Resource Course Catalog

Transforming Business
CPACharge is an easy-to-use practice management tool trusted by more than 60,000 successful professionals, developed exclusively for CPAs to help manage payments and grow revenue in their practice.

### DESIGNED FOR CPAs

- **0%, $2/TRANSACTION**
- **eCHECK PROCESSING**
- **RECURRING BILLING AND SCHEDULED PAYMENTS**
- **SECURE, CUSTOMIZABLE PAYMENT PAGES**
- **PCI COMPLIANCE INCLUDED ($150 VALUE)**
- **SIMPLE REPORTING AND RECONCILIATION**
- **UNLIMITED SUPPORT BY PHONE, LIVE CHAT, AND EMAIL**

### Payment Detail

Submit to Smith Johnson, CPA

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CPACharge is proud to be a vetted and approved Member Benefit of the Indiana CPA Society

Special offer for INCPAS members

[cpacharge.com/incpas](http://cpacharge.com/incpas)

866-449-5640
NEW FOR YOU IN 2019

There’s a lot of exciting new things at the Society — here’s a quick rundown of what to expect and take advantage of with your member benefits this year.

**LEARNING YOUR WAY: New ways for you to learn**
We have added new learning opportunities, including case studies, blended learning and live simulcasts. To review all of the new opportunities, see details on [page 7](#).

**OFFICE LOCATION: Update your records with our new address**
The INCPAS Learning Center is now located at 900 E. 96th St., #250, Indianapolis, IN 46240. The new space features modern classrooms and brand new technology. For all event locations, see details on [page 2](#).

**PAPERLESS MATERIALS: For all seminars and conferences**
Electronic materials will be available through your incpas.org account. Printed manuals are no longer provided for seminar courses and INCPAS conferences. See details on [page 2](#).

**FLEXPASS PACKAGES: Buy now and save on CPE**
Buy a FlexPass package now and schedule your courses later. Choose from INCPAS conferences, live seminars, simulcasts and CPA Center of Excellence® online interactive courses. Webinars are not eligible. See details on [page 4](#).

**LEARNING CONCIERGE: Make the most of your 40 hours of CPE to enhance your professional development**
Your Learning Concierge will help you find the best courses to fit your needs—whether it’s for technical updates, personal development or the right networking opportunities. See details on [page 4](#).

**IN THE KNOW WEBINARS: Earn at least 8 hours of free CPE each year**
This webinar series counts for live CPE hours. A diverse range of expert speakers cover strategic topics. See details on [page 7](#).
NEW OFFICE LOCATION

INCPAS Learning Center
900 E. 96th St., #250
Indianapolis, IN 46240

Facility Rental: INCPAS rents its classrooms, conference room and board room to outside groups for meetings and trainings. Members receive discounted rates. Contact Christina Pristasch for pricing and details at (317) 726-5014 or cpristasch@incpas.org.

GENERAL INFORMATION

- Please note that course dates, locations, discussion leaders and/or pricing are subject to change without notice. Be sure to verify course information online under “CPE and Events” or calling member services before purchasing a course.
- Attendees are encouraged to dress in layers when attending CPE courses, regardless of the season, since it is difficult to manage temperatures in large spaces and each attendee has their own level of comfort for different climates.
- Smoking, firearms, pets and children are not allowed at INCPAS events. Exceptions include service animals meeting the ADA requirements and special events where family members are invited to attend.

REGISTER EARLY: AVOID CANCELLED COURSES

Help us deliver the education you want by registering early. We recognize your schedule is busy, and we don’t want to cancel programs due to low attendance. For planning purposes, we make a decision whether the program is a “go” at least two weeks prior to the program date based on expected attendance.

COURSE TIMES

All course times are local time. 8-hour courses are from 8:30 a.m.–4:30 p.m., unless otherwise noted. 4-hour AM courses are from 8:30 a.m.–Noon, and PM courses are from 1–4:30 p.m. Please check individual 1- and 2-hour courses for start times.

LUNCH

Course fees do not include lunch unless indicated. All conferences include lunch.

INCPAS seminars are paperless. Manuals are available for download five business days prior to the date of the event. We will send a reminder email from info@incpas.org once the materials link is active. Printed manuals are no longer distributed onsite.

To access your materials, log in to your incpas.org account. Go to the “My Event Materials” section and click the down arrow to see your materials. If you would like a printed copy, you may download and print prior to the event.

Go to incpas.org/green for more info.
EVENT LOCATIONS

Batesville
Hillcrest Country Club
850 N. Walnut St.
(812) 934-3401

Bloomington
Monroe Convention Center
302 S. College Ave.
(812) 336-3681

Carmel
Drury Plaza Hotel
9625 N. Meridian St.
(317) 587-2701

Ritz Charles
12156 N. Meridian St.
(317) 846-9158

Evansville
Tropicana Evansville
421 NW Riverside Dr.
(812) 433-4000

Fort Wayne
Grand Wayne Center
120 W. Jefferson Blvd.
(260) 426-4100

Indiana Roof Ballroom
140 W. Washington St.
(317) 236-1870

Indianapolis
New Address
INCPAS Learning Center
900 E. 96th St., Suite 250
Indianapolis, IN 46240
(317) 726-5000
1-800-272-2054

Indianapolis Marriott East
7202 E. 21st St.
(317) 352-1231

Indianapolis Marriott North
3645 River Crossing Pkwy
(317) 705-0000

Jeffersonville
Sheraton Louisville—Riverside
700 W. Riverside Dr.
(812) 284-6711

Kokomo
Kokomo Country Club
1801 Country Club Dr.
(765) 457-3278

Lafayette
Four Points by Sheraton
1600 Cumberland Ave.
(765) 463-5511

Holiday Inn—City Centre
515 South St.
(765) 423-1000

Lafayette
Indiana Wesleyan University’s
Merrillville Education &
Conference Center
8415 Georgia St.
(219) 769-5100

Muncie
Horizon Convention Center
401 S. High St.
(765) 288-8860

South Bend
Century Center
120 S. Dr. Martin Luther
King Jr. Blvd.
(574) 235-9711

Embassy Suites at Notre Dame
1140 E. Angela Blvd.
(574) 400-2600

Terre Haute
Holiday Inn
3300 US Hwy 41 S.
(812) 232-6081

Merrillville
Indiana Wesleyan University’s
Merrillville Education &
Conference Center
8415 Georgia St.
(219) 769-5100

Evansville
421 NW Riverside Dr.
(812) 433-4000

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3300 US Hwy 41 S.
(812) 232-6081

Indianapolis Hotels with Discounted Rates

To receive discount, ask for the Indiana CPA Society (INCPAS) rate.

Drury Plaza Hotel
9625 N. Meridian St.
Indianapolis, IN 46290
$119/night

Call 1-800-378-7946 and provide our company name: Indiana CPA Society. Or, use the following link to reserve online with INCPAS corporate ID #329514: http://www.druryhotels.com/Reservations.aspx?corpid=329514.

SpringHill Suites Carmel
11855 N. Meridian St.
Carmel, IN 46032
Rates range from $109–119/night

Contact Amanda Michelsen for the Indiana CPA Society Good Neighbor Rate at (317) 708-5341 or amanda.michelsen@interstatehotels.com.
Forget discount codes and registering months — even weeks — in advance.

Buy a FlexPass package now and schedule your courses later. Choose from INCPAS conferences, live seminars, simulcasts or CPA Center of Excellence® online interactive courses. Webinars are not eligible.

**FLEXPASS PACKAGES**

- 16 hours – $590 / savings of at least $100*
- 24 hours – $875 / savings of at least $170*
- 40 hours – $1450 / savings of at least $295*

Learn more at incpas.org/flexpass.

*Based on 8-hour course prices.

**LEARNING CONCIERGE**

Make the most of your 40 hours of CPE to enhance your professional development.

Do you need help identifying the best courses that fit your career goals? Whether it’s technical updates, personal development or finding the right networking opportunities, a Learning Concierge can help you customize your education. Sign up for FlexPass and talk to a Learning Concierge at (317) 726-5000 to get your personalized recommendations.
INDIANA CPA SOCIETY CPE REGISTRATION

MEMBER ID NO.  FULL NAME

NAME TO GREET BY  FIRM/COMPANY

WORK PHONE NO.  FAX NO.

EMAIL

STREET ADDRESS (no P.O. Boxes)

CITY  STATE  ZIP CODE

I am not participating in the 2019 FlexPass Program.

I am participating in the 2019 FlexPass Program; I have read the policies and agree to abide by them. I understand that if I fail to follow these policies, my participation in the program will be revoked. For the policies, please refer to incpas.org/flexpass.

Select your package(s):

- 16-hour FlexPass package $590
- 24-hour FlexPass package $875
- 40-hour FlexPass package $1450

TOTAL

Method of Payment

AMEX  Discover  MasterCard  Visa  Check

CREDIT CARD NO.  EXP. DATE  CVV# (last 3 digits on back of card)

NAME INDICATED ON CARD  SIGNATURE

Payment must be submitted with the registration form. Make checks payable to: Indiana CPA Society, P.O. Box 40069, Indianapolis, IN 46240-0069. You may also register by phone: (317) 726-5000 or 1-800-272-2054 or fax: (317) 726-5005. For more information, email: info@incpas.org or go to incpas.org.
2019 CONFERENCE CALENDAR

CPAS IN BUSINESS & INDUSTRY CONFERENCE
June 19
Ritz Charles, Carmel
Member $254 | Nonmember $399
Who Should Attend: CFOs, controllers and financial officers

NOT-FOR-PROFIT CONFERENCE
July 25
Marriott East, Indianapolis
Member $254 | Bring a Colleague or Client $179 | Nonmember $399
Who Should Attend: CPAs in public accounting who have not-for-profit clients and CPAs working as staff at not-for-profit organizations

New CYBERSECURITY CONFERENCE
August 22
Ritz Charles, Carmel
Member $359 | Nonmember $509
Who Should Attend: CPAs interested in the latest trends in fraud, forensics, cybersecurity and emerging technology

ACCOUNTING & AUDITING CONFERENCE
September 24
Ritz Charles, Carmel
Member $359 | Nonmember $509
Who Should Attend: CPAs with an active license who need to stay up-to-date with accounting and auditing

BUSINESS VALUATION CONFERENCE
October 24
INCPAS Learning Center, Indianapolis
Member $359 | Nonmember $509
Who Should Attend: CPAs specializing in business valuation who want to hone their skills and collaborate with other business valuation professionals

New SMALL FIRM SUMMIT
November 7
INCPAS Learning Center, Indianapolis
Member $254 | Nonmember $399
Who Should Attend: Sole practitioners or CPAs at firms with one to three partners

INDIANA TAX CONFERENCE
November 20
Ritz Charles, Carmel
Member $359 | Nonmember $509
Who Should Attend: Experienced tax practitioners in public or private accounting

Register online at incpas.org/conferences.
Early Bird: Receive $25 off if you register at least three weeks before the conference.
LEARNING YOUR WAY

Be on the lookout for these Brand New opportunities.

We added new ways for you to learn in addition to our traditional CPE and conferences. Mix and match based on your interests and professional needs. Talk to a Learning Concierge to get custom recommendations. Call (317) 726-5000.

BLENDED LEARNING
Combination of virtual and live events

In Summer 2019, Donny Shimamato, CPA, CGMA, CITP, will lead a multi-course session on IT risk management. These courses will be both online and in person for a new blended learning approach.

LIVE SIMULCASTS
Live education even if you’re out of town

INCPAS has started hosting live simulcasts from the INCPAS Learning Center. You’ll be able to attend in-person or online. To find which courses will be simulcast go to cpe.incpas.org and search “Simulcast.”

BREAKFAST & LUNCH SERIES
Facilitated discussions and networking

INCPAS is bringing back and expanding this popular series. Morning and afternoon events will be scheduled around the state and count for 1 or 2 hours of CPE.

Don't forget about our other offerings

IN THE KNOW WEBINARS
Earn at least 8 hours of free CPE each year

In the Know is a webinar series that counts for live CPE hours. These webinars provide timely information on hot topics, emerging trends and issues impacting the profession. A diverse range of expert speakers cover many strategic topics. INCPAS President & CEO Jennifer Briggs, CAE, gives a quarterly INCPAS update on a broader range of Society and profession topics. See current schedule at incpas.org/intheknow. Webinars are released quarterly.

CASE STUDIES
Engage, retain, improve

Did you know you retain more of what you learn by doing hands-on exercises? We included more case studies in our course catalog to make it easy for you to find one to suit your needs. To find case studies in the Resource, look for course listings with the Case Study icon. To find them online, go to cpe.incpas.org and search “Case Study.”

CPA CONVERSATIONS
Interactive discussions with the INCPAS President & CEO

This is your chance to share your thoughts and questions with INCPAS President & CEO Jennifer Briggs, CAE. She’ll share a brief overview of current issues, your expanding role in business, what the future looks like for the profession, and Society news and events. See current schedule at incpas.org/CPAconvos.

70% of your learning opportunities should be experiential — on-the-go or on-the-job and easily built into your daily routines.

—AICPA & CIMA
LEARNING YOUR WAY, CONTINUED

CPA CENTER OF EXCELLENCE® SHORTENED ONLINE
INTERACTIVE COURSES
Leadership and communication skills in less time

You can look up technical information whenever you need it, but what about when you need to quickly figure out best practices in leadership or communications? The CPA Center of Excellence® has introduced shorter courses that help improve those skills. The short, flexible online format makes it ideal to work them into your schedule. Choose from Modern Leadership, Leadership Styles, Leadership vs. Management, Leading for Action, Modern Communication, Communication in Organizations, and Communications Strategy. Each course counts for a 2-hour CPE waiver.

See below for course descriptions. Register online at incpas.org/coe-courses.

New CPA Excellence: Communication Strategy
Date: Open
Enrollment Time: 90 days to complete the course
CPE: 2-hour waiver of live CPE
Member | Nonmember: $49

Overview: Learn how to plan for a better communication experience; explore the communication cycle, channels and patterns; be able to tailor communication to your audience; identify the “7 Cs” of communication; and learn to ask “open questions” and understand their use in conversations.

Audience: CPAs who want to improve their communication skills
Source: CPA Center of Excellence®
Level: Intermediate

New CPA Excellence: Communication in Organizations
Date: Open
Enrollment Time: 90 days to complete the course
CPE: 2-hour waiver of live CPE
Member | Nonmember: $49

Overview: Learn how to communicate better within an organizational setting; understand the nature of assertiveness in relation to communication skills; tailor communication according to the character of the receiver; explore the role of authenticity in communications; articulate the importance of perspective and empathy; ways better questions can lead to better communications; practical strategies for conducting one-on-one meetings; and learn how to work with managers with poor communications skills.

Audience: CPAs who want to improve their communication skills
Source: CPA Center of Excellence®
Level: Intermediate

CASE STUDIES:
ENGAGE, RETAIN, IMPROVE
Did you know you retain more of what you learn by doing hands-on exercises?

We included more case studies in our course catalog to help you enhance your knowledge and long-term learning.

To find case studies in the Resource, look for course listings with the Case Study icon.

To find case studies online and register for them, go to cpe.incpas.org and search “Case Study.”
**New CPA Excellence: Ethics – Organizational Case Study**

*Highly rated by over 98% of participants*

**Date:** Open  
**Enrollment Time:** 90 days to complete the course  
**CPE:** Fulfills Indiana ethics requirement  
**Member | Nonmember:** $99

**Overview:** Over the span of 11 years, Wells Fargo employees created 3.5 million fake accounts to meet unreasonably high sales goals. Of these accounts, 190,000 of them had fees — so customers were on the hook for charges they never signed up for, leading to overdraft fees. Examine what happened at Wells Fargo; how the organization’s culture contributed to such extreme behavior; what different employees, especially those in accounting, could or should have done to prevent the crimes; and methods to prevent this type of activity.

**Audience:** Any CPA licensed in Indiana who needs Ethics credit  
**Source:** CPA Center of Excellence®  
**Level:** Intermediate

**New CPA Excellence: Leadership Styles**

**Date:** Open  
**Enrollment Time:** 90 days to complete the course  
**CPE:** 2-hour waiver of live CPE  
**Member | Nonmember:** $49

**Overview:** Explore different leadership styles; discuss the benefits of situational leadership; understand the role of authenticity in leadership; and hear fellow CPAs’ perspectives on leadership.

**Audience:** CPAs who want to improve their leadership skills  
**Source:** CPA Center of Excellence®  
**Level:** Intermediate

**New CPA Excellence: Leadership vs. Management**

**Date:** Open  
**Enrollment Time:** 90 days to complete the course  
**CPE:** 2-hour waiver of live CPE  
**Member | Nonmember:** $49

**Overview:** Learn the differences between management and leadership; explore what it means to lead when you may not be in management; and apply these ideas to a case study.

**Audience:** CPAs who want to improve their leadership skills  
**Source:** CPA Center of Excellence®  
**Level:** Intermediate

**New CPA Excellence: Leading for Action**

**Date:** Open  
**Enrollment Time:** 90 days to complete the course  
**CPE:** 2-hour waiver of live CPE  
**Member | Nonmember:** $49

**Overview:** Explore how leaders can inspire others to action; define your leadership “why;” compare the views of leaders and followers; explain how feedback and self-reflection can improve leader performance; and learn more about your own leadership qualities.

**Audience:** CPAs who want to improve their leadership skills  
**Source:** CPA Center of Excellence®  
**Level:** Intermediate

**New CPA Excellence: Modern Communication**

**Date:** Open  
**Enrollment Time:** 90 days to complete the course  
**CPE:** 2-hour waiver of live CPE  
**Member | Nonmember:** $49

**Overview:** Learn the consequences of poor communication in a modern business environment; how communication actually happens; discuss key communication skills; identify problems related to communication; create a short action plan to make improvements; and hear another CPA’s perspective on communication skills.

**Audience:** CPAs who want to improve their communication skills  
**Source:** CPA Center of Excellence®  
**Level:** Intermediate

**New CPA Excellence: Modern Leadership**

**Date:** Open  
**Enrollment Time:** 90 days to complete the course  
**CPE:** 2-hour waiver of live CPE  
**Member | Nonmember:** $49

**Overview:** Learn leadership characteristics; understand the impact environment has on leadership; and create your personal definition of leadership.

**Audience:** CPAs who want to improve their leadership skills  
**Source:** CPA Center of Excellence®  
**Level:** Intermediate

**DO YOU WANT MORE?**

Find full-length competency-based online interactive courses at cpe.incpas.org. Courses include Collaboration & Networking, Critical Thinking, Decision Making, and Entrepreneurship.

**CPE:** 8-hour waiver  
**Enrollment Time:** 90 days to complete  
**Member | Nonmember:** $129

Register online at incpas.org/coe-courses.
GET TO THE POINT

Quick learning for $49 per course

- Modern Leadership
- Leadership Styles
- Leadership vs. Management
- Leading for Action
- Modern Communication
- Communication in Organizations
- Communications Strategy

The flexible courses adapt to your needs and situation. You’ll receive a PDF guide of what you learned once you complete the course. The courses are only $49 and you receive a 2-hour waiver for live CPE.

Register online at incpas.org/coe-courses.

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### Evansville

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<td>Indianapolis</td>
<td>$349/$506</td>
<td>56</td>
</tr>
<tr>
<td>Federal Tax Update with Ron Roberson</td>
<td>1/9–10/20</td>
<td>Carmel</td>
<td>$539/$782</td>
<td>54</td>
</tr>
</tbody>
</table>
Qualifies for Yellow Book = Qualifies for the 24 hour Yellow Book requirement. Determination as to the qualification of certain courses for the Yellow Book 24 hour requirement should be made on an auditor specific basis depending on that auditor's Yellow Book clients. Note that the determination of course qualification is a matter of an auditor's professional judgment in consultation with appropriate individuals in the audit firm. The 24 hours are a subset of the 80-hour requirement.

New 2019 FASB & AICPA Update

DATE: 11/14/19  TIME: 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Kenneth Heaslip, CPA, CGMA, MBA, MS
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8  |  MEMBER: $349  |  NONMEMBER: $506

OVERVIEW: For over 30 years, Loscalzo’s FASB and AICPA Update has been the most popular seminar. This course is a must to keep you on top of the continuing changes in the CPA profession. Whether these changes are in accounting technical standards or professional standards, the course authors will provide practical guidance including standards' review and implementation guidance where appropriate.

PREREQUISITE: Basic audit and accounting course or experience

AUDIENCE: All CPAs and financial professionals needing a good year-round update on recently issued standards

SOURCE: Kaplan Financial Education powered by Loscalzo Institute

LEVEL: Update

NOTE: Available as a simulcast

New A Complete Guide to the New Yellow Book

DATE: 9/11/19  TIME: 8:30 a.m.–4:30 p.m.
INSTRUCTOR: James Schmutte, CPA, DBA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8  |  MEMBER: $349  |  NONMEMBER: $506

OVERVIEW: The Yellow Book has been revised! This course will equip you with a comprehensive knowledge of the new Yellow Book requirements and increase your confidence and proficiency in performing Yellow Book audits. The course materials use a highly illustrative and innovative format, including over 20 focused exercises on key practice issues.

AUDIENCE: Auditors performing Yellow Book engagements

SOURCE: Surgent  LEVEL: Basic

NOTE: Qualifies for Yellow Book

A&A Update

DATE: 6/10/19  TIME: 8:30 a.m.–Noon
INSTRUCTOR: James Schaefer, CPA-inactive, CFE, CIA, CISA, DBA
LOCATION: Monroe Convention Center, Bloomington

DATE: 6/14/19  TIME: 8:30 a.m.–Noon
INSTRUCTOR: James Schaefer, CPA-inactive, CFE, CIA, CISA, DBA
LOCATION: Tropicana Executive Conference Center, Evansville

DATE: 6/17/19  TIME: 8:30 a.m.–Noon
INSTRUCTOR: James Schaefer, CPA-inactive, CFE, CIA, CISA, DBA
LOCATION: Indiana Wesleyan University's Merrillville Education and Conference Center, Merrillville

DATE: 6/21/19  TIME: 8:30 a.m.–Noon
INSTRUCTOR: James Schaefer, CPA-inactive, CFE, CIA, CISA, DBA
LOCATION: Embassy Suites South Bend at Notre Dame, South Bend

DATE: 6/24/19  TIME: 8:30 a.m.–Noon
INSTRUCTOR: James Schaefer, CPA-inactive, CFE, CIA, CISA, DBA
LOCATION: Holiday Inn Terre Haute, Terre Haute

DATE: 6/28/19  TIME: 8:30 a.m.–Noon
INSTRUCTOR: James Schaefer, CPA-inactive, CFE, CIA, CISA, DBA
LOCATION: Sheraton Louisville-Riverside, Jeffersonville

DATE: 8/2/19  TIME: 8:30 a.m.–Noon
INSTRUCTOR: James Schmutte, CPA, DBA
LOCATION: Horizon Convention Center, Muncie

DATE: 8/7/19  TIME: 8:30 a.m.–Noon
INSTRUCTOR: James Schmutte, CPA, DBA
LOCATION: Four Points by Sheraton, Lafayette

DATE: 8/14/19  TIME: 8:30 a.m.–Noon
INSTRUCTOR: James Schmutte, CPA, DBA
LOCATION: Grand Wayne Center, Fort Wayne

DATE: 8/16/19  TIME: 8:30 a.m.–Noon
INSTRUCTOR: James Schmutte, CPA, DBA
LOCATION: Kokomo Country Club, Kokomo

DATE: 8/23/19  TIME: 8:30 a.m.–Noon
INSTRUCTOR: James Schmutte, CPA, DBA
LOCATION: Hillcrest Country Club, Batesville
ACCOUNTING & AUDITING

CPE: 4
| MEMBER: $119 | NONMEMBER: $199

OVERVIEW: This 4-hour update reviews the recent activity of the Financial Accounting Standards Board, International Accounting Standards Board, Audit Standards Board, and Accounting and Review Services Committee.

