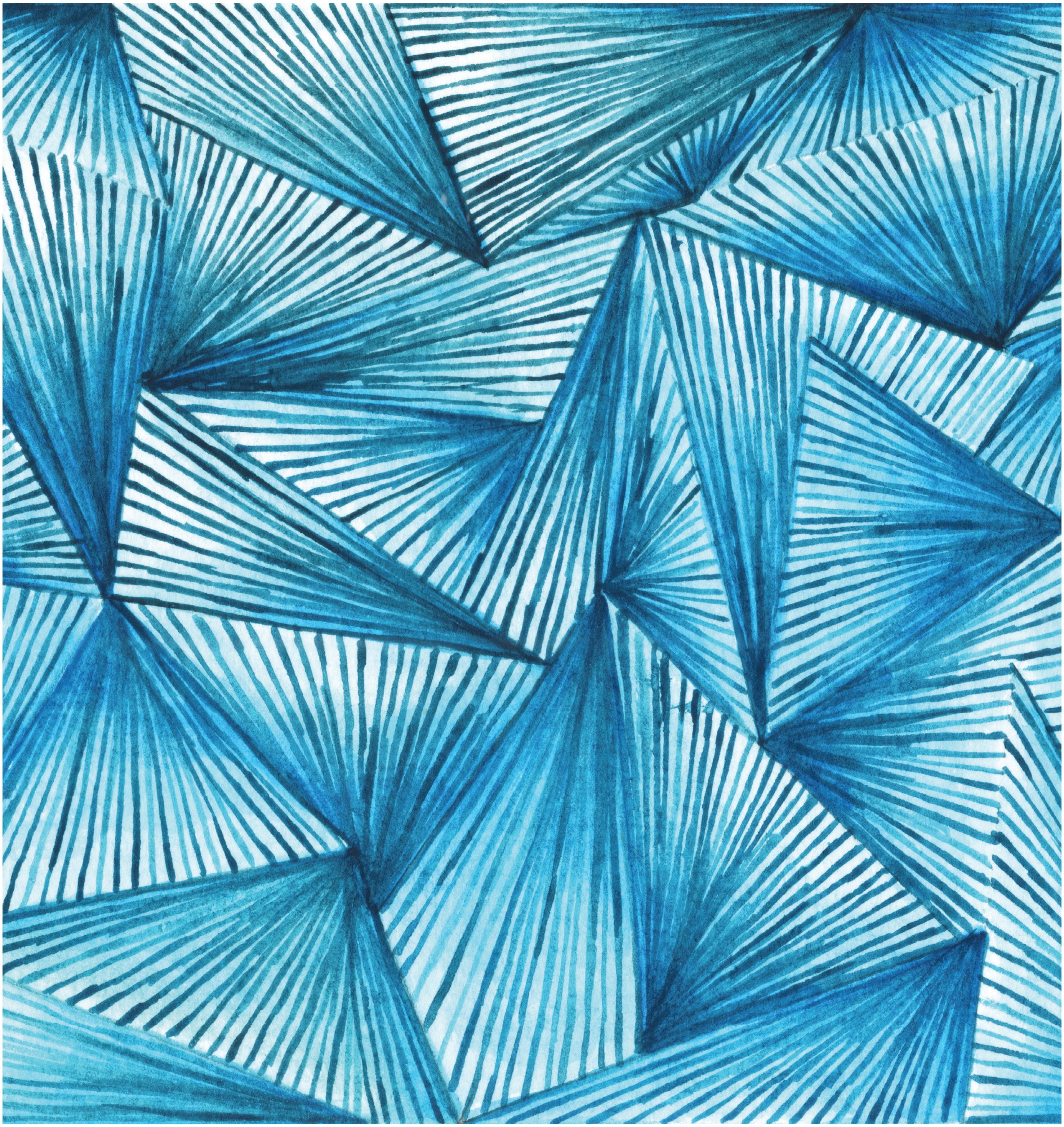
IN
CPA
SOCIETY

Resource Course Catalog



Transforming Business

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A NOTE FROM OUR CEO

3RD YEAR REPORTING CYCLE

Everyone had a difficult start to spring as plans for the year—and tax deadlines—changed. We don't know yet whether the CPE licensing requirements will be extended in this 3rd year reporting cycle, but we do know work and learning will continue.

With that in mind, this year's catalog is particularly flexible. We'll hold in-person sessions again down the road, but are also offering live simulcasts, webinars and online interactive courses if you want to stay at home. You can also talk to our Learning Concierge team and they can help you identify what offerings best suit your current needs.

Jennifer

Jennifer B. Briggs, CAE
INCPAS President & CEO

This catalog is up-to-date as of its printing. To see any event changes, go to incpas.org/Coronavirus.

Here are a few things we think you'll be interested in:

New INCPAS CONVENTION
Connect with colleagues and earn 16 hours CPE
Are you ready to get out of your home or office? Our new Convention on December 2–3 at the JW Marriott Indianapolis will offer up to five tracks each day. It also includes a reception and tour at Lucas Oil Stadium. See details on **page 47**.

New MICRO-CREDENTIAL PROGRAM
Lay the groundwork for your leadership skills now
These customized programs take the guesswork out of what you need to know and do to elevate yourself as a leader. Enroll in one of our set packages of leadership courses—Becoming a Firm Leader (see **page 25**), Becoming a Leader in Business & Industry (**page 51**), or Becoming a Technology Leader (**page 67**)—and benefit from a custom-fit curriculum. You'll also receive a digital badge upon completion. Each micro-credential is 24 hours of CPE.

LIVE SIMULCASTS
Live education, even if you're out of town
We will continue to host live simulcasts from the INCPAS Learning Center and have more options scheduled. Look for the icon in this catalog to see which courses will be offered as a simulcast.

WEBINARS
Shorter online learning opportunities
To see all of our webinars that offer 1–4 hours of CPE, go to incpas.org/CPE and search "Virtual." INCPAS webinars qualify as live CPE.

COURSE & CONFERENCE INFORMATION

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.

Breakroom


Classroom A/B


Board Room

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.

PAPERLESS
SEMINARS
incpas.org/green

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.

Paperless Seminars learn more at incpas.org/Green

COURSE & CONFERENCE INFORMATION, CONTINUED

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

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

Indianapolis

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

JW Marriott Indianapolis
10 S. West St.
(317) 860-5800

Jeffersonville

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

Kokomo

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

Lafayette

Fowler House Mansion
900 South St.
(765) 400-2002

Merrillville

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

Noblesville

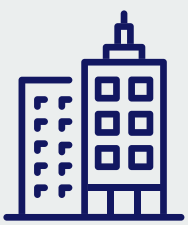
Embassy Suites by Hilton
13700 Conference Center Dr.
(317) 674-1900

South Bend

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

Terre Haute

Holiday Inn
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
$120/night + tax

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.

Hyatt Place Indianapolis Carmel
12045 N. Illinois St.
Carmel, IN 46032
$129/night + tax

Call (317) 343-6400. The INCPAS corporate rate code is 98433.

Residence Inn by Marriott Indianapolis Carmel
11895 N. Meridian St.
Carmel, IN 46032
$120/night + tax

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

Book online for both the Resdience Inn and SpringHill Suites at https://www.marriott.com/event-reservations/reservation-link.mi?id=1581374062363&key=CORP&app=resvlink.

This information and the web links are also available online at incpas.org/Hotels.

EVERYTHING CPE

SAVE FIRST. SHOP LATER.

Members-only discounted CPE packages

Buy a FlexPass package now and schedule your courses later. Choose from INCPAS live seminars, conferences, simulcasts, webinars, breakfast and lunch and learns, and CPA Center of Excellence® online interactive courses.

FLEXPASS PACKAGES

16 hours – $605 / savings of at least $103*
24 hours – $899 / savings of at least $160*
40 hours – $1490 / savings of at least $280*

Learn more at incpas.org/FlexPass.

