand	Patrick McCormick	Taxes (2 hours)	Basic	2
Accessing Your Company's Data in Power Query and Power BI	On-demand	Stephen Yoss	Computer Software & Applications (2 hours)	Intermediate	2
Accountants and Malpractice: Can We Get Sued for This?	On-demand	Allison McLeod	Regulatory Ethics (2 hours)	Basic	2
Accounting and Auditing End-of-Year Tune-up	On-demand	Pat Patterson	Accounting (1 hour), Auditing (1 hour)	Update	2
Accounting and Financial Reporting Considerations Related to COVID and the Economic Downturn	On-demand	Lynn Fountain	Accounting (1 hour), Auditing (1 hour)	Basic	2
Accounting for Business Combinations	Downloadable PDF	Kelen Camehl	Accounting (4 hours)	Overview	4
Accounting for Financial Instruments with Characteristics of Both Liabilities and Equity	On-demand	Pat Patterson	Accounting (2 hours)	Intermediate	2
Accounting for Intangibles and Research and Development Costs	On-demand	Pat Patterson	Accounting (2 hours)	Intermediate	2
Accounting for Managers	On-demand	Robert Minniti	Accounting (2 hours)	Basic	2
Accounting for Software Sales	Downloadable PDF	Kelen Camehl	Accounting (1 hour)	Basic	1
Accounting Fraud & Embezzlement: Case Studies from the Trenches	On-demand	Allison McLeod	Regulatory Ethics (2 hours)	Basic	2
Accounting Standards for CPAs: Fall Update	On-demand	Pat Patterson	Accounting (2 hours)	Update	2
Accounting Standards for CPAs: Winter Update 2024	On-demand	Pat Patterson	Accounting (2 hours)	Intermediate	2

Accounting, Auditing, and COVID-19	On-demand	Pat Patterson	Accounting (1 hour), Auditing (1 hour)	Intermediate	2
Accounts Payable Best Practices for Financial Professionals	On-demand	Mary Schaeffer	Accounting (2 hours)	Basic	2
Accounts Payable Internal Controls to Protect Against Fraud and Promote Efficiency	On-demand	Mary Schaeffer	Accounting (2 hours)	Basic	2
Advanced IRS Examinations: What the IRS Will Look at and Why?	On-demand	Eric Green	Taxes (2 hours)	Advanced	2
Advanced Partnership Taxation Concepts	On-demand	Greg White	Taxes (4 hours)	Advanced	4
Advanced PivotTable Techniques	On-demand	David Ringstrom	Specialized Knowledge and Applications (2 hours)	Advanced	2
Advanced Secrets of Microsoft Power BI	On-demand	Stephen Yoss	Information Technology (2 hours)	Intermediate	2
Advanced Staff Training: Accepting New Clients & Client Review	On-demand	Robert Minniti	Auditing (2 hours)	Advanced	2
Advanced Staff Training: Auditing Notes and Disclosures	On-demand	Robert Minniti	Auditing (2 hours)	Advanced	2
Advanced Staff Training: Auditing Payroll	On-demand	Robert Minniti	Auditing (2 hours)	Advanced	2
Advanced Staff Training: Reviewing Work Papers & Field Work	On-demand	Robert Minniti	Auditing (2 hours)	Advanced	2
Advanced Staff Training: Writing Audit Reports	On-demand	Robert Minniti	Auditing (2 hours)	Advanced	2
AI & Accounting – What You Need to Know	Downloadable PDF	Kelen Camehl	Accounting (4 hours)	Basic	4
AI Series – Audit & Compliance	Downloadable PDF	Kelen Camehl	Auditing (1 hour)	Basic	1
AI Series – Considerations for Organizations When Adopting AI	Downloadable PDF	Kelen Camehl	Accounting (1 hour)	Basic	1
AI Series – Considerations in Tax Preparation & Research	Downloadable PDF	Kelen Camehl	Taxes (1 hour)	Basic	1
AI Series – Ethics & Regulations	Downloadable PDF	Kelen Camehl	Accounting (1 hour)	Basic	1
AI Series – Future Trends in AI & Software for CPAs	Downloadable PDF	Kelen Camehl	Accounting (1 hour)	Basic	1
AI Series – Introduction to Artificial Intelligence	Downloadable PDF	Kelen Camehl	Accounting (1 hour)	Basic	1
AI Series – Leveraging AI for Data Analysis & Reporting	Downloadable PDF	Kelen Camehl	Accounting (1 hour)	Basic	1
AI Series – Technologies in Accounting Software	Downloadable PDF	Kelen Camehl	Accounting (1 hour)	Basic	1
AICPA Q&A	On-demand	Pat Patterson	Accounting (1 hour), Auditing (1 hour)	Basic	2
Allowable Costs under Uniform Guidance	On-demand	Diane Edelstein	Accounting (Governmental) (1 hour), Auditing (Governmental) (1 hour)	Basic	2
Amending Business Income Tax Returns	On-demand	Barbara Weltman	Taxes (1 hour)	Basic	1
Amending Form 1040: Filing 1040X	On-demand	Barbara Weltman	Taxes (1 hour)	Basic	1
An Accountant's Guide to Cryptocurrency and Blockchain	On-demand	Stephen Yoss	Information Technology (1 hour), Accounting (1 hour)	Basic	2
An Accountant's Detailed Guide to Databases, Integration, and Data Sharing	On-demand	Stephen Yoss	Computer Software & Applications (4 hours)	Intermediate	4
An Overview of 2022 FBAR Issues: Filing Standards, Willfulness, and Handling Examinations	On-demand	Patrick McCormick	Taxes (2 hours)	Basic	2
Analytics-Based Enterprise Performance Management (EPM)	On-demand	Gary Cokins	Finance (2 hours)	Basic	2
Analyzing Financial Efficiency and Performance Ratios	On-demand	Lynn Fountain	Auditing (2 hours)	Basic	2
Analyzing Payroll Data in Microsoft Excel	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
Are You Really Ready? Effective Disaster Recovery & Business Continuity Planning	On-demand	Stephen Yoss	Information Technology (2 hours)	Basic	2
Artificial Intelligence (AI) and Robotics Process Automation (RPA)	On-demand	Cory Campbell	Information Technology	Intermediate	2

			(2 hours)		
ASB: New Developments 2023	On-demand	Pat Patterson	Auditing (2 hours)	Update	2
ASC 606 Revenue Recognition: Allocating Transaction Price to Performance Obligations	On-demand	Lynn Fountain	Accounting (2 hours)	Basic	2
ASC 606 Revenue Recognition: Complying with the Revenue Recognition Standards	On-demand	Lynn Fountain	Accounting (2 hours)	Basic	2
ASC 606 Revenue Recognition: Considerations for Identifying the Contract Part 1	On-demand	Lynn Fountain	Accounting (2 hours)	Basic	2
ASC 606 Revenue Recognition: Considerations for Identifying the Contract Part 2	On-demand	Lynn Fountain	Accounting (2 hours)	Basic	2
ASC 606 Revenue Recognition: Determining Transaction Price	On-demand	Lynn Fountain	Accounting (2 hours)	Basic	2
ASC 606 Revenue Recognition: Identify Performance Obligations	On-demand	Lynn Fountain	Accounting (2 hours)	Basic	2
ASC 606 Revenue Recognition: Identifying the Transaction Price	On-demand	Lynn Fountain	Accounting (2 hours)	Basic	2
ASC 740 Part 1: Practical Application for Accounting for Income Taxes Based on Income	On-demand	Lynn Fountain	Accounting (2 hours)	Basic	2
ASC 740 Part 2: Practical Application for Income Taxes Based on Income	On-demand	Lynn Fountain	Accounting (2 hours)	Intermediate	2
Assessing Risk Considering GASB Statement No. 102 and Related Audit Risk Assessments	On-demand	Eric Berman Kurt Schlicker	Accounting (Governmental) (1 hour), Auditing (Governmental) (1 hour)	Intermediate	2
Assets and Liabilities: State and Local Governments	On-demand	Eric Berman	Accounting (2 hours)	Overview	2
Audit and Attestation: Q & A	On-demand	Pat Patterson	Accounting (1 hour), Auditing (1 hour)	Basic	2
Audit Evidence Standard SAS 142: Good or Bad	On-demand	Pat Patterson	Auditing (2 hours)	Intermediate	2
Audit Horror Stories: What to Do When the IRS Audit Goes off the Rails	On-demand	Eric Green	Taxes (2 hours)	Basic	2
Audit Technique Guide: The Entertainment Industry	On-demand	Susan Harper	Auditing (2 hours)	Basic	2
Auditing and Internal Control Issues	On-demand	Pat Patterson	Auditing (2 hours)	Intermediate	2
Auditing Crypto 2023	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
Auditing Excel Spreadsheets	On-demand	David Ringstrom	Specialized Knowledge and Applications (2 hours)	Basic	2
Auditing for Revenue Recognition	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
Auditing for Waste in a Government Entity	On-demand	Robert Minniti	Auditing (Governmental) (2 hours)	Basic	2
Auditing Internal Controls for Governments	On-demand	Robert Minniti	Auditing (Governmental) (2 hours)	Intermediate	2
Auditing Procedures and Practices: Analytical Procedures	On-demand	Pat Patterson	Auditing (2 hours)	Intermediate	2
Auditing Procedures and Practices: Audit Documentation	On-demand	Pat Patterson	Auditing (2 hours)	Intermediate	2
Auditing Procedures and Practices: Audit Supervision	On-demand	Pat Patterson	Auditing (2 hours)	Intermediate	2
Auditing Standards for CPAs: Fall Update	On-demand	Pat Patterson	Auditing (2 hours)	Update	2
Auditing Standards for CPAs: Winter Update 2024	On-demand	Pat Patterson	Auditing (2 hours)	Update	2
Audits of State and Local Government	On-demand	Eric Berman Kurt Schlicker	Auditing (Governmental) (8 hours)	Basic	8
Automating Excel-Based Financial Statements Part 1	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
Automating Excel-Based Financial Statements Part 2	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
Automation for Increasing Personal Efficiency and Effectiveness	On-demand	Stephen Yoss	Information Technology	Basic	2

			(2 hours)		
Bad Debt Deductions and Debt Write Offs	On-demand	Jennifer Kowal	Taxes (2 hours)	Intermediate	2
Bankruptcy Basics	On-demand	Robert Minniti	Finance (2 hours)	Basic	2
Basic Accounting Procedures: Part 1	On-demand	Robert Minniti	Accounting (2 hours)	Basic	2
Basic Accounting Procedures: Part 2	On-demand	Robert Minniti	Accounting (2 hours)	Basic	2
Basic Concepts of Individual Taxation	On-demand	Allison McLeod	Taxes (2 hours)	Basic	2
Basic Partnership Taxation	On-demand	James Hamill	Taxes (4 hours)	Basic	4
Basic Staff Training: Accounts Payable, Expenditures, & Related Fraud Risks	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
Basic Staff Training: Auditing Accounts Payable	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
Basic Staff Training: Auditing Accounts Receivable	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
Basic Staff Training: Auditing Accounts Receivable & Revenue	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
Basic Staff Training: Auditing Cash Receipts	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
Basic Staff Training: Auditing Expense Reimbursements	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
Basic Staff Training: Auditing Fixed Assets	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
Basic Staff Training: Auditing for Corruption	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
Basic Staff Training: Cash & Related Fraud Risks Audit Concepts	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
Basic Staff Training: Inventory & Cost of Goods Sold Audit Concepts	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
Basics of Fiduciary Accounting	On-demand	Klaralee Charlton	Accounting (2 hours)	Basic	2
Basics of Fraud Investigations	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
Basics of Risk Management	On-demand	Robert Minniti	Accounting (2 hours)	Basic	2
Basis Basics for S Corporation Shareholders	On-demand	James Hamill	Taxes (1 hour)	Basic	1
Basis Planning Opportunities in Estate Planning	On-demand	Jennifer Kowal	Taxes (2 hours)	Basic	2
Becoming a Tax Ninja: Tax Accounting Methods Part 1	On-demand	Greg White	Taxes (2 hours)	Basic	2
Becoming a Tax Ninja: Tax Accounting Methods Part 2	On-demand	Greg White	Taxes (2 hours)	Basic	2
Becoming a Tax Ninja: Tax Accounting Methods Part 3	On-demand	Greg White	Taxes (2 hours)	Basic	2
Becoming a Tax Ninja: Tax Accounting Methods Part 4	On-demand	Greg White	Taxes (2 hours)	Basic	2
Behavioral Finance	On-demand	Rob Stephens	Finance (5 hours)	Basic	5
Benefits and Hazards of Excel Office 365	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Basic	2
Best Practices for Getting Paid Faster	On-demand	Mary Schaeffer	Accounting (2 hours)	Basic	2
Best Practices: Mitigating Data Breaches & Vulnerabilities; and Appropriate Incident Respon	On-demand	Susan Harper	Taxes (2 hours)	Basic	2
Best Vendor Accounts Payable Policies and Practices	On-demand	Mary Schaeffer	Accounting (2 hours)	Basic	2
Beyond Excel's VLOOKUP Function	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
Big Data Unleashed: Opportunities and Challenges in Accounting	On-demand	Cory Campbell	Information Technology (2 hours)	Basic	2
Big Data: Possibilities and Probabilities	On-demand	Cory Campbell	Information Technology (2 hours)	Intermediate	2
Blockchain and Audit Assertions	On-demand	Cory Campbell	Auditing (2 hours)	Intermediate	2
Blockchain and Smart Contracts	On-demand	Cory Campbell	Information Technology (2 hours)	Intermediate	2
Breaking Down Excel Formulas	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
Bringing Artificial Intelligence to Your Organization	On-demand	Stephen Yoss	Information Technology (2 hours)	Basic	2
Budgeting Alternatives	On-demand	Rob Stephens	Finance (3 hours)	Basic	3