AUDIENCE: CPAs in public accounting or business and industry who want a quick update on accounting, auditing, compilation and review pronouncements.

SOURCE: Indiana CPA Society  LEVEL: Update

Accounting & Auditing Conference

DATE: 9/24/19  TIME: 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Various  LOCATION: Ritz Charles, Carmel

CPE: 8  MEMBER: $359  NONMEMBER: $509

OVERVIEW: Provide highlights of important changes in regulations so members can find out what they need to comply with or learn more about, and the regulation changes that don’t affect them. Will have a variety of high-quality breakout sessions with experienced and highly respected presenters in order to keep public and industry CPAs up to speed on A&A updates.

AUDIENCE: CPAs with an active license who need to stay up-to-date with accounting and auditing.

SOURCE: Kaplan Financial Education powered by Loscalzo Institute  LEVEL: Intermediate

NOTE: Continental breakfast and lunch are provided in the cost of registration.

Accounting & Auditing for 2019: An Update & Refresher

DATE: 9/6/19  TIME: 8:30 a.m.–4:30 p.m.
INSTRUCTOR: James Schaefer, CPA-inactive, CFE, CIA, CISA, DBA  LOCATION: Tropicana Executive Conference Center, Evansville

DATE: 11/8/19  TIME: 8:30 a.m.–4:30 p.m.
INSTRUCTOR: James Schaefer, CPA-inactive, CFE, CIA, CISA, DBA  LOCATION: Indiana Wesleyan University’s Merrillville Education and Conference Center, Merrillville

DATE: 11/25/19  TIME: 8:30 a.m.–4:30 p.m.
INSTRUCTOR: James Schaefer, CPA-inactive, CFE, CIA, CISA, DBA  LOCATION: Holiday Inn Terre Haute, Terre Haute

CPE: 8  MEMBER: $349  NONMEMBER: $506

OVERVIEW: Do you need to enhance your not-for-profit accounting skills? Through a case study-intense, highly interactive classroom environment, this course provides you with the tools necessary to go beyond theory and create value-added services for your clients. This course allows you to examine, evaluate and perform case studies which will enhance your working knowledge of fundamental not-for-profit accounting and reporting, presentation requirements, note disclosures unique to not-for-profits and options allowed under generally accepted accounting principles. FASB’s financial statement standard updates and revenue recognition standards are included.

PREREQUISITE: Experience in the not-for-profit environment.

AUDIENCE: Auditors, practitioners, CPAs and finance professionals of not-for-profit organizations.

SOURCE: AICPA  LEVEL: Intermediate

NOTE: Qualifies for Yellow Book

Accounting & Auditing Update for Small Businesses

DATE: 10/21/19  TIME: 8:30 a.m.–4:30 p.m.
INSTRUCTOR: James Schmutte, CPA, DBA  LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8  MEMBER: $349  NONMEMBER: $506

OVERVIEW: Geared toward practitioners who provide accounting and auditing services to small businesses, this course updates you on the new accounting, auditing, compilation, preparation and review standards, and other professional guidance that impact small businesses and their auditors. Materials include practical applications of the topics covered to help you understand and apply the standards to real-life scenarios. With the rate of change in today’s regulatory environment, you must stay current on the topics impacting the profession. Your clients are counting on you!

PREREQUISITE: Previous auditing and accounting experience.

AUDIENCE: CPAs who require a review of recent accounting and auditing pronouncements.

SOURCE: AICPA  LEVEL: Update

Accounting & Reporting for Not-for-Profit Organizations

DATE: 11/21/19  TIME: 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Martin Birr, CPA, CIA, CMA  LOCATION: Embassy Suites South Bend at Notre Dame, South Bend

CPE: 8  MEMBER: $349  NONMEMBER: $506

OVERVIEW: Do you need to enhance your not-for-profit accounting skills? Through a case study-intense, highly interactive classroom environment, this course provides you with the tools necessary to go beyond theory and create value-added services for your clients. This course allows you to examine, evaluate and perform case studies which will enhance your working knowledge of fundamental not-for-profit accounting and reporting, presentation requirements, note disclosures unique to not-for-profits and options allowed under generally accepted accounting principles. FASB’s financial statement standard updates and revenue recognition standards are included.

PREREQUISITE: Experience in the not-for-profit environment.

AUDIENCE: Auditors, practitioners, CPAs and finance professionals of not-for-profit organizations.

SOURCE: AICPA  LEVEL: Intermediate

NOTE: Qualifies for Yellow Book
### New Accounting for Financial Statement Uncertainty: Estimates, Contingencies & Going Concern

**DATE:** 8/23/19  
**TIME:** 1–4:30 p.m.  
**INSTRUCTOR:** Curtis J. Quickel, CPA  
**LOCATION:** Indiana Wesleyan University's Merrillville Education and Conference Center, Merrillville  

| CPE: 4 | MEMBER: $195 | NONMEMBER: $283 |

**OVERVIEW:** Understanding the proper accounting for and reporting of financial statement areas containing uncertainty can be challenging, especially ensuring adequate disclosure of risk to the financial statement users. This course will provide critical considerations when evaluating the proper treatment of accounting estimates, loss contingencies, and going concern in U.S. GAAP basis financial statements.  

**AUDIENCE:** CPAs in either public or private practice with accounting, financial reporting, or attest responsibilities  

**SOURCE:** Surgent  
**LEVEL:** Basic

### New Accounting for Long-Term Assets: Addressing the Challenging Issues

**DATE:** 8/23/19  
**TIME:** 8:30 a.m.–Noon  
**INSTRUCTOR:** Curtis J. Quickel, CPA  
**LOCATION:** Indiana Wesleyan University's Merrillville Education and Conference Center, Merrillville  

| CPE: 4 | MEMBER: $195 | NONMEMBER: $283 |

**OVERVIEW:** Often considered relatively low-risk assets, accounting for long-term assets such as property, plant and equipment (PP&E), intangible assets and goodwill can pose significant accounting challenges in their initial measurement and subsequent valuation. Also, the new accounting guidance for revenue recognition and leases will create other classes of long-term assets which will result in additional accounting challenges. In this course, we'll discuss the basic accounting model for various types of long-term assets, such as PP&E, intangibles and right of use assets. We'll discuss the complex accounting around asset impairment and other valuation issues, and the impact of recent ASC Updates, such as ASU No. 2017-04 on goodwill impairment and ASU No. 2017-01 on business combinations. As there is often more than meets the eye when it comes to long-term assets, this course will refresh your knowledge on this surprisingly complex area of accounting.  

**AUDIENCE:** Accounting and auditing practitioners at all levels desiring to understand challenging issues in long-term asset accounting  

**SOURCE:** Surgent  
**LEVEL:** Basic

### New Analyzing Financial Statements

**DATE:** 11/15/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Kenneth Heaslip, CPA, CGMA, MBA  
**LOCATION:** INCPAS Learning Center, Indianapolis  

| CPE: 8 | MEMBER: $349 | NONMEMBER: $506 |

**OVERVIEW:** Many professionals including corporate management, loan officers, investors, suppliers, customers and auditors use financial statement analysis to perform their daily responsibilities. This program focuses on financial statements and the analysis of financial statements using cases to assess profitability, liquidity and resource management efficiency. We conclude with discussions of non-GAAP performance measurements, forecasting and valuation.  

**AUDIENCE:** Industry CPAs, accountants and financial professionals who analyze financial results, evaluate operational performance, perform acquisition due diligence and develop business strategies; auditors when performing risk assessments as a part of audit planning  

**SOURCE:** Kaplan Financial Education powered by Loscalzo Institute  
**LEVEL:** Basic

### Annual Update for CPAs & Auditors

**DATE:** 11/12/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Daryl Krause, CPA  
**LOCATION:** Grand Wayne Center, Fort Wayne

**DATE:** 11/13/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Daryl Krause, CPA  
**LOCATION:** Embassy Suites South Bend at Notre Dame, South Bend

**DATE:** 12/19/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Daryl Krause, CPA  
**LOCATION:** INCPAS Learning Center, Indianapolis

| CPE: 8 | MEMBER: $349 | NONMEMBER: $506 |

**OVERVIEW:** Keep abreast of the fast-paced changes in accounting and auditing. This comprehensive course covers relevant pronouncements, exposure drafts and other guidance recently issued in the accounting, auditing, review, compilation and preparation engagement arenas. We'll help you sort through the complexities to identify and apply recently issued FASB, PCAOB, and other guidance.
New Applying Professional Skepticism in an Audit

DATE: 8/12/19   TIME: 1–4:30 p.m.
INSTRUCTOR: Anne Marchetti, B.S., M.S.
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 4 | MEMBER: $195 | NONMEMBER: $283

OVERVIEW: Audit inspection reports have identified issues about the level and consistency of professional skepticism being applied in audits. Additionally, the complexity of transactions and markets continues to increase, requiring auditors and managers to use more professional judgment during audit engagements. This interactive course will provide an overview of professional skepticism, including what it is and why it is important in audit engagements. Featuring case studies to teach the content and concepts, participants will gain knowledge about how to apply professional skepticism and techniques to enhance the use of professional skepticism in their own practice.

AUDIENCE: Auditors of any level who would like to better incorporate professional skepticism into their audits

SOURCE: AICPA   LEVEL: Update

New Audit Workpapers: Documenting Field Work

DATE: 8/12/19   TIME: 8:30 a.m.–Noon
INSTRUCTOR: Anne Marchetti, B.S., M.S.
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 4 | MEMBER: $195 | NONMEMBER: $283

OVERVIEW: Do you need to make sure significant audit items are properly documented? Working papers — the building blocks of an audit — must list relevant details so the manager and partners are aware of significant transactions and can consider possible ramifications. A poorly prepared working paper causes inefficiencies for the preparer, reviewer and partner; thus, proper working paper preparation and documentation are critical. This course offers practical guidance on the basics of working paper preparation, from form and content to proper documentation of significant audit items.

AUDIENCE: Staff auditors who create working papers and supervisors and seniors who supervise audit engagements

SOURCE: AICPA   LEVEL: Basic

Auditing Employee Benefit Plans

DATE: 6/10/19   TIME: 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Daryl Krause, CPA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | MEMBER: $349 | NONMEMBER: $506

OVERVIEW: Master the fundamentals of auditing employee benefit plans in accordance with AICPA standards and ERISA rules and regulations, and avoid the problems that are often encountered. Explore the accounting and auditing requirements unique to employee benefit plans. This course is designed to give you an understanding of requirements and audit procedures related to defined contribution, defined benefit, and health and welfare plans to help you more effectively plan and carry out your audit.

PREREQUISITE: Experience with the employee benefit plan audit process and a working knowledge of ERISA

AUDIENCE: Auditors providing employee benefit audit and accounting services, benefit plan administrators, and employees of companies with responsibility for accounting and reporting for plan benefits

SOURCE: AICPA   LEVEL: Basic

Audits of Defined Contribution Pension Plans (Emphasizing 401k Plans)

DATE: 5/21/19   TIME: 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Joseph E. Manfre, CPA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | MEMBER: $349 | NONMEMBER: $506

OVERVIEW: For the beginner, employee benefit plan audits have always presented unique challenges and practice risks. This basic to intermediate course will address many of these challenges and provide the skills to: avoid the most common deficiencies identified by the DOL and peer reviewers; plan a defined contribution 401(k) audit; identify unique employee benefit plan (EBP) audit risks including the risk of fraud; perform the level of service requested by plan; perform required audit testing; consider the SOC report; identify and effectively document the required procedures; and prepare U.S. GAAP and DOL compliant financial statements.

PREREQUISITE: Some experience in conducting EBP audits would be helpful

AUDIENCE: Practitioners in public accounting firms who audit defined contribution pension plans emphasizing 401(k) plans

SOURCE: Kaplan Financial Education powered by Loscalzo Institute   LEVEL: Basic
**New Blockchain Essentials: Impacts on Modern Accounting**

**DATE:** 12/9/19  
**TIME:** 8:30 a.m.–Noon  
**INSTRUCTOR:** Mark Mishler, CPA, CMA  
**LOCATION:** INCPAS Learning Center, Indianapolis  

**CPE:** 4  |  **MEMBER:** $195  |  **NONMEMBER:** $283  

**OVERVIEW:** You may think of bitcoin as just another investment currency, but its underlying technology has much wider implications. Since its 2009 inception, blockchain threatens to upend the CPA profession by offering unprecedented reliability and transparency to standard transactions. Blockchain adoption is growing steadily among multinational organizations and is now poised to revolutionize the entire financial industry. In this course, you will learn the history behind blockchain technology and its major components, how blockchain challenges the accounting status quo, and how to handle issues surrounding auditing and assurance in the blockchain era.  

**PREREQUISITE:** Accounting experience  

**AUDIENCE:** All staff responsible for the accounting and finance functions within an organization that may leverage blockchain technology  

**SOURCE:** Kaplan Financial Education powered by Loscalzo Institute  

**LEVEL:** Basic  

**NOTE:** Qualifies for 2 hours of Accounting & Auditing.

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**Business Intelligence, Featuring Microsoft's Power BI Tools**

**DATE:** 10/18/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Brian Tankersley, CPA, CITP  
**LOCATION:** INCPAS Learning Center, Indianapolis  

**CPE:** 8  |  **MEMBER:** $349  |  **NONMEMBER:** $506  

**OVERVIEW:** In today’s business climate, Business Intelligence (BI) is perhaps the hottest topic in most professional circles. Increasingly, organizations of all sizes are seeking to take advantage of the data available to them to identify previously undiscovered insights and gain competitive advantages thought to be out of reach just a few short years ago. A growing array of tools — ranging from Excel add-ins to dedicated solutions such as Power BI — now allow you to leverage your existing knowledge and skills to create powerful, interactive dashboards and analyses. In this program, you will learn how to implement “do-it-yourself business intelligence” using a variety of techniques and tools. You will learn how to work with some of the advanced data query and summarization features in Excel to create Excel-based dashboards. You will then learn how to leverage that knowledge to build even more powerful BI objects using Microsoft’s Power BI tools. If gaining greater insights into your data to make better decisions is of interest to you, then join us for a fast-paced look at how you can take advantage of these fantastic tools.  

**PREREQUISITE:** Basic understanding of computer operations and terminology, including Microsoft Office Excel  

**AUDIENCE:** Business professionals seeking to develop and implement BI solutions  

**SOURCE:** K2 Enterprises  

**LEVEL:** Advanced

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**Compilation & Review Practice Guide**

**DATE:** 12/10/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Mark Mishler, CPA, CMA  
**LOCATION:** INCPAS Learning Center, Indianapolis  

**CPE:** 8  |  **MEMBER:** $349  |  **NONMEMBER:** $506  

**OVERVIEW:** Compilation and review issues have dominated the profession the past few years, and the codification of SSARS 21 in AR-C Sections 60, 70, 80 and 90, as well as the changes made in SSARS 22, 23 and 24. This course addresses these changes and current performance requirements in the compilation and review literature so practitioners will be able to perform these services in compliance with SSARS, while applying best practices for both efficiency and effectiveness.  

**PREREQUISITE:** Basic familiarity with SSARS standards  

**AUDIENCE:** Practitioners who perform compilation and review engagements for non-public entities  

**SOURCE:** Kaplan Financial Education powered by Loscalzo Institute  

**LEVEL:** Intermediate  

**NOTE:** Available as a simulcast

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**Compilations, Reviews & Preparations: Engagement Performance & Annual Update**

**DATE:** 11/5/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Martin Birr, CPA, CIA, CMA  
**LOCATION:** Embassy Suites South Bend at Notre Dame, South Bend  

**DATE:** 11/7/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Daryl Krause, CPA  
**LOCATION:** Grand Wayne Center, Fort Wayne  

**DATE:** 12/20/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Daryl Krause, CPA  
**LOCATION:** Indiana Wesleyan University's Merrillville Education and Conference Center, Merrillville  

**CPE:** 8  |  **MEMBER:** $349  |  **NONMEMBER:** $506  

**OVERVIEW:** Specifically designed for preparation, compilation and review practitioners and their staff, this course will provide a comprehensive review and hands-on application for performing financial statement preparation, compilation and review engagements. You will learn the ins and outs of SSARS No. 21, Clarification and Recodification. The course will also cover the changes that have occurred with the issuance of SSARS Nos. 22 and 23 with regard to compilation of pro forma financial information engagements, engagements on prospective financial information and other areas relevant to SSARS No. 21 engagements. Lastly, the course will perform a detailed review of the key provisions of the recently issued SSARS No. 24, Omnibus Statement on Standards for Accounting and Review Services–2018. Not only will this course bring you up to date on SSARS requirements and guidance, but more importantly, it will provide you with practical examples and illustrations to help you effectively and efficiently perform these types of engagements. This course is intended to be your go-to reference for training your staff and managing your SSARS Nos. 21-24 services in compliance with professional, ethical and technical requirements.
Compliance Auditing: Questions from the Field

DATE: 5/20/19  TIME: 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Marci Thomas, CPA, CGMA, MHA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | MEMBER: $349 | NONMEMBER: $506

OVERVIEW: Compliance auditing is a significant risk area for firms. We are now in the year where engagements will be selected for testing in the OMB mandated quality study. Additionally, the GAO issued its update of Government Auditing Standards in summer of 2018. This course will discuss those changes as well as new questions and answers that have been recently included in the Uniform Guidance FAQ document, changes that will be made to the data collection form for 2019–2021, and changes the OMB made to its method for updating the compliance supplement. This course is taught in the popular Question & Answer format and discusses real questions and issues that Loscalzo instructors receive from practitioners in the field. This course will: provide an update on the changes to the Uniform Guidance; help participants avoid recurring common failures in audits under Government Auditing Standards and the Uniform Guidance; provide the latest changes in professional literature impacting compliance auditing; and help participants understand the latest changes in Government Auditing Standards.

PREREQUISITE: Basic knowledge of compliance auditing, accounting and reporting, Yellow Book and OMB’s Uniform Guidance

AUDIENCE: Audit practitioners working on nonprofit and/or public sector clients who need audits performed in accordance with the Yellow Book and the Uniform Guidance; CPAs in nonprofit or government organizations who need a single audit

SOURCE: Kaplan Financial Education powered by Loscalzo Institute

LEVEL: Intermediate

NOTE: Qualifies for Yellow Book

Construction Contractors: Accounting, Auditing & Tax

DATE: 12/12/19  TIME: 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Martin Birr, CPA, CIA, CMA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | MEMBER: $349 | NONMEMBER: $506

OVERVIEW: The construction industry is one of the most unique when it comes to being in compliance with the various accounting and auditing standards. This course examines the core knowledge necessary to succeed and the key issues impacting construction accounting, auditing and taxation. Find out what new developments may mean for you, your company or clients. In addition, this course explores the relationship between the contractor and the surety. With construction comprising such a large portion of the economy and always growing, it is more important than ever for you to be on top of the very latest in accounting, auditing and tax changes for the construction industry.

AUDIENCE: Accounting and attestation practitioners at all levels who want to remain up-to-date on recent pronouncements and other standard setters’ activities

SOURCE: Surgent

Current Issues in Accounting & Auditing: An Annual Update

DATE: 12/17/19  TIME: 8:30 a.m.–Noon
INSTRUCTOR: Gregory M. Clark, CPA, CGMA
LOCATION: Ritz Charles, Carmel

CPE: 4 | MEMBER: $195 | NONMEMBER: $283

OVERVIEW: Designed for accounting and attestation practitioners at all levels in both public accounting and business and industry, this course provides an overview of recent accounting, compilation, preparation, review and attestation matters including: recently issued Accounting Standards Updates (ASUs); the FASB's comprehensive new Revenue Recognition standard — Topic 606; Lease Accounting — Topic 842; Financial Instruments; SSARS No. 21, Clarification and Recodification and other new standards issued by the ARSC; recent AICPA and PCAOB releases; and other important A&A practice matters of which you should be aware.

PREREQUISITE: Experience in accounting and attestation

AUDIENCE: Accounting and attestation practitioners at all levels who want to remain up-to-date on recent pronouncements and other standard setters’ activities

SOURCE: Surgent

Cybersecurity Advisory Services: Readiness Assessment Deep Dive

DATE: 12/11/19  TIME: 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Kristina Demek, CFE, Ph.D.
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | MEMBER: $349 | NONMEMBER: $506

OVERVIEW: Cybersecurity yields potential business opportunities for a firm to better serve its clients. Cyberthreats come in all shapes, sizes, complexity and are ever-evolving. Attacks are causing great financial loss and serious damage to companies. It is essential for organizations to establish a baseline for identifying critical components that must be incorporated into any cybersecurity risk management approach. Participants will learn how to keep abreast of the latest cybersecurity trends, manage risks and ensure clients have a sound risk management program to safeguard their organization. Once a baseline...
has been established, firms can take these competencies and conduct readiness assessments for their clients through consulting or advisory services.

**PREREQUISITE:** Some knowledge of a cybersecurity risk management program

**AUDIENCE:** Firm practitioners performing consulting or advisory services

**SOURCE:** AICPA  LEVEL: Intermediate

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### Data Breaches & Other Cyberfrauds: A 21st Century Risk to Your Organization

**DATE:** 5/23/19  **TIME:** 8:30 a.m.–Noon

**INSTRUCTOR:** Ronald Kral, CPA

**LOCATION:** INCPAS Learning Center, Indianapolis

**CPE:** 4  **MEMBER:** $195  **NONMEMBER:** $283

**OVERVIEW:** Data breaches and cyberfraud are an ever-present risk for more companies. Is your data secure? Is your organization at risk of a data breach? What is cyberfraud and how can it affect your organization? How can you protect your company from cyberfraud? This course will help you understand and become more aware of the risks associated with data breaches and other cyberfrauds. You will become more aware of the policies and procedures needed to protect your company data. We will review the requirements for internal controls over technology required by the 2013 COSO Framework on Internal Controls and review internal controls that can help prevent and detect cyberfrauds, including data breaches. Become a resource for your company and your clients.