FlexPass must be purchased by December 31, 2020. Hours must be used by January 31, 2021.

**Based on 8-hour course prices.*

FREE LEARNING CONCIERGE

We can help you make the most of your CPE in the 3rd year reporting cycle

Whether you're new to the profession, mid-career or are approaching the end of your career, an INCPAS Learning Concierge can help you identify courses that make the most sense for your career goals. Sign up for FlexPass and talk to a Learning Concierge at (317) 726-5000 or go to incpas.org/LearningConcierge to discover which learning opportunities are most relevant to you.

INDIANA CPA SOCIETY CPE REGISTRATION

MEMBER ID NO. FULL NAME

NAME TO GREET BY

FIRM/COMPANY

WORK PHONE NO.

FAX NO.

EMAIL

WORK / HOME *(circle)*

STREET ADDRESS (*no P.O. Boxes)*

CITY

STATE

ZIP CODE

IN CPA SOCIETY FlexPass

I am not participating in the 2020 FlexPass Program.

I am participating in the 2020 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 **$605**

24-hour FlexPass package **$899**

40-hour FlexPass package **$1490**

SIGNATURE

TOTAL

USING FlexPass (Y/N)	COURSE DATE	COURSE TITLE	CITY	PRICE

TOTAL

DON'T PAY NONMEMBER PRICES! JOIN TODAY TO TAKE ADVANTAGE OF MEMBER PRICING AT INCPAS.ORG/JOIN.

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.

2020 CONFERENCES & CONVENTION CALENDAR

New
INCPAS CONVENTION
December 2–3 | 2020

JW Marriott, Indianapolis

Networking reception and tours of the facility at Lucas Oil Stadium

▶ Register at INCPAS.org/Convention

IND INDUSTRY SPRING FORUM

New INDUSTRY SPRING FORUM
May 21
Virtual
Registration Fee: $300

Who Should Attend: CPAs in business or industry seeking an affordable annual update and opportunity to connect with colleagues

CC CONTROLLERS CONFERENCE

CONTROLLERS CONFERENCE
June 8
Ritz Charles, Carmel
Member: $364
Nonmember: $514

Who Should Attend: Current or aspiring controllers, financial managers and CFOs in business/industry

YP YOUNG PROS FORUM

New YOUNG PROS FORUM
June 25
INCPAS Learning Center, Indianapolis
Member: $174
Nonmember: $224

Who Should Attend: Young accounting professionals 35 years and younger who want to connect with their peers and improve their leadership skills

NFP NOT-FOR-PROFIT CONFERENCE

NOT-FOR-PROFIT CONFERENCE
July 23
New Location Embassy Suites, Noblesville
Member: $259
Nonmember: $404

Who Should Attend: CPAs in public accounting who have not-for-profit clients and CPAs working as staff at not-for-profit organizations

Bring a colleague or client: $179

SF SMALL FIRM SUMMIT

SMALL FIRM SUMMIT
August 20
Ritz Charles, Carmel
Member: $259
Nonmember: $404

Who Should Attend: Sole practitioners or CPAs at firms with one to three partners

CYB CYBERSECURITY CONFERENCE

CYBERSECURITY CONFERENCE
October 29
Ritz Charles, Carmel
Member: $364
Nonmember: $514

Who Should Attend: CPAs interested in the latest trends in fraud, forensics, cybersecurity and emerging technology

CN CONSTRUCTION CONFERENCE

CONSTRUCTION CONFERENCE
November 10
Ritz Charles, Carmel
Member: $364
Nonmember: $514

Who Should Attend: CPAs who work in residential and commercial construction in Indiana

▶ **Register at INCPAS.org/Conferences.**

Early Bird: Receive $25 off if you register at least three weeks before the conference.

3RD YEAR REPORTING CYCLE

LEARNING YOUR WAY

Make the Most of Your Member Benefits

We are offering new ways for you to learn this year in addition to our traditional CPE and conferences. Mix and match based on your interests and professional needs or talk to a **Learning Concierge** to get custom recommendations. Call (317) 726-5000 or visit incpas.org/LearningConcierge.

New CPE opportunities in 2020

INCPAS CONVENTION
Connect with colleagues and earn 16 hours CPE

Access a larger network and elevate your professional development at INCPAS Convention. The new INCPAS Convention will offer up to five tracks each day covering Accounting & Auditing, Business & Industry, Management & Leadership, Tax and Technology. Sessions will be led by nationally-renowned speakers such as Judson Laipply; Rebecca Lee, CPA; Samantha Mansfield, CPA; Sarah Turner; Amy Vetter, CPA; and the Indiana Department of Revenue. It is December 2–3 at the JW Marriott Indianapolis and includes a reception and tour at Lucas Oil Stadium. See details on page 47.

MICRO-CREDENTIAL PROGRAM
Lay the groundwork for your leadership skills now

Take the guesswork and time out of figuring out what you need to know to be a successful leader. Enroll in one of our set packages of leadership courses—Becoming a Firm Leader (see page 25), Becoming a Leader in Business & Industry (page 51), or Becoming a Technology Leader (page 67)—and benefit from a custom-fit curriculum. You'll also receive a digital badge upon completion. Each micro-credential is 24 hours of CPE.

Don't forget about our other offerings

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

We will continue to host live simulcasts from the INCPAS Learning Center and schedule more options. Look for the icon in this catalog to see which courses will be offered as a simulcast. You can also go to incpas.org/CPE and search "Simulcast."

BREAKFAST & LUNCH SERIES
Facilitated discussions and networking

INCPAS is expanding on this popular series and offering tailored topics for public accounting, business and industry, and young professionals. Meal is included. See details on page 8.

*"**Great series!** It includes current, relevant issues impacting CPAs in both industry and practice, and is presented in a comfortable, relaxed and open format."*
—2019 attendee

FREE CPA CONVERSATIONS
Interactive discussions with the INCPAS President & CEO

These events are 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 details on page 8.

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

Our popular webinar series provides timely information on hot topics and emerging trends. A diverse range of expert speakers cover many strategic topics, and INCPAS President & CEO Jennifer Briggs, CAE, gives a quarterly INCPAS update on a broader range of Society and profession topics. See details on page 9.

CASE STUDIES
Engage, retain, improve

Did you know you retain more of what you learn by doing hands-on exercises? Look for the icon in this catalog to see which courses are case studies.

LEARNING YOUR WAY, CONTINUED

SHORTER LEARNING & NETWORKING OPPORTUNITIES
Earn 1 hour CPE for each of these events.

CPA Conversations Events

FREE for members/$75 nonmembers
First 30 minutes is for networking and breakfast/lunch. Program will follow.

Batesville
August 28
8:30–10:15 a.m.
Hillcrest Country Club

Bloomington
September 23
8:30–10:15 a.m.
Monroe Convention Center

Evansville
September 22
11:30 a.m.–1:15 p.m.
Tropicana Executive Conference Center

Fort Wayne
November 6
8:30–10:15 a.m.
Grand Wayne Center

Indianapolis
August 26
8:30–10:15 a.m. and 11:30 a.m.–1:15 p.m.
INCPAS Learning Center

Indianapolis
November 18
8:30–10:15 a.m. and 11:30 a.m.–1:15 p.m.
INCPAS Learning Center

Jeffersonville
September 16
11:30 a.m.–1:15 p.m.
Sheraton Louisville Riverside Hotel

Kokomo
September 28
8:30–10:15 a.m.
Kokomo Country Club

Lafayette
August 14
8:30–10:15 a.m.
Fowler House Mansion

Merrillville
October 30
8:30–10:15 a.m.
Indiana Wesleyan University's Merrillville Education & Conference Center

Muncie
November 5
11:30 a.m.–1:15 p.m.
Horizon Convention Center

South Bend
November 20
8:30–10:15 a.m.
Century Center

Terre Haute
December 4
11:30 a.m.–1:15 p.m.
Holiday Inn

▶ **Register at incpas.org/CPAconvos.**

Breakfast and Lunch & Learns

$25 members/$50 nonmembers
First 30 minutes is for networking and breakfast/lunch. Program will follow.