Building a Data Warehouse: DIY Approach to Getting All Your Data in One Place	On-demand	Stephen Yoss	Information Technology (2 hours)	Basic	2
Building Effective Budget Spreadsheets in Excel	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
Building Your Professional Presence	On-demand	Annette Nellen	Personnel/HR (2 hours)	Basic	2
Business Law Basics for the CPA	On-demand	David Osburn	Business Law (2 hours)	Basic	2
Business Loan Basics	On-demand	Rob Stephens	Accounting (2 hours)	Basic	2
Business Valuations: Cost Approach	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
Business Valuations: Developing Economic Outlooks	On-demand	Robert Minniti	Finance (2 hours)	Basic	2
Business Valuations: Income Approach	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
Business Valuations: Market Approach	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
Business Valuations: Writing the Report	On-demand	Robert Minniti	Specialized Knowledge (2 hours)	Basic	2
By the Numbers Update on IRS Compliance Enforcement Initiatives	On-demand	Jim Buttonow	Taxes (2 hours)	Basic	2
California 8-Hour Annuity Training	Downloadable PDF	Paul Winn	Specialized Knowledge (8 hours)	Basic	8
California Tax Update: Part 1	On-demand	Steven Gill	Taxes (2 hours)	Update	2
California Tax Update: Part 2	On-demand	Steven Gill	Taxes (2 hours)	Update	2
Can You and Should You Aggregate for Sections 465, 469, and 199A	On-demand	James Hamill	Taxes (2 hours)	Basic	2
Cancellation of Indebtedness Income	On-demand	Jennifer Kowal	Taxes (2 hours)	Basic	2
CAPEX Analysis using Discounted Cash Flow Techniques	On-demand	Miles Hutchinson	Finance (2 hours)	Intermediate	2
Capital Budgeting: Analysis that Improves Long-term ROI	On-demand	Blair Cook	Finance (1 hour)	Intermediate	1
Capital Gain or Ordinary Income?	On-demand	Jennifer Kowal	Taxes (2 hours)	Intermediate	2
Cash Versus Accrual Accounting	On-demand	Robert Minniti	Accounting (2 hours)	Basic	2
Change Management - Making it Work	On-demand	Robert Minniti	Specialized Knowledge and Applications (2 hours)	Basic	2
Change Management: Being A Catalyst CFO	On-demand	Blair Cook	Management Services (1 hour)	Basic	1
Changing Your State Tax Residency	On-demand	Ariele Doolittle Emma Savino Hodgson Russ LLP	Taxes (2 hours)	Overview	2
Charitable Contribution Deduction: Rules & Changes	On-demand	Susan Harper	Taxes (1 hour)	Basic	1
Charitable Contributions by Individuals and Businesses	On-demand	Barbara Weltman	Taxes (1 hour)	Basic	1
Charitable Remainder Trusts and Preparing Form 5227	On-demand	Steven Siegel	Taxes (2 hours)	Intermediate	2
ChatGPT for Tax: A Quick Guide to Successful Tax Research	On-demand	Greg White	Taxes (1 hour)	Basic	1
Choice of Entity and Tax Issue Entity Formations: Part 1	On-demand	Jennifer Kowal	Taxes (4 hours)	Basic	4
Choice of Entity and Tax Issue Entity Formations: Part 2	On-demand	Jennifer Kowal	Taxes (4 hours)	Intermediate	4
Choice of Entity for Foreign Operations via Checking-the-Box: Elections on Form 8832 and Compliance	On-demand	Robert Misey	Taxes (2 hours)	Basic	2
Cloud Computing for Accountants and Financial Professionals	On-demand	Stephen Yoss	Information Technology (2 hours)	Basic	2
Collecting Bad Debts and the Fair Debt Collections Practices Act (FDCPA)	On-demand	Robert Minniti	Accounting (2 hours)	Basic	2
Combat Fraud with Effective Internal Controls	On-demand	Susan Harper	Business Management & Organization (2 hours)	Basic	2
Coming in From the Cold: How to Help Non-Filers	On-demand	Eric Green	Taxes (2 hours)	Basic	2
Commercial & Industrial (C&I) Lending and the CPA	On-demand	David Osburn	Finance (2 hours)	Basic	2
Common Estate Planning Mistakes and How to Avoid Them	On-demand	Steven Siegel	Taxes (2 hours)	Basic	2

Common Frauds in Governmental Entities	On-demand	Robert Minniti	Accounting (Governmental) (1 hour), Auditing (Governmental) (1 hour)	Basic	2
Common Frauds in Small Businesses	On-demand	Robert Minniti	Accounting (1 hour), Auditing (1 hour)	Basic	2
Communication Skills Training for the CPA	On-demand	David Osburn	Personnel/HR (2 hours)	Basic	2
Compilation and Review in the Red Zone	On-demand	Pat Patterson	Accounting (2 hours)	Intermediate	2
Compilation, Preparation, and COVID-19	On-demand	Pat Patterson	Accounting (2 hours)	Intermediate	2
Complying with Revenue Recognition Standards	On-demand	Lynn Fountain	Accounting (2 hours)	Basic	2
Complying with the Revenue Recognition – Step 5 Recognize Revenue	On-demand	Lynn Fountain	Accounting (2 hours)	Basic	2
Condo Associations: Reserves and Accounting Issues	On-demand	Pat Patterson	Accounting (2 hours)	Intermediate	2
Condos and HOAs: Federal Tax Issues	On-demand	Pat Patterson	Taxes (2 hours)	Intermediate	2
Condos and HOAs: GAAP, GAAS, & SSARS Issues	On-demand	Pat Patterson	Accounting (2 hours)	Intermediate	2
Conducting a Successful Audit: Risk Assessment Factors and Internal Control Considerations	On-demand	Lynn Fountain	Auditing (2 hours)	Basic	2
Conducting Remote Audits in Uncertain Times	On-demand	Lynn Fountain	Auditing (1 hour)	Basic	1
Considering COVID-19 in Financial Statement Disclosures	On-demand	Robert Minniti	Auditing (2 hours)	Intermediate	2
COOPs: Federal Tax Issues	On-demand	Pat Patterson	Taxes (2 hours)	Intermediate	2
Coops: GAAP, GAAS, and SSARS Issues	On-demand	Pat Patterson	Accounting (1 hour), Auditing (1 hour)	Intermediate	2
Corporate Controller in Today's Environment: Part 1	On-demand	Miles Hutchinson	Business Management & Organization (2 hours)	Basic	2
Corporate Controller in Today's Environment: Part 2	On-demand	Miles Hutchinson	Business Management & Organization (2 hours)	Basic	2
Corporate Finance Principles	On-demand	Blair Cook	Finance (1 hour)	Basic	1
Corporate Finance: CMA Exam 2 - Section B	On-demand	Tom Coghlan	Finance (10 hours)	Overview	10
Corporate Liquidations	On-demand	Jennifer Kowal	Taxes (2 hours)	Intermediate	2
Corporate Restructuring	On-demand	Tom Coghlan	Business Management & Organization (2 hours)	Basic	2
Corporate Tax: Formation and Operation	On-demand	Jennifer Kowal	Taxes (2 hours)	Basic	2
Cost Effective Internal Controls for Small Businesses	On-demand	Robert Minniti	Accounting (1 hour), Auditing (1 hour)	Intermediate	2
Cost Management: CMA Exam Review Part 1 - Section D	On-demand	Tom Coghlan	Finance (6 hours)	Overview	6
Costly Pitfalls in Old Estate Planning Documents	On-demand	Klaralee Charlton	Taxes (2 hours)	Basic	2
COVID-19 and Tax Fraud	On-demand	Robert Minniti	Taxes (2 hours)	Basic	2
COVID-19 Issues for Government Accountants and Auditors	On-demand	Robert Minniti	Accounting (Governmental) (1 hour), Auditing (Governmental) (1 hour)	Basic	2
COVID-19 New Cyber Frauds and Cybersecurity Internal Controls	On-demand	Robert Minniti	Information Technology (1 hour)	Basic	1
COVID-19 Stimulus Plans: What You Need to Know	On-demand	Robert Minniti	Accounting (1 hour), Auditing (1 hour)	Basic	2
COVID-19: Accountant's Compilation Engagements	On-demand	Pat Patterson	Accounting (2 hours)	Intermediate	2
CPA's Guidebook for Ethical Behavior: Code of Professional Conduct	On-demand	Allison McLeod	Regulatory Ethics (2 hours)	Basic	2
Crazy Tax Cases	On-demand	Eric Green	Taxes (2 hours)	Basic	2

Creating an Effective and Efficient Travel and Entertainment Expense Reimbursement Policy	On-demand	Mary Schaeffer	Accounting (2 hours)	Basic	2
Creating Error-Proof Excel Spreadsheets	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
Creating Powerful and Effective Presentations with PowerPoint	On-demand	Stephen Yoss	Computer Software & Applications (2 hours)	Basic	2
Credit Analysis Basics: The ABCs of Underwriting	On-demand	David Osburn	Accounting (2 hours)	Basic	2
Credit Card & Cash Frauds	On-demand	Robert Minniti	Accounting (1 hour), Auditing (1 hour)	Basic	2
Critical Audit Matters	On-demand	Lynn Fountain	Auditing (2 hours)	Basic	2
Critical Concepts to Understand Financial Statements in a For-Profit and Not-for-Profit Organization	On-demand	Lynn Fountain	Accounting (2 hours)	Basic	2
Crucial Real Estate Insights Part 1: Acquisition Strategies	On-demand	Greg White	Taxes (2 hours)	Basic	2
Crucial Real Estate Insights Part 2: Partial Dispositions, Removal Costs, & Maximizing Interest Exp	On-demand	Greg White	Taxes (2 hours)	Basic	2
Crucial Real Estate Insights Part 3: §199A Deductions for Real Estate	On-demand	Greg White	Taxes (2 hours)	Basic	2
Crucial Real Estate Insights Part 4: Passive Loss Issues and Dispositions	On-demand	Greg White	Taxes (2 hours)	Basic	2
Crypto Basics and Audit Considerations	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
Crypto Frauds 2024 Update	On-demand	Robert Minniti	Accounting (2 hours)	Basic	2
Cryptocurrency Risk Financial Statement Disclosure Requirements	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
Cryptocurrency Taxation Fundamentals and Open Issues	On-demand	Annette Nellen	Taxes (2 hours)	Basic	2
Current Expected Credit Losses: How To Account and Audit Them	On-demand	Salvatore Collemi	Accounting (1 hour), Auditing (1 hour)	Intermediate	2
Cutting Edge Tax Strategies for Real Estate: Part 1	On-demand	Greg White	Taxes (4 hours)	Intermediate	4
Cutting Edge Tax Strategies for Real Estate: Part 2	On-demand	Greg White	Taxes (4 hours)	Intermediate	4
Cyber Risk Management Frameworks and Implementation	On-demand	Lynn Fountain	Information Technology (2 hours)	Basic	2
Cyber Risk Management Roles and Responsibilities	On-demand	Lynn Fountain	Information Technology (2 hours)	Basic	2
Cybersecurity for Employees Working from Home	On-demand	Robert Minniti	Information Technology (2 hours)	Basic	2
Cybersecurity for Tax Professionals	On-demand	Robert Minniti	Taxes (2 hours)	Basic	2
Cybersecurity Implications for the Accounting Profession	On-demand	Cory Campbell	Information Technology (2 hours)	Basic	2
Cybersecurity: What do Accountants Really Need to Know?	On-demand	Cory Campbell	Information Technology (2 hours)	Intermediate	2
Data and Statistical Analytics Using Microsoft Excel	On-demand	Stephen Yoss	Computer Science (2 hours)	Intermediate	2
Data Breaches, What's My Risk?	On-demand	Robert Minniti	Accounting (1 hour), Auditing (1 hour)	Basic	2
Database Basics for Financial Professionals	On-demand	Stephen Yoss	Computer Software & Applications (2 hours)	Intermediate	2
Dealing with Dates and Times in Excel	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Basic	2
Dealing with Duplicate Data in Excel	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
Debt or Equity?	On-demand	Jennifer Kowal	Taxes (2 hours)	Intermediate	2
Deciphering Excel Error Prompts	On-demand	David Ringstrom	Computer Software &	Intermediate	2