**AUDIENCE:** Auditors and CPAs working for businesses, governments and not-for-profits who want a basic understanding of the issues associated with cyberfrauds and cybersecurity

**SOURCE:** AICPA  LEVEL: Basic

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### Financial Statement Disclosures: A Guide for Small- & Medium-Sized Businesses

**DATE:** 12/18/19  **TIME:** 8:30 a.m.–Noon

**INSTRUCTOR:** Gregory M. Clark, CPA, CGMA

**LOCATION:** Ritz Charles, Carmel

**CPE:** 4  **MEMBER:** $195  **NONMEMBER:** $283

**OVERVIEW:** A clear and concise set of proper financial statement disclosures can make or break an entity’s financial statements. Such disclosures are no longer simply additional information provided by a business; they can be complex in nature and difficult to both prepare and understand, even for small- and medium-sized businesses. Oftentimes, financial statement users will first turn to the notes in the financial statements in order to get a feel for where the business and its numbers might be heading. This course will focus on key balance sheet and income statement disclosure as well as those relating to adoption of new accounting standards such as Topic 606, accounting policies, changes in accounting estimates and errors, subsequent events, going concern, and related party disclosures. The course will use illustrations, examples based on private company financial statements disclosures, and real-world excerpts from financial statements to provide you with a hands-on feel for the disclosure requirements across a number of accounting standards.

**AUDIENCE:** CPAs and other accounting professionals in public practice and business and industry involved in preparing financial statement disclosures for small- and medium-sized businesses

**SOURCE:** Surgent  LEVEL: Intermediate

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### New Financial Statement Fraud

**DATE:** 12/19/19  **TIME:** 1–4:30 p.m.

**INSTRUCTOR:** Mark Mishler, CPA, CMA

**LOCATION:** INCPAS Learning Center, Indianapolis

**CPE:** 4  **MEMBER:** $195  **NONMEMBER:** $283

**OVERVIEW:** Instances of financial statement fraud have occurred ever since the first financial statements were prepared. Financial statement fraud poses a significant threat to all businesses regardless of size. In this program, we will discuss fraud, the Fraud Triangle, who commits fraud, fraud red flags, motivations to commit fraud, common fraud activities, COSO internal controls and selected financial statement fraud case studies.

**PREREQUISITE:** Basic accounting and finance knowledge

**AUDIENCE:** CPAs and finance professionals in industry and public practice

**SOURCE:** Kaplan Financial Education powered by Loscalzo Institute  LEVEL: Intermediate

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### Fraud Basics: Protecting the Company Till

**DATE:** 12/17/19  **TIME:** 1–4:30 p.m.

**INSTRUCTOR:** Gregory M. Clark, CPA, CGMA

**LOCATION:** Ritz Charles, Carmel

**CPE:** 4  **MEMBER:** $195  **NONMEMBER:** $283

**OVERVIEW:** Our focus is to reduce the overall risk of fraud. To that end, this course focuses on what factors contribute to turning honest employees into schemers. Discussion will include integrity and ethics, as well as how people may react in certain situations. We also explore the darknet and cryptocurrency fraud.

**AUDIENCE:** CPAs in public practice and industry who wish to educate clients or colleagues on how to better prevent fraud from occurring at the source

**SOURCE:** Surgent  LEVEL: Basic
### Fraud Update: Detecting & Preventing the Top 10 Fraud Schemes

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<th>DATE:</th>
<th>11/6/19</th>
<th>TIME:</th>
<th>8:30 a.m.–4:30 p.m.</th>
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<tbody>
<tr>
<td>INSTRUCTOR:</td>
<td>Daryl Krause, CPA</td>
<td>LOCATION:</td>
<td>INCPAS Learning Center, Indianapolis</td>
</tr>
</tbody>
</table>

**PREREQUISITE:** Experience in performing and managing compilation, preparation and review engagements  
**AUDIENCE:** Accounting practitioners and their staff performing and managing compilation, preparation and review engagement services  
**SOURCE:** Surgent  
**LEVEL:** Update

**OVERVIEW:** Many costly fraudulent schemes have occurred repeatedly throughout the past several decades. Why do these material and frequently recurring frauds succeed? One reason is business owners, management, auditors and employees fail to recognize the red flags that have been associated with these financial statement and misappropriation of asset frauds. Another major reason is the reporting and transaction processing systems do not have adequate controls to either prevent and/or detect these schemes. This course will provide descriptions of how these major frauds are perpetrated (including real-world examples) and the types of cost-effective controls that can be implemented by both small and large businesses and nonprofit entities to identify and prevent these deceptive acts.

**AUDIENCE:** Business owners, managers, supervisors, employees, CPAs and auditors  
**SOURCE:** AICPA  
**LEVEL:** Intermediate

### Guide & Update to Compilations, Reviews and Preparations

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<tr>
<td>INSTRUCTOR:</td>
<td>Gregory M. Clark, CPA, CGMA</td>
<td>LOCATION:</td>
<td>Ritz Charles, Carmel</td>
</tr>
</tbody>
</table>

**PREREQUISITE:** Experience in performing and managing compilation, preparation and review engagements  
**AUDIENCE:** Accounting practitioners and their staff performing and managing compilation, preparation and review engagements  
**SOURCE:** Kaplan Financial Education powered by Loscalzo Institute  
**LEVEL:** Intermediate

**OVERVIEW:** Specifically designed for compilation, preparation and review practitioners and their staff, this course will provide you with an overview, update and hands-on application for performing compilation, preparation and review engagements. You will learn the ins and outs of SSARS No. 21, Clarification and Recodification as well as other recent releases from the AICPA. Lastly, the course will perform a detailed review of the key provisions of the recently issued SSARS No. 24, Omnibus Statement on Standards for Accounting and Review Services–2018. Not only will this course bring you up to date on SSARS requirements and guidance, but more importantly, it will provide you with practical examples and illustrations to help you effectively and efficiently perform compilation, preparation, and review engagements. This course will walk you through the content of The Essential SSARS Implementation Toolkit, which is a comprehensive resource to help ensure that you satisfy professional, ethical, and technical requirements for all SSARS Nos. 21-24 services.
### Interpreting the New Revenue Recognition Standard: What All CPAs Need to Know

**DATE:** 11/8/19  
**TIME:** 8:30 a.m.–Noon  
**INSTRUCTOR:** Daryl Krause, CPA  
**LOCATION:** INCPAS Learning Center, Indianapolis

| CPE: 4 | MEMBER: $195 | NONMEMBER: $283 |

**OVERVIEW:** The new accounting standard for revenue recognition was released in 2014, but its effective date is right around the corner. With the issuance of FASB ASU No. 2014-09, Revenue from Contracts with Customers, FASB has completed a convergence project. For years, revenue recognition has been the cause of audit failures and the focus of corporate abuse and fraud allegations. This course will provide you with an in-depth understanding of the framework for revenue recognition built around the core principle that is applied in a 5-step process. In addition, understanding the changes and new requirements is critical for successful implementation of this new standard. Supported by practical examples, this course will assist you in avoiding revenue recognition traps and provide you with latest FASB guidance.

**PREREQUISITE:** Experience in the application of accounting standards

**AUDIENCE:** CPAs in public practice and industry who need an update on the latest revenue recognition guidance

**SOURCE:** AICPA  
**LEVEL:** Intermediate

### Latest Developments in Nonprofit Accounting & Auditing

**DATE:** 10/29/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Martin Birr, CPA, CIA, CMA  
**LOCATION:** INCPAS Learning Center, Indianapolis

| CPE: 8 | MEMBER: $349 | NONMEMBER: $506 |

**OVERVIEW:** This year is indeed another year of significant change in the world of nonprofit accounting and auditing. Time is valuable, and it’s hard to stay current in today’s rapidly changing environment. Let us save you time and effort in staying current through this informative update course. The course materials use a highly illustrative and innovative format. Over 30 focused exercises are included to provide an enhanced working knowledge of the latest developments in nonprofit accounting and auditing.

**PREREQUISITE:** Knowledge of nonprofit accounting and auditing

**AUDIENCE:** Auditors and industry professionals working in the nonprofit environment

**SOURCE:** Surgent  
**LEVEL:** Update

**NOTE:** Qualifies for Yellow Book

### Metrics Management: Choose & Use Key Performance Indicators

**DATE:** 5/20/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Don Minges, MBA  
**LOCATION:** INCPAS Learning Center, Indianapolis

| CPE: 8 | MEMBER: $349 | NONMEMBER: $506 |

**OVERVIEW:** Financial managers have long struggled to drive results through their financial planning and control processes. This seminar shows how to build a performance management framework, linking the company’s high-level strategic objectives to performance metrics at the individual responsibility center level. The result will be an easier-to-use financial planning process that produces better projections and control. Learn how to move the dials on every executive’s dashboard.

**AUDIENCE:** Those who are, or aspire to be, upper level financial managers

**SOURCE:** Executive Education  
**LEVEL:** Intermediate

**NOTE:** This seminar includes five interactive exercises as a vehicle for group discussion.

### Not-for-Profit Accounting & Auditing Update

**DATE:** 9/23/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** James Schmutte, CPA, DBA  
**LOCATION:** Grand Wayne Center, Fort Wayne

| CPE: 8 | MEMBER: $349 | NONMEMBER: $506 |

**OVERVIEW:** The best avenue to success is to be indispensable to your clients. The best way to becoming indispensable is having a solid understanding of your client’s business. This course details the latest developments affecting not-for-profits such as requirements of FASB directed toward the organizations and information on the latest OMB and Yellow Book developments.

**PREREQUISITE:** Knowledge of not-for-profit accounting and auditing

**AUDIENCE:** CPAs and finance personnel responsible for accounting and financial reporting for not-for-profits, and auditors of those entities

**SOURCE:** AICPA  
**LEVEL:** Update

**NOTE:** Qualifies for Yellow Book

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**Case Study**
Not-for-Profit Financial Reporting: Mastering the Unique Requirements

**DATE:** 11/12/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Martin Birr, CPA, CIA, CMA  
**LOCATION:** INCPAS Learning Center, Indianapolis

**CPE:** 8  
**MEMBER:** $349  
**NONMEMBER:** $506

**OVERVIEW:** Do you know what makes not-for-profit accounting and financial reporting different? Avoid the potholes of confusion and provide a financial picture end users can truly understand. Through a combination of practical guidance and case studies, this course provides insight into what makes not-for-profits different. You also will receive guidance on FASB’s financial statement standard and revenue recognition, including grants and contracts.

**PREREQUISITE:** Experience in the not-for-profit environment

**AUDIENCE:** Professionals working with or in the not-for-profit environment

**SOURCE:** AICPA  
**LEVEL:** Intermediate

**NOTE:** Qualifies for Yellow Book

Practical Internal Controls: A Case Study Approach

**DATE:** 8/26/19  
**TIME:** 1–4:30 p.m.  
**INSTRUCTOR:** James Schaefer, CPA-inactive, CFE, CIA, CISA, DBA  
**LOCATION:** INCPAS Learning Center, Indianapolis

**CPE:** 4  
**MEMBER:** $195  
**NONMEMBER:** $283

**OVERVIEW:** This updated and revised course uses real-life case studies to identify risks and then implement internal controls to manage (or at least mitigate) these risks. Participants will practice designing cost-effective internal controls. Case studies include applications in small business, health care and not-for-profit sectors.

**AUDIENCE:** While the target audience is those new to internal control, those with previous experience should benefit from this course.

**SOURCE:** James Schaefer  
**LEVEL:** Basic

Preparing Not-for-Profit Financial Statements Under ASU No. 2016-14

**DATE:** 11/6/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** James Schmutte, CPA, DBA  
**LOCATION:** INCPAS Learning Center, Indianapolis

**CPE:** 8  
**MEMBER:** $349  
**NONMEMBER:** $506

**OVERVIEW:** ASU No. 2016-14, Presentation of Financial Statements of Not-for-Profit Entities, is the most significant not-for-profit reporting standard in over 20 years and is now fully effective. To properly implement the new financial reporting model, professionals must have a strong, working knowledge of the new requirements. Now is the time to obtain that knowledge! This course explains the new requirements, illustrates how the requirements manifest themselves in the financial statements, and clarifies key options that not-for-profits have in implementing the requirements. The course also examines other key changes affecting not-for-profits including the new revenue recognition and contribution requirements (which apply to 12/31/19 year-ends) and leases (which apply to 12/31/20 year-ends). The course materials use a highly illustrative and innovative format, including over 30 focused exercises to provide an enhanced working knowledge of not-for-profit accounting and reporting.

**PREREQUISITE:** Some introductory background in not-for-profit accounting and reporting

**AUDIENCE:** Not-for-profit industry professionals and auditors

**SOURCE:** Surgent  
**LEVEL:** Intermediate

Preventing, Detecting & Investigating Identity Theft

**DATE:** 9/23/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Doug Warren, CPA, CFE, CFF, FCPA  
**LOCATION:** INCPAS Learning Center, Indianapolis

**CPE:** 8  
**MEMBER:** $349  
**NONMEMBER:** $506

**OVERVIEW:** Protect yourself and your clients from identity theft, which includes the theft of personal and professional identities. No one is immune from this rising tide of criminal misconduct and — as your clients seek your advice — you will be required to perform due diligence in protecting their IDs. Some will even be tasked with investigating the crime. This course addresses the needs of each. As the instances of identity theft and data breaches continue, people are clamoring for ways to detect identity theft, protect themselves from becoming a victim, and investigate instances of theft when they strike. Don't allow you or your client to become the next victim! If you have clients who are victims of identity theft, learn how to be an advocate for them and where to report the theft in order to assist them in recovering from this crime.

**PREREQUISITE:** Basic knowledge of fraud and related investigations

**AUDIENCE:** CPAs, forensic accountants, fraud examiners, individuals in the banking and financial services industry, attorneys, law enforcement and other interested individuals

**SOURCE:** AICPA  
**LEVEL:** Intermediate

Preventing, Detecting & Responding to Fraud: What Every CPA Should Know

**DATE:** 12/20/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** James Schaefer, CPA-inactive, CFE, CIA, CISA, DBA  
**LOCATION:** INCPAS Learning Center, Indianapolis

**CPE:** 8  
**MEMBER:** $349  
**NONMEMBER:** $506

**OVERVIEW:** This course provides CPAs with detailed guidance on how to prevent, detect and respond to fraud. Starting with an overview of current fraud statistics, the course then covers the fraud triangle, the fraud diamond and legal elements of fraud. Numerous case studies will provide tools to identify key risk areas and cost-effective controls to mitigate the risk of fraud. Specific investigative tools include statement analysis, Benford’s
Revenue Recognition for Long-Term Construction & Similar Contracts: Topics 606 Implementation Challenges

DATE: 8/21/19 | TIME: 8:30 a.m.–Noon
INSTRUCTOR: Brent McClure, CPA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 4 | MEMBER: $195 | NONMEMBER: $283

OVERVIEW: Change is definitely coming. For those entities who currently recognize revenue under the guidance of Statement of Position 81-1, Accounting for Performance of Construction-Type and Certain Production-Type Contracts (SOP 81-1), understanding the basics of Topic 606 is not enough. You need to be able to apply Topic 606 to your types of contracts and determine what changes, if any, will occur in how you recognize revenue under the new standard. In this course, we'll explore Topic 606 from the perspective of entities that currently recognize revenue under SOP 81-1, focusing on those areas most likely to be impacted under the new guidance. Applying Topic 606 to your long-term contracts will definitely change your revenue recognition approach. This course will help you determine how big that change will be.

PREREQUISITE: Experience in accounting and auditing

AUDIENCE: Accounting and auditing practitioners at all levels desiring to understand the challenges in applying Topic 606 to entities with long-term construction projects

SOURCE: Surgent | LEVEL: Intermediate

Revenue Recognition, Leases & Financial Instruments: The FASB's "Big 3" New Standards

DATE: 9/19/19 | TIME: 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Martin Birr, CPA, CIA, CMA
LOCATION: Grand Wayne Center, Fort Wayne

DATE: 9/26/19 | TIME: 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Martin Birr, CPA, CIA, CMA
LOCATION: Embassy Suites South Bend at Notre Dame, South Bend

CPE: 8 | MEMBER: $349 | NONMEMBER: $506

OVERVIEW: Sometimes we can avoid addressing the elephant in the room for a while. However, when there are three elephants in the room, it's time to address the issues. Designed for practitioners and their staff, whether in public accounting or business and industry, this course provides a comprehensive review and update of the FASB's Big 3 accounting and reporting areas: Revenue Recognition, Leases and Financial Instruments, including equity securities, hedging and impairment. We will focus on recently issued Accounting Standards Updates, covering these critical areas of your practice or organization.

We will analyze the Big 3 which have a major effect on all industries, using examples and illustrations to provide a hands-on approach that will help you better assess and implement the new standards and guidance applicable to your clients or organization.

PREREQUISITE: Experience in financial accounting and reporting

AUDIENCE: Practicing CPAs and their staffs, both in public accounting and business and industry; controllers and other financial accounting personnel involved in financial statement preparation and review

SOURCE: Surgent | LEVEL: Intermediate

New Risk-Based Audit Standards: Effective Utilization

DATE: 12/2/19 | TIME: 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Sal Collemi, CPA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | MEMBER: $349 | NONMEMBER: $506

OVERVIEW: This program will review the requirements of risk-based auditing, address best practices when conducting planning and risk assessment procedures, describe audit testing strategies including sampling and internal control testing, and illustrate documentation examples that comply with the risk assessment standards. Additionally, this course will introduce, explain and outline how artificial intelligence (AI) can, and already is, changing the audit process. It will examine how AI will change fundamental components of the risk-based audit process.

PREREQUISITE: Basic auditing course or equivalent experience

AUDIENCE: Audit practitioners responsible for planning and supervising audits; other members of audit engagement teams involved with audits of non-public entities; audit professionals seeking to better understand how AI will change how audits are conducted and future applications based on AI technologies

SOURCE: Kaplan Financial Education powered by Loscalzo Institute | LEVEL: Intermediate

Shorten Month-End: Closing Best Practices

DATE: 11/19/19 | TIME: 1–4:30 p.m.
INSTRUCTOR: John L. Daly, CPA, CMA, CPIM, MBA
LOCATION: INCPAS Learning Center, Indianapolis

DATE: 12/20/19 | TIME: 1–4:30 p.m.
INSTRUCTOR: John L. Daly, CPA, CMA, CPIM, MBA
LOCATION: Embassy Suites South Bend at Notre Dame, South Bend

CPE: 4 | MEMBER: $195 | NONMEMBER: $283

OVERVIEW: Surveys show the average North American company completes their monthly financial statement closing in five days. However, some companies can close their books in one day or less. Many financial managers who feel pressured to shorten financial statement preparation time struggle with the balance between accuracy and speed. This seminar will focus on the key aspects of every close and provide attendees with methods to
prepare better quality financial information more cheaply and in less time.

**AUDIENCE:** Corporate financial managers  
**SOURCE:** Executive Education  
**LEVEL:** Intermediate

**NOTE:** This seminar will use hands-on exercises and provide opportunities for group discussion of the issues relating to performing a quick financial statement closing.

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### Statement of Cash Flows: Preparation Guidance & Presentation Illustrations

**DATE:** 8/21/19  
**TIME:** 1–4:30 p.m.  
**INSTRUCTOR:** Brent McClure, CPA  
**LOCATION:** INCPAS Learning Center, Indianapolis

**CPE:** 4  
**MEMBER:** $195  
**NONMEMBER:** $283

**OVERVIEW:** From its humble beginnings way back in 1963 when the Accounting Principles Board “encouraged” the presentation of a funds statement, the Statement of Cash Flows has made its way to a required, critical and often the most important financial statement in an entity’s financial reporting package. This course will provide you with an overall review of the authoritative literature used for preparing a statement of cash flows, FASB Accounting Standards Codification (ASC) 230, Statement of Cash Flows, as well as implementation guidance and real-world presentation examples from published financial statements. The course will also address recent Accounting Standards Updates (ASUs) related to the preparation of the statement of cash flows. Hands-on exercises will be used to help you apply the requirements and guidance which can be challenging especially in those situations when non-operating changes in assets and liabilities are involved. Disclosure requirements will also be reviewed and illustrated across a number of accounting standards.

**AUDIENCE:** Accounting practitioners in public practice and business and industry involved in preparing the statement of cash flows; other financial professionals who review, analyze and use the statement of cash flows, including lenders, creditors, investors and financial analysts  
**SOURCE:** Surgent  
**LEVEL:** Basic

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### The Bottom Line on the New Lease Accounting Requirements

**DATE:** 11/8/19  
**TIME:** 1–4:30 p.m.  
**INSTRUCTOR:** Daryl Krause, CPA  
**LOCATION:** INCPAS Learning Center, Indianapolis

**CPE:** 4  
**MEMBER:** $195  
**NONMEMBER:** $283

**OVERVIEW:** How do the leasing requirements in the new standard differ from current GAAP? This course addresses that question by focusing on the basic core principles of the new standard. Discussion includes basic identification, recognition, measurement, presentation and disclosure requirements. Case study exercises are included to illustrate application of the new standard. This course discusses the lessee accounting model, including lease classification, amortization of the right-of-use asset and interest on the lease liability. It also discusses the lessor accounting model, including profit recognition and collectability.

**PREREQUISITE:** Experience in application of accounting standards  
**AUDIENCE:** CPAs in practice and industry  
**SOURCE:** AICPA  
**LEVEL:** Intermediate

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### The Most Common Financial Statement & Asset Fraud Schemes: How to Detect & Prevent Them

**DATE:** 5/23/19  
**TIME:** 1–4:30 p.m.  
**INSTRUCTOR:** Ronald Kral, CPA  
**LOCATION:** INCPAS Learning Center, Indianapolis

**CPE:** 4  
**MEMBER:** $195  
**NONMEMBER:** $283

**OVERVIEW:** Many costly fraudulent schemes have occurred repeatedly throughout the past several decades. Why do these material fraud schemes continue to succeed? Is this due to failures of properly designed internal controls? Could the internal controls be adequate but not complied with? This course provides descriptions of how the most common types of financial statement and misappropriation of asset fraud schemes are detected. Cost-effective internal controls that can be implemented to prevent these schemes are provided. Classic and contemporary real-world fraud cases are reviewed in detail to reinforce how these schemes are perpetrated, both due to internal control failures and other factors. Red flags that might possibly be indicative of these fraud schemes are addressed.