Driver's Ed: Using Technology to Steer 4 Key Results
Chris Ortega
June 12
INCPAS Learning Center, Indianapolis
11:30 a.m.–1 p.m.

Building Credibility & Navigating Office Politics
Karl Ahlrichs, CSP, SHRM-SCP, SPHR
June 24
11:30 a.m.–1 p.m.

November 2
8:30–10 a.m.
INCPAS Learning Center, Indianapolis

What Do CPAs Really Need to Know About Cybersecurity?
Cory Campbell, CPA, CGMA, CFE, Ph.D.
August 19
INCPAS Learning Center, Indianapolis
8:30–10 a.m.

Artificial Intelligence & Machine Learning: Know Before You "Go"
Chris Ortega
September 21
INCPAS Learning Center, Indianapolis
8:30–10 a.m.

How to Build an Inclusive Culture
Toni Neely
October 28
11:30 a.m.–1 p.m.
INCPAS Learning Center, Indianapolis

YOUNG PROS
(CAREER DEVELOPMENT FOCUSED)

Leadership vs. Management
John Minnich, CPA, CFRM, CGMA, MAcct
August 5
INCPAS Learning Center, Indianapolis
11:30 a.m.–1 p.m.

Leadership vs. Management
John Minnich, CPA, CFRM, CGMA, MAcct
August 13
Junior Achievement of Northern Indiana, Fort Wayne
11:30 a.m.–1 p.m.

Having Difficult Conversations
Amy Woodall
September 16
West Market Conference Center, Indianapolis
11:30 a.m.–1 p.m.

CPA Rising Star
Adam Schwelnus, CPA, CGMA
October 8
Location TBD, South Bend
11:30 a.m.–1 p.m.

Confidence & Clarity
Andrea Liebross
October 14
INCPAS Learning Center, Indianapolis
11:30 a.m.–1 p.m.

Session TBD
Aszure Gray
November 4
West Market Conference Center, Indianapolis
11:30 a.m.–1 p.m.

Turning Obstacles into Opportunities
Andrea Liebross
December 1
INCPAS Learning Center, Indianapolis
11:30 a.m.–1 p.m.

▶ **Register at incpas.org/BreakfastLunch.**

EVERYTHING CPE

In the Know Webinars

***FREE** for members/$45 nonmembers*

INCPAS Spring Legislative Update
Lou Belch, Abdul-Hakim Shabazz & Sherrill Rude, CAE
May 28
Noon–1 p.m.

LIVE REPLAY
June 22
9–10 a.m.

Building Credibility & Navigating Organizational Communication in a COVID-19 World *LIVE REPLAY*
Karl Ahlrichs, CSP, SHRM-SCP, SPHR
June 1
9–10 a.m.

Developing a Digital Mindset
Cory Campbell, CPA, CGMA, CFE, Ph.D.
August 5
Noon–1 p.m.

LIVE REPLAY
September 23
9–10 a.m.

How to Build an Inclusive Culture
Toni Neely
August 11
9–10 a.m.

LIVE REPLAY
September 17
Noon–1 p.m.

INCPAS Fall Update
Jennifer Briggs, CAE
September 30
Noon–1 p.m.

LIVE REPLAY
October 26
9–10 a.m.

Robotics Process Automation: There's a BOT for That
Cory Campbell, CPA, CGMA, CFE, Ph.D.
October 21
Noon–1 p.m.

LIVE REPLAY
November 11
9–10 a.m.

INCPAS Winter Update
Jennifer Briggs, CAE
November 19
Noon–1 p.m.

LIVE REPLAY
December 17
9–10 a.m.

▶ Register at incpas.org/InTheKnow.

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.

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

Note: This course is part of the Becoming a Technology Leader micro-credential program. For details about this NEW opportunity and how to earn a digital badge see page 67.

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

Note: This course is part of the Becoming a Firm Leader micro-credential program. For details about this NEW opportunity and how to earn a digital badge see page 25.

CPA Excellence: Ethics – Approaching Ethical Dilemmas Throughout Your Career

Date: Open

Enrollment Time: 90 days to complete the course

CPE: Fulfills Indiana ethics requirement

Member | Nonmember: $99

Overview: Experience a new way to fulfill your ethics requirement. Learn about ethics for CPAs for both behavioral and regulatory issues; explore stories, scenarios and case studies from the real world; and reflect on previous education and the AICPA Code of Professional Conduct to determine how to answer the discussion questions.

Audience: Any CPA licensed in Indiana who needs Ethics credit

Source: CPA Center of Excellence®

Level: Intermediate

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

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

LEARNING YOUR WAY, CONTINUED

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

Note: This course is part of the Becoming a Firm Leader micro-credential program. For details about this NEW opportunity and how to earn a digital badge see page 25.

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

Note: This course is part of the Becoming a Technology Leader micro-credential program. For details about this NEW opportunity and how to earn a digital badge see page 67.

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

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 incpas.org/COE-Courses. 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.**

REGIONAL LISTINGS

TITLE	DATE	CPE	MEM./ NON.	PAGE
Bloomington				
A&A Update	6/30/20	4	$124/$199	26
Professional Ethics Update	6/30/20	4	$124/$199	40
The Best Federal Tax Update Course	12/8/20	8	$354/$513	61
Carmel				
Controllers Conference	6/8/20	8	$364/$514	46
Small Firm Summit	8/20/20	8	$259/$404	48
Cybersecurity Conference	10/29/20	8	$364/$514	64
Construction Conference	11/10/20	8	$364/$514	45
Federal Tax Update with Pat Garverick	1/5–6/21	16	$544/$789	56
Evansville				
A&A Update	6/3/20	4	$124/$199	26
Professional Ethics Update	6/3/20	4	$124/$199	40
Employment Law Update: Key Risks & Recent Trends	8/27/20	8	$384/$543	46
Annual Update for Controllers	11/9/20	8	$384/$543	43
Compilations, Reviews & Preparations: Engagement Performance & Annual Update	11/11/20	8	$354/$513	31
Interpreting the New Revenue Recognition Standard: What All CPAs Need to Know	11/12/20	4	$200/$290	33
The Bottom Line on the New Lease Accounting Requirements	11/12/20	4	$200/$290	37
Federal Tax Update with Pat Garverick	11/16–17/20	16	$544/$789	56
Annual Update for CPAs & Auditors	11/30/20	8	$384/$543	28
4 Tiers of Loss Limitations: Guide to the New Rules for Pass-Through Entities	12/7/20	4	$200/$290	55
Individual Income Tax Update Course	12/7/20	4	$200/$290	57
Social Security & Medicare: Planning for You & Your Clients	12/11/20	8	$354/$513	60
Preventing, Detecting & Responding to Fraud: What Every CPA Should Know	12/15/20	8	$354/$513	36
Fort Wayne				
A&A Update	6/12/20	4	$124/$199	26
Professional Ethics Update	6/12/20	4	$124/$199	40