			Applications (2 hours)		
Decision Analysis: CMA Exam 2 - Section C	On-demand	Tom Coghlan	Finance (5 hours)	Overview	5
Deferred Compensation	On-demand	Jennifer Kowal	Taxes (4 hours)	Basic	4
Delivering Effective Feedback for Maximum Employee Growth	On-demand	Jennifer Kowal	Business Management & Organization (2 hours)	Basic	2
Demystifying Accounting for Blockchain, Cryptocurrency, and NFTs	On-demand	Stephen Yoss	Accounting (2 hours)	Basic	2
Designing Effective KPIs and Performance Dashboards	On-demand	Miles Hutchinson	Business Management & Organization (2 hours)	Basic	2
Determining Tax Basis of Property	On-demand	Jennifer Kowal	Taxes (2 hours)	Intermediate	2
Developing a Digital Mindset	On-demand	Cory Campbell	Information Technology (2 hours)	Basic	2
Developing a Well Trained Staff Using a Skills Based Approach	On-demand	Jennifer Kowal	Business Management & Organization (2 hours)	Basic	2
Developing and Deploying Effective Cloud Cyber Security: Best Practices for Your Organization	On-demand	Stephen Yoss	Computer Software & Applications (2 hours)	Basic	2
Digging into Excel's Data Validation Feature	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
Digital Assets - What to Ask Clients and What To Do with the Answers	On-demand	Annette Nellen	Taxes (2 hours)	Intermediate	2
Disability Benefits For Qualifying Individuals	On-demand	Theodore Sarenski	Specialized Knowledge and Applications (1 hour)	Basic	1
Disability Insurance Products and Principles	Downloadable PDF	Paul Winn	Specialized Knowledge and Applications (3 hours)	Basic	3
Disaster Recovery and Business Continuity for Accountants and Financial Professionals	On-demand	Stephen Yoss	Information Technology (2 hours)	Basic	2
Disaster-Proofing Excel Spreadsheets	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
Distributing Capital Gains on Form 1041	On-demand	Klaralee Charlton	Taxes (2 hours)	Intermediate	2
Diversity, Equity, and Inclusion: Building a Strong Culture	On-demand	Lynn Fountain	Personnel/HR (2 hours)	Basic	2
Diversity, Equity, and Inclusion: Building Confidence and Trust	On-demand	Lynn Fountain	Personnel/HR (2 hours)	Basic	2
Diversity, Equity, and Inclusion: Leadership Skills	On-demand	Lynn Fountain	Personnel/HR (2 hours)	Basic	2
Diversity, Equity, and Inclusion: Unconscious Bias Impact	On-demand	Lynn Fountain	Behavioral Ethics (2 hours)	Basic	2
Diversity, Equity, and Inclusion: Understanding the Requirements	On-demand	Lynn Fountain	Personnel/HR (2 hours)	Basic	2
Documenting COVID-19 Economic Damages	On-demand	Robert Minniti	Accounting (2 hours)	Basic	2
Documenting Economic Damages from Civil Unrest	On-demand	Robert Minniti	Accounting (1 hour)	Basic	1
Driving Strategy & Delivering Results	On-demand	Amy McCormick Ken Polk	Business Management & Organization (1 hour)	Basic	1
Dynamic Arrays Formulas in Excel 2021 and Microsoft 365	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
Effective Spreadsheets, Databases, & Reporting Tools for Financial Professionals	On-demand	Stephen Yoss	Computer Software & Applications (2 hours)	Basic	2
Effectively Working with the IRS: Using IRS Transcripts and Current IRS Online Tools	On-demand	Jim Buttonow	Taxes (2 hours)	Basic	2
Elder Care and Taxes	On-demand	Barbara Weltman	Taxes (2 hours)	Basic	2
Electronic Data Analysis	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
Emerging Technology for Your Organization	On-demand	Cory Campbell	Information Technology (2 hours)	Intermediate	2

Employee Benefit Plans Audit Update: Accounting Principles and Auditing Considerations	On-demand	Lewis Fisher	Auditing (2 hours)	Update	2
Employee Benefit Plans: Auditing Investments	On-demand	Lewis Fisher	Auditing (2 hours)	Basic	2
Employee Benefit Plans: Contribution and Distribution Testing	On-demand	Lewis Fisher	Auditing (2 hours)	Basic	2
Employee Benefit Plans: Internal Controls and SOC 1 Reports	On-demand	Lewis Fisher	Auditing (2 hours)	Basic	2
Employee Fraud: Bid Rigging	On-demand	Robert Minniti	Accounting (2 hours)	Basic	2
Employee Fraud: The Misappropriation of Assets	On-demand	Robert Minniti	Accounting (3 hours)	Basic	3
Employee Management and Communication Processes During Trying Times	On-demand	Lynn Fountain	Business Management & Organization (1 hour)	Basic	1
Employment Law Issues Accountants Need to Know	On-demand	Robert Minniti	Business Law (2 hours)	Basic	2
Employment Tax Fraud: More Common than Expected!	On-demand	Susan Harper	Taxes (2 hours)	Basic	2
Enterprise Risk Management: CMA Exam 2 - Section D	On-demand	Tom Coghlan	Finance (1 hour)	Overview	1
Environmental, Social, and Governance: A New Landscape	On-demand	Pat Patterson	Accounting (1 hour), Auditing (1 hour)	Basic	2
Establishing a Good Tone at the Top	On-demand	Robert Minniti	Accounting (1 hour), Auditing (1 hour)	Intermediate	2
Estate Administration Process: A Practitioner's Guide	On-demand	Klaralee Charlton	Taxes (2 hours)	Basic	2
Ethical and Audit Considerations of Cryptocurrency	On-demand	Blair Cook	Auditing (1 hour)	Basic	1
Ethics for Colorado CPAs	On-demand	Jennifer Nicholson Allison McLeod	Regulatory Ethics (4 hours)	Basic	4
Ethics for Ohio CPAs	On-demand	Pat Patterson	Regulatory Ethics (3 hours)	Basic	3
Everyday Tax Rules: Tax Tips from 38 Years in the Trenches	On-demand	Greg White	Taxes (2 hours)	Basic	2
Excel 101: Introduction to Spreadsheets Part 1	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Basic	2
Excel 101: Introduction to Spreadsheets Part 2	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Basic	2
Excel 101: Lookup Formulas	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Basic	2
Excel 101: Pivot Tables Basics	On-demand	David Ringstrom	Specialized Knowledge and Applications (2 hours)	Basic	2
Excel Chart Speed Tips	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Basic	2
Excel Chart Speed Tips: Pivot Charts (Nano Course)	On-demand	David Ringstrom	Computer Software & Applications (0.2 hour)	Basic	0.2
Excel Logic: IF, AND, OR, and Beyond	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
Excel Lookup Functions: Function Wizard (Nano Course)	On-demand	David Ringstrom	Computer Software & Applications (0.2 hour)	Basic	0.2
Excel Nuances	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Basic	2
Excel Pivot Tables: Columns (Nano Course)	On-demand	David Ringstrom	Computer Software & Applications (0.2 hour)	Basic	0.2
Excel Printing and Page Layouts	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Basic	2
Excel Speed Tips	On-demand	David Ringstrom	Computer Software &	Basic	2

Excel Speed Tips: PDF Documents (Nano Course)	On-demand	David Ringstrom	Applications (2 hours) Computer Software & Applications (0.2 hour)	Intermediate	0.2
Excel Speed Tips: Recent Items Menu (Nano Course)	On-demand	David Ringstrom	Computer Software & Applications (0.2 hour)	Basic	0.2
Excel Spreadsheet Accessibility Features	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Basic	2
Excel's LET and LAMBDA Functions	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Advanced	2
Excel's XLOOKUP Function	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Basic	2
Executive Compensation Issues	On-demand	Jennifer Kowal	Taxes (2 hours)	Intermediate	2
Expanding Your Use of Data Analytics for Audit	On-demand	Ken Petersen	Business Management & Organization (1 hour)	Basic	1
Expense or Capitalize?	On-demand	Jennifer Kowal	Taxes (2 hours)	Intermediate	2
Expense Reimbursement Fraud	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
External Reporting Decisions: CMA Exam 1 - Section A	On-demand	Tom Coghlan	Finance (6 hours)	Overview	6
Fair Value Measurements	On-demand	Pat Patterson	Accounting (2 hours)	Intermediate	2
Fair Value Options for Financial Instruments	On-demand	Pat Patterson	Accounting (2 hours)	Intermediate	2
Family Protection: How Social Security Assists Survivors	On-demand	Theodore Sarenski	Specialized Knowledge and Applications (1 hour)	Basic	1
Family Trusts: Planning to Preserve, Protect and Transfer Wealth for Your Clients	On-demand	Steven Siegel	Taxes (2 hours)	Basic	2
FASB's Big 3 Project Overview: Leases, Financial Instruments & Revenue Recognition	On-demand	Pat Patterson	Accounting (1 hour), Auditing (1 hour)	Overview	2
FATCA: How to Comply with Minimal Withholding, Tax, & Penalty Impact	On-demand	Miles Hutchinson	Taxes (2 hours)	Basic	2
Federal Income Taxation of Trusts and Estates	On-demand	Steven Siegel	Taxes (2 hours)	Basic	2
Federal Taxation of Cannabis	On-demand	Greg White	Taxes (2 hours)	Basic	2
Filing for Benefits: The How and Best Ideas	On-demand	Theodore Sarenski	Specialized Knowledge and Applications (1 hour)	Basic	1
Filing Form 7203	On-demand	Greg White	Taxes (2 hours)	Basic	2
Filtering Techniques for Excel Data	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
Final Pay, Reimbursements, & Other Paycheck Administration Pitfalls	On-demand	Robert Minniti	Accounting (Governmental) (2 hours)	Basic	2
Financial Reporting Tips and Tricks	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
Financial Statement Analysis: CMA Exam 2 - Section A	On-demand	Tom Coghlan	Finance (6 hours)	Overview	6
Financial Statement Analysis: Reading the Numbers Correctly	On-demand	David Osburn	Finance (2 hours)	Intermediate	2
Financial Statement Fraud	On-demand	Susan Harper	Auditing (2 hours)	Basic	2
Finding the Leader Within	On-demand	Lynn Fountain	Personnel/HR (2 hours)	Basic	2
Five Ways COVID-19 Will Change Risk Thinking	On-demand	Blair Cook	Management Services (1 hour)	Basic	1
Fixed Asset Accounting	On-demand	Jennifer Nicholson	Accounting (2 hours)	Basic	2
Forecasting with Excel's Powerful Sensitivity Tools	On-demand	Robert Minniti	Accounting (2 hours)	Basic	2
Foreign Tax Credit	On-demand	Miles Hutchinson	Computer Software & Applications (2 hours)	Basic	2
		Barbara Weltman Sidney Kess	Taxes (2 hours)	Basic	2