**PREREQUISITE:** Experience in accounting and reporting  
**AUDIENCE:** CPAs, business owners, managers, supervisors, employees and auditors  
**SOURCE:** AICPA  
**LEVEL:** Intermediate

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**Business Ethics: Cases from the Real World**

**DATE:** 11/15/19  
**TIME:** 8:30 a.m.–Noon  
**INSTRUCTOR:** Don Minges, MBA  
**LOCATION:** INCPAS Learning Center, Indianapolis

**DATE:** 12/5/19  
**TIME:** 8:30 a.m.–Noon  
**INSTRUCTOR:** Don Minges, MBA  
**LOCATION:** Grand Wayne Center, Fort Wayne

**OVERVIEW:** Being ethical is not the same as complying with the law, and ethical issues are not always black and white. Being consistently ethical is a challenge. Most of us have had to make tough choices. This session will discuss real-world cases involving thorny ethical dilemmas and how to resolve them. Being ethical is not the same as complying with the law and ethical issues are not always black and white. This session will review different professional ethical standards. What does integrity mean in the office? If you want to learn lessons from the best in a short time, this session is for you. Participate in engaging dialogue about how to prepare for the inevitable ethical situations. These lessons are valuable for every business leader.

**PREREQUISITE:** Some corporate finance classwork or experience

**AUDIENCE:** Corporate financial managers, business owners, entrepreneurs and professionals who advise them, including CPAs, CFOs, controllers, directors and managers

**SOURCE:** Executive Education  
**LEVEL:** Intermediate

**NOTE:** This seminar features cases and group discussion of real-life situations.

**Ethical & Legal Responsibilities of Board Members**

**DATE:** 12/18/19  
**TIME:** 8:30 a.m.–Noon  
**INSTRUCTOR:** John F. Levy, CPA, MBA  
**LOCATION:** Ritz Charles, Carmel

**OVERVIEW:** The first years of the 21st century have seen unprecedented changes in the roles and demands on corporate and nonprofit directors. Board members now cope with ever-fuller agendas, greater potential liability and increasing demands by shareholders, regulators, activists and the government. In this session, public company board veteran John F. Levy discusses every board member's responsibilities for public, private and not-for-profit boards.

**AUDIENCE:** Individuals who serve, or aspire to serve, on a board of directors, or finance professionals who work with the boards of their organizations

**SOURCE:** Executive Education  
**LEVEL:** Intermediate

**NOTE:** This seminar includes group discussion of four case studies.

**Cases in Corporate Ethics: Discuss Real-Life Conflicts**

**DATE:** 11/19/19  
**TIME:** 8:30 a.m.–Noon  
**INSTRUCTOR:** John L. Daly, CPA, CMA, CPIM, MBA  
**LOCATION:** INCPAS Learning Center, Indianapolis

**DATE:** 12/20/19  
**TIME:** 8:30 a.m.–Noon  
**INSTRUCTOR:** John L. Daly, CPA, CMA, CPIM, MBA  
**LOCATION:** Embassy Suites South Bend at Notre Dame, South Bend

**CPE:** 4  
**MEMBER:** $195  
**NONMEMBER:** $283

**OVERVIEW:** Anyone who has attended a lecture-format ethics seminar knows there is a better way. This course provides an opportunity for lively group discussion of real-world, ethical dilemmas. It examines eight cases drawn from real-life business conflicts involving corporate financial managers.
explains why the code is necessary and how it is organized. AICPA members must follow the AICPA code — and many courts and regulatory bodies view the AICPA code as the de facto standard for the CPA profession — therefore it is imperative to stay current on the rules and apply them properly. Through interactive case studies, exercises and illustrative graphics, you will learn the most up-to-date rules.

**AUDIENCE:** Individuals who want a refresher course on the AICPA Code of Professional Conduct and licensed CPAs looking to fulfill their ethics requirement

**SOURCE:** AICPA  
**LEVEL:** Basic

### Heartfelt Leadership: How Ethical Leaders Build Trusting Organizations

**DATE:** 12/17/19  
**TIME:** 8:30 a.m.–Noon  
**INSTRUCTOR:** John F. Levy, CPA, MBA  
**LOCATION:** Ritz Charles, Carmel

**CPE:** 4  
**MEMBER:** $195  
**NONMEMBER:** $283

**OVERVIEW:** Leaders provide the culture, environment, values and incentives that foster and encourage change. Most importantly, great leaders create environments of trust which allow employees to challenge, innovate and work as teams. In a rapidly changing world, heartfelt leaders build great organizations. In this session, we will discuss the qualities of great leaders and how you can become a great and heartfelt leader, no matter your title or place in an organization.

**AUDIENCE:** Individuals who have attained, or aspire to attain, management positions

**SOURCE:** Executive Education  
**LEVEL:** Intermediate

**NOTE:** This course material includes group discussion and case studies.

### Professional Ethics Update

**DATE:** 6/10/19  
**TIME:** 1–4:30 p.m.  
**INSTRUCTOR:** James Schaefer, CPA-inactive, CFE, CIA, CISA, DBA  
**LOCATION:** Monroe Convention Center, Bloomington

**DATE:** 6/14/19  
**TIME:** 1–4:30 p.m.  
**INSTRUCTOR:** James Schaefer, CPA-inactive, CFE, CIA, CISA, DBA  
**LOCATION:** Tropicana Executive Conference Center, Evansville

**DATE:** 6/17/19  
**TIME:** 1–4:30 p.m.  
**INSTRUCTOR:** James Schaefer, CPA-inactive, CFE, CIA, CISA, DBA  
**LOCATION:** Indiana Wesleyan University's Merrillville Education and Conference Center, Merrillville

**DATE:** 6/21/19  
**TIME:** 1–4:30 p.m.  
**INSTRUCTOR:** James Schaefer, CPA-inactive, CFE, CIA, CISA, DBA  
**LOCATION:** Embassy Suites South Bend at Notre Dame, South Bend

**DATE:** 6/24/19  
**TIME:** 1–4:30 p.m.  
**INSTRUCTOR:** James Schaefer, CPA-inactive, CFE, CIA, CISA, DBA  
**LOCATION:** Holiday Inn Terre Haute, Terre Haute

**DATE:** 6/28/19  
**TIME:** 1–4:30 p.m.  
**INSTRUCTOR:** James Schaefer, CPA-inactive, CFE, CIA, CISA, DBA  
**LOCATION:** Sheraton Louisville-Riverside, Jeffersonville

**CPE:** 4  
**MEMBER:** $119  
**NONMEMBER:** $199

**OVERVIEW:** This 4-hour course reviews the AICPA Code of Professional Conduct, latest developments in independence and legal liability, and responsibilities to clients as well as non-CPA ownership. Case studies also are included. This course fulfills the ethics requirement for Indiana’s 3-year reporting period requirement.

**AUDIENCE:** Any CPA who needs ethics for the current reporting period

**SOURCE:** Indiana CPA Society  
**LEVEL:** Update
WHAT WOULD YOU HAVE DONE?

Deep dive into the snowballing fraud at Wells Fargo as a current and ongoing Ethics case study. Learn how organizations impact fraud and get a modern framework for detection and prevention. Share your thoughts on how you would handle fraud in the workplace in this competency-based online interactive course. See full course description at incpas.org/ethics.

You have 90 days to complete the course; take it all at once or in small bits—whichever works best for you!

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Across, Up & Out: Different Tactics for Different Audiences

DATE: 10/18/19  TIME: 8–9:40 a.m.
INSTRUCTOR: Robert and Sara Norris, Principals
LOCATION: INCPAS Learning Center, Indianapolis

OVERVIEW: Customize your messages for three different audiences: across to peers, up the chain of command or out to external audiences.

PREREQUISITE: Know the basic principles of business presentation (e.g., the importance of audience analysis, benefits of rehearsal and need to establish a success metric in advance).

AUDIENCE: Anyone who currently is or may be required to present to at least two of the three audiences.

NOTE: Different business presentations must be crafted for each of these three audiences. In presenting, as in life, one size does not fit all!

Annual CFO Spotlight: Essential Skills

DATE: 12/19/19  TIME: 8:30 a.m.–4:30 p.m.
INSTRUCTOR: John L. Daly, CPA, CMA, CPIM, MBA
LOCATION: Embassy Suites South Bend at Notre Dame, South Bend

OVERVIEW: This course is designed specifically for current and aspiring CFOs. In this 8-hour session, the day will be divided into four different topics, consisting of two hours for each topic. The course will provide extensive case study analysis and many opportunities for group discussion on these essential skills:
1. Doing More with Less – Do you have too much to do and not enough time to do it?
2. Beyond Traditional Budgeting: Reduce Work and Improve Control – Many financial managers wage a constant struggle to keep their projections current, and keep their operating managers engaged and focused on their budgets.
3. Negotiating with Your Banker: Get the Best Deal – Some CFOs think your banker’s proposal is a “take it or leave it” proposition. If your organization needs bank financing, this session is for you.
4. MS Word: Advanced Features – Financial professionals are often Excel experts but unaware of MS Word tools that can save time and make their written communications considerably more professional looking and easier to read.

AUDIENCE: Anyone who is, or aspires to be, chief financial officers; most appropriate for people in medium-sized organizations.

SOURCE: Executive Education
LEVEL: Intermediate

NOTE: Bring a calculator. This seminar includes extensive case study analysis and many opportunities for group discussion.
Qualifies for 2 hours of Accounting & Auditing.

Annual Update for Controllers

DATE: 10/23/19  TIME: 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Bruce Shepard, CPA
LOCATION: Tropicana Executive Conference Center, Evansville

DATE: 10/25/19  TIME: 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Bruce Shepard, CPA
LOCATION: Embassy Suites South Bend at Notre Dame, South Bend

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

PREREQUISITE: Management experience in accounting, finance or operations.

AUDIENCE: CFOs, controllers, treasurers and other financial managers.

SOURCE: AICPA
LEVEL: Update

Business Consulting for CPAs

DATE: 10/17/19  TIME: 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Jim Lindell, CPA, CGMA, CSP, MBA
LOCATION: INCPAS Learning Center, Indianapolis

OVERVIEW: Does your firm have an interest in expanding its services beyond traditional CPA services? Do you have staff with the expertise to compete against non-CPA firms? Welcome to a course that will lead you through the maze of creating a successful consulting business practice for your CPA firm. The course will help you understand where consulting business...
opportunities exist, what the firm’s professional responsibilities are and — most importantly — how to recognize the needs of the client.

**AUDIENCE:** CPAs in public practice who want to expand their business beyond traditional services

**SOURCE:** Thorsten Consulting Group, Inc.  **LEVEL:** Basic

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**New Business Law Essentials for Practitioners & Controllers**

**DATE:** 8/19/19  **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Brent McClure, CPA  
**LOCATION:** INCPAS Learning Center, Indianapolis

**CPE:** 8  | **MEMBER:** $349 | **NONMEMBER:** $506

**OVERVIEW:** This course covers basic legal principles every CPA should be familiar with to avoid common legal disputes and costly litigation. By analyzing business law issues from the standpoint and background of CPAs and auditors, this course will help you develop an approach to client and practice issues with a sensitivity and appreciation for the legal ramifications that can occur.

**AUDIENCE:** All practitioners and controllers who want a better understanding of how the law can impact their practice and clients

**SOURCE:** Surgent  **LEVEL:** Basic

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**New Business Longevity**

**DATE:** 5/22/19  **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Jim Lindell, CPA, CGMA, CSP, MBA  
**LOCATION:** INCPAS Learning Center, Indianapolis

**CPE:** 8  | **MEMBER:** $349 | **NONMEMBER:** $506

**OVERVIEW:** Almost 50% of businesses that started five years ago are no longer in operation today. Controllers and CFOs can and must influence the longevity of their organization to improve their success rate. Be aware and able to understand the answers to these issues: can you describe the financial health of your company; can you also explain what the financial health of your industry is; do you know your Business Cycle compared to the industry business cycle; do you have an executable plan; do you know what the competitive, legal and technological landscape is currently, and for the future; and is your organization aligned and incentivized to be successful?

**AUDIENCE:** Industry and public CPAs who wish to move to the next level within their organization

**SOURCE:** Thorsten Consulting Group, Inc.  **LEVEL:** Basic

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**New CFO Leadership Series: Balance Sheet Management**

**DATE:** 11/14/19  **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Don Minges, MBA  
**LOCATION:** INCPAS Learning Center, Indianapolis

**CPE:** 8  | **MEMBER:** $349 | **NONMEMBER:** $506

**OVERVIEW:** This is day four of five in Indianapolis for the popular series designed specifically for CFOs and those who aspire to be CFOs. In this eight-hour session, the day will be divided into four different topics, consisting of two hours for each topic. The course will provide extensive case study analysis and may opportunities for group discussion on essential skills. See page 48 for more information.

**PREREQUISITE:** Management experience helpful

**AUDIENCE:** Individuals who are, or aspire to be, chief financial officers; most appropriate for people in medium-sized organizations

**SOURCE:** Executive Education  **LEVEL:** Intermediate

**NOTE:** Bring a calculator. This seminar includes extensive case study analysis and many opportunities for group discussion. Qualifies for 6 hours of Accounting & Auditing.

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**New CFO Leadership Series: Financial Leadership**

**DATE:** 12/16/19  **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** John F. Levy, CPA, MBA  
**LOCATION:** INCPAS Learning Center, Indianapolis

**CPE:** 8  | **MEMBER:** $349 | **NONMEMBER:** $506

**OVERVIEW:** This is day five of five in Indianapolis for the popular series designed specifically for CFOs and those who aspire to be CFOs. In this eight-hour session, the day will be divided into four different topics, consisting of two hours for each topic. The course will provide extensive case study analysis and may opportunities for group discussion on essential skills. See page 48 for more information.
CFO Leadership Series: Honing Your Management Style

- **DATE:** 12/6/19
- **TIME:** 8:30 a.m.–4:30 p.m.
- **INSTRUCTOR:** Don Minges, MBA
- **LOCATION:** Grand Wayne Center, Fort Wayne

**OVERVIEW:** This is day three of three in Fort Wayne for the popular series designed specifically for CFOs and those who aspire to be CFOs. In this eight-hour session, the day will be divided into four different topics, consisting of two hours for each topic. The course will provide extensive case study analysis and may opportunities for group discussion on essential skills. See page 48 for more information.

**PREREQUISITE:** Management experience helpful

**AUDIENCE:** Individuals who are, or aspire to be, chief financial officers; most appropriate for people in medium-sized organizations

**SOURCE:** Executive Education  **LEVEL:** Intermediate

**NOTE:** Bring a calculator. This seminar includes extensive case study analysis and many opportunities for group discussion.

New CFO Leadership Series: Managing People

- **DATE:** 9/16/19
- **TIME:** 8:30 a.m.–4:30 p.m.
- **INSTRUCTOR:** John L. Daly, CPA, CMA, CPIM, MBA
- **LOCATION:** INCPAS Learning Center, Indianapolis

**OVERVIEW:** This is day two of five in Indianapolis for the popular series designed specifically for CFOs and those who aspire to be CFOs. In this eight-hour session, the day will be divided into four different topics, consisting of two hours for each topic. The course will provide extensive case study analysis and may opportunities for group discussion on essential skills. See page 48 for more information.

**PREREQUISITE:** Management experience helpful

**AUDIENCE:** Individuals who are, or aspire to be, chief financial officers; most appropriate for people in medium-sized organizations

**SOURCE:** Executive Education  **LEVEL:** Intermediate

**NOTE:** This seminar includes extensive case study analysis and many opportunities for group discussion. Qualifies for 4 hours of Ethics.

CFO Leadership Series: Reinventing the Finance Role

- **DATE:** 10/21/19
- **TIME:** 8:30 a.m.–4:30 p.m.
- **INSTRUCTOR:** Richard A. Karwic, MBA
- **LOCATION:** Grand Wayne Center, Fort Wayne

**CPE:** 8  **MEMBER:** $349  **NONMEMBER:** $506

**OVERVIEW:** This is day two of three in Fort Wayne for the popular series designed specifically for CFOs and those who aspire to be CFOs. In this eight-hour session, the day will be divided into four different topics, consisting of two hours for each topic. The course will provide extensive case study analysis and may opportunities for group discussion on essential skills. See page 48 for more information.

**PREREQUISITE:** Management experience helpful

**AUDIENCE:** Individuals who are, or aspire to be, chief financial officers; most appropriate for people in medium-sized organizations

**SOURCE:** Executive Education  **LEVEL:** Intermediate

**NOTE:** Bring a calculator. This seminar includes extensive case study analysis and many opportunities for group discussion.

New CFO Leadership Series: Strategy & Critical Thinking Skills

- **DATE:** 10/22/19
- **TIME:** 8:30 a.m.–4:30 p.m.
- **INSTRUCTOR:** Richard A. Karwic, MBA
- **LOCATION:** INCPAS Learning Center, Indianapolis

**CPE:** 8  **MEMBER:** $349  **NONMEMBER:** $506

**OVERVIEW:** This is day three of five in Indianapolis for the popular series designed specifically for CFOs and those who aspire to be CFOs. In this eight-hour session, the day will be divided into four different topics, consisting of two hours for each topic. The course will provide extensive case study analysis and may opportunities for group discussion on essential skills. See page 48 for more information.

**PREREQUISITE:** Management experience helpful

**AUDIENCE:** Individuals who are, or aspire to be, chief financial officers; most appropriate for people in medium-sized organizations

**SOURCE:** Executive Education  **LEVEL:** Intermediate

**NOTE:** Bring a calculator. This seminar includes extensive case study analysis and many opportunities for group discussion. Qualifies for 2 hours of Accounting & Auditing.

CFO Leadership Series: Technical Competence

- **DATE:** 9/17/19
- **TIME:** 8:30 a.m.–4:30 p.m.
- **INSTRUCTOR:** John L. Daly, CPA, CMA, CPIM, MBA
- **LOCATION:** Grand Wayne Center, Fort Wayne

**CPE:** 8  **MEMBER:** $349  **NONMEMBER:** $506

**OVERVIEW:** This is day one of three in Fort Wayne for the popular series designed specifically for CFOs and those who aspire to be...
New Change the Way You Work: Success as a Virtual CFO

DATE: 5/22/19        TIME: 1–4:30 p.m.
INSTRUCTOR: Ronald Kral, CPA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 4 | MEMBER: $195 | NONMEMBER: $283

OVERVIEW: Small and growing businesses do not have the funds to hire a CFO, but still need advice on strategic, financial, and operational matters. In many cases, these businesses are turning to virtual (or outsourced) CFOs to guide them through periods of transition or growth. CPAs and other finance and accounting professionals are well positioned to be virtual, strategic business partners for these companies. You will learn the core competencies a virtual CFO needs and the role a virtual CFO can provide. This course will emphasize the synergy between competencies developed by experienced CPAs, finance and accounting professionals, and successful virtual CFOs. Finally, you will understand potential service models and the need for a readiness assessment before embarking on this career trajectory.

AUDIENCE: CPAs and finance professionals interested in becoming or understanding more about the virtual/outsourced CFO role

SOURCE: AICPA | LEVEL: Basic

New Developing Your Digital Mindset

DATE: 5/22/19        TIME: 8:30 a.m.–Noon
INSTRUCTOR: Ronald Kral, CPA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 4 | MEMBER: $195 | NONMEMBER: $283

OVERVIEW: The CPA and finance profession is seeing seismic change because of new technologies, which are developing and launching ahead of the profession's ability and willingness to adapt to them and take advantage of their benefits. Digital mindsets are reported to be one of the key barriers in the initial adoption of technology, its full use and exploiting the opportunity it presents. Many early adopters are still experimenting, but most of the market are in the late-majority category of adopters. This course will explain what it means to develop a digital mindset, including concepts related to agility, constant learning, thriving in ambiguity, curiosity and innovation. Through tangible examples, this course will help participants gain knowledge about the competencies needed to thrive in today's disruptive world, enhance employability, accelerate company performance, and manage the accelerating and relentless pace of change.

AUDIENCE: CPAs and finance professionals of any level who would like more insight into developing a digital mindset

SOURCE: AICPA | LEVEL: Basic

Critical Thinking Skills for Financial Professionals

DATE: 12/17/19        TIME: 1–4:30 p.m.
INSTRUCTOR: John F. Levy, CPA, MBA
LOCATION: Ritz Charles, Carmel

CPE: 4 | MEMBER: $195 | NONMEMBER: $283

OVERVIEW: “What were they thinking?” Why do business leaders sometimes make decisions that severely damage themselves and their organizations? It is tempting to attribute poor choices to a leader’s assumed incompetence, inexperience, bad character or low intelligence — but reality is much more complex. Understand what factors really cause the most blunders. When business decisions go wrong, financial professionals usually find themselves deeply involved. This seminar provides conceptual and case study material to better equip you for the challenge.

AUDIENCE: Corporate financial managers

SOURCE: Executive Education | LEVEL: Intermediate

NOTE: This seminar includes group discussion of three exercises or case studies.

CPAs in Business & Industry Conference

DATE: 6/18/19        TIME: 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Various
LOCATION: Ritz Charles, Carmel

CPE: 8 | MEMBER: $254 | NONMEMBER: $399

OVERVIEW: Bringing together CPAs in manufacturing, health care and other industries, this is a great way to network and get an inexpensive update on a variety of topics relevant issues to CPAs in business and industry. Don’t miss this opportunity to attend the Society’s fastest-growing conference.

AUDIENCE: CPAs in private business and industry seeking an affordable annual update on pressing issues for corporate CPAs

SOURCE: INCPAS | LEVEL: Intermediate

NOTE: May include some A&A hours. Continental breakfast and lunch are provided in the cost of registration.

Educators Conference

DATE: 5/3/19        TIME: 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Various
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | MEMBER: $159 | NONMEMBER: $219

OVERVIEW: The Educators Conference provides key updates, trends and best practices in accounting education while providing a forum for accounting educators to network and share ideas.
**Management**

**Audience:** Accounting instructors seeking key updates, trends and best practices in accounting education  
**Source:** INCPAS  
**Level:** Intermediate  
**Note:** Continental breakfast and lunch are provided in the cost of registration.

### Employer’s Handbook: Legal, Tax & Health Care Issues

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Instructor</th>
<th>Location</th>
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<tbody>
<tr>
<td>8/20/19</td>
<td>8:30 a.m.–4:30 p.m.</td>
<td>Brent McClure, CPA</td>
<td>INCPAS Learning Center, Indianapolis</td>
</tr>
<tr>
<td>8/21/19</td>
<td>8:30 a.m.–4:30 p.m.</td>
<td>Curtis J. Quickel, CPA</td>
<td>Embassy Suites South Bend at Notre Dame, South Bend</td>
</tr>
</tbody>
</table>

**Overview:** The employer-employee relationship strains both sides in uncertain times, and businesses need CPAs, controllers and other advisors to provide understanding of the complex legal, tax and health care issues associated with all aspects of employment, especially now. This course provides in-depth coverage of this critical area and is updated and supplemented throughout the year for breaking developments.