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TITLE	DATE	CPE	MEM./ NON.	PAGE
CFO Leadership Series: Strategy & Critical Thinking Skills	9/24/20	8	$354/$513	45
Annual Update for Controllers	10/9/20	8	$384/$543	43
Securing a Comfortable Retirement in the Age of Spending	10/19/20	8	$354/$513	60
Compilations, Reviews & Preparations: Engagement Performance & Annual Update	10/27/20	8	$354/$513	31
Interpreting the New Revenue Recognition Standard: What All CPAs Need to Know	10/28/20	4	$200/$290	33
The Bottom Line on the New Lease Accounting Requirements	10/28/20	4	$200/$290	37
Emerging Technologies, Including Blockchain & Cryptocurrencies	10/29/20	4	$200/$290	64
Testing & Auditing Excel Workbooks	10/29/20	4	$200/$290	65
Not-for-Profit Financial Reporting: Mastering the Unique Requirements	11/5/20	8	$384/$543	35
Internal & External Fraud: Understanding It & Working to Control It	11/11/20	8	$354/$513	65
CFO Leadership Series: Balance Sheet Management	11/12/20	8	$354/$513	44
Ethical Leadership: Power, Influence, Integrity & Trust	11/13/20	4	$200/$290	39
Valuing a Business: What Is This Company Worth?	11/13/20	4	$200/$290	49
Mastering Basis Issues for S Corporations, Partnerships & LLCs	11/19/20	4	$200/$290	57
The Top 5 Tax Issues in Dealing with LLCs & Partnerships	11/19/20	4	$200/$290	61
Fiduciary Income Tax Returns: Form 1041 Workshop with Filled-in Forms	11/20/20	8	$354/$513	56
Social Security & Medicare: Planning for You & Your Clients	11/23/20	8	$354/$513	60
Accounting & Reporting for Not-for-Profit Organizations	11/24/20	8	$384/$543	27
Accounting & Auditing 2020: An Update & Refresher	12/1/20	8	$354/$513	27
Federal Tax Update with Ron Roberson	12/7–8/20	16	$544/$789	56
CFO Leadership Series: Managing People	12/10/20	8	$354/$513	45
Section 199A: Applications & Challenges	12/14/20	4	$200/$290	59
New Section 199A: Schedule K-1 Reporting by Relevant Passthrough Entities	12/14/20	4	$200/$290	60

Indianapolis

TITLE	DATE	CPE	MEM./ NON.	PAGE
A&A Update	6/17/20	4	$124/$199	26
Professional Ethics Update	6/17/20	4	$124/$199	40
Revenue Recognition: Mastering the New FASB Requirements	6/24/20	8	$384/$543	36
New Young Pros Forum	6/25/20	4	$174/$224	50
Leases: Mastering the New FASB Requirements	6/26/20	8	$384/$543	34
New Tax Cuts & Jobs Act and Farm Taxation	7/22/20	8	$354/$513	61
The Competent CPA: Mastering The Controller/CFO Role	8/7/20	8	$354/$513	49
Data Analytics & Dashboards	8/17–18/20	16	$544/$789	64
New CFO Leadership Series: Emotional Intelligence—What Makes Leaders Great?	8/20/20	8	$354/$513	45
Balance Sheet Management	8/21/20	4	$200/$290	43
Business Ethics	8/21/20	4	$200/$290	39
Not-for-Profit Accounting & Auditing Update	8/27/20	8	$384/$543	35
A Complete Guide to the New Yellow Book	9/16/20	8	$354/$513	26
Transform Your Organization with Office 365 & Teams	9/16/20	8	$354/$513	66

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The 8-Hour MBA for CPAs	9/17/20	8	$354/$513	48
Compilation & Review Practice Guide	9/21/20	4	$200/$290	31
Meeting Documentation Requirements in Your Workpapers	9/21/20	2	$110/$160	34
Peer Review Deficiencies: How to Solve Them?	9/21/20	2	$110/$160	35
New CFO Leadership Series: Become More Effective	9/23/20	8	$354/$513	44
Multistate Tax Update	9/23/20	8	$354/$513	57
Leases, Financial Instruments & Revenue: The FASB's "Big 3"	9/24/20	8	$354/$513	34
New Advanced Excel Data Magic: Managing, Analyzing & Reporting	9/28/20	8	$354/$513	28
Audit Working Papers: Document & Reviewing Field Work	9/28/20	8	$384/$543	29
New Case Studies in Fraud & Technology Controls	9/29/20	4	$200/$290	30
New Ethics & Technology	9/29/20	4	$200/$290	40
Financial Statement Disclosures: A Guide For Small- & Medium-Sized Businesses	9/29/20	4	$200/$290	32
New Update on Recent AICPA Standard Setting: Staying Current in a Changing Environment	9/29/20	4	$200/$290	38
Leases: Mastering the New FASB Requirements	10/19/20	8	$384/$543	34
Accounting & Auditing Update for Small Businesses	10/20/20	8	$384/$543	27
New Focus on Engagement Quality: How to Avoid Deficiencies in Peer Reviews	10/21/20	8	$354/$513	32
New S Corporation (Form 1120S) Tax Return Review & Case Study	10/21/20	8	$354/$513	59
New CFO Leadership Series: Developing Credibility—Inside & Outside the Organization	10/22/20	8	$354/$513	44
New Partnership & LLC (Form 1065) Tax Return Review & Case Study	10/22/20	8	$354/$513	58
The Strategic CFO: Big Picture Skills	10/23/20	8	$354/$513	49
New Assessing the Risk of Fraud in a Financial Statement Audit	10/26/20	8	$354/$513	28
New The New Yellow Book: Government Auditing Standards (2018 Revision)	10/26/20	8	$384/$543	37
Analytics & Big Data for CPAs	10/27/20	8	$384/$543	42
Buying & Selling a Business: Critical Tax & Structuring Issues	10/27/20	8	$354/$513	55
New 2020 Technology Trends Update	10/28/20	8	$354/$513	63
Real Estate Tax Boot Camp	10/28/20	8	$354/$513	58
New Excel Charting & Visualizations	10/30/20	4	$200/$290	64
New Remote Access to Small Businesses	10/30/20	4	$200/$290	65
Federal Tax Update with Ron Roberson	11/4–5/20	16	$544/$789	56
2020 FASB & AICPA Update	11/6/20	8	$354/$513	26
Fraud Update: Detecting & Preventing the Top 10 Fraud Schemes	11/6/20	8	$384/$543	32
Latest Developments in Not-for-Profit Accounting & Auditing	11/10/20	8	$354/$513	33
Applying the Uniform Guidance in Your Single Audits	11/11/20	8	$384/$543	28
Preparing Not-for-Profit Financial Statements Under ASU No. 2016-14	11/12/20	8	$354/$513	53
New Using Internal Controls to Strengthen Security, Efficiency & Employee Conduct	11/12/20	8	$354/$513	66
Data Analytics & Dashboards	11/16–17/20	16	$544/$789	64
New Organizational Leadership for Financial Executives	11/16/20	8	$354/$513	47
New Thriving in Recessionary Times	11/17/20	8	$354/$513	49