Form 1041 Basics	On-demand	Klaralee Charlton	Taxes (2 hours)	Basic	2
Form 1042/1042-S Reporting	On-demand	Steven Mercatante	Taxes (2 hours)	Basic	2
Form 1065 and Schedule K-1 - IRS Throws Rocks at a Hornets' Nest	On-demand	Bradley Burnett	Taxes (1 hour)	Overview	1
Form 1099 and Worker Classification Issues	On-demand	Steven Mercatante	Taxes (2 hours)	Basic	2
Form 1099-MISC Explained	On-demand	Steven Mercatante	Taxes (2 hours)	Basic	2
Form 990-T and Unrelated Business Income	On-demand	Clark Nuber Megan Ryan Danielle Wright	Taxes (2 hours)	Intermediate	2
Form 990PF: Tax Return Walk through and Overview of the Basics	On-demand	Celia Davis Lisa McCreedy Clark Nuber	Taxes (2 hours)	Basic	2
Foundations for a Strong Internal Audit Department	On-demand	Lynn Fountain	Auditing (2 hours)	Basic	2
Fraud Essentials: What is Tax Fraud and its Consequences?	On-demand	Susan Harper	Taxes (2 hours)	Basic	2
Fraud Evaluations: A Guide for The Compliance Professional	On-demand	Lynn Fountain	Auditing (2 hours)	Basic	2
Fraud Risks When Conducting Remote Audits	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
Fraud Roundup: Newer Frauds and How to Spot Them When Targeted	On-demand	Mary Schaeffer	Accounting (1 hour), Auditing (1 hour)	Basic	2
Fundamentals of Hedge Fund NAV Accounting	On-demand	Rita BasuMallick	Accounting (2 hours)	Intermediate	2
Funding the Marital Share	On-demand	Klaralee Charlton	Taxes (2 hours)	Intermediate	2
GAAP Hot Topics: What You Need to Know	Downloadable PDF	Kelen Camehl	Accounting (16 hours)	Basic	16
GAAP Preparation of Financial Statements and Presentation in Accordance with ASC 205	On-demand	Lynn Fountain	Accounting (2 hours)	Basic	2
GAAP Presentation of Financial Statements	On-demand	Lynn Fountain	Auditing (2 hours)	Basic	2
GAAP vs IFRS Update	On-demand	Pat Patterson	Accounting (2 hours)	Intermediate	2
GASB-100, 101 and 102	On-demand	Eric Berman	Accounting (Governmental) (2 hours)	Update	2
GASB-94, 96 and 99 for Calendar Year Governments	On-demand	Eric Berman	Accounting (Governmental) (2 hours)	Overview	2
Gearing Up for GASB-94 and 96, as amended by GASB-99 along with related Implementation Guidance	On-demand	Eric Berman	Accounting (Governmental) (2 hours)	Overview	2
General Ethics for CPAs	On-demand	Allison McLeod	Regulatory Ethics (3 hours)	Basic	3
Getting Ahead of the Emerging Technology Curve: Blockchain, AI, and Big Data	On-demand	Stephen Yoss	Information Technology (2 hours)	Basic	2
Getting Rid of Tax Penalties	On-demand	Eric Green	Taxes (2 hours)	Basic	2
Getting Started with CCH CPELink - Administrator On Boarding	On-demand	CPE Link		Overview	1
Gift Tax Biggest Reporting Issues and Mistakes	On-demand	Klaralee Charlton	Taxes (2 hours)	Basic	2
Going Concern: SAS 132	On-demand	Pat Patterson	Auditing (2 hours)	Basic	2
Going Concerns: New Issues 2021	On-demand	Pat Patterson	Accounting (1 hour), Auditing (1 hour)	Update	2
Goodwill Impairment Basics and Testing	Downloadable PDF	Kelen Camehl	Accounting (3 hours)	Basic	3
Google Workspace vs. Microsoft 365 What's Right For Your Organization?	On-demand	Stephen Yoss	Computer Software & Applications (2 hours)	Basic	2
Government Benefits Fraud	On-demand	Robert Minniti	Accounting (Governmental) (1 hour), Auditing (Governmental) (1 hour)	Basic	2
Government Risk Assessments	On-demand	Robert Minniti	Accounting	Basic	2

Governmental Accounting and Auditing Update: Building on the Leases Framework	On-demand	Eric Berman	(Governmental) (2 hours) Accounting (Governmental) (1 hour), Auditing (Governmental) (1 hour)	Update	2
Governmental Accounting and Auditing Update: GAAP Quick Hits	On-demand	Eric Berman	Accounting (Governmental) (1 hour), Auditing (Governmental) (1 hour)	Update	2
Governmental Accounting and Auditing Update: GASB-87, Leases: An Overview for Lessees and Lessors	On-demand	Eric Berman	Accounting (Governmental) (1 hour), Auditing (Governmental) (1 hour)	Update	2
Governmental Accounting and Auditing Update: SAS 134-145 Update	On-demand	Kurt Schlicker	Accounting (Governmental) (1 hour), Auditing (Governmental) (1 hour)	Update	2
Governmental Accounting and Auditing Update: Single Audit Update	On-demand	Kurt Schlicker	Accounting (Governmental) (1 hour), Auditing (Governmental) (1 hour)	Update	2
Governmental Accounting and Auditing Update: Year-End Planning	On-demand	Eric Berman	Accounting (Governmental) (1 hour), Auditing (Governmental) (1 hour)	Update	2
Governmental GAAP: Introduction to Government Accounting	On-demand	Diane Edelstein	Accounting (Governmental) (2 hours)	Basic	2
Handling an IRS Collection Case: From Initial Call to Offer Acceptance	On-demand	Eric Green	Taxes (2 hours)	Basic	2
Handling Changes to W-8 and W-9	On-demand	Steven Mercatante	Taxes (2 hours)	Basic	2
Handling the OID and Below Market Loan Rules	On-demand	Jennifer Kowal	Taxes (2 hours)	Intermediate	2
Handling Your Accounts Payable Function in Times of Crisis	On-demand	Mary Schaeffer	Accounting (1 hour)	Basic	1
Health Care Options for Small Businesses	On-demand	Barbara Weltman	Taxes (1 hour)	Basic	1
Help Clients Deal with Tax Law Challenges: Using Practical Planning Strategies	On-demand	Steven Siegel	Taxes (2 hours)	Basic	2
High Interest Rate Estate Planning Opportunities	On-demand	Klaralee Charlton	Taxes (2 hours)	Intermediate	2
Highlights for Passthrough Entities	On-demand	Greg White	Taxes (2 hours)	Basic	2
Highlights of the Inflation Reduction Act	On-demand	Annette Nellen	Taxes (1 hour)	Update	1
History, Current Legislation, and Social Security Basics	On-demand	Theodore Sarenski	Specialized Knowledge and Applications (2 hours)	Basic	2
Hot Tax Topics at Year End for 2023	On-demand	Annette Nellen	Taxes (2 hours)	Update	2
How Accounting Works and Reporting Guidelines	On-demand	Miles Hutchinson	Accounting (2 hours)	Basic	2
How the IRS's New Strategic Operating Plan Will Affect Tax Professionals and Their Clients	On-demand	Eric Green	Taxes (2 hours)	Basic	2
How the Pandemic Changed FASB and ASB Effective Dates	On-demand	Pat Patterson	Accounting (2 hours)	Update	2
How the U.S. Taxes Foreign Subsidiaries and How to Complete Form 5471	On-demand	Robert Misey	Taxes (2 hours)	Basic	2
How to Account and Audit for Digital Assets	On-demand	Salvatore Collemi	Accounting (1 hour), Auditing (1 hour)	Intermediate	2

How to Account and Audit under the New Leasing Standard	On-demand	Salvatore Collemi	Accounting (1 hour), Auditing (1 hour)	Intermediate	2
How to Analyze Financial Statements	On-demand	Miles Hutchinson	Accounting (2 hours)	Basic	2
How to Audit in a COVID-19 Environment	On-demand	Salvatore Collemi	Auditing (2 hours)	Update	2
How to Audit under the New Leasing Standard	On-demand	Salvatore Collemi	Accounting (1 hour), Auditing (1 hour)	Intermediate	2
How to Avoid Common Peer Review Pitfalls	On-demand	Salvatore Collemi	Auditing (2 hours)	Intermediate	2
How to Avoid the Most Common Errors in Tax Problem Solving	On-demand	Jim Buttonow	Taxes (2 hours)	Basic	2
How to Build Strong Client Communication Skills for Tax Practice	On-demand	Jennifer Kowal	Communications & Marketing (2 hours)	Basic	2
How To Conduct a Proper Group Audit Engagement	On-demand	Salvatore Collemi	Auditing (2 hours)	Intermediate	2
How to Deal with Difficult People	On-demand	Lynn Fountain	Business Management & Organization (2 hours)	Basic	2
How to Handle the Top 10 Issues in an IRS Small Business Audit	On-demand	Jim Buttonow	Taxes (2 hours)	Basic	2
How to Help Your Clients Claim Energy Credits Over the Next 10 Years	On-demand	Annette Nellen	Taxes (1 hour)	Basic	1
How to Manage Your Remote Employees	On-demand	Amy McCormick	Business Management & Organization (1 hour)	Basic	1
How To Perform An Effective Internal Inspection of Your Attest Practice	On-demand	Salvatore Collemi	Auditing (2 hours)	Intermediate	2
How to Prepare for Your Upcoming AICPA Peer Review	On-demand	Salvatore Collemi	Auditing (2 hours)	Intermediate	2
How to Properly Perform an Agreed-Upon Procedures Engagement	On-demand	Salvatore Collemi	Auditing (2 hours)	Intermediate	2
How to Properly Tailor Your Audit Program	On-demand	Salvatore Collemi	Auditing (2 hours)	Intermediate	2
Identifying and Implementing the Proper Balance of Internal Controls	On-demand	Lynn Fountain	Auditing (2 hours)	Basic	2
Identity Theft	On-demand	Robert Minniti	Accounting (1 hour), Auditing (1 hour)	Basic	2
Impact on Reasonable Compensation for S Corp Shareholder: Employees	On-demand	Greg White	Taxes (2 hours)	Intermediate	2
Implementing Excel Spreadsheet Internal Controls	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
Implementing the Revenue Recognition Model: Case Scenarios Part One	On-demand	Lynn Fountain	Auditing (2 hours)	Basic	2
Implementing the Revenue Recognition Model: Case Scenarios Part Two	On-demand	Lynn Fountain	Auditing (2 hours)	Basic	2
Income Sourcing for Nonresidents	On-demand	Patrick McCormick	Taxes (2 hours)	Basic	2
Income Taxation of Trusts and Estates and Preparing Form 1041 Part 1	On-demand	Steven Siegel	Taxes (4 hours)	Intermediate	4
Income Taxation of Trusts and Estates and Preparing Form 1041 Part 2	On-demand	Steven Siegel	Taxes (4 hours)	Intermediate	4
Information Technology (IT) Risks in Emerging Business Environments	On-demand	Lynn Fountain	Information Technology (1 hour), Auditing (1 hour)	Basic	2
Information Technology in Today's Digital World: General Controls Primer	On-demand	Lynn Fountain	Information Technology (2 hours)	Basic	2
Innocent Spouse Relief from Joint Liability	On-demand	Eric Green	Taxes (2 hours)	Intermediate	2
Ins and Outs of Alternative Investments	On-demand	Jennifer Becker Harris	Taxes (2 hours)	Intermediate	2
		Celia Davis Clark Nuber			
Inside Excel's Conditional Formatting Feature	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
Insurance Fraud	On-demand	Susan Harper	Taxes (2 hours)	Basic	2
Intellectual Property: What Every Financial Professional Needs to Know	On-demand	Paul Jorgensen	Business Law (2 hours)	Basic	2
Interest Expense Deduction Individuals and Businesses	On-demand	Barbara Weltman	Taxes (1 hour)	Basic	1
		Sidney Kess			
Intermediate Partnership Taxation	On-demand	James Hamill	Taxes (4 hours)	Intermediate	4
Intermediate PivotTable Techniques	On-demand	David Ringstrom	Specialized Knowledge	Intermediate	2