**Audience:** CPAs who need an in-depth understanding of employment issues

**Source:** Surgent  
**Level:** Basic

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### Employment Law Update: Key Risks & Recent Trends

<table>
<thead>
<tr>
<th>Date</th>
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<th>Instructor</th>
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<tbody>
<tr>
<td>8/28/19</td>
<td>8:30 a.m.–4:30 p.m.</td>
<td>Michael Ussery, CPA</td>
<td>Indiana Wesleyan University’s Merrillville Education and Conference Center, Merrillville</td>
</tr>
<tr>
<td>8/29/19</td>
<td>8:30 a.m.–4:30 p.m.</td>
<td>Michael Ussery, CPA</td>
<td>Grand Wayne Center, Fort Wayne</td>
</tr>
</tbody>
</table>

**Overview:** Businesses and non-profits today face an explosion of EEOC actions and employment litigation that can threaten the organization’s financial stability as well as its reputation. This course will update you on — and provide tips about mitigating exposure for — the key employment risks every employer faces: cyberissues such as social media, device and internet use, wrongful termination, retaliation, whistleblowers, all types of discrimination and harassment, workplace safety, wage and hour laws, immigration issues, laws such as the FMLA, ADA, HIPAA, COBRA, FLSA and more. Know how to react to developing employment issues, understand recent trends in employment claims, and arm yourself with the knowledge and assessment tools that can make a difference for your employer or your clients.

**Prerequisite:** Experience in, and knowledge of, employment law issues encountered by businesses and non-profits

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### Networking: How to Make New Contacts & Leverage to Your Career Advantage

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<th>Location</th>
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<tbody>
<tr>
<td>11/5/19</td>
<td>8–9:40 a.m.</td>
<td>Robert and Sara Norris, Principals</td>
<td>INCPAS Learning Center, Indianapolis</td>
</tr>
</tbody>
</table>

**Overview:** Make confident and constructive conversation at networking events and meetings, then turn them into productive next steps.

**Prerequisite:** Knowledge that the ability to network well can jumpstart your career

**Audience:** Individuals who want to turn every event into a networking goldmine

**Source:** When You Leave The Room  
**Level:** Basic

**Note:** Participants will learn the importance of active listening and meeting the other person’s needs first.

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### Finance & Innovation: Reinvent Your Department & Company

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<th>Date</th>
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<th>Instructor</th>
<th>Location</th>
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<tr>
<td>5/21/19</td>
<td>8:30 a.m.–4:30 p.m.</td>
<td>Don Minges, MBA</td>
<td>INCPAS Learning Center, Indianapolis</td>
</tr>
</tbody>
</table>

**Overview:** Innovation drives economic growth. The key to reigniting the American economy is reigniting innovation. Innovation can be fostered, nurtured, encouraged and sustained by our companies and organizations. Innovation is not solely the purview of marketing, sales, service or production. Financial managers can create organizations that thrive on innovation or kill new ideas. They may choose to help develop and maintain practices that nurture innovation, or they can just maintain the status quo. Truly innovative finance professionals provide new, more meaningful and actionable information to all employees.

**Audience:** CPAs and accounting professionals who seek to create, foster, nurture, encourage and sustain innovation in their organizations and departments

**Source:** Executive Education  
**Level:** Intermediate

**Note:** This seminar provides extensive case study analysis and many opportunities for group discussion.

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### Only Financial Officers 3.0: More Skills for Smaller Company Financial Managers

<table>
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<th>Instructor</th>
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<tbody>
<tr>
<td>11/22/19</td>
<td>8:30 a.m.–4:30 p.m.</td>
<td>John L. Daly, CPA, CMA, CPIM, MBA</td>
<td>Grand Wayne Center, Fort Wayne</td>
</tr>
</tbody>
</table>

**Overview:** The employer-employee relationship strains both sides in uncertain times, and businesses need CPAs, controllers and other advisors to provide understanding of the complex legal, tax and health care issues associated with all aspects of employment, especially now. This course provides in-depth coverage of this critical area and is updated and supplemented throughout the year for breaking developments.

**Audience:** CPAs in business and industry, non-profits or public practice who want to increase their knowledge of employment law issues encountered by businesses and non-profits

**Source:** AICPA  
**Level:** Advanced

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**Paperless Seminars** learn more at incpas.org/green
**OVERVIEW:** The title “Chief Financial Officer” is not an accurate description for what many financial managers do because the word “chief” implies the company has more than one degreed CPA. This seminar covers four major topics of importance to the financial manager who must do it all. We have designed Only Financial Officer 3.0 to give financial managers in small- to medium-sized companies the high-level skills needed to act as a member of top management.

**AUDIENCE:** Individuals who are the only degreed CPA in small- to medium-sized companies

**SOURCE:** Executive Education

**LEVEL:** Intermediate

**NOTE:** Bring a calculator. This seminar includes group discussion of five cases.

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**Presentation Skills for New Managers**

**DATE:** 8/27/19  
**TIME:** 8–9:40 a.m.  
**INSTRUCTOR:** Robert and Sara Norris, Principals  
**LOCATION:** INCPAS Learning Center, Indianapolis

**CPE:** 2  |  **MEMBER:** $105  |  **NONMEMBER:** $152

**OVERVIEW:** Discover best practices in planning and delivering confident and compelling business presentations packed with actionable information.

**PREREQUISITE:** Know the basic principles of business presentation (e.g., the importance of audience analysis, benefits of rehearsal and need to establish a success metric in advance)

**AUDIENCE:** Individuals who recently moved into a management role and are now expected to present to team members, senior management and/or to external audiences

**SOURCE:** When You Leave The Room  
**LEVEL:** Basic

**NOTE:** This interactive session is packed with tips and tricks that can take your presentation from acceptable to awesome.

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**Presentations Master Class Workshop: Taking Your Presentation Skills to the Next Level!**

**DATE:** 10/25/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Robert and Sara Norris, Principals  
**LOCATION:** INCPAS Learning Center, Indianapolis

**CPE:** 8  |  **MEMBER:** $349  |  **NONMEMBER:** $506

**OVERVIEW:** Become a skilled presenter by mastering best practices in content development, visual aid design and delivery.

**PREREQUISITE:** Know the basic principles of presenting in a business environment and commit to improving skills by reviewing video of your presentations

**AUDIENCE:** Individuals whose presentation skills need work and are open to improving them in a supportive environment

**SOURCE:** When You Leave The Room  
**LEVEL:** Intermediate

**NOTE:** This is a highly interactive and constructive session that enables you to see yourself improve.

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**Presenting Financial & Technical Information to Non-Technical Audiences**

**DATE:** 9/26/19  
**TIME:** 8–9:40 a.m.  
**INSTRUCTOR:** Rhonda Tamulonis and Sara Norris, Principal  
**LOCATION:** INCPAS Learning Center, Indianapolis

**CPE:** 2  |  **MEMBER:** $105  |  **NONMEMBER:** $152

**OVERVIEW:** Simplify complex information, create strong graphics, emphasize trends and patterns, and leverage the power of Microsoft SmartArt.

**PREREQUISITE:** Know the basic principles of business presentation (e.g., the importance of audience analysis, benefits of rehearsal and need to establish a success metric in advance)

**AUDIENCE:** Individuals who feel their current presentations don’t convey business data in a way that results in clear understanding and decision making

**SOURCE:** When You Leave The Room  
**LEVEL:** Basic

**NOTE:** Most of us have sat through presentations packed with unfamiliar jargon, unnecessary detail and communicate little useful information. Here is how to avoid these pitfalls.

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**Risk, Cost & Cash Management for Controllers & Financial Managers**

**DATE:** 10/22/19  
**TIME:** 1–4:30 p.m.  
**INSTRUCTOR:** John Minnich, CPA, CFRM, CGMA, Macct  
**LOCATION:** Grand Wayne Center, Fort Wayne

**DATE:** 11/4/19  
**TIME:** 1–4:30 p.m.  
**INSTRUCTOR:** John Minnich, CPA, CFRM, CGMA, Macct  
**LOCATION:** Embassy Suites South Bend at Notre Dame, South Bend

**CPE:** 4  |  **MEMBER:** $195  |  **NONMEMBER:** $283

**OVERVIEW:** When an organization fails, it is usually due to several factors. These often result from a number of undetected, poor practices that infect and grow throughout the entire organization. They can include a lack of understanding of costs, poor asset allocation, systems that support the status quo, failure to identify risk, tunnel vision by management, and so on. Often, management will repeat poor practices across the enterprise. For example, do you think a so-called “budgeting crisis” is normally due to the budget, or actually hidden, existing problems that were uncovered due to the budgeting process? This course demonstrates the use of practices and techniques specifically designed to assist CPAs and other financial professionals in adding value to their company through improved decision making, cost management, understanding business cycles, managing continuous improvements, cash management and risk management. Examples of actions by both successful and failed organizations are used throughout the session.

**PREREQUISITE:** Management experience in accounting, finance or operations

**AUDIENCE:** Owners, controllers, treasurers, financial officers and other financial managers in organizations with less than $250 million in sales

**SOURCE:** AICPA  
**LEVEL:** Intermediate

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Small Firm Summit

**DATE:** 11/7/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Various  
**LOCATION:** INCPAS Learning Center, Indianapolis

**CPE:** 8  
**MEMBER:** $254  
**NONMEMBER:** $399

**OVERVIEW:** This is the forum where small firm practitioners in Indiana get together to discuss their everyday challenges, share solutions and get new strategic ideas to enhance the success of their firm’s future. This group will also have a hand in developing future opportunities for networking on a more regular basis.

**AUDIENCE:** Sole practitioners or CPAs at firms with one to three partners

**SOURCE:** INCPAS  
**LEVEL:** Intermediate

**NOTE:** Continental breakfast and lunch are provided in the cost of registration.

The 8-Hour MBA for CPAs

**DATE:** 9/23/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** James Schaefer, CPA-inactive, CFE, CIA, CISA, DBA  
**LOCATION:** INCPAS Learning Center, Indianapolis

**DATE:** 9/30/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** James Schaefer, CPA-inactive, CFE, CIA, CISA, DBA  
**LOCATION:** Grand Wayne Center, Fort Wayne

**CPE:** 8  
**MEMBER:** $349  
**NONMEMBER:** $506

**OVERVIEW:** This class is designed specifically for CPA and provides an overview of the major topics included in an MBA program. These include marketing, organizational behavior, quality control, finance, data analytics and strategic management.

**AUDIENCE:** All CPAs, regardless of experience

**SOURCE:** James Schaefer  
**LEVEL:** Intermediate

The Successful Family Business

**DATE:** 9/9/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Jim Lindell, CPA, CGMA, CSP, MBA  
**LOCATION:** INCPAS Learning Center, Indianapolis

**CPE:** 8  
**MEMBER:** $349  
**NONMEMBER:** $506

**OVERVIEW:** This course takes a candid look inside the family business. Understanding the dynamics of family interaction will be one of the most important skills in helping a family business succeed. This course will help the participant navigate delicate issues and learn to provide counsel that will grow — or protect — the family business and non-family staff.

**AUDIENCE:** Individuals who work in or with family businesses; helpful to both members of family- owned businesses and non-family employees

**SOURCE:** Thorsten Consulting Group, Inc.  
**LEVEL:** Basic

The Strategic CFO: Big Picture Skills

**DATE:** 11/20/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** John L. Daly, CPA, CMA, CPIM, MBA  
**LOCATION:** INCPAS Learning Center, Indianapolis

**CPE:** 8  
**MEMBER:** $349  
**NONMEMBER:** $506

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

**AUDIENCE:** Current and aspiring chief financial officers; discussion will focus on medium-sized organizations

**SOURCE:** Executive Education  
**LEVEL:** Intermediate

**NOTE:** This seminar includes group discussion of five cases. Qualifies for 4 hours of Accounting & Auditing.

The Tactical CFO: Make Your Business Processes Work for You

**DATE:** 11/21/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** John L. Daly, CPA, CMA, CPIM, MBA  
**LOCATION:** INCPAS Learning Center, Indianapolis

**DATE:** 12/18/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** John L. Daly, CPA, CMA, CPIM, MBA  
**LOCATION:** Embassy Suites South Bend at Notre Dame, South Bend

**CPE:** 8  
**MEMBER:** $349  
**NONMEMBER:** $506

**OVERVIEW:** Effective CFOs drive continuous improvements in their departments and beyond. Come share ideas with experienced CFOs that will allow you to improve your department’s performance in four key areas. Learn skills that will allow you to improve the effectiveness of your finance team and company.

**AUDIENCE:** Current and aspiring CFOs and upper-level financial managers; discussion will focus on medium-sized organizations

**SOURCE:** Executive Education  
**LEVEL:** Intermediate

**NOTE:** This seminar includes group discussion of five cases. Qualifies for 2 hours of Accounting & Auditing.
Valuing a Business: What Is This Company Worth?

DATE: 11/15/19  TIME: 1–4:30 p.m.
INSTRUCTOR: Don Minges, MBA
LOCATION: INCPAS Learning Center, Indianapolis

DATE: 12/5/19  TIME: 1–4:30 p.m.
INSTRUCTOR: Don Minges, MBA
LOCATION: Grand Wayne Center, Fort Wayne

CPE: 4  |  MEMBER: $195  |  NONMEMBER: $283

OVERVIEW: What is your company worth? Is business value the single most important metric? This session discusses various business valuation methods for any stage company: start-up, spin-off or acquisition. Many valuation methods exist. Which method is right? Which is the "best" for a given business or a given situation? CPAs and corporate financial managers cannot afford to miss this course.

PREREQUISITE: Some corporate finance classwork or experience

AUDIENCE: Corporate financial managers, business owners, entrepreneurs and professionals who advise them; CPAs with the ABV certification

SOURCE: Executive Education  LEVEL: Intermediate

NOTE: Bring a laptop. This seminar includes three case studies for group discussion.

Working with or Serving on a Board

DATE: 12/18/19  TIME: 1–4:30 p.m.
INSTRUCTOR: John F. Levy, CPA, MBA
LOCATION: Ritz Charles, Carmel

CPE: 4  |  MEMBER: $195  |  NONMEMBER: $283

OVERVIEW: Board members now cope with ever-fuller agendas, greater potential liability and increasing demands by shareholders, regulators, activists and the government. Whether you serve on a board or just work with one, this session covers what you need to know, including the special responsibilities of audit committee members.

AUDIENCE: For individuals who serve or aspire to serve on a board of directors or finance professionals who work with the boards of their organizations

SOURCE: Executive Education  LEVEL: Intermediate

NOTE: This seminar includes four case studies on public, private and not-for-profit boards.
This popular and highly-rated series is designed specifically for CFOs and aspiring CFOs. Each course consists of four related focus areas for case studies and group discussion.

You don’t have to register for all of the courses; attend one or some based on your CPE needs.

**CFO LEADERSHIP SERIES**

**INDIANAPOLIS**  
**INCPAS Learning Center**

**New Day 1: Keeping Up with Technology**  
**August 19**
Learn about technology trends and innovations impacting you, your organization and the CPA profession: blockchain, IoT (Internet of Things), artificial intelligence, data analytics, cloud accounting software, MS Office 365 applications, and more.

**New Day 2: Managing People**  
**September 16 – Includes 4 hours Ethics**
Learn about the “soft” side necessary to excel in your role; corporate ethics in diversity, inclusion and anti-harassment/discrimination initiatives; benefits of an “open book” culture of transparency; and how to promote ethics and consierate conduct.

**New Day 3: Strategy & Critical Thinking Skills**  
**October 22 – Includes 2 hours A&A**
Learn about groundbreaking studies on enhanced logic and decision making within your company and the CPA profession; how to apply disciplined experimentation as a means to innovate; real-world models that successfully align budgets and strategy; and best financial management practices for the future.

**New Day 4: Balance Sheet Management**  
**November 14 – Includes 6 hours A&A**
Learn how to analyze and manage your financial statements more holistically; calculate the cost of capital and avoid the common ways organizations misuse it; key considerations when determining whether to raise your organization’s debt or equity; and what to do to keep your own personal net worth on track.

**New Day 5: Financial Leadership**  
**December 16**
Learn how to become a more effective business communicator who can move, motivate and lead others through storytelling; to create environments of trust that allow employees to challenge, innovate and work as teams; attributes and plans of successful people; and simple steps to create a forward-thinking finance department.

**FORT WAYNE**  
**Grand Wayne Center**

**Day 1: Technical Competence**  
**September 17 – Includes 6 hours A&A**
Learn about COSO Updates; the new standards for revenue and lease accounting that will go into effect; how to identify the right performance metrics for your organization, organize them in to a balanced scorecard and use them to improve organizational performance; and how to raise capital.

**Day 2: Reinventing the Finance Role**  
**October 21 – Includes 4 hours Ethics**
Learn how to reinvent the finance role; why some financial managers succeed while others fail; find common ground with the different generations who make up the current workforce; and what makes the Trappist Monks successful.

**Day 3: Honing Your Management Style**  
**December 6 – Includes 4 hours Ethics**
Learn why quiet leaders are so successful; how to create a cohesive team; how to recognize and deal with others who are unethical; and how to use a 15-step action plan to gain commitment from your team members, build trust, hold each person accountable and create results for your organization.

**ADDITIONAL DETAILS**

**Time:** 8:30 a.m.–4:30 p.m.
**CPE:** 8 hours per course
**Cost:** Members: $349 per course  
Nonmembers: $504 per course

**FLEXPASS SAVINGS:** Register for FlexPass to get discounts on one, some or all CFO Series courses.

To register go to cpe.incpas.org and search "CFO Leadership Series" or call (317) 726-5000.
NOT-FOR-PROFIT & GOVERNMENT

**New A Complete Guide to the New Yellow Book**

**DATE:** 9/11/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** James Schmutte, CPA, DBA  
**LOCATION:** INCPS Learning Center, Indianapolis

CPE: 8  
MEMBER: $349  
NONMEMBER: $506

**OVERVIEW:** The Yellow Book has been revised! This course will equip you with a comprehensive knowledge of the new Yellow Book requirements and increase your confidence and proficiency in performing Yellow Book audits. The course materials use a highly illustrative and innovative format, including over 20 focused exercises on key practice issues.

**AUDIENCE:** Auditors performing Yellow Book engagements  
**SOURCE:** Surgent  
**LEVEL:** Basic  
**NOTE:** Qualifies for Yellow Book

**Accounting & Reporting for Not-for-Profit Organizations**

**DATE:** 11/21/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Martin Birr, CPA, CIA, CMA  
**LOCATION:** Embassy Suites South Bend at Notre Dame, South Bend

CPE: 8  
MEMBER: $349  
NONMEMBER: $506

**OVERVIEW:** Do you need to enhance your not-for-profit accounting skills? Through a case study-intensive, highly interactive classroom environment, this course provides you with the tools necessary to go beyond theory and create value-added services for your clients. This course allows you to examine, evaluate and perform case studies which will enhance your working knowledge of fundamental not-for-profit accounting and reporting, presentation requirements, note disclosures unique to not-for-profits and options allowed under generally accepted accounting principles. FASB’s financial statement standard updates and revenue recognition standards are included.

**PREREQUISITE:** Experience in the not-for-profit environment

**Advanced Auditing of HUD-Assisted Projects**

**DATE:** 9/19/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Michele Kemp, CPA  
**LOCATION:** INCPS Learning Center, Indianapolis

CPE: 8  
MEMBER: $349  
NONMEMBER: $506

**OVERVIEW:** Does your organization know what it takes to perform a HUD audit? During this course, you will gain important insights into compliance pitfalls for HUD-assisted housing owners and managers. You will also assess and evaluate the latest changes in the federally-assisted housing industry and efficiently plan, perform and report a HUD-assisted engagement.

**PREREQUISITE:** Experience in conducting and/or planning HUD audits

**AUDIENCE:** CPA firm audit managers (and above) involved with the performance of audits of HUD-assisted projects, government auditors and HUD-assistance grantees  
**SOURCE:** AICPA  
**LEVEL:** Advanced  
**NOTE:** Qualifies for Yellow Book

**Compliance Auditing: Questions from the Field**

**DATE:** 5/20/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Marci Thomas, CPA, CGMA, MHA  
**LOCATION:** INCPS Learning Center, Indianapolis

CPE: 8  
MEMBER: $349  
NONMEMBER: $506

**OVERVIEW:** Compliance auditing is a significant risk area for firms. We are now in the year where engagements will be selected for testing in the OMB mandated quality study. Additionally, the GAO issued its update of Government Auditing Standards in summer of 2018. This course will discuss those changes as well as new questions and answers that have been recently been included in the Uniform Guidance FAQ document, changes that will be made to the data collection form for 2019–2021, and changes the OMB made to its method for updating the compliance supplement. This course is taught in the popular Question & Answer format and discusses real questions and issues that Loscalzo instructors receive from practitioners in the field. This course will: provide

**SOURCE:** AICPA  
**LEVEL:** Intermediate  
**NOTE:** Qualifies for Yellow Book
an update on the changes to the Uniform Guidance; help participants avoid recurring common failures in audits under Government Auditing Standards and the Uniform Guidance; provide the latest changes in professional literature impacting compliance auditing; and help participants understand the latest changes in Government Auditing Standards.

**PREREQUISITE:** Basic knowledge of compliance auditing, accounting and reporting, Yellow Book and OMB's Uniform Guidance

**AUDIENCE:** Audit practitioners working on nonprofit and/or public sector clients who need audits performed in accordance with the Yellow Book and the Uniform Guidance; CPAs in nonprofit or government organizations who need a single audit

**SOURCE:** Kaplan Financial Education powered by Loscalzo Institute

**LEVEL:** Intermediate

**NOTE:** Qualifies for Yellow Book

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### Latest Developments in Nonprofit Accounting & Auditing

**DATE:** 10/29/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Martin Birr, CPA, CIA, CMA  
**LOCATION:** INCPAS Learning Center, Indianapolis

**CPE:** 8  
**MEMBER:** $349  
**NONMEMBER:** $506

**OVERVIEW:** This year is indeed another year of significant change in the world of nonprofit accounting and auditing. Time is valuable, and it’s hard to stay current in today's rapidly changing environment. Let us save you time and effort in staying current through this informative update course. The course materials use a highly illustrative and innovative format. Over 30 focused exercises are included to provide an enhanced working knowledge of the latest developments in nonprofit accounting and auditing.

**PREREQUISITE:** Knowledge of nonprofit accounting and auditing

**AUDIENCE:** Auditors and industry professionals working in the nonprofit environment

**SOURCE:** Surgent

**LEVEL:** Update

**NOTE:** Qualifies for Yellow Book

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### Not-for-Profit Accounting & Auditing Update

**DATE:** 9/23/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** James Schmutte, CPA, DBA  
**LOCATION:** Grand Wayne Center, Fort Wayne

**DATE:** 10/16/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** James Schmutte, CPA, DBA  
**LOCATION:** INCPAS Learning Center, Indianapolis

**CPE:** 8  
**MEMBER:** $349  
**NONMEMBER:** $506

**OVERVIEW:** The best avenue to success is to be indispensable to your clients. The best way to becoming indispensable is having a solid understanding of your client’s business. This course details the latest developments affecting not-for-profits such as requirements of FASB directed toward the organizations and information on the latest OMB and Yellow Book developments.