TITLE	DATE	CPE	MEM./ NON.	PAGE
New CFO Leadership Series: Cash Management—Managing the Lifeblood of the Business	11/19/20	8	$354/$513	44
Social Security & Medicare: Planning for You & Your Clients	11/19/20	8	$354/$513	60
New Avoiding Deficiencies in Peer Reviews: Focus on Engagement Quality	11/20/20	4	$200/$290	30
Critical Thinking Skills for Financial Professionals	11/20/20	4	$200/$290	46
Ethics in the Real World: Living Values for Today	11/20/20	4	$200/$290	40
Non-GAAP Financial Statement Options: Cash, Modified Cash & Tax Basis	11/20/20	4	$200/$290	34
Risk-Based Audit Standards: Effective Utilization	11/30/20	8	$354/$513	37
Analyzing Financial Statements: A Guide	12/1/20	2	$110/$160	28
Construction Contractors: Critical Accounting, Auditing & Tax Issues	12/1/20	8	$354/$513	55
Recent Compilation & Review Issues	12/1/20	2	$110/$160	36
New INCPAS Convention	12/2–3/20	16	Visit incpas.org/ Convention for pricing options.	47
New Audits of Employee Benefit Plans Subject to ERISA	12/4/20	8	$384/$543	29
Securing a Comfortable Retirement in the Age of Spending	12/4/20	8	$354/$513	60
Accounting & Reporting for Not-for-Profit Organizations	12/8/20	8	$384/$543	27
New CFO Leadership Series: Advanced Skills, Made Easy	12/8/20	8	$354/$513	43
Internal Controls for Industry: How to Implement & Maintain	12/9/20	8	$354/$513	33
Metrics Management: Choose & Use Key Performance Indicators	12/9/20	8	$354/$513	34
Ethics & Professional Conduct: Updates & Practical Applications	12/14/20	4	$200/$290	39
Financial Reporting for Not-for-Profit Entities	12/14/20	4	$200/$290	31
Preparation, Compilation & Review Engagement Update & Review	12/14/20	4	$200/$290	35
Real-World Frauds Found in Not-for-Profits	12/14/20	4	$200/$290	36
Employment Law Update: Reducing Employer Liability	12/15/20	4	$200/$290	46
Hottest Tax Planning Developments Under the Current Tax Law	12/15/20	4	$200/$290	57
Reviewing Individual Tax Returns: What Are You Missing?	12/15/20	4	$200/$290	58
Reviewing Partnership Tax Returns: What Are You Missing?	12/15/20	4	$200/$290	59
Heartfelt Leadership: How Ethical Leaders Build Trusting Organizations	12/16/20	4	$200/$290	40
Reviewing S Corporation Tax Returns: What Are You Missing?	12/16/20	4	$200/$290	59
Social Security & Medicare: Maximizing Retirement Benefits	12/16/20	4	$200/$290	60
Staff Retention: Attract & Keep the Best People	12/16/20	4	$200/$290	48
Blockchain Essentials: Impact on Modern Accounting	12/17/20	4	$200/$290	30
Business Valuation Issues	12/17/20	4	$200/$290	43
Financial Statement Fraud	12/17/20	4	$200/$290	32
Honing Your Management Style	12/17/20	4	$200/$290	47
Accounting & Auditing 2020: An Update & Refresher	12/18/20	8	$354/$513	27
Nexus Update: Latest Developments in State Income, Franchise & Sales Taxes	12/18/20	8	$384/$543	58
Form 1065 Boot Camp: Step-By-Step Preparation with Completed Forms	1/7/21	8	$354/$513	56
Preparing Individual Tax Returns for New Staff & Para-Professionals	1/8/21	8	$354/$513	58

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REGIONAL LISTINGS

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Merrillville				
A&A Update	6/26/20	4	$124/$199	26
Professional Ethics Update	6/26/20	4	$124/$199	40
The 8-Hour MBA for CPAs	8/17/20	8	$354/$513	48
Preventing, Detecting & Responding to Fraud: What Every CPA Should Know	8/31/20	8	$354/$513	36
Not-for-Profit Accounting & Auditing Update	9/10/20	8	$384/$543	35
Multistate Tax Update	9/24/20	8	$354/$513	57
Leases, Financial Instruments & Revenue: The FASB's "Big 3"	9/29/20	8	$354/$513	34
Guide & Update to Compilations, Reviews & Preparations	9/30/20	4	$200/$290	33
New Top 10 Technology Risks & Trends Every CPA Should Know	9/30/20	4	$200/$290	65
Accounting & Auditing Update for Small Businesses	10/27/20	8	$384/$543	27
Estate Life Planning Issues for Middle-Income Client	10/28/20	8	$354/$513	56
Securing a Comfortable Retirement in the Age of Spending	11/9/20	8	$354/$513	60
Annual Update for Controllers	11/23/20	8	$384/$543	43
Annual Update for CPAs & Auditors	12/11/20	8	$384/$543	28
The Best Federal Tax Update Course	12/15/20	8	$354/$513	61
Noblesville				
Not-for-Profit Conference	7/23/20	8	$259/$404	53
South Bend				
A&A Update	6/10/20	4	$124/$199	26
Professional Ethics Update	6/10/20	4	$124/$199	40
Employment Law Update: Key Risks & Recent Trends	8/31/20	8	$384/$543	46
Advanced Audit of 401k Plans: Best Practices & Current Developments	9/14/20	8	$354/$513	27
Financial Reporting Update for Tax Practitioners	9/17/20	8	$354/$513	31
Analytics & Big Data for CPAs	9/28/20	8	$384/$543	42
The 8-Hour MBA for CPAs	9/29/20	8	$354/$513	48
Fraud Update: Detecting & Preventing the Top 10 Fraud Schemes	10/20/20	8	$384/$543	32
Not-for-Profit Financial Reporting: Mastering the Unique Requirements	10/22/20	8	$384/$543	35
Compilations, Reviews & Preparations: Engagement Performance & Annual Update	10/26/20	8	$354/$513	31
Business Intelligence, Featuring Microsoft's Power BI Tools	10/27/20	8	$354/$513	30
Technology for CPAs: Don't Get Left Behind	10/28/20	8	$354/$513	65
Employer's Handbook: Health Care, Retirement & Fringe Benefit Tax Issues	11/16/20	4	$200/$290	55
The Essentials Multistate Tax Update	11/16/20	4	$200/$290	61
Accounting & Auditing 2020: An Update & Refresher	11/17/20	8	$354/$513	27
S Corporation Taxation: Advanced Issues	11/18/20	4	$200/$290	59
New Succession Planning for the Small Business Owner: Finding the Exit Ramp	11/18/20	4	$200/$290	61

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New Annual CFO Forum: Emotional Intelligence	12/7/20	8	$354/$513	42
New Annual CFO Forum: Developing Credibility	12/8/20	8	$354/$513	42
Federal Tax Update with Ron Roberson	12/9–10/20	16	$544/$789	56

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CHRONOLOGICAL LISTINGS

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May					
Audit Workpapers: Documenting Fieldwork (Webinar)	5/18/20	4	Webinar	$200/$290	29
Ethics & Professional Conduct: Updates & Practical Applications (Webinar)	5/18/20	4	Webinar	$200/$290	39
Risk, Cost & Cash Management for Controllers & Financial Managers (Webinar)	5/18/20	4	Webinar	$200/$290	48
The Changing Role of the Controller: Advancing from Tactical to Strategic (Webinar)	5/18/20	4	Webinar	$200/$290	48
Controller's Update: Today's Latest Trends (Webinar)	5/19/20	4	Webinar	$200/$290	46
Lean Accounting & Management: Saving Money by Streamlining Operations (Webinar)	5/19/20	4	Webinar	$200/$290	47
The Tactical CFO: Make Your Business Processes Work For You (Webinar)	5/19/20	8	Webinar	$354/$513	49
Advanced Leadership Skills: Emotional Intelligence, Innovation, Troubled Employees, Team Culture & Project/Change Management (Webinar)	5/20/20	4	Webinar	$200/$290	42
Cases in Corporate Ethics (Webinar)	5/20/20	4	Webinar	$200/$290	39
Coaching Skills for CPAs, Controllers & Financial Managers (Webinar)	5/20/20	4	Webinar	$200/$290	45
Shorten Month-End: Closing Best Practices (Webinar)	5/20/20	4	Webinar	$200/$290	37
Audits of Defined Contribution Pension Plans, Emphasizing 401k Plans (Webinar)	5/21/20	8	Webinar	$354/$513	29
New Industry Spring Forum	5/21/20	5	Virtual	$300	47
June					
A&A Update	6/3/20	4	Evansville	$124/$199	26
Professional Ethics Update	6/3/20	4	Evansville	$124/$199	40
Controllers Conference	6/8/20	8	Carmel	$364/$514	46
A&A Update	6/10/20	4	South Bend	$124/$199	26
Professional Ethics Update	6/10/20	4	South Bend	$124/$199	40
A&A Update	6/12/20	4	Fort Wayne	$124/$199	26
Professional Ethics Update	6/12/20	4	Fort Wayne	$124/$199	40
A&A Update	6/17/20	4	Indianapolis	$124/$199	26