			and Applications (2 hours)		
Intermediate Staff Training: Auditing Internal Controls	On-demand	Robert Minniti	Auditing (2 hours)	Intermediate	2
Intermediate Staff Training: Auditing Inventory	On-demand	Robert Minniti	Auditing (2 hours)	Intermediate	2
Intermediate Staff Training: Auditing Revenue Recognition	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
Internal Audit Challenges During COVID Times	On-demand	Lynn Fountain	Auditing (2 hours)	Intermediate	2
Internal Audit Standards - Executing the Audit Engagement	On-demand	Lynn Fountain	Auditing (2 hours)	Basic	2
Internal Audit Standards - Managing Internal Audit Work	On-demand	Lynn Fountain	Auditing (2 hours)	Basic	2
Internal Audit Trends 2023	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
Internal Audit: Keys to Managing an Effective Function	On-demand	Lynn Fountain	Auditing (2 hours)	Basic	2
Internal Auditing - 2023 Review & 2024 Preview	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
Internal Control and COSO Essentials for Financial Managers, Accountants and Auditors	On-demand	Lynn Fountain	Auditing (2 hours)	Basic	2
Internal Controls for Smaller Not-For-Profit and Governmental Entities	On-demand	Robert Minniti	Auditing (Governmental) (2 hours)	Intermediate	2
Internal Controls: CMA Exam Part 1 - Section E	On-demand	Tom Coghlan	Finance (3 hours)	Overview	3
Internal Controls: What Every Financial and Accounting Professional Needs to Know	On-demand	Lynn Fountain	Auditing (2 hours)	Basic	2
International Considerations for Not-for-Profit Organizations	On-demand	Clark Nuber Jennifer Becker Harris Frances Olson	Taxes (2 hours)	Intermediate	2
International Tax for Immigration Purposes	On-demand	Patrick McCormick	Taxes (2 hours)	Basic	2
International Tax Treaties	On-demand	Allison McLeod	Taxes (2 hours)	Basic	2
International Tax: An Overview of PFICs	On-demand	Patrick McCormick	Taxes (2 hours)	Basic	2
International Tax: Basics of Income Sourcing	On-demand	Patrick McCormick	Taxes (2 hours)	Overview	2
Introduction to Business Intelligence (BI)	On-demand	Lynn Fountain	Auditing (2 hours)	Basic	2
Introduction to Business Valuations	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
Introduction to Cost Accounting	On-demand	Robert Minniti	Accounting (2 hours)	Basic	2
Introduction to Cyber Fraud	On-demand	Robert Minniti	Accounting (1 hour), Auditing (1 hour)	Basic	2
Introduction to Environmental, Social and Governance (ESG) for Accountants	On-demand	Lynn Fountain	Accounting (2 hours)	Basic	2
Introduction to Excel Macros: Part 1	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Basic	2
Introduction to Excel Macros: Part 2	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Basic	2
Introduction to Forensic Accounting	On-demand	Lynn Fountain	Accounting (2 hours)	Basic	2
Introduction to Payroll Law	On-demand	Miles Hutchinson	Taxes (2 hours)	Basic	2
Introduction to Pooled Employer Plans	On-demand	Klaralee Charlton	Taxes (2 hours)	Basic	2
Introduction to Power Query Part 1	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
Introduction to Power Query Part 2	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
Investment Decisions: CMA Exam 2 - Section E	On-demand	Tom Coghlan	Finance (3 hours)	Overview	3
IRAs: What You Need to Know About Contributions, Conversions and Distributions	On-demand	Greg White	Taxes (2 hours)	Basic	2
IRS Audit Technique Guide - Exploring the Construction Industry	On-demand	Susan Harper	Taxes (2 hours)	Basic	2
IRS Audits and Appeals: A Practical and Technical Approach	On-demand	Greg White	Taxes (2 hours)	Intermediate	2

IRS Compliance Trends and 10 Actions You Should Take To Help Your Client	On-demand	Jim Buttonow	Taxes (2 hours)	Basic	2
IRS Examinations of Cash Businesses	On-demand	Eric Green	Taxes (2 hours)	Intermediate	2
IRS Tax Problem Solving Fundamentals	On-demand	Jim Buttonow	Taxes (2 hours)	Basic	2
Key Ratio Analysis: Calculating the Numbers Correctly	On-demand	David Osburn	Accounting (2 hours)	Intermediate	2
Key to Maintaining Objectivity and Professional Skepticism	On-demand	Lynn Fountain	Regulatory Ethics (2 hours)	Basic	2
Keys to Managing an Effective Internal Audit Function	On-demand	Lynn Fountain	Auditing (2 hours)	Basic	2
Last Minute Form 1099 Filing Tips	On-demand	Steven Mercatante	Taxes (2 hours)	Basic	2
Leases and Credit Losses: Post Implementation and Lessons Learned	On-demand	Kelen Camehl	Accounting (2 hours)	Basic	2
Leases: Land Easements and Rights-of-Way	On-demand	Pat Patterson	Accounting (2 hours)	Intermediate	2
Leases: New and Existing Leases-Annual & Monthly Accounting	On-demand	Pat Patterson	Accounting (2 hours)	Basic	2
Leases: The Lessor Perspective	On-demand	Pat Patterson	Accounting (2 hours)	Basic	2
Lessee Recording of Existing Leases: Finance of Operating	On-demand	Pat Patterson	Accounting (2 hours)	Basic	2
Lessee Recording of New Leases: Finance and/or Operating	On-demand	Pat Patterson	Accounting (2 hours)	Intermediate	2
Leveraging Big Data for Public Accounting	On-demand	Stephen Yoss	Information Technology (2 hours)	Basic	2
Leveraging Linked Workbooks in Excel	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
Leveraging Microsoft Teams Effectively for Your Organization	On-demand	Stephen Yoss	Computer Software & Applications (2 hours)	Basic	2
Lightning Fast Depreciation: The World of Depreciation (Updated for CARES Act)	On-demand	Greg White	Taxes (4 hours)	Intermediate	4
Like-Kind Exchanges: Qualify as a Valid Section 1031 Exchange	On-demand	Jennifer Kowal	Taxes (2 hours)	Basic	2
Local Tax Issues for Multistate Businesses	On-demand	Debra Herman Hodgson Russ LLP	Taxes (2 hours)	Basic	2
Major Audit Issues for 2024	On-demand	Pat Patterson	Auditing (2 hours)	Update	2
Major Audit Issues: SAS 141, 142, and 143	On-demand	Pat Patterson	Auditing (2 hours)	Basic	2
Major Program Determination	On-demand	Diane Edelstein	Auditing (Governmental) (2 hours)	Basic	2
Making Your Client More Appealing: Taking the Client's Case to Appeals	On-demand	Eric Green	Taxes (2 hours)	Basic	2
Management Discussion and Analysis (MD&A)	On-demand	Lynn Fountain	Auditing (2 hours)	Basic	2
Managing a Multistate Voluntary Disclosure Process in an Economic Nexus World	On-demand	K. Craig Reilly Hodgson Russ LLP	Taxes (2 hours)	Basic	2
Managing a Residency Audit	On-demand	Timothy Noonan Andrew Wright Daniel Kelly Hodgson Russ LLP	Taxes (2 hours)	Overview	2
Managing Cash Flow	On-demand	Rob Stephens	Accounting (3 hours)	Basic	3
Managing Difficult Personalities	On-demand	Lynn Fountain	Auditing (2 hours)	Basic	2
Managing Millennials	On-demand	Jennifer Kowal	Business Management & Organization (2 hours)	Basic	2
Managing Through Corporate Politics: The Achilles Heel of Executing Professional Skepticism	On-demand	Lynn Fountain	Personnel/HR (2 hours)	Basic	2
Marketing the CPA in Public Practice	On-demand	David Osburn	Personnel/HR (2 hours)	Basic	2
Master Vendor File Best Practices	On-demand	Mary Schaeffer	Accounting (2 hours)	Basic	2
Mastering Adobe Acrobat for Financial Professionals	On-demand	Stephen Yoss	Computer Software & Applications (2 hours)	Basic	2

Mastering Audit Documentation	On-demand	Salvatore Collemi	Auditing (2 hours)	Intermediate	2
Mastering Audit Sampling	On-demand	Salvatore Collemi	Auditing (2 hours)	Intermediate	2
Mastering Excel's Custom Views Feature	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
Mastering the AICPA SSARS Requirements	On-demand	Salvatore Collemi	Auditing (2 hours)	Basic	2
Mastering the Six Traits of Executive You	On-demand	Blair Cook	Personnel/HR (5 hours)	Basic	5
		Jennifer Nicholson			
Materiality Changes	On-demand	Pat Patterson	Auditing (2 hours)	Intermediate	2
Maximizing Itemized Deductions under Current Tax Law	On-demand	Greg White	Taxes (2 hours)	Intermediate	2
Maximizing Social Security Benefits	On-demand	Greg White	Taxes (2 hours)	Basic	2
Maximizing the Employee Retention Credit	On-demand	Greg White	Taxes (1 hour)	Update	1
Measuring and Managing Customer Profitability	On-demand	Gary Cokins	Accounting (2 hours)	Basic	2
Mentoring to Increase Employee Retention and Diversity	On-demand	Jennifer Kowal	Business Management & Organization (2 hours)	Basic	2
Mid-Year Tax Update	On-demand	Greg White	Taxes (4 hours)	Update	4
Minimizing Data Entry in Excel	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
Minimizing Expense Reimbursement Headaches Caused by the Traveler, the Manager, and Fraud	On-demand	Mary Schaeffer	Accounting (2 hours)	Basic	2
Money Laundering	On-demand	Robert Minniti	Accounting (1 hour), Auditing (1 hour)	Basic	2
More Excel Speed Tips	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
Multistate Income Allocation and Apportionment	On-demand	Hodgson Russ LLP	Taxes (2 hours)	Basic	2
		Open Banks			
Multistate PTETs and Resident Credits	On-demand	Elizabeth Pascal	Taxes (2 hours)	Basic	2
		Hodgson Russ LLP			
Multistate Tax Issues for Financial Services	On-demand	K. Craig Reilly	Taxes (2 hours)	Basic	2
		Hodgson Russ LLP			
Navigating the Hobby Loss Rules	On-demand	Susan Harper	Taxes (2 hours)	Basic	2
Navigating the Top 10 IRS Issues for Small Businesses	On-demand	Susan Harper	Taxes (2 hours)	Basic	2
Net Investment Income Tax	On-demand	Barbara Weltman	Taxes (1 hour)	Basic	1
		Sidney Kess			
New Auditor's Reporting Standards	On-demand	Salvatore Collemi	Auditing (2 hours)	Intermediate	2
New COVID-19 Frauds and Scams	On-demand	Robert Minniti	Accounting (2 hours)	Basic	2
New Overtime Rules for 2024 & Worker Categorization	On-demand	Robert Minniti	Accounting (2 hours)	Basic	2
New Partnership Reporting of Foreign Items: K-2 and K-3	On-demand	Adnan Islam	Taxes (1 hour)	Overview	1
New Quality Management Issues	On-demand	Pat Patterson	Accounting (1 hour), Auditing (1 hour)	Intermediate	2
Nexus in the Era of Telecommuting and Market-Based Sourcing	On-demand	Christopher Doyle	Taxes (2 hours)	Overview	2
		Emma Savino			
		Hodgson Russ LLP			
Non-Profit Entity Financial Statements	On-demand	Pat Patterson	Accounting (3 hours)	Basic	3
Nonprofit Financial Statements	On-demand	Diane Edelstein	Accounting (5 hours)	Basic	5
Not-for-Profit Issues: Accounting and Auditing Update	On-demand	Pat Patterson	Accounting (1 hour), Auditing (1 hour)	Update	2
Not-for-Profit Reporting Model	On-demand	Diane Edelstein	Accounting (2 hours)	Basic	2
Objectives of the Independent Auditor and the Conduct of an Audit in	On-demand	Lynn Fountain	Auditing (2 hours)	Basic	2