**PREREQUISITE:** Knowledge of not-for-profit accounting and auditing

**AUDIENCE:** CPAs and finance personnel responsible for accounting and financial reporting for not-for-profits, and auditors of those entities

**SOURCE:** AICPA  
**LEVEL:** Update

**NOTE:** Qualifies for Yellow Book

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### Not-for-Profit Conference

**DATE:** 7/25/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Various,  
**LOCATION:** Marriott East, Indianapolis

**CPE:** 8  
**MEMBER:** $254  
**NONMEMBER:** $399

**OVERVIEW:** This is the Society's highest attended conference and the only one in Indiana for CPAs serving not-for-profits! The conference provides a well-rounded set of general and breakout sessions to allow CPAs to add value to the organizations they work in or serve.

**AUDIENCE:** CPAs in public accounting who have not-for-profit clients and CPAs working as staff at not-for-profit organizations

**SOURCE:** INCPAS  
**LEVEL:** Intermediate

**NOTE:** Bring-a-Colleague or Client Rate: $179; may include some A&A hours. Continental breakfast and lunch are provided in the cost of registration

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### Not-for-Profit Financial Reporting: Mastering the Unique Requirements

**DATE:** 11/12/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Martin Birr, CPA, CIA, CMA  
**LOCATION:** INCPAS Learning Center, Indianapolis

**CPE:** 8  
**MEMBER:** $349  
**NONMEMBER:** $506

**OVERVIEW:** Do you know what makes not-for-profit accounting and financial reporting different? Avoid the potholes of confusion and provide a financial picture end users can truly understand. Through a combination of practical guidance and case studies, this course provides insight into what makes not-for-profits different. You also will receive guidance on FASB's financial statement standard and revenue recognition, including grants and contracts.

**PREREQUISITE:** Experience in the not-for-profit environment

**AUDIENCE:** Professionals working with or in the not-for-profit environment

**SOURCE:** INCPAS  
**LEVEL:** Update

**NOTE:** Qualifies for Yellow Book

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### Preparing Not-for-Profit Financial Statements Under ASU No. 2016-14

**DATE:** 11/6/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** James Schmutte, CPA, DBA  
**LOCATION:** INCPAS Learning Center, Indianapolis

**CPE:** 8  
**MEMBER:** $349  
**NONMEMBER:** $506
OVERVIEW: ASU No. 2016-14, Presentation of Financial Statements of Not-for-Profit Entities, is the most significant not-for-profit reporting standard in over 20 years and is now fully effective. To properly implement the new financial reporting model, professionals must have a strong, working knowledge of the new requirements. Now is the time to obtain that knowledge! This course explains the new requirements, illustrates how the requirements manifest themselves in the financial statements, and clarifies key options that not-for profits have in implementing the requirements. The course also examines other key changes affecting not-for-profits including the new revenue recognition and contribution requirements (which apply to 12/31/19 year-end) and leases (which apply to 12/31/20 year-end). The course materials use a highly illustrative and innovative format, including over 30 focused exercises to provide an enhanced working knowledge of not-for-profit accounting and reporting.

PREREQUISITE: Some introductory background in not-for-profit accounting and reporting

AUDIENCE: Not-for-profit industry professionals and auditors

SOURCE: Surgent

LEVEL: Intermediate

NOTE: Qualifies for Yellow Book
New 4 Tiers of Loss Limitations: A Guide to the New Rules for Pass-Through Entities

DATE: 12/17/19  
TIME: 1–4:30 p.m.  
INSTRUCTOR: Michael A. Frost, CPA, EA  
LOCATION: Ritz Charles, Carmel

CPE: 4 | MEMBER: $195 | NONMEMBER: $283

OVERVIEW: Owners of S corporations and partnerships are subject to numerous limitations on pass-through losses, each with unique rules, applications and complexities. With the increase in popularity of pass-through business entities, it is essential for CPAs to understand the complexities and interactions of these pass-through loss limitations.

PREREQUISITE: Basic familiarity with loss allowance rules of pass-through entities

AUDIENCE: Experienced practitioners who want a refresher on loss limitations and an analysis of the new rules; inexperienced practitioners who want to learn the basics of all four pass-through loss limitations and their interactions in one course

SOURCE: Surgent  
LEVEL: Intermediate

Annual Tax-Planning Guide for S Corporations, Partnerships & LLCs

DATE: 11/19/19  
TIME: 8:30 a.m.–4:30 p.m.  
INSTRUCTOR: Edward A. Harter, CPA  
LOCATION: Grand Wayne Center, Fort Wayne

DATE: 11/22/19  
TIME: 8:30 a.m.–4:30 p.m.  
INSTRUCTOR: Edward A. Harter, CPA  
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | MEMBER: $349 | NONMEMBER: $506

OVERVIEW: As long as LLCs, partnerships and S corporations form the backbone of many CPAs’ practices, in-depth knowledge of all tax aspects of these entities will be essential. The purpose of this practical course is to focus on planning issues in creating, operating and liquidating S corporations, partnerships and LLCs. This course is essential for CPAs in public accounting and industry who advise these entities or their investors.

PREREQUISITE: Basic course in partnership theory and S corporation theory

Buying & Selling a Business: Critical Tax & Structuring Issues

DATE: 11/25/19  
TIME: 8:30 a.m.–4:30 p.m.  
INSTRUCTOR: William Murphy, CPA, CGMA, ABV, CFF, CVA, PFS  
LOCATION: Embassy Suites South Bend at Notre Dame, South Bend

CPE: 8 | MEMBER: $349 | NONMEMBER: $506

OVERVIEW: One of the major transactions CPA clients enter into is a purchase or disposition of a business. To help tax professionals in advising those clients, this course offers a comprehensive analysis of the business and tax aspects of buying and selling a business. It is a practical guide to help practitioners and industry CPAs understand structuring techniques. All CPAs, controllers and executives in industry should understand how difficult the process of buying and selling a business has become.

PREREQUISITE: Basic course in partnerships/LLCs; experience with C corporations

AUDIENCE: All practitioners who will be involved in the sale of a business

SOURCE: Surgent  
LEVEL: Intermediate

New Buying & Selling a Business: Tax & Structuring Overview

DATE: 12/3/19  
TIME: 8:30 a.m.–Noon  
INSTRUCTOR: John N. Sherrick, CPA  
LOCATION: Grand Wayne Center, Fort Wayne

CPE: 4 | MEMBER: $195 | NONMEMBER: $283

OVERVIEW: One of the major transactions CPA clients enter into is a purchase or disposition of a business. To help tax professionals in advising those clients, this course offers a comprehensive analysis of the business and tax aspects of buying and selling a business. It is a practical guide to help practitioners and industry CPAs understand structuring techniques. All CPAs, including controllers and executives in industry, should understand how difficult the process of buying and selling a business has become.
### Construction Contractors: Accounting, Auditing & Tax

**DATE:** 12/12/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Martin Birr, CPA, CIA, CMA  
**LOCATION:** INCPAS Learning Center, Indianapolis

**CPE:** 8  
**MEMBER:** $349  
**NONMEMBER:** $506

**OVERVIEW:** The construction industry is one of the most unique when it comes to being in compliance with the various accounting and auditing standards. This course examines the core knowledge necessary to succeed and the key issues impacting construction accounting, auditing and taxation. Find out what new developments may mean for you, your company or clients. In addition, this course explores the relationship between the contractor and the surety. With construction comprising such a large portion of the economy and always growing, it is more important than ever for you to be on top of the very latest in accounting, auditing and tax changes for the construction industry.

**AUDIENCE:** Practitioners and financial professionals in the construction industry

**SOURCE:** AICPA  
**LEVEL:** Basic

**NOTE:** Qualifies for 5 hours of Accounting & Auditing.

### New Critical Issues Involving Taxation of Construction Contractors

**DATE:** 11/12/19  
**TIME:** 8:30 a.m.–Noon  
**INSTRUCTOR:** John L. Evanich, CPA  
**LOCATION:** INCPAS Learning Center, Indianapolis

**CPE:** 4  
**MEMBER:** $195  
**NONMEMBER:** $283

**OVERVIEW:** Many consider taxation of construction contractors to be the most complex area of the Internal Revenue Code. Probably no other industry has so many elections and considerations that need to be considered and made in order to reduce or defer amounts owed to the IRS. This is a critical presentation tailor-made for CPAs who either work for or represent construction contractors.

**PREREQUISITE:** Previous experience in the construction industry or in providing service to construction clients

**AUDIENCE:** CPAs who either work for or represent construction contractors looking for ways to reduce taxable income

**SOURCE:** Surgent  
**LEVEL:** Intermediate

### Employer’s Handbook: Legal, Tax & Health Care Issues

**DATE:** 8/20/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Brent McClure, CPA  
**LOCATION:** INCPAS Learning Center, Indianapolis

**CPE:** 8  
**MEMBER:** $349  
**NONMEMBER:** $506

**OVERVIEW:** The employer-employee relationship strains both sides in uncertain times, and businesses need CPAs, controllers and other advisors to provide understanding of the complex legal, tax and health care issues associated with all aspects of employment, especially now. This course provides in-depth coverage of this critical area and is updated and supplemented throughout the year for breaking developments.

**AUDIENCE:** CPAs who need an in-depth understanding of employment issues

**SOURCE:** Surgent  
**LEVEL:** Basic

### Estate & Life Planning Issues for the Middle-Income Client

**DATE:** 10/28/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** John Lawrence, CPA  
**LOCATION:** INCPAS Learning Center, Indianapolis

**CPE:** 8  
**MEMBER:** $349  
**NONMEMBER:** $506

**OVERVIEW:** Clients think estate planning only applies to the very rich. In truth, there are many issues of critical concern for which the middle-income client needs to plan. This is a must-attend for all CPAs who work with middle-income clients and are looking for ways to provide additional quality services. Course is continually updated with the latest guidance.

**AUDIENCE:** CPAs who advise clients on estate tax planning

**SOURCE:** Surgent  
**LEVEL:** Basic

**NOTE:** Qualifies for CFP.

### Farm Taxation Update

**DATE:** 7/30/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Paul Neiffer, CPA  
**LOCATION:** INCPAS Learning Center, Indianapolis

**CPE:** 8  
**MEMBER:** $349  
**NONMEMBER:** $506

**OVERVIEW:** This session will help practitioners recognize unique tax opportunities and pitfalls for taxpayers in the agriculture industry. Our education sessions give tax professionals a forum to discuss current issues affecting their farm and ranch clients. In addition to covering income and deduction items unique to agribusiness producers, we will also cover what we have learned from the 2017 Tax Cuts and Jobs Act. This seminar is presented by CPAs and agribusiness professionals active in public
accounting. All of our instructors have many years of experience in farm taxation and regularly present at national agribusiness conferences.

**PREREQUISITE:** Two years of experience with farm tax return preparation

**AUDIENCE:** Tax practitioners representing farmers and ranchers who need to be aware of new federal tax legislation, IRS guidance and recent court decisions

**SOURCE:** CliftonLarsonAllen  |  **LEVEL:** Intermediate

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**Federal Tax Update with Pat Garverick**

**DATE:** 10/31–11/1

**INSTRUCTOR:** J. Patrick Garverick, CPA, CFP, MT

**LOCATION:** Marriott East, Indianapolis

**DATE:** 12/9–10

**INSTRUCTOR:** J. Patrick Garverick, CPA, CFP, MT

**LOCATION:** Century Center, South Bend

**DATE:** 12/11–12

**INSTRUCTOR:** J. Patrick Garverick, CPA, CFP, MT

**LOCATION:** Grand Wayne Center, Fort Wayne

**CPE:** 16  |  **MEMBER:** $539  |  **NONMEMBER:** $782

**OVERVIEW:** With the increasing complexity and ever-changing nature of tax laws and issues, today's CPA needs this two-day update course focusing on individual and business income tax issues. This comprehensive class will not only review the current Federal individual and business income tax laws but will also update tax return preparers of new tax forms, changes to existing tax forms, and tax planning opportunities and pitfalls. This is a "must-attend" course for all tax practitioners who want to be up to speed quickly and have a successful Federal individual and business income tax filing season.

**AUDIENCE:** CPAs in public or private practice in need of a power-packed two-day Federal individual and business income tax update course before tax season

**SOURCE:** Phoenix Beach, LLC  |  **LEVEL:** Update

**NOTE:** Qualifies for CFP.

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**Form 1040 Return Review for New & Experienced Reviewers**

**DATE:** 12/9

**INSTRUCTOR:** John Kilroy, CPA, CFP

**LOCATION:** Tropicana Executive Conference Center, Evansville

**DATE:** 1/9–10

**INSTRUCTOR:** Ron Roberson, CPA

**LOCATION:** Ritz Charles, Carmel

**CPE:** 16  |  **MEMBER:** $539  |  **NONMEMBER:** $782

**OVERVIEW:** Each year there is one must-do tax education seminar, and this is it! This two-day Federal Tax Update will be taught in an understandable, high tech and sometimes humorous manner. All the latest tax developments that impact individual, partnership and corporate tax returns will be covered. Each participant will receive a complete and up-to-date manual in both physical and electronic format. Our electronic manual includes numerous hyperlinks to the Internal Revenue Code, court cases and other documents that are available on the internet. Join us for cutting-edge tax planning strategies and real-life experiences that will make complicated tax topics understandable.

**AUDIENCE:** CPAs in public or private practice in need of a power-packed two-day Federal individual and business income tax update course before tax season

**SOURCE:** TaxSpeaker  |  **LEVEL:** Update

**NOTE:** Manual includes numerous practical examples, flowcharts, editorial planning tips and other helpful information to aid the participant's understanding of tax law and new developments. Qualifies for CFP.

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**Fiduciary Income Tax Returns: Form 1041 Workshop with Filled-in Forms**

**DATE:** 11/11

**INSTRUCTOR:** John L. Evanich, CPA

**LOCATION:** INCPAS Learning Center, Indianapolis

**CPE:** 8  |  **MEMBER:** $349  |  **NONMEMBER:** $506

**OVERVIEW:** This course is designed for participants to understand the core concepts of trust and estate income tax preparation. It explains the common terminology and complicated income tax rules of estates and trusts, fiduciary accounting, and an introduction to or refresher on preparing Form 1041. This practical, over 300-page manual is an excellent reference source for your practice, which begins with quite simple cases. Building upon that base throughout the manual, the course ends with two complicated preparation cases, one trust and one estate, each with filled-in forms.

**PREREQUISITE:** Experience with the preparation of trust and estate income tax returns

**AUDIENCE:** CPAs whose practice includes the preparation of fiduciary income tax returns

**SOURCE:** Surgent  |  **LEVEL:** Intermediate

**NOTE:** Qualifies for CFP.
New Form 1065 Boot Camp: Step-by-Step Preparation with Completed Forms

DATE: 1/6/20  TIME: 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Donald B. Cooley, CPA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | MEMBER: $349 | NONMEMBER: $506

OVERVIEW: The objective of this course is to train new, rusty or returning-to-practice staff to prepare a complicated federal partnership tax return. The course includes a chapter-by-chapter, hands-on approach to completing Form 1065. As details are discussed within each chapter, information is provided to prepare an intricate Form 1065. The course and instruction delivery is geared toward a basic understanding and progresses to more complex issues via Surgent’s “Step-by-Step” preparation guide. The boot camp allows staff to discover the connections between a trial balance and a completed partnership return, with a filled-in completed Form 1065 provided in the case solutions.

AUDIENCE: All levels of staff and company controllers responsible for filing these forms

SOURCE: Surgent  LEVEL: Intermediate

New Form 1065 Return Review: Essential Procedures You Can’t Overlook

DATE: 12/18/19  TIME: 1–4:30 p.m.
INSTRUCTOR: Michael A. Frost, CPA, EA
LOCATION: Ritz Charles, Carmel

CPE: 4 | MEMBER: $195 | NONMEMBER: $283

OVERVIEW: Most review techniques developed by professionals are self-taught and fine-tuned via experience. Yet how does one start? The purpose of this course is to give both new and seasoned reviewers additional and advanced procedures via a multitude of checklists to more thoroughly review partnership tax returns. Its emphasis is not planning; rather, it is to develop a strategy to properly review a return effectively and thoroughly. The course includes dozens of “practice tips for new reviewers” and is updated for impacts of newly enacted legislation.

PREREQUISITE: Experience in preparing Form 1065, reviewing diagnostics and preparing workpapers

AUDIENCE: Senior-level staff new to the review process or experienced staff members looking to update and/or expand their review procedures

SOURCE: Surgent  LEVEL: Intermediate

New Form 1120S Return Review: Essential Procedures You Can’t Overlook

DATE: 12/3/19  TIME: 1–4:30 p.m.
INSTRUCTOR: John N. Sherrick, CPA
LOCATION: Grand Wayne Center, Fort Wayne

CPE: 4 | MEMBER: $195 | NONMEMBER: $283

OVERVIEW: Most review techniques developed by professionals are self-taught and fine-tuned via experience. Yet how does one start? The purpose of this course is to give both new and seasoned reviewers additional and advanced procedures via a multitude of checklists to more thoroughly review S corporation tax returns. Its emphasis is not planning; rather, it is to develop a strategy to properly review a return effectively and thoroughly. The course includes dozens of “practice tips for new reviewers” and is updated for impacts of newly enacted legislation.

PREREQUISITE: Experience in preparing Form 1120S, reviewing diagnostics and preparing workpapers

AUDIENCE: Senior-level staff new to the review process or experienced staff members looking to update and/or expand their review procedures

SOURCE: Surgent  LEVEL: Intermediate

Form 990: Mastering Its Unique Characteristics

DATE: 6/26/19  TIME: 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Martin Birr, CPA, CIA, CMA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | MEMBER: $349 | NONMEMBER: $506

OVERVIEW: Explore the tax information and inherent not-for-profit organization issues to be mastered in properly preparing the current Form 990. This course covers the numerous reporting demands the 990 imposes, including how to respond to the Form’s demands for narrative answers. Participants will gain an understanding of the tax and practical points essential to appropriate completion of the Form 990 and be guided on advising exempt clients on the Form’s complexities and diverse demands.

AUDIENCE: CPAs, attorneys and nonprofit managers

SOURCE: AICPA  LEVEL: Basic

New Forms 1120S & 1065 Return Review for New & Experienced Reviewers

DATE: 12/10/19  TIME: 8:30 a.m.–4:30 p.m.
INSTRUCTOR: John Kilroy, CPA, CFP
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | MEMBER: $349 | NONMEMBER: $506

OVERVIEW: Most review techniques developed by professionals are self-taught and fine-tuned via experience. Yet how does one start? The purpose of this course is to give both new and seasoned reviewers additional and advanced procedures via a multitude of checklists to more thoroughly review S corporation and partnership tax returns. Its emphasis is not planning; rather,
it is to develop a strategy to properly review a return effectively and thoroughly. The course includes dozens of “practice tips for new reviewers” and is updated for impacts of newly enacted legislation.

**PREREQUISITE:** Experience in preparing Forms 1120S and 1065, reviewing diagnostics and preparing workpapers

**AUDIENCE:** Senior-level staff new to the review process or experienced staff members looking to update and/or expand their review procedures

**SOURCE:** Surgent **LEVEL:** Intermediate

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### Indiana Tax Conference

**DATE:** 11/20/19  **TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Various  **LOCATION:** Ritz Charles, Carmel

**CPE:** 8  |  **MEMBER:** $359  |  **NONMEMBER:** $509

**OVERVIEW:** Using top tax speakers, this conference will provide high-quality updates on common tax areas — multi-state, estate, individual, business, etc. — and will bring sessions on niche tax areas or highly specialized issues that CPAs don’t find elsewhere.

**AUDIENCE:** Experienced tax practitioners in public or private accounting

**SOURCE:** INCPAS **LEVEL:** Intermediate

**NOTE:** Continental breakfast and lunch are provided in the cost of registration.

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### Mastering Basis Issues for S Corporations, Partnerships & LLCs

**DATE:** 11/14/19  **TIME:** 8:30 a.m.–Noon

**INSTRUCTOR:** John M. Kilroy, CPA, CFP  **LOCATION:** Indiana Wesleyan University’s Merrillville Education and Conference Center, Merrillville

**CPE:** 4  |  **MEMBER:** $195  |  **NONMEMBER:** $283

**OVERVIEW:** The most difficult concepts to master when dealing with flow-through business entities are the basis and distribution concepts. Major error and malpractice issues occur if the CPA does not fully understand the impact of these rules. This course is designed to focus on the practical applications of these rules.

**PREREQUISITE:** Experience in business taxation

**AUDIENCE:** CPAs who prepare both individual and flow-through business entity tax returns and need a thorough grasp of these significant issues

**SOURCE:** Surgent **LEVEL:** Intermediate

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### Nexus Update: Latest Developments in State Income, Franchise & Sales Taxes

**DATE:** 12/20/19  **TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** William Murphy, CPA, CGMA, ABV, CFF, CVA, PFS  **LOCATION:** INCPAS Learning Center, Indianapolis

**CPE:** 8  |  **MEMBER:** $349  |  **NONMEMBER:** $506

**OVERVIEW:** The barriers to doing business across state lines have significantly decreased in recent years. However, this creates additional issues for taxpayers and their preparers in determining where and when they have nexus in a state which would require them to file either state income tax or sales tax returns. This class will not only help equip you in learning the various ways that states define and enforce nexus but also in how to determine when your company or client has nexus in a state, thus requiring the filing of tax returns. Course materials will include the latest developments regarding the Wayfair decision.

**PREREQUISITE:** Basic knowledge of multistate tax issues

**AUDIENCE:** CPAs in public practice who want to expand the scope of services they provide to clients; CPAs in industry who want to understand their exposure to nexus issues

**SOURCE:** AICPA **LEVEL:** Intermediate

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### Preparing Individual Tax Returns for New Staff & Para-Professionals

**DATE:** 1/7/20  **TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Donald B. Cooley, CPA  **LOCATION:** INCPAS Learning Center, Indianapolis

**CPE:** 8  |  **MEMBER:** $349  |  **NONMEMBER:** $506

**OVERVIEW:** The objective of this course is to train new staff accountants, data processing employees, para-professionals and bookkeepers to prepare a complicated federal individual income tax return. Over the years, thousands of new staff have received practical, hands-on experience to become familiar with tax forms. This course covers the latest tax law changes, making it essential for your new staff.