TITLE	DATE	CPE	CITY	MEM./ NON.	PAGE
Professional Ethics Update	6/17/20	4	Indianapolis	$124/$199	40
Revenue Recognition: Mastering the New FASB Requirements	6/24/20	8	Indianapolis	$384/$543	36
New Young Pros Forum	6/25/20	4	Indianapolis	$174/$224	50
A&A Update	6/26/20	4	Merrillville	$124/$199	26
Leases: Mastering the New FASB Requirements	6/26/20	8	Indianapolis	$384/$543	34
Professional Ethics Update	6/26/20	4	Merrillville	$124/$199	40
A&A Update	6/30/20	4	Bloomington	$124/$199	26
Professional Ethics Update	6/30/20	4	Bloomington	$124/$199	40
July					
New Tax Cuts & Jobs Act and Farm Taxation	7/22/20	8	Indianapolis	$354/$513	61
Not-for-Profit Conference	7/23/20	8	Noblesville	$259/$404	53
August					
The Competent CPA: Mastering The Controller/CFO Role	8/7/20	8	Indianapolis	$354/$513	49
Data Analytics & Dashboards	8/17–18/20	16	Indianapolis	$544/$789	64
The 8-Hour MBA for CPAs	8/17/20	8	Merrillville	$354/$513	48
New CFO Leadership Series: Emotional Intelligence—What Makes Leaders Great?	8/20/20	8	Indianapolis	$354/$513	45
Small Firm Summit	8/20/20	8	Carmel	$259/$404	48
Balance Sheet Management	8/21/20	4	Indianapolis	$200/$290	43
Business Ethics	8/21/20	4	Indianapolis	$200/$290	39
Employment Law Update: Key Risks & Recent Trends	8/27/20	8	Evansville	$384/$543	46
Not-for-Profit Accounting & Auditing Update	8/27/20	8	Indianapolis	$384/$543	35
Employment Law Update: Key Risks & Recent Trends	8/31/20	8	South Bend	$384/$543	46
Preventing, Detecting & Responding to Fraud: What Every CPA Should Know	8/31/20	8	Merrillville	$354/$513	36
September					
Not-for-Profit Accounting & Auditing Update	9/10/20	8	Merrillville	$384/$543	35
Advanced Audit of 401k Plans: Best Practices & Current Developments	9/14/20	8	South Bend	$354/$513	27
A Complete Guide to the New Yellow Book	9/16/20	8	Indianapolis	$354/$513	26
Transform Your Organization with Office 365 & Teams	9/16/20	8	Indianapolis	$354/$513	66
Financial Reporting Update for Tax Practitioners	9/17/20	8	South Bend	$354/$513	31
The 8-Hour MBA for CPAs	9/17/20	8	Indianapolis	$354/$513	48
Compilation & Review Practice Guide	9/21/20	4	Indianapolis	$200/$290	31
Meeting Documentation Requirements in Your Workpapers	9/21/20	2	Indianapolis	$110/$160	34

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Peer Review Deficiencies: How to Solve Them?	9/21/20	2	Indianapolis	$110/$160	35
New CFO Leadership Series: Become More Effective	9/23/20	8	Indianapolis	$354/$513	44
Multistate Tax Update	9/23/20	8	Indianapolis	$354/$513	57
CFO Leadership Series: Strategy & Critical Thinking Skills	9/24/20	8	Fort Wayne	$354/$513	45
Leases, Financial Instruments & Revenue: The FASB's "Big 3"	9/24/20	8	Indianapolis	$354/$513	34
Multistate Tax Update	9/24/20	8	Merrillville	$354/$513	57
New Advanced Excel Data Magic: Managing, Analyzing & Reporting	9/28/20	8	Indianapolis	$354/$513	28
Analytics & Big Data for CPAs	9/28/20	8	South Bend	$384/$543	42
Audit Working Papers: Document & Reviewing Field Work	9/28/20	8	Indianapolis	$384/$543	29
New Case Studies in Fraud & Technology Controls	9/29/20	4	Indianapolis	$200/$290	30
New Ethics & Technology	9/29/20	4	Indianapolis	$200/$290	40
Financial Statement Disclosures: A Guide For Small- & Medium-Sized Businesses	9/29/20	4	Indianapolis	$200/$290	32
Leases, Financial Instruments & Revenue: The FASB's "Big 3"	9/29/20	8	Merrillville	$354/$513	34
The 8-Hour MBA for CPAs	9/29/20	8	South Bend	$354/$513	48
New Update on Recent AICPA Standard Setting: Staying Current in a Changing Environment	9/29/20	4	Indianapolis	$200/$290	38
Guide & Update to Compilations, Reviews & Preparations	9/30/20	4	Merrillville	$200/$290	33
New Top 10 Technology Risks & Trends Every CPA Should Know	9/30/20	4	Merrillville	$200/$290	65
October					
Annual Update for Controllers	10/9/20	8	Fort Wayne	$384/$543	43
Leases: Mastering the New FASB Requirements	10/19/20	8	Indianapolis	$384/$543	34
Securing a Comfortable Retirement in the Age of Spending	10/19/20	8	Fort Wayne	$354/$513	60
Accounting & Auditing Update for Small Businesses	10/20/20	8	Indianapolis	$384/$543	27
Fraud Update: Detecting & Preventing the Top 10 Fraud Schemes	10/20/20	8	South Bend	$384/$543	32
New Focus on Engagement Quality: How to Avoid Deficiencies in Peer Reviews	10/21/20	8	Indianapolis	$354/$513	32
New S Corporation (Form 1120S) Tax Return Review & Case Study	10/21/20	8	Indianapolis	$354/$513	59
New CFO Leadership Series: Developing Credibility—Inside & Outside the Organization	10/22/20	8	Indianapolis	$354/$513	44
Not-for-Profit Financial Reporting: Mastering the Unique Requirements	10/22/20	8	South Bend	$384/$543	35
New Partnership & LLC (Form 1065) Tax Return Review & Case Study	10/22/20	8	Indianapolis	$354/$513	58

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TITLE	DATE	CPE	CITY	MEM./ NON.	PAGE
A&A Update (Webinar LIVE REPLAY)	10/23/20	4	Webinar	$124/$199	26
The Strategic CFO: Big Picture Skills	10/23/20	8	Indianapolis	$354/$513	49
New Assessing the Risk of Fraud in a Financial Statement Audit	10/26/20	8	Indianapolis	$354/$513	28
Compilations, Reviews & Preparations: Engagement Performance & Annual Update	10/26/20	8	South Bend	$354/$513	31
New The New Yellow Book: Government Auditing Standards (2018 Revision)	10/26/20	8	Indianapolis	$384/$543	37
Accounting & Auditing Update for Small Businesses	10/27/20	8	Merrillville	$384/$543	27
Analytics & Big Data for CPAs	10/27/20	8	Indianapolis	$384/$543	42
Business Intelligence, Featuring Microsoft's Power BI Tools	10/27/20	8	South Bend	$354/$513	30
Buying & Selling a Business: Critical Tax & Structuring Issues	10/27/20	8	Indianapolis	$354/$513	55
Compilations, Reviews & Preparations: Engagement Performance & Annual Update	10/27/20	8	Fort Wayne	$354/$513	31
New 2020 Technology Trends Update	10/28/20	8	Indianapolis	$354/$513	63
Estate Life Planning Issues for Middle-Income Client	10/28/20	8	Merrillville	$354/$513	56
Interpreting the New Revenue Recognition Standard: What All CPAs Need to Know	10/28/20	4	Fort Wayne	$200/$290	33
Real Estate Tax Boot Camp	10/28/20	8	Indianapolis	$354/$513	58
Technology for CPAs: Don't Get Left Behind	10/28/20	8	South Bend	$354/$513	65
The Bottom Line on the New Lease Accounting Requirements	10/28/20	4	Fort Wayne	$200/$290	37
Cybersecurity Conference	10/29/20	8	Carmel	$364/$514	64
Emerging Technologies, Including Blockchain & Cryptocurrencies	10/29/20	4	Fort Wayne	$200/$290	64
Testing & Auditing Excel Workbooks	10/29/20	4	Fort Wayne	$200/$290	65
New Excel Charting & Visualizations	10/30/20	4	Indianapolis	$200/$290	64
Professional Ethics Update (Webinar LIVE REPLAY)	10/30/20	4	Webinar	$124/$199	40
New Remote Access to Small Businesses	10/30/20	4	Indianapolis	$200/$290	65
November					
Federal Tax Update with Ron Roberson	11/4–5/20	16	Indianapolis	$544/$789	56
Not-for-Profit Financial Reporting: Mastering the Unique Requirements	11/5/20	8	Fort Wayne	$384/$543	35
2020 FASB & AICPA Update	11/6/20	8	Indianapolis	$354/$513	26
Fraud Update: Detecting & Preventing the Top 10 Fraud Schemes	11/6/20	8	Indianapolis	$384/$543	32
Annual Update for Controllers	11/9/20	8	Evansville	$384/$543	43
Securing a Comfortable Retirement in the Age of Spending	11/9/20	8	Merrillville	$354/$513	60
Construction Conference	11/10/20	8	Carmel	$364/$514	45