Accordance with GAAS					
Obtaining and Understanding Your Client's IRS Account Information	On-demand	Jim Buttonow	Taxes (2 hours)	Basic	2
Obtaining Innocent Spouse Relief	On-demand	Eric Green	Taxes (2 hours)	Basic	2
OCBOA: Something Old, Something New	On-demand	Pat Patterson	Accounting (2 hours)	Intermediate	2
Office 365 New Dynamic Arrays	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Basic	2
Opportunity Zones	On-demand	James Hamill	Taxes (2 hours)	Intermediate	2
Options for Clients Who Cannot Pay the IRS	On-demand	Jim Buttonow	Taxes (2 hours)	Basic	2
Other than GASB-94 and 96, What You Need to Know for this June 30 Year-End	On-demand	Eric Berman	Accounting (Governmental) (2 hours)	Update	2
Overview of the SECURE Act 2.0	On-demand	Klaralee Charlton	Taxes (2 hours)	Basic	2
Overview of Uniform Guidance	On-demand	Diane Edelstein	Auditing (Governmental) (2 hours)	Basic	2
Overview of Yellow Book	On-demand	Diane Edelstein	Auditing (Governmental) (2 hours)	Basic	2
Partnership and LLC Taxation: Entities Taxed as Partnerships	On-demand	Greg White	Taxes (5 hours)	Basic	5
Partnership and S Corporation Tax Filing Issues	On-demand	James Hamill	Taxes (2 hours)	Basic	2
Partnership Debt Sharing Under Section 752	On-demand	James Hamill	Taxes (2 hours)	Intermediate	2
Partnership Tax Allocations under Sections 704(b) and 704(c)	On-demand	James Hamill	Taxes (2 hours)	Intermediate	2
Partnership Tax Filing Issues	On-demand	James Hamill	Taxes (2 hours)	Intermediate	2
Partnership Tax Updates	On-demand	Allison McLeod	Taxes (2 hours)	Basic	2
Passive Activities: Becoming a Tax Ninja Part 1	On-demand	Greg White	Taxes (2 hours)	Basic	2
Passive Activities: Becoming a Tax Ninja Part 2	On-demand	Greg White	Taxes (2 hours)	Basic	2
Passive Activities: Becoming a Tax Ninja Part 3	On-demand	Greg White	Taxes (2 hours)	Basic	2
Passive Activities: Becoming a Tax Ninja Part 4	On-demand	Greg White	Taxes (2 hours)	Basic	2
Passive Loss Rules and Real Estate Professionals	On-demand	Annette Nellen	Taxes (2 hours)	Basic	2
Payroll Fraud	On-demand	Robert Minniti	Accounting (1 hour), Auditing (1 hour)	Basic	2
Payroll Protection Program and Forgiveness Calculation Update	On-demand	Lynn Fountain	Accounting (1 hour), Auditing (1 hour)	Update	2
Payroll Tax Train-Wreck: Resolving Your Client's Payroll Tax Nightmare	On-demand	Eric Green	Taxes (2 hours)	Intermediate	2
PCI 4.0 Compliance and Credit Card Frauds	On-demand	Robert Minniti	Accounting (2 hours)	Basic	2
Performance Management: CMA Exam Part 1 - Section C	On-demand	Tom Coghlan	Finance (6 hours)	Overview	6
Phishing, Vishing, & Smishing: Protecting your Organization from Frauds in 2023	On-demand	Robert Minniti	Accounting (2 hours)	Basic	2
Planning for the Death of the Majority Shareholder	On-demand	Klaralee Charlton	Taxes (2 hours)	Basic	2
Planning with Intentionally Defective Grantor Trusts	On-demand	Steven Siegel	Taxes (2 hours)	Intermediate	2
Planning, Budgeting, and Forecasting: CMA Exam Part 1 -Section B	On-demand	Tom Coghlan	Finance (6 hours)	Overview	6
Predictive Accounting: Driver-Based Budgeting and Rolling Financial Forecasts	On-demand	Gary Cokins	Accounting (2 hours)	Overview	2
Preparation Engagements and Professional Standards	On-demand	Pat Patterson	Accounting (2 hours)	Update	2
Preparation of State Level Estate Tax Returns	On-demand	Klaralee Charlton	Taxes (2 hours)	Intermediate	2
Preparation vs. Compilation: What Is It?	On-demand	Pat Patterson	Accounting (1 hour), Auditing (1 hour)	Intermediate	2
Preparation, Compilation, and Review: Q & A	On-demand	Pat Patterson	Accounting (2 hours)	Update	2
Preparation, Compilation, Review, and Audit: What's the Difference?	On-demand	Pat Patterson	Accounting (1 hour), Auditing (1 hour)	Update	2
Preparing & Reporting on Personal Financial Statements	On-demand	Robert Minniti	Accounting (2 hours)	Basic	2

Preparing Form 1065: Part 1	On-demand	Greg White	Taxes (4 hours)	Basic	4
Preparing Form 1065: Part 2	On-demand	Greg White	Taxes (4 hours)	Basic	4
Preparing Form 1120S: Part 1	On-demand	Greg White	Taxes (4 hours)	Basic	4
Preparing Form 1120S: Part 2	On-demand	Greg White	Taxes (4 hours)	Basic	4
Preparing Form 706: The Federal Estate Tax Return	On-demand	Steven Siegel	Taxes (2 hours)	Basic	2
Preparing Form 709: The Federal Gift Tax Return	On-demand	Steven Siegel	Taxes (2 hours)	Basic	2
Preparing Personal Financial Statements Update	On-demand	Pat Patterson	Accounting (2 hours)	Basic	2
Preparing the Statement of Cash Flow	On-demand	Robert Minniti	Accounting (2 hours)	Basic	2
Preparing U.S. Personal Tax Returns for Cross Border Persons: Common Tax Issues	On-demand	Patrick McCormick	Taxes (2 hours)	Basic	2
Presentation Skills for Finance Professionals and Executives that Make an Impact	On-demand	Blair Cook	Management Services (1 hour)	Basic	1
Principles of Taxation: Ideas and Planning	On-demand	Greg White	Taxes (4 hours)	Basic	4
Principles of Unrelated Business Income and Form 990-T Reporting Requirements	On-demand	Megan Ryan Danielle Wright Clark Nuber	Taxes (2 hours)	Intermediate	2
Private Foundation Grantmaking Strategies and Best Practices	On-demand	Clark Nuber Sarah Huang	Taxes (2 hours)	Intermediate	2
Private Foundation Pitfalls: Self-Dealing, Taxable Expenditures, and More	On-demand	Clark Nuber Sarah Huang Celia Davis	Taxes (2 hours)	Basic	2
Procurement Standards under Uniform Guidance	On-demand	Diane Edelstein	Auditing (Governmental) (2 hours)	Basic	2
Professional Ethics: CMA Exam 2 - Section F	On-demand	Tom Coghlan	Regulatory Ethics (2 hours)	Overview	2
Proper Documentation Methods for Internal Audit and Internal Controls	On-demand	Lynn Fountain	Auditing (2 hours)	Basic	2
Proving Material Participation for the Passive Loss Rules	On-demand	James Hamill	Taxes (2 hours)	Intermediate	2
Quality Management Standards: Update	On-demand	Pat Patterson	Accounting (1 hour), Auditing (1 hour)	Intermediate	2
Quality Management vs Quality Control: What's the Difference?	On-demand	Pat Patterson	Accounting (1 hour), Auditing (1 hour)	Intermediate	2
QuickBooks Desktop/Microsoft Excel Data Analysis	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
QuickBooks Online Accountant (QBOA) for Public Accounting	On-demand	Stephen Yoss	Computer Software & Applications (2 hours)	Basic	2
QuickBooks Online Accountant Collaborating with Clients	On-demand	Laura Madeira	Computer Software & Applications (2 hours)	Intermediate	2
QuickBooks Online/Microsoft Excel Data Analysis	On-demand	David Ringstrom	Computer Science (2 hours)	Intermediate	2
QuickBooks/Excel Report Speed Tips Part 2	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
QuickBooks/Excel Report Speed Tips: Part 1	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
Real World Blockchain Applications	On-demand	Robert Minniti	Accounting (2 hours)	Basic	2
Recent Changes in Sales and Use Compliance and Reporting	On-demand	Steven Mercatante	Taxes (2 hours)	Basic	2
Red Flags in Small Business Valuations	On-demand	Robert Minniti	Accounting (2 hours)	Basic	2
Reference Rate Reforms	On-demand	Pat Patterson	Accounting (2 hours)	Intermediate	2
Regulation S-K	On-demand	Kelen Camehl	Accounting (1 hour)	Overview	1

Regulatory Ethics Guidebook for CPAs: AICPA Code of Professional Conduct	On-demand	Allison McLeod	Regulatory Ethics (4 hours)	Basic	4
Regulatory Review for California CPAs	On-demand	Pat Patterson	Regulatory Ethics (2 hours)	Overview	2
Reporting Charitable Bequests on Form 706 and Form 1041	On-demand	Klaralee Charlton	Taxes (2 hours)	Intermediate	2
Reporting Illegal & Unethical Acts	On-demand	Robert Minniti	Regulatory Ethics (2 hours)	Basic	2
Reporting in a Single Audit	On-demand	Diane Edelstein	Auditing (Governmental) (2 hours)	Basic	2
Reporting Partnership Targeted Tax Allocations	On-demand	James Hamill	Taxes (2 hours)	Intermediate	2
Residency Part I: New York Issues	On-demand	Hodgson Russ LLP Andrew Wright Kristine Bly K. Craig Reilly	Taxes (2 hours)	Basic	2
Residency Part II: A Multistate (and Multinational) Perspective	On-demand	Hodgson Russ LLP Timothy Noonan James Bandoblu, Jr. Daniel Kelly	Taxes (2 hours)	Basic	2
Resolving Payroll Tax Issues	On-demand	Eric Green	Taxes (2 hours)	Basic	2
Revenue Recognition Disclosure Requirements: Contracts with Customers	On-demand	Lynn Fountain	Accounting (2 hours)	Basic	2
Reviewing Partnership Agreements to Identify Key Tax Issues	On-demand	James Hamill	Taxes (2 hours)	Intermediate	2
Risks and Internal Controls for Employees Working From Home	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
Risks and Rewards of Excel in Office 365	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Basic	2
Roles of IRS - Stakeholder Liaison & National Taxpayer Advocate	On-demand	Susan Harper	Taxes (1 hour)	Basic	1
Roles of IRS Criminal Investigation	On-demand	Susan Harper	Taxes (1 hour)	Basic	1
S Corp. Distributions: Determining the Taxability	On-demand	Jennifer Kowal	Taxes (2 hours)	Basic	2
S Corporation and Shareholder Tax Reporting	On-demand	James Hamill	Taxes (2 hours)	Intermediate	2
S Corporation Basis: How to Calculate the Stock Basis	On-demand	Jennifer Kowal	Taxes (2 hours)	Basic	2
S Corporation Exit Strategies	On-demand	Jennifer Kowal	Taxes (2 hours)	Intermediate	2
S Corporation Taxation Concepts and Planning Strategies: Part 1	On-demand	James Hamill	Taxes (4 hours)	Basic	4
S Corporation Taxation Concepts and Planning Strategies: Part 2	On-demand	James Hamill	Taxes (4 hours)	Intermediate	4
S Corporation Taxation Strategies	On-demand	Greg White	Taxes (4 hours)	Basic	4
S Corporation Taxation: State of the Art Tax Strategies: Part 1	On-demand	Greg White	Taxes (4 hours)	Intermediate	4
S Corporation Taxation: State of the Art Tax Strategies: Part 2	On-demand	Greg White	Taxes (4 hours)	Intermediate	4
S Corporations Part 1: Converting C Corps to S Corps and Preserving S Status	On-demand	Greg White	Taxes (2 hours)	Basic	2
S Corporations Part 2: Determining Reasonable Compensation	On-demand	Greg White	Taxes (2 hours)	Basic	2
S Corporations Part 3: Maximizing the §199A QBID and Other Planning Insights	On-demand	Greg White	Taxes (2 hours)	Basic	2
S Corporations Part 4: Ordinary Losses on Stock Sales, Exit Strategies, and K-1 Conformity	On-demand	Greg White	Taxes (2 hours)	Basic	2
Sale of Closely Held Businesses	On-demand	Jennifer Kowal	Taxes (4 hours)	Intermediate	4
Sales and Use Tax Considerations for Early Stage Companies	On-demand	Hodgson Russ LLP K. Craig Reilly Ariele Doolittle	Taxes (2 hours)	Overview	2
Sales Tax Update: Digital Products and Services	On-demand	Hodgson Russ LLP Joseph Endres	Taxes (2 hours)	Basic	2