**AUDIENCE:** New staff and para-professionals who prepare individual returns

**SOURCE:** INCPAS **LEVEL:** Intermediate

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### Protecting Your Client & Your Firm from Tax Return Identity Theft

**DATE:** 10/18/19  **TIME:** 1–4:30 p.m.

**INSTRUCTOR:** Pamela Davis-Vaughn, CPA  **LOCATION:** Embassy Suites South Bend at Notre Dame, South Bend

**CPE:** 4  |  **MEMBER:** $195  |  **NONMEMBER:** $283

**OVERVIEW:** Identity theft has become a serious issue with clients and practitioners alike — 43% of CPAs who answered the 2017 tax software survey conducted by The Tax Adviser and Journal of Accountancy said at least one of their clients was a victim of tax identity theft in the 2016 filing season. This course provides examples of the ramifications of data loss and how it impacted the practitioner and the client. This course covers best practices for your firm to protect firm and client data. In the event a breach does occur, learn the steps to take to remedy the situation and prevent the problem from happening again.

**PREREQUISITE:** Basic knowledge of taxation

**AUDIENCE:** Tax practitioners in public practice

**SOURCE:** AICPA **LEVEL:** Intermediate
# Section 199A: Applications & Challenges in 2019

**DATE:** 12/18/19  
**TIME:** 8:30 a.m.–Noon  
**INSTRUCTOR:** Michael A. Frost, CPA, EA  
**LOCATION:** Ritz Charles, Carmel

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**OVERVIEW:** Section 199A is easily the least understood topic of The Tax Cuts and Jobs Act. Your clients will look to you for explanations and best practices to maximize the 20% deduction. Pass-through entities and real estate investors stand to gain valuable tax cuts, and the average practitioner cannot afford to be uninformed on Section 199A. This course will cover all relevant facets and nuances of the deduction and enable implementation for tax returns. This program will include all IRS-issued guidance.

**PREREQUISITE:** Basic understanding of the Federal tax rules relating to individuals and businesses

**AUDIENCE:** Any tax practitioner wishing to understand and apply the §199A deduction

**SOURCE:** Surgent  
**LEVEL:** Update

**NOTE:** Qualifies for CFP.

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# Securing a Comfortable Retirement

**DATE:** 10/18/19  
**TIME:** 8:30 a.m.–Noon  
**INSTRUCTOR:** Pamela Davis-Vaughn, CPA  
**LOCATION:** Embassy Suites South Bend at Notre Dame, South Bend

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**OVERVIEW:** Join us as we discuss the common errors practitioners make on individual tax returns that are often missed by review staff. The intent is to sharpen skills for reviewers by examining case studies and discussing issues where additional information from the client may be warranted and areas of tax law where proper treatment requires additional analysis and information. Multiple issues will be discussed including passthrough K-1s, home office issues, hobby losses, rental property, hiring spouses, depreciation, §179 issues, amortization and more! Course materials include the impact of the Tax Cuts and Jobs Act of 2017 (TCJA) tax reform law. This course follows a highly illustrative case study format to increase participant comprehension and retention.

**PREREQUISITE:** Basic knowledge of individual income taxation

**AUDIENCE:** CPAs working with clients requiring up-to-date expertise in individual income taxation for the current tax season

**SOURCE:** AICPA  
**LEVEL:** Intermediate

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# Securing a Comfortable Retirement in the Age of Spending

**DATE:** 9/18/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** William Murphy, CPA, CGMA, ABV, CFF, CVA, PFS  
**LOCATION:** Tropicana Executive Conference Center, Evansville

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**OVERVIEW:** This course gives CPAs the knowledge to help their clients plan for retirement by evaluating how much retirement income they will require and planning for how to reach their retirement goals.

**PREREQUISITE:** Basic knowledge of retirement planning

**AUDIENCE:** CPAs looking to advise clients on retirement planning; CPAs looking for effective strategies for their own retirement

**SOURCE:** Surgent  
**LEVEL:** Intermediate

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# Case Study

**DATE:** 11/18/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** William Murphy, CPA, CGMA, ABV, CFF, CVA, PFS  
**LOCATION:** Embassy Suites South Bend at Notre Dame, South Bend

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**PREREQUISITE:** Basic knowledge of retirement planning

**AUDIENCE:** CPAs looking to advise clients on retirement planning; CPAs looking for effective strategies for their own retirement

**SOURCE:** Surgent  
**LEVEL:** Intermediate

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# Securing a Comfortable Retirement in the Age of Spending

**DATE:** 12/6/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Joshua R. Jenson, CPA  
**LOCATION:** INCPAS Learning Center, Indianapolis

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**OVERVIEW:** This course gives CPAs the knowledge to help their clients plan for retirement by evaluating how much retirement income they will require and planning for how to reach their retirement goals.

**PREREQUISITE:** Basic knowledge of retirement planning

**AUDIENCE:** CPAs looking to advise clients on retirement planning; CPAs looking for effective strategies for their own retirement

**SOURCE:** Surgent  
**LEVEL:** Intermediate
income they will require and planning for how to reach their retirement goals.

**PREREQUISITE:** Basic knowledge of retirement planning

**AUDIENCE:** CPAs looking to advise clients on retirement planning; CPAs looking for effective strategies for their own retirement

**SOURCE:** Surgent

**NOTE:** Qualifies for CFP.

### Social Security, Medicare & Prescription Drug Retirement Benefits: What Every Baby Boomer Needs to Know Now

**DATE:** 9/23/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** William Murphy, CPA, CGMA, ABV, CFF, CVA, PFS  
**LOCATION:** Embassy Suites South Bend at Notre Dame, South Bend

**DATE:** 9/25/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** William Murphy, CPA, CGMA, ABV, CFF, CVA, PFS  
**LOCATION:** Tropicana Executive Conference Center, Evansville

**DATE:** 10/28/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Kenneth R. Greenwood  
**LOCATION:** Grand Wayne Center, Fort Wayne

**DATE:** 11/13/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** John M. Kilroy, CPA, CFP  
**LOCATION:** INCPAS Learning Center, Indianapolis

**DATE:** 12/5/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** John N. Sherrick, CPA  
**LOCATION:** Indiana Wesleyan University’s Merrillville Education and Conference Center, Merrillville

**CPE:** 8  
| **MEMBER:** $349 | **NONMEMBER:** $506

**OVERVIEW:** Social Security seems poised for changes in benefits and eligibility age. The leading edge of the baby boomer generation has already reached retirement age. Financial and tax planners can expect increased demand for strategies that dovetail Social Security with other retirement and estate planning objectives. This course provides tax and financial planning professionals with background information on the Social Security system, the strategies clients will need in dealing with Social Security, and the myriad other related retirement planning issues.

**AUDIENCE:** Practitioners who have clients contemplating receipt of Social Security

**SOURCE:** Surgent

**NOTE:** Qualifies for CFP.

### Surgent's Advanced Individual Income Tax Return Issues

**DATE:** 11/20/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Edward A. Harter, CPA  
**LOCATION:** Grand Wayne Center, Fort Wayne

**CPE:** 8  
| **MEMBER:** $349 | **NONMEMBER:** $506

**OVERVIEW:** This highly informative course comprehensively covers all the latest tax law developments. The focus is on individual taxation and discussion of the planning opportunities practitioners need to understand to help clients respond effectively. You will come away from the course with the up-to-date knowledge to educate your individual tax clients and implement tax-saving ideas that will serve their ever-evolving needs.
The Essential Multistate Tax Update

DATE: 11/14/19  TIME: 1–4:30 p.m.
INSTRUCTOR: John M. Kilroy, CPA, CFP
LOCATION: Indiana Wesleyan University's Merrillville Education and Conference Center, Merrillville

CPE: 4  |  MEMBER: $195  |  NONMEMBER: $283

OVERVIEW: With the largest overhaul of the federal income tax code in 30 years and repeal of the physical presence nexus standards for sales tax in the Wayfair case, the states are working fast and furious to overhaul their tax laws. As some states scramble to fund their budgets, they continue to look for additional forms of revenue. Plan to attend this fast-paced class that covers developing topics in state taxation, ranging from individuals to pass-through entities to corporate taxpayers. This class will focus on issues of small- and middle-market companies, and offer guidance for minimizing tax liability and negotiating the treacherous waters of compliance.

PREREQUISITE: Experience in corporate taxation

AUDIENCE: CPAs who want an update on current multistate tax issues to minimize clients' potential state and local tax liability

SOURCE: Surgent  LEVEL: Update

The Top 5 Tax Issues in Dealing with LLCs & Partnerships

DATE: 11/12/19  TIME: 1–4:30 p.m.
INSTRUCTOR: John L. Evanich, CPA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 4  |  MEMBER: $195  |  NONMEMBER: $283

OVERVIEW: Partnerships and LLCs involve unique problems that require careful attention. This course covers selected critical tax issues that practitioners need to know when working with partnerships and limited liability companies, with a focus on planning opportunities and pitfalls.

PREREQUISITE: Basic course in partnership theory or experience in tax compliance or planning for partnerships and LLCs

AUDIENCE: CPAs who wish to gain a more in-depth understanding of LLC and partnership tax law

SOURCE: Surgent  LEVEL: Intermediate
### 2019 Technology Trends Update

**DATE:** 10/30/19  
**TIME:** 8:30 a.m.—4:30 p.m.  
**INSTRUCTOR:** John Higgins, CPA, CITP  
**LOCATION:** INCPAS Learning Center, Indianapolis  

**CPE:** 8  
**MEMBER:** $349  
**NONMEMBER:** $506  

**OVERVIEW:** One of the biggest professional challenges for CPAs, CFOs, controllers and auditors is keeping up with the rapid pace of information technology. This course will get you up to date on all of the new and emerging technologies that impact accounting, finance and auditing. It will cover the full landscape, from the ground level of personal computer technology to the 5,000-foot level of emerging technologies like blockchain, artificial intelligence, data analytics and more. Investing a day to attend this course will prepare you to actively participate in discussions with management, IT and service providers about all topics related to information technology.  

**AUDIENCE:** Anyone who wants to understand the emerging technologies that will impact their organization and personal career opportunities  

**SOURCE:** CPA Crossings  
**LEVEL:** Basic

### Advanced Excel for Spreadsheet Power Users

**DATE:** 10/1/19  
**TIME:** 8:30 a.m.—4:30 p.m.  
**INSTRUCTOR:** Karl W. Egnatoff, CPA, CITP  
**LOCATION:** INCPAS Learning Center, Indianapolis  

**CPE:** 8  
**MEMBER:** $349  
**NONMEMBER:** $506  

**OVERVIEW:** CPAs and other business professionals who work in Excel extensively become very strong with many aspects of the ubiquitous spreadsheet application. However, they often do not have knowledge of the numerous advanced features available. In this session, we highlight many of the powerful tools found in Excel and provide details as to how they are beneficial and how they are used. Topics include data connectivity, advanced functions available for formula creation, Excel Tables and PivotTables, and charting tools. Many proficient Excel users only use a limited percentage of the available functionality when they work with spreadsheets, which is like tying one's hands behind his or her back. This session will help make participants “two-fisted” Excel users!  

**PREREQUISITE:** Understanding of Excel conventions  
**AUDIENCE:** CPAs and other business professionals who work extensively with Excel who want to become knowledgeable about the many powerful features it possesses  

**SOURCE:** Phoenix Beach, LLC  
**LEVEL:** Intermediate

### New Blockchain Essentials: Impacts on Modern Accounting

**DATE:** 12/9/19  
**TIME:** 8:30 a.m.—Noon  
**INSTRUCTOR:** Mark Mishler, CPA, CMA  
**LOCATION:** INCPAS Learning Center, Indianapolis  

**CPE:** 4  
**MEMBER:** $195  
**NONMEMBER:** $283  

**OVERVIEW:** You may think of bitcoin as just another investment currency, but its underlying technology has much wider implications. Since its 2009 inception, blockchain threatens to upend the accounting profession by offering unprecedented...
reliability and transparency to standard transactions. Blockchain adoption is growing steadily among multinational organizations and is now poised to revolutionize the entire financial industry. In this course, you will learn the history behind blockchain technology and its major components, how blockchain challenges the accounting status quo, and how to handle issues surrounding auditing and assurance in the blockchain era.

**PREREQUISITE:** Accounting experience  
**AUDIENCE:** All staff responsible for the accounting and finance functions within an organization that may leverage blockchain technology  
**SOURCE:** Kaplan Financial Education powered by Loscalzo Institute  
**LEVEL:** Basic  
**NOTE:** Qualifies for 2 hours of Accounting & Auditing.

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### Business Intelligence, Featuring Microsoft's Power BI Tools

**DATE:** 10/18/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Brian Tankersley, CPA, CITP  
**LOCATION:** INCPAS Learning Center, Indianapolis  

| CPE: 8 | MEMBER: $349 | NONMEMBER: $506 |

**OVERVIEW:** In today's business climate, Business Intelligence (BI) is perhaps the hottest topic in most professional circles. Increasingly, organizations of all sizes are seeking to take advantage of the data available to them to identify previously undiscovered insights and gain competitive advantages thought to be out of reach just a few short years ago. A growing array of tools — ranging from Excel add-ins to dedicated solutions such as Power BI — now allow you to leverage your existing knowledge and skills to create powerful, interactive dashboards and analyses. In this program, you will learn how to implement "do-it-yourself business intelligence" using a variety of techniques and tools. You will learn how to work with some of the advanced data query and summarization features in Excel to create Excel-based dashboards. You will then learn how to leverage that knowledge to build even more powerful BI objects using Microsoft's Power BI tools. If gaining greater insights into your data to make better decisions is of interest to you, then join us for a fast-paced look at how you can take advantage of these fantastic tools.

**PREREQUISITE:** Basic understanding of computer operations and terminology, including Microsoft Office Excel  
**AUDIENCE:** Business professionals seeking to develop and implement BI solutions  
**SOURCE:** K2 Enterprises  
**LEVEL:** Advanced

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### New CFO Leadership Series: Keeping Up with Technology

**DATE:** 8/19/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Bryan Smith, CPA, CISA, CITP  
**LOCATION:** INCPAS Learning Center, Indianapolis  

| CPE: 8 | MEMBER: $349 | NONMEMBER: $506 |

**OVERVIEW:** This is day three of five in Indianapolis for the popular series designed specifically for CFOs and those who aspire to be CFOs. In this eight-hour session, the day will be divided into four different topics, consisting of two hours for each topic. The course will provide extensive case study analysis and may opportunities for group discussion on essential skills. See page 48 for more information.

**PREREQUISITE:** Management experience helpful  
**AUDIENCE:** Individuals who are, or aspire to be, chief financial officers; most appropriate for people in medium-sized organizations  
**SOURCE:** Executive Education  
**LEVEL:** Intermediate  
**NOTE:** Bring a calculator. This seminar includes extensive case study analysis and many opportunities for group discussion.

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### Cybersecurity Advisory Services: Readiness Assessment Deep Dive

**DATE:** 12/11/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Kristina Demek, Ph.D., CFE  
**LOCATION:** INCPAS Learning Center, Indianapolis  

| CPE: 8 | MEMBER: $349 | NONMEMBER: $506 |

**OVERVIEW:** Cybersecurity yields potential business opportunities for a firm to better serve its clients. Cyberthreats come in all shapes, sizes, complexity and are ever-evolving. Attacks are causing great financial loss and serious damage to companies. It is essential for organizations to establish a baseline for identifying critical components that must be incorporated into any cybersecurity risk management approach. Participants will learn how to keep abreast of the latest cybersecurity trends, manage risks and ensure clients have a sound risk management program to safeguard their organization. Once a baseline has been established, firms can take these competencies and conduct readiness assessments for their clients through consulting or advisory services.

**PREREQUISITE:** Some knowledge of a cybersecurity risk management program  
**AUDIENCE:** Firm practitioners performing consulting or advisory services  
**SOURCE:** AICPA  
**LEVEL:** Intermediate

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### New Cybersecurity Conference

**DATE:** 8/22/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Various  
**LOCATION:** Ritz Charles, Carmel  

| CPE: 8 | MEMBER: $359 | NONMEMBER: $509 |

**OVERVIEW:** Provide a well-rounded mix of general and breakout sessions on the latest trends in fraud, forensics, cybersecurity and emerging technology to allow CPAs to add value to their firm, organization and/or client.

**AUDIENCE:** CPAs interested in the latest trends in fraud, forensics, cyber security and emerging technology  
**SOURCE:** INCPAS  
**LEVEL:** Intermediate  
**NOTE:** Continental breakfast and lunch are provided in the cost of registration.
### Data Analytics & Dashboards: Leverage the Power of Microsoft Power BI

**DATE:** 8/20–21/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Bryan Smith, CPA, CISA, CITP  
**LOCATION:** INCPAS Learning Center, Indianapolis

| CPE: 16 | MEMBER: $539 | NONMEMBER: $782 |

**OVERVIEW:** Two of the most important skills every CFO, CPA or auditor should develop are applying data analytics and creating visual dashboard reporting models. This two-day course will teach you both skills using one of the most popular tools available: Microsoft Power BI. When you complete this course, you will have advanced to the top of the profession in your ability to perform powerful data analytics and create engaging dashboards. You will be sought after in your organization as the “go-to” person to tap into these skills to help your management team and colleagues make better business decisions. You will leave with knowledge that will set you apart in your profession. To optimize your learning experience, we highly recommend that you bring your laptop with the appropriate software installed. Instructions will be provided.

**AUDIENCE:** Anyone in an organization that is either considering or currently deploying Office 365

**PREREQUISITE:** Thorough understanding of Pivot Tables

**SOURCE:** CPA Crossings  
**LEVEL:** Intermediate

### Emerging Technologies, Including Blockchain and Cryptocurrencies

**DATE:** 10/17/19  
**TIME:** 8:30 a.m.–Noon  
**INSTRUCTOR:** Brian Tankersley, CPA, CITP  
**LOCATION:** INCPAS Learning Center, Indianapolis

| CPE: 4 | MEMBER: $195 | NONMEMBER: $283 |

**OVERVIEW:** Unlike mainstream technologies in use in businesses every day, many of the currently emerging technologies have the potential to drastically change how we work, live and play in the years ahead. New and emerging technologies such as blockchain, cryptocurrency, big data, artificial intelligence and machine learning all offer great potential, just as the advent of the personal computer did some four decades ago. This session will cover an assortment of technologies which are nearing mainstream adoption and help you understand what they do, how they work and some of the potential risks and rewards they offer potential users, particularly in business environments. In this course you will learn the basics of blockchain, cryptocurrency, big data, artificial intelligence, and machine learning. You will also learn about the anticipated uses, benefits, risks, and threats posed to legacy businesses by these innovative, yet disruptive platforms. Now is the time to prepare for the future by learning about these technologies and how they will impact — and potentially disrupt — current business practices.

**AUDIENCE:** Practitioners and business executives who need to know more about emerging technologies, including blockchain and cryptocurrencies

**SOURCE:** K2 Enterprises  
**LEVEL:** Intermediate

### Technology for CPAs: Don’t Get Left Behind!

**DATE:** 11/19/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Stephen Phelan, CPA, CITP  
**LOCATION:** INCPAS Learning Center, Indianapolis

| CPE: 8 | MEMBER: $349 | NONMEMBER: $506 |

**OVERVIEW:** How good are you with the technology you use daily? What new technology tools are available that could save you time and make you more effective? Technology continues to accelerate rapidly, and the need to keep pace is important. If you are not an information technology (IT) expert but need a technology update to maintain and improve your skills so you can serve your companies and/or clients more efficiently and effectively, then this course is for you! In this fast-paced, update-style course, you will survey today’s IT environment, learning about computer hardware, software (including Office 2016/Office 2019/Office 365), operating systems (including Windows 10) and what they mean for you, and peripheral devices. You will also learn about significant trends in information technology and how to take advantage of the opportunities presented by these trends. Examples include the latest Excel features, working with PDF files, and security and privacy issues. Additionally, you will learn how to improve the overall performance of your IT investment, thereby increasing your return on investment. Throughout this program, you will learn from real-time demonstrations of practical applications of the latest tools which can provide you with knowledge you need to harness the power of technology, both now and in the future. Register now for this “don’t miss” opportunity to get the skills needed to enhance the value of your IT investment.

**AUDIENCE:** CPAs and financial professionals seeking to improve their knowledge of technology and the return on their investment in technology

**SOURCE:** K2 Enterprises  
**LEVEL:** Basic

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**Microsoft Excel: You Don’t Know What You Don’t Know**

**DATE:** 10/2/19  
**TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Karl W. Egnatoff, CPA, CITP  
**LOCATION:** INCPAS Learning Center, Indianapolis

| CPE: 8 | MEMBER: $349 | NONMEMBER: $506 |

**OVERVIEW:** Many Excel users have received little or no formal training to help them use the ubiquitous productivity application. This session can help users who wish to improve their Excel skills to increase their productivity. The material starts by covering basic topics such as time saving tips and keyboard shortcuts, then moves to more advanced areas like conditional formatting and complex formula building. Users who find themselves looking at the spreadsheets that others design and wishing they could do as much with Excel will benefit greatly by taking this course.

**AUDIENCE:** CPAs and other business professionals who have an understanding of Excel but want to become more proficient as they design and edit workbooks of all types

**SOURCE:** Phoenix Beach, LLC  
**LEVEL:** Basic
New Testing & Auditing Excel Workbooks

DATE: 10/17/19  TIME: 1–4:30 p.m.  INSTRUCTOR: Brian Tankersley, CPA, CITP  LOCATION: INCPAS Learning Center, Indianapolis

CPE: 4  |  MEMBER: $195  |  NONMEMBER: $283

OVERVIEW: Excel errors continue to plague organizations of all sizes — estimates peg the error rate at approximately 90%. As spreadsheets become ever-more common, testing and auditing Excel workbooks becomes more necessary than ever to mitigate the effects these errors could have on virtually every Excel user and those who rely on Excel-based data and analyses. Fortunately, that need not be the case because many options exist to prevent, identify and correct spreadsheet errors before they adversely affect reports and decision-making processes. In this session, you will learn procedures for testing and auditing Excel workbooks. In this session you will learn how to apply best practices to reduce the error rate in workbooks that you and others on your team create and edit. Equally important, you will learn how to take advantage of add-ins for Excel that can programmatically scan and audit your spreadsheets to identify potentially disastrous errors while there is still time to correct them. You do not want to miss this opportunity to learn how tools such as PerfectXL, Cluster Seven and Active Data can help you and your team to identify and correct potentially disastrous spreadsheet errors.