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TITLE	DATE	CPE	CITY	MEM./ NON.	PAGE
Latest Developments in Not-for-Profit Accounting & Auditing	11/10/20	8	Indianapolis	$354/$513	33
Applying the Uniform Guidance in Your Single Audits	11/11/20	8	Indianapolis	$384/$543	28
Compilations, Reviews & Preparations: Engagement Performance & Annual Update	11/11/20	8	Evansville	$354/$513	31
Internal & External Fraud: Understanding It & Working to Control It	11/11/20	8	Fort Wayne	$354/$513	65
CFO Leadership Series: Balance Sheet Management	11/12/20	8	Fort Wayne	$354/$513	44
Interpreting the New Revenue Recognition Standard: What All CPAs Need to Know	11/12/20	4	Evansville	$200/$290	33
Preparing Not-for-Profit Financial Statements Under ASU No. 2016-14	11/12/20	8	Indianapolis	$354/$513	36
The Bottom Line on the New Lease Accounting Requirements	11/12/20	4	Evansville	$200/$290	37
New Using Internal Controls to Strengthen Security, Efficiency & Employee Conduct	11/12/20	8	Indianapolis	$354/$513	66
Ethical Leadership: Power, Influence, Integrity & Trust	11/13/20	4	Fort Wayne	$200/$290	39
Valuing a Business: What Is This Company Worth?	11/13/20	4	Fort Wayne	$200/$290	49
Data Analytics & Dashboards	11/16–17/20	16	Indianapolis	$544/$789	64
Federal Tax Update with Pat Garverick	11/16–17/20	16	Evansville	$544/$789	56
Employer's Handbook: Health Care, Retirement & Fringe Benefit Tax Issues	11/16/20	4	South Bend	$200/$290	55
New Organizational Leadership for Financial Executives	11/16/20	8	Indianapolis	$354/$513	47
The Essentials Multistate Tax Update	11/16/20	4	South Bend	$200/$290	61
Accounting & Auditing 2020: An Update & Refresher	11/17/20	8	South Bend	$354/$513	27
New Thriving in Recessionary Times	11/17/20	8	Indianapolis	$354/$513	49
S Corporation Taxation: Advanced Issues	11/18/20	4	South Bend	$200/$290	59
New Succession Planning for the Small Business Owner: Finding the Exit Ramp	11/18/20	4	South Bend	$200/$290	61
New CFO Leadership Series: Cash Management—Managing the Lifeblood of the Business	11/19/20	8	Indianapolis	$354/$513	44
Mastering Basis Issues for S Corporations, Partnerships & LLCs	11/19/20	4	Fort Wayne	$200/$290	57
Social Security & Medicare: Planning for You & Your Clients	11/19/20	8	Indianapolis	$354/$513	60
Top 5 Tax Issues in Dealing with LLCs & Partnerships	11/19/20	4	Fort Wayne	$200/$290	61
New Avoiding Deficiencies in Peer Reviews: Focus on Engagement Quality	11/20/20	4	Indianapolis	$200/$290	30
Critical Thinking Skills for Financial Professionals	11/20/20	4	Indianapolis	$200/$290	46
Ethics in the Real World: Living Values for Today	11/20/20	4	Indianapolis	$200/$290	40
Fiduciary Income Tax Returns: Form 1041 Workshop with Filled-in Forms	11/20/20	8	Fort Wayne	$354/$513	56
Non-GAAP Financial Statement Options: Cash, Modified Cash & Tax Basis	11/20/20	4	Indianapolis	$200/$290	34

Paperless Seminars learn more at incpas.org/Green

TITLE	DATE	CPE	CITY	MEM./ NON.	PAGE
A&A Update (Webinar LIVE REPLAY)	11/23/20	4	Webinar	$124/$199	26
Annual Update for Controllers	11/23/20	8	Merrillville	$384/$543	43
Social Security & Medicare: Planning for You & Your Clients	11/23/20	8	Fort Wayne	$354/$513	60
Accounting & Reporting for Not-for-Profit Organizations	11/24/20	8	Fort Wayne	$384/$543	27
Annual Update for CPAs & Auditors	11/30/20	8	Evansville	$384/$543	28
Professional Ethics Update (Webinar LIVE REPLAY)	11/30/20	4	Webinar	$124/$199	40
Risk-Based Audit Standards: Effective Utilization	11/30/20	8	Indianapolis	$354/$513	37
December					
Accounting & Auditing 2020: An Update & Refresher	12/1/20	8	Fort Wayne	$354/$513	27
Analyzing Financial Statements: A Guide	12/1/20	2	Indianapolis	$110/$160	28
Construction Contractors: Critical Accounting, Auditing & Tax Issues	12/1/20	8	Indianapolis	$354/$513	55
Recent Compilation & Review Issues	12/1/20	2	Indianapolis	$110/$160	36
New INCPAS Convention	12/2–3/20	16	Indianapolis	Visit incpas.org/ Convention for pricing options.	47
New Audits of Employee Benefit Plans Subject to ERISA	12/4/20	8	Indianapolis	$384/$543	29
Securing a Comfortable Retirement in the Age of Spending	12/4/20	8	Indianapolis	$354/$513	60
Federal Tax Update with Ron Roberson	12/7–8/20	16	Fort Wayne	$544/$789	56
4 Tiers of Loss Limitations: Guide to the New Rules for Pass-Through Entities	12/7/20	4	Evansville	$200/$290	55
New Annual CFO Forum: Emotional Intelligence	12/7/20	8	South Bend	$354/$513	42
Individual Income Tax Update Course	12/7/20	4	Evansville	$200/$290	57
Accounting & Reporting for Not-for-Profit Organizations	12/8/20	8	Indianapolis	$384/$543	27
New Annual CFO Forum: Developing Credibility	12/8/20	8	South Bend	$354/$513	42
New CFO Leadership Series: Advanced Skills, Made Easy	12/8/20	8	Indianapolis	$354/$513	43
The Best Federal Tax Update Course	12/8/20	8	Bloomington	$354/$513	61
Federal Tax Update with Ron Roberson	12/9–10/20	16	South Bend	$544/$789	56
Internal Controls for Industry: How to Implement & Maintain	12/9/20	8	Indianapolis	$354/$513	33
Metrics Management: Choose & Use Key Performance Indicators	12/9/20	8	Indianapolis	$354/$513	34
CFO Leadership Series: Managing People	12/10/20	8	Fort Wayne	$354/$513	45
Annual Update for CPAs & Auditors	12/11/20	8	Merrillville	$384/$543	28
Social Security & Medicare: Planning for You & Your Clients	12/11/20	8	Evansville	$354/$513	60