		Daniel Kelly Katherine Piazza Diane Edelstein			
Sampling for Single Audit	On-demand		Auditing (Governmental) (2 hours)	Basic	2
Sarbanes Oxley (SOX) Overview	On-demand	Lynn Fountain	Auditing (1 hour), Accounting (1 hour)	Basic	2
Sarbanes Oxley (SOX) Section 404	On-demand	Lynn Fountain	Accounting (1 hour), Auditing (1 hour)	Basic	2
Sarbanes-Oxley Update - 20 Years Later: Examining Fraud Risks	On-demand	Lynn Fountain	Auditing (2 hours)	Basic	2
SAS 146: Quality Management for an Engagement Conducted in Accordance with GAAS	On-demand	Pat Patterson	Auditing (2 hours)	Intermediate	2
Save Your Practice: Form 8867 Landmines for Tax Pros	On-demand	Greg White	Taxes (1 hour)	Overview	1
Schedule C of Form 1040	On-demand	Allison McLeod	Taxes (2 hours)	Basic	2
Schedule E of Form 1040 or 1040-SR	On-demand	Barbara Weltman	Taxes (1 hour)	Basic	1
Searching for Hidden Assets	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2
SEC Climate-Related Disclosures – Deep Dive	Downloadable PDF	Kelen Camehl	Accounting (4 hours)	Basic	4
SEC Climate-Related Disclosures – Overview	Downloadable PDF	Kelen Camehl	Accounting (1 hour)	Basic	1
SEC Climate-Related Disclosures – What You Need To Know	Downloadable PDF	Kelen Camehl	Accounting (2 hours)	Basic	2
SEC Filing and Reporting Requirements: Regulation S-X, S-K and 8K	On-demand	Lynn Fountain	Accounting (2 hours)	Basic	2
SEC Financial Reports: Focus on Form 10K and 10Q	On-demand	Lynn Fountain	Accounting (2 hours)	Basic	2
SEC Mandates and Programs	On-demand	Lynn Fountain	Accounting (2 hours)	Basic	2
SEC Rulemaking and Enforcement	On-demand	Lynn Fountain	Accounting (2 hours)	Basic	2
SEC Structure and Responsibility	On-demand	Lynn Fountain	Accounting (2 hours)	Basic	2
SEC Top Focus Areas: Non-GAAP Financial Measures	On-demand	Kelen Camehl	Accounting (1 hour)	Basic	1
Sec. 199A Cutting Edge Tax Strategies: The Ground Rules and Planning to Optimize the QBID	On-demand	Greg White	Taxes (2 hours)	Basic	2
Sec. 199A Planning Insights	On-demand	Greg White	Taxes (2 hours)	Basic	2
Section 1031 Exchanges: Qualification and Tax Reporting	On-demand	James Hamill	Taxes (2 hours)	Basic	2
Section 1202 and Qualified Small Business Stock	On-demand	Jennifer Kowal	Taxes (2 hours)	Basic	2
Section 199A Qualified Business Income	On-demand	James Hamill	Taxes (2 hours)	Basic	2
Securities Fraud	On-demand	Susan Harper	Specialized Knowledge and Applications (2 hours)	Basic	2
Segment Reporting Basics	Downloadable PDF	Kelen Camehl	Accounting (1 hour)	Basic	1
Segment Reporting: A Detailed Review	Downloadable PDF	Kelen Camehl	Accounting (2 hours)	Basic	2
Segregation of Duties for Core Business Processes	On-demand	Lynn Fountain	Business Management & Organization (2 hours)	Basic	2
Segregation of Duties for the Office of the CFO	On-demand	Lynn Fountain	Business Management & Organization (2 hours)	Basic	2
Select Income Tax Considerations for Crypto and Blockchain Transactions	On-demand	Adnan Islam	Taxes (2 hours)	Intermediate	2
Self-Employment Tax: Today's World of Sharing, LLCs & Tax Reform	On-demand	Annette Nellen	Taxes (2 hours)	Basic	2
Self-Employment Tax: Today's World of Sharing, LLCs, and Tax Reform	On-demand	Annette Nellen	Taxes (2 hours)	Basic	2
Settling Your Tax Bill for Less: Myths vs. Reality	On-demand	Jim Buttonow	Taxes (2 hours)	Basic	2
Simplifying the FASB Codification Research System	On-demand	Lynn Fountain	Accounting (2 hours)	Basic	2
Single Audit Nuts & Bolts	On-demand	Diane Edelstein	Auditing (Governmental) (10 hours)	Basic	10
Single Audit Update: What to Know and How to Prepare	On-demand	Clark Nuber Troy Rector	Auditing (Governmental) (2 hours)	Intermediate	2

		Kelly Rancourt			
Six Ways to Sum in Excel	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
Sleeper Features and Functions in Microsoft Excel	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
Small Business Retirement Plans: Picking the Best Plan for Your Client	On-demand	Greg White	Taxes (2 hours)	Basic	2
Small Business Tax Frauds	On-demand	Robert Minniti	Accounting (1 hour), Auditing (1 hour)	Basic	2
Social Security and Medicare Planning Quarterly Update (Spring 2023)	On-demand	Steven Siegel	Specialized Knowledge and Applications (2 hours)	Update	2
Social Security and Medicare Planning Quarterly Update (Winter 2023)	On-demand	Steven Siegel	Specialized Knowledge and Applications (2 hours)	Update	2
Solving Tax Research Puzzles	On-demand	Jennifer Kowal	Taxes (4 hours)	Intermediate	4
Special Gift Tax Issues	On-demand	Klaralee Charlton	Taxes (2 hours)	Basic	2
Specific New Auditing Standards in SAS 134 for 2020	On-demand	Pat Patterson	Auditing (2 hours)	Intermediate	2
Spreadsheet Skyscrapers vs. Spreadsheet Sprawl	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Basic	2
SQL For Excel Users	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
SSARS 25 and Materiality Changes to Preparation, Compilation and Review Engagements	On-demand	Pat Patterson	Accounting (2 hours)	Intermediate	2
SSARS 26 and Quality Management	On-demand	Pat Patterson	Auditing (2 hours)	Intermediate	2
Staff Training Part 1: Individuals	On-demand	Greg White	Taxes (5 hours)	Basic	5
Staff Training Part 2: Individuals	On-demand	Greg White	Taxes (4 hours)	Basic	4
Staff Training Part 3: Individuals	On-demand	Greg White	Taxes (5 hours)	Basic	5
Staff Training Part 4: Individuals	On-demand	Greg White	Taxes (4 hours)	Basic	4
Staff Training Part 5: Partnerships	On-demand	Greg White	Taxes (5 hours)	Basic	5
Staff Training Part 6: S & C Corporations	On-demand	Greg White	Taxes (4 hours)	Basic	4
State and Local Reporting: 1099 and SALT Issues	On-demand	Steven Mercatante	Taxes (2 hours)	Basic	2
State Tax Considerations When Selling a Business	On-demand	Hodgson Russ LLP K. Craig Reilly Open Banks Katherine McDonald	Taxes (2 hours)	Overview	2
State Taxation of Passthrough Entities and the Federal Deduction	On-demand	Hodgson Russ LLP Christopher Doyle Elizabeth Pascal William Turkovich	Taxes (2 hours)	Basic	2
Strategies to Conquer the Overwhelming Complexity of Tax Laws	On-demand	Annette Nellen	Taxes (2 hours)	Intermediate	2
Strategy Management with a Strategy Map and its Balanced Scorecard	On-demand	Gary Cokins	Business Management & Organization (2 hours)	Basic	2
Structuring United States Activities of a Nonresident Business	On-demand	Patrick McCormick	Taxes (2 hours)	Basic	2
Subrecipient Monitoring under Uniform Guidance	On-demand	Diane Edelstein	Auditing (Governmental) (2 hours)	Basic	2
Substantiation of Business Expenses	On-demand	Jennifer Kowal	Taxes (2 hours)	Basic	2
Taking Your Accounts Payable Function Beyond Best Practice	On-demand	Mary Schaeffer	Accounting (2 hours)	Basic	2
Taming Large Excel Spreadsheets	On-demand	David Ringstrom	Computer Software &	Intermediate	2

			Applications (2 hours)		
Tax Aspects to Lawsuits, Awards, and Settlements	On-demand	Susan Harper	Taxes (2 hours)	Basic	2
Tax Breaks, Tips, and Updates: Part 1	On-demand	Eva Rosenberg	Taxes (2 hours)	Update	2
Tax Breaks, Tips, and Updates: Part 2	On-demand	Eva Rosenberg	Taxes (2 hours)	Update	2
Tax Consequences of Business Breakups	On-demand	Jennifer Kowal	Taxes (2 hours)	Basic	2
Tax Credits for Businesses	On-demand	Barbara Weltman	Taxes (1 hour)	Basic	1
Tax Credits for Individuals	On-demand	Barbara Weltman	Taxes (1 hour)	Basic	1
Tax Ethics and Circular 230	On-demand	Jennifer Kowal	Regulatory Ethics (2 hours)	Basic	2
Tax Implications in a Remote Work Environment: State Tax Nexus and Income Tax Issues	On-demand	Ariele Doolittle Hodgson Russ LLP	Taxes (2 hours)	Basic	2
Tax Implications of Cryptocurrency	On-demand	Allison McLeod	Taxes (2 hours)	Basic	2
Tax Issues in Corporate Mergers and Acquisitions	On-demand	Jennifer Kowal	Taxes (4 hours)	Intermediate	4
Tax Issues Involving Troubled Borrowers	On-demand	Jennifer Kowal	Taxes (2 hours)	Intermediate	2
Tax Liens and Levies	On-demand	Eric Green	Taxes (2 hours)	Basic	2
Tax Planning for Marriage and Divorce	On-demand	Jennifer Kowal	Taxes (2 hours)	Basic	2
Tax Planning for Purchases and Sales of Property: Part 1	On-demand	Greg White	Taxes (2 hours)	Basic	2
Tax Planning for Purchases and Sales of Property: Part 2	On-demand	Greg White	Taxes (2 hours)	Basic	2
Tax Practice Standards	On-demand	Allison McLeod	Regulatory Ethics (2 hours)	Basic	2
Tax Practice: Becoming a Tax Ninja	On-demand	Greg White	Taxes (4 hours)	Basic	4
Tax Research Made Easy with CCH AnswerConnect	On-demand	John Payne	Taxes (1 hour)	Basic	1
Tax Return Identity Theft	On-demand	Robert Minniti	Taxes (2 hours)	Basic	2
Tax Rules for Vehicles	On-demand	Barbara Weltman	Taxes (2 hours)	Basic	2
Tax Savings With Exports Using The Deduction for Foreign Derived Intangible Income and the IC-DISC	On-demand	Robert Misey	Taxes (2 hours)	Basic	2
Tax Season Tune Up	On-demand	Bradley Burnett	Taxes (2 hours)	Update	2
Tax Strategies for Partnerships Part 1: Formation, Purchase, and Sales of Partnership Interests	On-demand	Greg White	Taxes (2 hours)	Basic	2
Tax Strategies for Partnerships Part 2: Operating Issues	On-demand	Greg White	Taxes (2 hours)	Basic	2
Tax Strategies for Partnerships Part 3: Allocations, Partnership Audit Rules, and Self-Employment	On-demand	Greg White	Taxes (2 hours)	Basic	2
Tax Strategies for Partnerships Part 4: Maximizing the QBID and Minimizing Self-Employment Taxes	On-demand	Greg White	Taxes (2 hours)	Basic	2
Tax Strategies for Passive Activities	On-demand	Greg White	Taxes (2 hours)	Basic	2
Tax Updates for 2021 Individual Planning and Due Diligence	On-demand	Annette Nellen	Taxes (4 hours)	Update	4
Taxability of Judgments and Settlements	On-demand	Allison McLeod	Taxes (2 hours)	Basic	2
Taxable Vs. Non-Taxable Fringe Benefits	On-demand	Steven Mercatante	Taxes (2 hours)	Basic	2
Taxation of Business Entities	On-demand	Allison McLeod	Taxes (2 hours)	Basic	2
Taxation of Employee Stock and Stock Options	On-demand	Jennifer Kowal	Taxes (2 hours)	Intermediate	2
Taxation of Foreign Partnerships and How to Report the Information Required by Form 8865	On-demand	Robert Misey	Taxes (2 hours)	Basic	2
Taxation of Life Insurance Proceeds	On-demand	Klaralee Charlton	Taxes (2 hours)	Basic	2
Taxation of Non-fungible Tokens (NFTs)	On-demand	Allison McLeod	Taxes (2 hours)	Basic	2
Taxation of the Family Home	On-demand	Klaralee Charlton	Taxes (2 hours)	Basic	2
Telecommuting and Beyond: Tax Issues for the Employer	On-demand	Hodgson Russ LLP Elizabeth Pascal Emma Savino	Taxes (2 hours)	Basic	2