AUDIENCE: Business professionals seeking to reduce errors and improve accuracy and efficiency when working with Microsoft Office Excel

SOURCE: K2 Enterprises  LEVEL: Intermediate

NOTE: Although any of the concepts in this program apply to Microsoft Office Excel for Mac, this seminar focuses on techniques found for Windows.
### EDUCATION REQUIREMENTS

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</table>

<table>
<thead>
<tr>
<th>ETHICS</th>
<th>AICPA</th>
<th>GAO YELLOW BOOK</th>
<th>INCPAS</th>
</tr>
</thead>
<tbody>
<tr>
<td>4 hrs/3 yrs*</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SELF-STUDY RESTRICTIONS</th>
<th>AICPA</th>
<th>GAO YELLOW BOOK</th>
<th>INCPAS</th>
</tr>
</thead>
<tbody>
<tr>
<td>No more than 50% (60 hrs) can be attained through self-study</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>REPORTING CYCLE</th>
<th>AICPA</th>
<th>GAO YELLOW BOOK</th>
<th>INCPAS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/1/2018 to 12/31/2020</td>
<td>Cycle begins the calendar year after joining the AICPA</td>
<td>Year end**</td>
<td>N/A</td>
</tr>
</tbody>
</table>

See full statute on page 67.

* Effective October 22, 2016, licensees may meet their Ethics requirement by successfully completing a competency-based course or through Ethics-related volunteer work.

**Based on individual firm's entry into governmental accounting. Consult the Yellow Book Reporting Requirements for specific information.

**Qualifies for Yellow Book** = Qualifies for the 24-hour Yellow Book requirement. Determination as to the qualification of certain courses for the Yellow Book 24-hour requirement should be made on an auditor specific basis depending on that auditor's Yellow Book clients. Note that the determination of course qualification is a matter of an auditor's professional judgement in consultation with appropriate individuals in the audit firm. The 24 hours are a subset of the 80 hour requirement.

### HAVE YOU RECENTLY OBTAINED YOUR LICENSE?

872 IAC 1-3-16 Prorated continuing education requirements for holders of certificates granted during a reporting period


Sec. 16. The following table establishes the number of CPE hours that a licensee must obtain for the three (3) year reporting period in progress at the time of the issuance or reactivation of a certificate under section 8, 14, or 14.5 of this rule, and it also establishes the minimum hours required in the calendar year of the issuance or reactivation:

<table>
<thead>
<tr>
<th>DATE OF ISSUANCE OF CERTIFICATE</th>
<th>REQUIRED HOURS FOR THREE YEAR REPORTING CYCLE</th>
<th>REQUIRED MINIMUM HOURS FOR THE YEAR OF ISSUANCE OR REACTIVATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/01–03/31 first year of the reporting period</td>
<td>120</td>
<td>20</td>
</tr>
<tr>
<td>04/01–06/30 first year of the reporting period</td>
<td>110</td>
<td>15</td>
</tr>
<tr>
<td>07/01–09/30 first year of the reporting period</td>
<td>100</td>
<td>10</td>
</tr>
<tr>
<td>10/01–12/31 first year of the reporting period</td>
<td>90</td>
<td>0</td>
</tr>
<tr>
<td>01/01–03/31 second year of the reporting period</td>
<td>80</td>
<td>20</td>
</tr>
<tr>
<td>04/01–06/30 second year of the reporting period</td>
<td>70</td>
<td>15</td>
</tr>
<tr>
<td>07/01–09/30 second year of the reporting period</td>
<td>60</td>
<td>10</td>
</tr>
<tr>
<td>10/01–12/31 second year of the reporting period</td>
<td>50</td>
<td>0</td>
</tr>
<tr>
<td>01/01–03/31 third year of the reporting period</td>
<td>40</td>
<td>N/A</td>
</tr>
<tr>
<td>04/01–06/30 third year of the reporting period</td>
<td>30</td>
<td>N/A</td>
</tr>
<tr>
<td>07/01–09/30 third year of the reporting period</td>
<td>20</td>
<td>N/A</td>
</tr>
<tr>
<td>10/01–12/31 third year of the reporting period</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

* For purposes of this section, “N/A” means that there is no specifically stated requirement for the year of issuance or reactivation because the licensee would have to obtain the prorated CPE hours for the three (3) year reporting period.
POLICIES & PROCEDURES

COURSE PRICING

<table>
<thead>
<tr>
<th>HOURS</th>
<th>MEMBER PRICE</th>
<th>NONMEMBER PRICE</th>
</tr>
</thead>
<tbody>
<tr>
<td>16-hour courses</td>
<td>$539</td>
<td>$782</td>
</tr>
<tr>
<td>8-hour courses</td>
<td>$349</td>
<td>$506</td>
</tr>
<tr>
<td>4-hour courses</td>
<td>$195</td>
<td>$283</td>
</tr>
<tr>
<td>4-hour A&amp;A Update and Professional Ethics Update courses</td>
<td>$119</td>
<td>$199</td>
</tr>
<tr>
<td>2-hour courses</td>
<td>$105</td>
<td>$152</td>
</tr>
</tbody>
</table>

MEMBER/NONMEMBER FEE

Registration for INCPAS events is open to the public. Members of INCPAS or other state CPA societies may register under the member price. To become a member, complete a membership application online at incpas.org/join or contact member services for additional information.

AICPA DISCOUNT

A $30 discount for 8-hour courses, with AICPA listed as the vendor, is available to CPAs who are AICPA members. The $30 discount is available as a drop down when registering for courses online; when registering by phone, be sure to mention you are an AICPA member. The AICPA member discount is not available for four-hour AICPA courses.

PAYMENT

INCPAS accepts all major credit cards, checks and purchase orders for payment of CPE courses. If payment has not been received by the course date, you will still be allowed to attend, but your CPE certificate will be withheld until the balance has been paid in full. Webinars and on-demand courses must be paid in full before access to the course will be granted.

COURSE AVAILABILITY

You may check course availability by calling member services; however, we cannot hold space in a course without full payment. On-site registration the day of the course is accepted only if space is available. Payment of the nonmember fee is required for all on-site registrations.

REGISTRATION CONFIRMATIONS

All registration confirmations will be emailed once payment has been processed. This will serve as your receipt. Registration confirmations can also be found under the My Account section of the INCPAS website. Make sure your email address is on file with INCPAS. If you have not received the registration confirmation, be sure to check your SPAM filter, and approve [info@incpas.org] as a sender. If you do not receive a confirmation, contact member services.

CPE CERTIFICATES

Courses. CPE certificates are sent electronically. You should receive your CPE certificate within two weeks of the course completion date. Course certificates can also be found under the My Account section of the INCPAS website. CPE certificates are not available until the course has been reconciled and the full balance has been paid. Contact member services if you do not receive your CPE certificate. Make sure your email address is on file with INCPAS. If you have not received the registration confirmation, be sure to check your SPAM filter, and approve “INCPAS Christina Pristasch” [cpristasch@incpas.org] as a sender.

Conferences. CPE certificates are mailed to your preferred mailing address. You should receive your CPE certificate within three weeks of the conference date. CPE credits for conferences can be viewed in My Account under the “My CPE Tracker” section of the INCPAS website; however, you are not able to print or download a copy of your CPE certificate, since they are mailed to you directly. Contact member services if you do not receive your conference CPE certificate or need an additional copy.

EVALUATIONS

All course and conference evaluations are sent electronically. A link to the online evaluation will be emailed to you within two days of the course or conference.

CELL PHONES

Cell phones must be silenced or turned off during INCPAS events to ensure an optimum learning environment.

BUSINESS MEAL DEDUCTIONS

Under IRS Code Section 162 (effective 1/1/94), 50 percent of the costs of business meals held in conjunction with association meeting are generally deductible.

IF YOU CANCEL, SUBSTITUTE OR SWITCH A COURSE

All live courses are subject to the INCPAS Cancellation or Switch Policy. All cancellations and switches are subject to an administrative services fee. Cancellations must be received in writing or by telephone to member services.

- You may substitute another individual in your place at any time without penalty provided the registration fee paid applies to both registrants (i.e. both registrants qualify for the member fee). Please notify member services of the change to assure proper assignment of CPE credit.
- You may switch your registration to another course. Additional fees would pertain if the new course is more expensive, in which case the difference would be charged in addition to a switch fee.
- You may cancel a registration any time; however, the following fees will be incurred.

INCPAS DISCOUNT

FlexPass must be purchased by September 30, 2019. FlexPass purchasers may transfer his or her registration to another live seminar and conference without a penalty. FlexPass excludes any free CPE opportunities, self study and webinars.

AICPA DISCOUNT

A $30 discount for 8-hour courses, with AICPA listed as the vendor, is available to CPAs who are AICPA members. The $30 discount is available as a drop down when registering for courses online; when registering by phone, be sure to mention you are an AICPA member. The AICPA member discount is not available for four-hour AICPA courses.

January 31, 2020. FlexPass must be purchased by September 30, 2019. FlexPass purchasers may transfer his or her registration to another live seminar and conference without a penalty. FlexPass excludes any free CPE opportunities, self study and webinars.

Members may purchase a FlexPass package for a discount on INCPAS courses. FlexPass applies to all INCPAS live seminars, conferences, simulcasts and CPA Center of Excellence® Online Interactive Courses offered through January 31, 2020. FlexPass must be purchased by September 30, 2019. FlexPass purchasers may transfer his or her registration to another live seminar and conference without a penalty. FlexPass excludes any free CPE opportunities, self study and webinars.

For more information about INCPAS, visit incpas.org.
CANCELLATION AND SWITCH FEES

• $15 service fee for cancellations or switches received 15 business days or more prior to the course or conference date.
• $25 service fee for cancellations or switches received 6–14 business days or more prior to the course or conference date.
• 50% of the registration fee will be refunded for cancellations or switches received five business days or less prior to any course.
• Nonrefundable registration fee for any INCPAS-sponsored conference cancellations or switches received five business days less prior to any conference.
• Nonrefundable registration fee for cancellations or switches received on or after the course or conference date.

IF INCPAS CANCELS A COURSE

INCPAS reserves the right to cancel a course at any time due to low number of registrants, discussion leader travel issues and/or inclement weather conditions.

A course will be cancelled if the minimum number of participants is not obtained approximately 10 days prior to the course. You may elect to receive a full refund or choose another course without penalty. INCPAS is not responsible for any personal expenses.

INCLEMENT WEATHER POLICY

Registrants will be notified at their office immediately upon cancellation of an event due to inclement weather. If we are unable to reach registrants or the decision to cancel has been made during non-business hours, registrants will be contacted at home. The Society uses our database to contact registrants, therefore it is imperative you notify the Society when your information has changed.

When an event has been cancelled due to inclement weather, registrants will have the option of attending the rescheduled event or registering for another even at the time of cancellation. If the registrant is unable to attend the rescheduled event and is unable to register for another event, a full refund will be issued.

If a registrant is unable to attend an even due to inclement weather, they must notify the Society the day of the scheduled event. Cancellation will not be accepted before or after the event. If the event has not been cancelled, no refunds will be issued. Instead, registrants will be issued a credit voucher valid for one year from the date of issue. It is applicable to another event of equal value.

DISCLAIMERS

DISCLAIMER

The information and suggestions presented at the courses, seminars and institutes sponsored by the Indiana CPA Society are subject to constant change and, therefore, should serve only as a foundation for further investigation and study. Any forms presented at such courses, seminars or institutes are samples only and are not necessarily authoritative. All information, procedures and forms contained or used in such courses, seminars or institutes should be carefully reviewed and should serve only as a guide for use in specific situations.

The INCPAS and contributing authors and lectures hereby disclaim any and all responsibility, which may be asserted or claimed arising from or claimed to have arisen from reliance upon the information or utilization of the information or forms used in such courses, seminars or institutes. The opinions expressed by teachers or course leaders are not necessarily those of INCPAS.

Continuing education courses purchased from INCPAS may be deductible for federal income tax purposes as ordinary and necessary business expenses. Continuing education course purchases are not deductible as charitable contributions. Please consult your tax advisor for individual assistance in specific situations.

CLE DISCLAIMER

Indiana CPA Society continuing professional education courses have presumptive approval by the Indiana Commission for Continuing Legal Education (ICCLE). Attendance at each approved course will be documented by INCPAS and forwarded within 30 days to ICCLE for their records. It is the sole discretion of ICCLE to determine what courses will be approved for CLE credit and how much credit can be earned for each approved course. Attendance reported more than 30 days after course completion will include a late processing fee of $25.00, administered by ICCLE. Late attendance will not be recorded until payment is made.

PHOTO DISCLAIMER

It is the policy of the Indiana CPA Society, Inc. (“Society”) that any Society member or other person who attends a Society event, function or meeting consents to the Society’s use of that member or attendee’s name, voice, likeness, or image in Society advertising, fundraising, promotional, or educational materials, in any medium whatsoever, without payment of additional consideration to the member or attendee. By participating in or attending Society events, each member or attendee understands and agrees that (i) the Society may record or document its events with photographs, audio and/or video recordings, and other media; (ii) the Society will own any such photographs, audio and/or video recordings or other media; and (iii) the Society may utilize such materials, including without limitation, posting any such photographs, audio or video recordings, or other media on the Society’s website, for any purpose the Society deems appropriate. Any member or attendee objecting to the possible use of his or her name, voice, likeness, or image in this manner shall communicate in writing his or her objections to or limitations on such use to the Society.
872 IAC 1-3-3 Renewal of certificate
Authority: IC 25-2.1-2-15
Affected: IC 25-2.1-4-5

Sec. 3. (a) Applicants for renewal of a certificate as a CPA, PA, or AP must complete a minimum of one hundred twenty (120) hours of instruction acceptable under this section and sections 4 and 5.1 of this rule. Subsections (c) and (d) and sections 3.1 through 3.4 of this rule will apply to determine the number of hours. (b) CPE is measured by course length with one (1) fifty (50) minute period equal to one (1) hour of CPE credit. One-half (1/2) hour CPE credit increments (equal to twenty-five (25) minutes) are permitted after the first hour of credit has been earned in a given course. When the total minutes of a course are greater than fifty (50) minutes, but not divisible by fifty (50), CPE credit hours granted will be rounded down to the nearest one-half (1/2) credit. For example, for courses with segments totaling one hundred forty (140) minutes, two and one-half (2 1/2) hours CPE credit may be granted. (c) A minimum of ten percent (10%) of the required minimum hours in a reporting period shall be in accounting or auditing, or both. (d) An ethics requirement of four (4) hours of CPE credit shall be met during the reporting period through: (1) a minimum of four (4) hours in ethics; (2) completion of a competency-based ethics course; or (3) experience that augments the applicant’s knowledge and skill in providing accounting services specifically through application of the code of professional conduct (as adopted in 872 IAC 1-2-1(b) (1)), which shall be in a noncompensated role with a professional or trade organization verified by the organization. (e) The time reporting period in which the applicant must have a minimum of one hundred twenty (120) hours is the three (3) years ending on December 31 prior to the expiration of certificates with a minimum of twenty (20) hours per year.
## Membership Application
### 2019–20

<table>
<thead>
<tr>
<th>First</th>
<th>MI</th>
<th>Last</th>
</tr>
</thead>
</table>

Name to greet by

Degrees and Professional Credentials

Gender*       

Male

Female

AICPA Member No.

Ethnic Background*  

Month/Year of Birth*  

Phone (Home)

Home Address

Phone (Cell)

City

County

State

Zip Code

Business Name

Title

Address 1

Address 2

Phone (Direct Line)

City

County

State

Zip Code

Preferred Email Address

Preferred Phone:  

Home

Cell

Office

CPA License No./State/Date Issued

Send all INCPAS mail to  

Home

Business

Is the firm/company/organization you are employed by:  

Government

Education

Public Accounting

Industry

If public accounting, please select:  

Sole Practitioner

1–3 Partners

4–12 Partners

13 or more Partners

In case of an emergency, whom should we contact on your behalf?  

Name

Phone

### Membership Classifications

<table>
<thead>
<tr>
<th>Membership Classification</th>
<th>Fee</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>First-Time Applicants</strong>—PAY ONLY $150</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Resident</td>
<td>$435</td>
<td>Holder of CPA license, lives or works in Indiana</td>
</tr>
<tr>
<td>Non-Resident</td>
<td>$295</td>
<td>Holder of CPA license, does not live or work in Indiana</td>
</tr>
<tr>
<td>Government</td>
<td>$335</td>
<td>Holder of CPA license, works in a government position</td>
</tr>
<tr>
<td>Education</td>
<td>$335</td>
<td>Holder of CPA license, works in an education position</td>
</tr>
<tr>
<td>Associate</td>
<td>$340</td>
<td>Does not hold an active CPA license, but successfully completed CPA Exam</td>
</tr>
<tr>
<td>CPA Candidate</td>
<td>$190</td>
<td>Pursuing successful completion of the CPA Exam</td>
</tr>
<tr>
<td>Affiliate</td>
<td>$340</td>
<td>Working with the CPA profession and not eligible for other categories of membership</td>
</tr>
<tr>
<td>Business Professional</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Firm Administrator</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Non-CPA Accounting Professional</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Paraprofessional</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Senior</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Senior</td>
<td>$190</td>
<td>Must be retired</td>
</tr>
<tr>
<td>Students</td>
<td></td>
<td>Call the Indiana CPA Society for a free student membership application or visit incpas.org</td>
</tr>
</tbody>
</table>

### Reinstatement Fee — $25

A $25 reinstatement fee applies to applicants who previously dropped or resigned membership or affiliation. Fee is in addition to full membership dues.

Join Online: incpas.org/join

*optional
I am joining the Society

(primary reason)
- To take advantage of member discounts.
- To network with colleagues.
- To gain access to discounted continuing education opportunities.
- To support the profession and help uphold the integrity of my credential.
- To stay current on new developments affecting my profession.

Payment Information

NOTICE: If this is the first time you are applying for membership in the Indiana CPA Society, pay only the $150 fee for the first year.

Method of Payment:
- Check
- American Express
- Discover
- MasterCard
- VISA
- Please send me an invoice

Card No.

Cardholder's Name

Cardholder's Signature

Expiration Date

CVV# (last 3 digits on back of card)

To the best of my knowledge the information contained herein is accurate. I agree to be governed by the bylaws of the Indiana CPA Society and the Code of Professional Conduct.

Signature:

Date:

Note: INCPAS dues are not deductible as charitable contributions, but may be deductible as ordinary and necessary business expenses. A portion of the dues, however, is not deductible as an ordinary and necessary business expense to the extent that the Indiana CPA Society engages in state and federal lobbying as defined by IRS regulations. Please contact the Society office to obtain the nondeductible portion of the dues.

Professional Interests
This category will be used to help identify your areas of interest so we may provide you with appropriate information related to these areas. Check as many as six areas of interest. These codes are used to determine targeted mailing lists for notices on issue specific information and events. Keep your codes updated to ensure that you receive appropriate mailings.

- Auto Dealers
- Agriculture
- Assurance Services
- Auditing (Internal)
- Auditing (Public)
- Budgeting/Planning
- Business Valuation
- Communications
- Construction
- Consulting Services
- Controllership
- Corporate Analysis
- Cost Accounting
- Education
- Employee Benefits
- Employment Services
- Entertainment/Recreation
- Estate Planning
- Financial Institutions
- Financial Planning—Business
- Financial Planning—Personal
- Financial Reporting
- Forensic Accounting
- Governmental Accounting—Federal
- Governmental Accounting—State
- General Management
- Health Care
- Holding/Investment Company
- Human Resources
- Hospitality
- Insurance
- International Business
- Investment Analysis
- Litigation Services
- Legal Services
- Management of an Accounting Practice
- Management of Information Systems
- Manufacturing
- Marketing/Public Relations
- Museums/Zoos/Art Galleries
- Natural Resources
- Nonprofit Organizations
- Printing/Publishing
- Real Estate
- Restaurants
- Retail Trade
- Risk Management
- SEC Reporting
- Securities/Commodities
- Taxes—Federal
- Taxes—State & Local
- Technology
- Transportation
- Treasury Management
- Utilities
- Waste Management/Recycling
- Wholesale Trade

The Society's 2019–20 fiscal year is July 1 through June 30.
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Fax: (317) 726-5005

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Assesses the political, legislative and regulatory environment affecting INCPAS and its members, identify advocacy issues and propose relevant policy and position statements.

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Promotes the ethical practice of the CPA profession through education and enforcement activities.

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(Effective July 1, 2018–June 30, 2019)
IMPORTANT NUMBERS

**Internal Revenue Service**

*District Office:*
Minton Building
575 N. Pennsylvania
Indianapolis, IN 46204
(317) 685-7500

*Mailing Address:*
P.O. Box 44687
Indianapolis, IN 46244

**IRS Tax Practitioner Priority Service Hotline** ...........1-866-860-4259
*Hours of Operation: 7 a.m.–7 p.m. local time*

**IRS Phone Numbers**

Appeals ...............................................................(317) 685-7892
Counsel .................................................................(317) 685-7938
Criminal Investigation Division .........................(317) 685-7727
Small Business/Self Employed Operating Division
 Collections Division .............................................(317) 685-7762
Liaison and Disclosure, Governmental Liaison .......(312) 292-3520
Stakeholder Liaison Field – Stakeholder Liaison ....(317) 685-7573
Examination Division ............................................(317) 581-5701
Specialty Programs Employment ..........................(317) 685-7725
Tax Exempt/Government Entities Organization .......(317) 685-7648
Local Taxpayer Advocate .....................................(317) 685-7799
Tax Payer Advocate Office .................................(317) 685-7840
Treasury Inspector General for Tax Administration ..(317) 685-7961

**IRS Phone Numbers Outside of Indianapolis**

Bloomington ......................................................(812) 337-7600
Columbus ...........................................................(812) 379-7400
Evansville ...........................................................(812) 479-4800
Fort Wayne .........................................................(260) 458-5000
Lafayette ...............................................................(765) 449-3880
Merrillville ...........................................................(219) 736-4378
Muncie .................................................................(765) 216-0570
South Bend .........................................................(574) 401-6656
Terre Haute ...........................................................(812) 233-6060

**Indiana Department of Revenue**
Indiana Government Center North
100 N. Senate Ave., Room N105
Indianapolis, IN 46204-2281
in.gov/dor

**IN DOR Corporate Line**
(317) 232-0129

**IN DOR Tax Practitioners Hotline**
(317) 233-4017 or 1-800-462-6320 (enter 4367 when prompted)

**IN DOR Collections Hotline/Stop Warrants**
(317) 233-4017 or 1-800-462-6320 (enter 4367 when prompted, then select Option 3 for collections when prompted)

**Indiana Board of Accountancy**
Handles inquiries regarding regulation, licensing, renewals, CPE credits, examinations and certificates for CPAs, CPA corporations, CPA partnerships and professional corporations.
in.gov/pla/accountancy.htm

**Indiana Professional Licensing Agency (IPLA)**
Attn: Board of Accountancy
402 W. Washington St., Room W072
Indianapolis, IN 46204
(317) 234-8800
in.gov/pla/accountancy.htm
pla14@pla.in.gov

**IN Department of Workforce Development Tax Line**
1-800-437-9136 (Not Benefits Line)

**AICPA Member Service Center**
1-888-777-7077
service@aicpa.org
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