Testing Internal Controls in a Single Audit	On-demand	Diane Edelstein	Auditing (Governmental) (2 hours)	Basic	2
The 10 Best (and 3 Worst) Excel Features for Accountants	On-demand	David Ringstrom	Specialized Knowledge and Applications (2 hours)	Basic	2
The Accounts Payable Function of Tomorrow: The Impact of New Technology	On-demand	Mary Schaeffer	Accounting (2 hours)	Basic	2
The Art of Being A Good Manager: Part 1: Traits and Skills in the New Normal	On-demand	Lynn Fountain	Personnel/HR (2 hours)	Basic	2
The Art of Being A Good Manager: Part 2: Generational and Cultural Considerations	On-demand	Lynn Fountain	Personnel/HR (2 hours)	Basic	2
The Balance Sheet: Reporting in Compliance with GAAP	On-demand	Lewis Fisher	Accounting (2 hours)	Basic	2
The Biggest Mistakes Made During Tax Season that Trigger IRS Enforcement!	On-demand	Eric Green	Taxes (2 hours)	Basic	2
The Budgeting Process	On-demand	Rob Stephens	Finance (2 hours)	Basic	2
The Controllership Series: Future Role of the Controller: Part 1	On-demand	Lynn Fountain	Accounting (2 hours)	Basic	2
The Controllership Series: Future Role of the Controller: Part 2	On-demand	Lynn Fountain	Accounting (2 hours)	Basic	2
The CPA's Role in Negotiating Loan Covenants	On-demand	David Osburn	Accounting (2 hours)	Basic	2
The Criminal Investigation Process	On-demand	Eric Green	Taxes (2 hours)	Basic	2
The Dirty Dozen Tax Scams: What You Should Know to Protect Your Clients	On-demand	Susan Harper	Taxes (2 hours)	Basic	2
The Financial Reporting Model is almost done - What is in it	On-demand	Eric Berman	Accounting (Governmental) (2 hours)	Update	2
The Future of Accounting: Big Data and Artificial Intelligence	On-demand	Cory Campbell	Information Technology (2 hours)	Basic	2
The Future of Internal Audit	On-demand	Lynn Fountain	Auditing (2 hours)	Basic	2
The Impact of Lease Changes: ASU 2016-02	On-demand	Pat Patterson	Accounting (2 hours)	Basic	2
The Impact of the Digital Revolution on the Accounting Profession	On-demand	Gary Cokins	Computer Software & Applications (2 hours)	Overview	2
The Inflation Reduction Act - What the IRS is doing with \$80 Billion	On-demand	Susan Harper	Taxes (2 hours)	Basic	2
The Intersection of Fiduciary Accounting and Taxation	On-demand	Klaralee Charlton	Accounting (2 hours)	Intermediate	2
The IRS Collection Process	On-demand	Susan Harper	Taxes (1 hour)	Basic	1
The IRS Examination Process	On-demand	Susan Harper	Taxes (1 hour)	Basic	1
The Latest and Greatest in Helping Clients Claim Home Energy Credits	On-demand	Annette Nellen	Taxes (2 hours)	Overview	2
The Many Applications of IRC 1014	On-demand	Klaralee Charlton	Taxes (2 hours)	Basic	2
The Master Budget and Sub-Budgets	On-demand	Rob Stephens	Finance (3 hours)	Basic	3
The Road to Compliance: Understanding the Corporate Transparency Act and FinCEN Beneficial Ownership	On-demand	David Morrissey Steven Antico, Esq Garfunkel Wild P.C.	Finance (1 hour)	Overview	1
The Schedule of Expenditures of Federal Awards (SEFA)	On-demand	Diane Edelstein	Auditing (Governmental) (2 hours)	Basic	2
The Science of Well Being in the Workplace, or How to Be Happy at Work	On-demand	Jennifer Kowal	Personnel/HR (2 hours)	Basic	2
The Statement of Cash Flows: Compliance & Presentation Update	On-demand	Lewis Fisher	Accounting (2 hours)	Update	2
The Uses of Trusts and their Tax Consequences	On-demand	Steven Siegel	Taxes (8 hours)	Basic	8
Theft of Data & Intellectual Property	On-demand	Susan Harper	Taxes (2 hours)	Basic	2
Time Management	On-demand	Amy McCormick Ken Polk	Business Management & Organization (1 hour)	Basic	1
Tips to 1042/1042-S Report Successfully in 2024	On-demand	Steven Mercatante	Taxes (2 hours)	Basic	2

Top 7 Trends in Management Accounting	On-demand	Gary Cokins	Accounting (2 hours)	Overview	2
Top Accounting and Auditing Issues for 2023 CPE Course: Module 1	Downloadable PDF	Robert Minniti Lewis Fisher	Accounting (6 hours)	Basic	6
Top Accounting and Auditing Issues for 2023 CPE Course: Module 2	Downloadable PDF	Robert Minniti Pat Patterson	Auditing (6 hours)	Basic	6
Top Accounting and Auditing Issues for 2023 CPE Course: Module 3	Downloadable PDF	Kelen Camehl	Accounting (4 hours)	Basic	4
Top Accounting and Auditing Issues for 2024 CPE Course: Module 1	Downloadable PDF	Salvatore Collemi Lynn Fountain Robert Minniti	Accounting (6 hours)	Basic	6
Top Accounting and Auditing Issues for 2024 CPE Course: Module 2	Downloadable PDF	Salvatore Collemi Lynn Fountain	Auditing (5 hours)	Intermediate	5
Top Federal Tax Issues for 2023 CPE Course: Module 1	Downloadable PDF	Jim Buttonow Steven Mercatante Allison McLeod Greg White James Hamill	Taxes (11 hours)	Basic	11
Top Federal Tax Issues for 2023 CPE Course: Module 2	Downloadable PDF	Allison McLeod Greg White Steven Siegel Eric Green	Taxes (12 hours)	Basic	12
Top Federal Tax Issues for 2024 CPE Course: Module 1	Downloadable PDF	James Hamill Klaralee Charlton Barbara Weltman Ariele Doolittle	Taxes (8 hours)	Basic	8
Top Federal Tax Issues for 2024 CPE Course: Module 2	Downloadable PDF	Greg White Susan Harper Robert Minniti	Taxes (10 hours)	Basic	10
Top Skills for Internal Audit Management	On-demand	Lynn Fountain	Business Management & Organization (2 hours)	Basic	2
Topic 606: Revenue Recognition for Software and Technology	On-demand	Lynn Fountain	Accounting (2 hours)	Basic	2
Transactional Tax Basis Capital Reporting	On-demand	James Hamill	Taxes (2 hours)	Intermediate	2
Transfer Pricing and How to Complete Form 5472	On-demand	Robert Misey	Taxes (2 hours)	Basic	2
Transfer Taxes for the Multinational Individual	On-demand	Patrick McCormick	Taxes (2 hours)	Intermediate	2
Travel and Entertainment Best Practices: Prevent Fraud and Comply with IRS Regs	On-demand	Mary Schaeffer	Accounting (2 hours)	Basic	2
Travel Pay, Travel Expense Reimbursement and Liability for the Acts of Employees	On-demand	Miles Hutchinson	Specialized Knowledge (2 hours)	Basic	2
Trust Fundamentals: A Practical Primer for Tax Practitioners	On-demand	Steven Siegel	Taxes (2 hours)	Basic	2
U.S. Tax Treaties: Planning, Application, and Compliance	On-demand	Robert Misey	Taxes (2 hours)	Basic	2
Understanding Contracts Better Than Your Lawyer	On-demand	Paul Jorgensen	Business Law (3 hours)	Basic	3
Understanding Risk-Based Auditing	On-demand	Lynn Fountain	Auditing (2 hours)	Basic	2
Understanding the Basics of Robotic Process Automation (RPA)	Downloadable PDF	Kelen Camehl	Accounting (1 hour)	Basic	1
Understanding the Federal Gift Tax	On-demand	Steven Siegel	Taxes (2 hours)	Overview	2
Understanding the New Forms K-2 and K-3	On-demand	Allison McLeod	Taxes (2 hours)	Basic	2
Unique Areas for Auditing of Not-for-Profit Organizations	On-demand	Diane Edelstein	Auditing (2 hours)	Basic	2
Unusual Lease Accounting Issues: Disclosures, Cancellations, Dispositions, and Statement Presentatio	On-demand	Pat Patterson	Accounting (1 hour), Auditing (1 hour)	Update	2
Using Data Analytics in an Audit	On-demand	Robert Minniti	Auditing (2 hours)	Basic	2

Using Excel What-If Analysis: When, Why, and How	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Intermediate	2
Using the COSO Framework	On-demand	Robert Minniti	Accounting (2 hours)	Basic	2
Using the Great Resignation to Your Organization's Advantage: Attracting the Best Talent	On-demand	Jennifer Kowal	Personnel/HR (2 hours)	Basic	2
Value-Based Enterprise Management in Government	On-demand	Gary Cokins	Business Management & Organization (2 hours)	Overview	2
W-8/1042-S Compliance When Making Payments to Non-U.S. Persons	On-demand	Steven Mercatante	Taxes (2 hours)	Basic	2
W-9 Best Practices	On-demand	Steven Mercatante	Taxes (2 hours)	Basic	2
WEP, GPO, Divorce, and other Social Security Nuances for Advanced Knowledge	On-demand	Theodore Sarenski	Specialized Knowledge and Applications (1 hour)	Advanced	1
What You Need to Know About the IFAC Standards	On-demand	Salvatore Collemi	Auditing (2 hours)	Basic	2
What You Need to Know About the New Leasing Standard	On-demand	Salvatore Collemi	Accounting (2 hours)	Intermediate	2
What's Coming Next: 2022 Technology for Today's Financial Professional	On-demand	Stephen Yoss	Information Technology (2 hours)	Basic	2
What's New in Microsoft 365	On-demand	David Ringstrom	Computer Software & Applications (2 hours)	Basic	2
When Your Client Dies: Final Form 1040, Post-Death Elections and More	On-demand	Steven Siegel	Taxes (2 hours)	Intermediate	2
Why Estate Planning is Still Alive for those not Subject to the Estate Tax	On-demand	Klaralee Charlton	Taxes (2 hours)	Basic	2
Winning the Leadership Race	On-demand	Ed Robinson	Personnel/HR (2 hours)	Basic	2
Worker Classification: Dealing with Current Rules and What Might Lie Ahead	On-demand	Annette Nellen	Taxes (2 hours)	Basic	2
Working with Small Businesses in Bankruptcy	On-demand	Robert Minniti	Finance (2 hours)	Basic	2
Working with the Cloud During Tough Times	On-demand	Stephen Yoss	Information Technology (2 hours)	Basic	2
Working with Whistleblowers Reporting Illegal Acts	On-demand	Robert Minniti	Regulatory Ethics (2 hours)	Basic	2
Wrapping Up 2023, What You Need to Know for Calendar Year end Governments	On-demand	Eric Berman	Accounting (Governmental) (2 hours)	Update	2
Year-End Accounting and Tax Considerations for Not-for-Profits	On-demand	Sarah Huang Andrew Prather	Taxes (2 hours)	Basic	2
Year-End Tax Update for Not-for-Profits	On-demand	Clark Nuber Frances Olson Jennifer Becker Harris	Taxes (2 hours)	Update	2
You Suspect Fraud? Now What?	On-demand	Robert Minniti	Accounting (1 hour), Auditing (1 hour)	Basic	2