=Case Study =Live Simulcast

TITLE	DATE	CPE	CITY	MEM./ NON.	PAGE
Ethics & Professional Conduct: Updates & Practical Applications	12/14/20	4	Indianapolis	$200/$290	39
Financial Reporting for Not-for-Profit Entities	12/14/20	4	Indianapolis	$200/$290	31
Preparation, Compilation & Review Engagement Update & Review	12/14/20	4	Indianapolis	$200/$290	35
Real-World Frauds Found in Not-for-Profits	12/14/20	4	Indianapolis	$200/$290	36
Section 199A: Applications & Challenges	12/14/20	4	Fort Wayne	$200/$290	59
New Section 199A: Schedule K-1 Reporting by Relevant Passthrough Entities	12/14/20	4	Fort Wayne	$200/$290	60
Employment Law Update: Reducing Employer Liability	12/15/20	4	Indianapolis	$200/$290	46
Hottest Tax Planning Developments Under the Current Tax Law	12/15/20	4	Indianapolis	$200/$290	57
Preventing, Detecting & Responding to Fraud: What Every CPA Should Know	12/15/20	8	Evansville	$354/$513	36
Reviewing Individual Tax Returns: What Are You Missing?	12/15/20	4	Indianapolis	$200/$290	58
Reviewing Partnership Tax Returns: What Are You Missing?	12/15/20	4	Indianapolis	$200/$290	59
The Best Federal Tax Update Course	12/15/20	8	Merrillville	$354/$513	61
Heartfelt Leadership: How Ethical Leaders Build Trusting Organizations	12/16/20	4	Indianapolis	$200/$290	40
Reviewing S Corporation Tax Returns: What Are You Missing?	12/16/20	4	Indianapolis	$200/$290	59
Social Security & Medicare: Maximizing Retirement Benefits	12/16/20	4	Indianapolis	$200/$290	60
Staff Retention: Attract & Keep the Best People	12/16/20	4	Indianapolis	$200/$290	48
Blockchain Essentials: Impact on Modern Accounting	12/17/20	4	Indianapolis	$200/$290	30
Business Valuation Issues	12/17/20	4	Indianapolis	$200/$290	43
Financial Statement Fraud	12/17/20	4	Indianapolis	$200/$290	32
Honing Your Management Style	12/17/20	4	Indianapolis	$200/$290	47
Accounting & Auditing 2020: An Update & Refresher	12/18/20	8	Indianapolis	$354/$513	27
Nexus Update: Latest Developments in State Income, Franchise & Sales Taxes	12/18/20	8	Indianapolis	$384/$543	58
January					
Federal Tax Update with Pat Garverick	1/5–6/21	16	Carmel	$544/$789	56
Form 1065 Boot Camp: Step-By-Step Preparation with Completed Forms	1/7/21	8	Indianapolis	$354/$513	56
Preparing Individual Tax Returns for New Staff & Para-Professionals	1/8/21	8	Indianapolis	$354/$513	58

New INCPAS Micro-Credential Program

IN CPA SOCIETY

Becoming a Firm Leader

As an aspiring leader at a small- or medium-sized firm, you need to make the most of your limited professional development time—we can help with that. Commit to your growth with our customized CPE package and save at least $200 on average.

Level I

This program is designed for young CPAs who are new or aspiring managers. Adapted from our popular Young Pros Leadership Academy curriculum, this interactive series will help you identify and cultivate the skills you need to lead a team successfully.

September 10
Thrive: Personally Succeeding *(8 hours CPE)*
Create a personal plan and develop individual skills that set you on the road to success.

October 16
Synergy: Create Winning Teams *(8 hours CPE)*
Develop management skills that develop your people, free up your time and deliver great results for clients.

November 9
Collective: Leveraging External Relationships *(8 hours CPE)*
Use relationships outside the office to bring more value to your career and organization.

Program Benefits & Details

- 24 hours CPE
- "Firm Leadership" Digital Badge upon completion

DISCOUNTED PACKAGE PRICE: $899

▶ Register at incpas.org/MicroCredential.

Level II

This program is designed for senior managers or new partners. This series will help you to refine your "big picture" responsibilities including strategy, practice management, internal controls and organizational communications.

August 20
Small Firm Summit *(8 hours CPE)*
Stay up-to-speed on trending topics and connect with fellow CPAS at firms with one to three partners.

September 28
Advanced Excel Data Magic: Managing, Analyzing & Reporting *(8 hours CPE)*
Develop management skills that develop your people, free up your time and deliver great results for clients.

December 14
Ethics & Professional Conduct: Updates & Practical Applications *(4 hours CPE)*
Brush up on the AICPA Code of Conduct, including the conceptual framework and independence provisions for nonattest services and other critical matters.

Ongoing
CPA Excellence: Communication Strategy *(2-hour CPE waiver)*
Explore the communication cycle, patterns and channels, understand the importance of knowing your audience, and how to use and ask "open questions."

Ongoing
CPA Excellence: Leadership vs. Management *(2-hour CPE waiver)*
Discuss the differences between management and leadership, determine what it means for someone to lead even if they're not in management, and apply these ideas to a case study.

ACCOUNTING & AUDITING

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.

2020 FASB & AICPA Update

DATE: 11/6/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Rebecca M. Lee, CPA, CGMA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

OVERVIEW: For over 30 years, the FASB and AICPA Update has been the most popular course among all of our seminars. This course is a must to keep you on top of the continuing changes in the accounting 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 comprehensive, year-round update on recently issued standards

SOURCE: Kaplan Financial Education powered by Loscalzo Institute

LEVEL: Update

NOTE: Available as a Simulcast.

A Complete Guide to the New Yellow Book

DATE: 9/16/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: James Schmutte, CPA, DBA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

OVERVIEW: The new Yellow Book is effective for audits of financial statements for periods ending on or after June 30, 2020. Save yourself the time and stress of trying to understand the new Yellow Book alone. This course will equip you with comprehensive knowledge that will enable you to confidently implement the requirements. Course materials utilize a highly illustrative and innovative format, including over 25 focused exercises on key practice issues.

PREREQUISITE: Basic audit knowledge

AUDIENCE: Auditors performing Yellow Book engagements

SOURCE: Surgent **LEVEL:** Basic

NOTE: Qualifies for Yellow Book.

A&A Update

DATE: 6/3/20 **TIME:** 8:30 a.m.–Noon
INSTRUCTOR: James Schmutte, CPA, DBA
LOCATION: Tropicana Executive Conference Center, Evansville

DATE: 6/10/20 **TIME:** 8:30 a.m.–Noon
INSTRUCTOR: James Schmutte, CPA, DBA
LOCATION: Century Center, South Bend

DATE: 6/12/20 **TIME:** 8:30 a.m.–Noon
INSTRUCTOR: James Schaefer, CPA-inactive, CFE
LOCATION: Grand Wayne Center, Fort Wayne

DATE: 6/17/20 **TIME:** 8:30 a.m.–Noon
INSTRUCTOR: James Schmutte, CPA, DBA
LOCATION: INCPAS Learning Center, Indianapolis
NOTE: Available both in-person and as a Simulcast.

DATE: 6/26/20 **TIME:** 8:30 a.m.–Noon
INSTRUCTOR: James Schaefer, CPA-inactive, CFE
LOCATION: Indiana Wesleyan University's Merrillville Education & Conference Center, Merrillville

DATE: 6/30/20 **TIME:** 8:30 a.m.–Noon
INSTRUCTOR: James Schaefer, CPA-inactive, CFE
LOCATION: Monroe Convention Center, Bloomington

DATE: 10/23/20 **TIME:** 8:30 a.m.–Noon
INSTRUCTOR: James Schmutte, CPA, DBA
LOCATION: Webinar
NOTE: This date is a Webinar LIVE REPLAY.

DATE: 11/23/20 **TIME:** 8:30 a.m.–Noon
INSTRUCTOR: James Schmutte, CPA, DBA
LOCATION: Webinar
NOTE: This date is a Webinar LIVE REPLAY.

CPE: 4 | **MEMBER:** $124 | **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 2020: An Update & Refresher

DATE: 11/17/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: James Schaefer, CPA-inactive, CFE
LOCATION: Century Center, South Bend

DATE: 12/1/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: James Schaefer, CPA-inactive, CFE
LOCATION: Grand Wayne Center, Fort Wayne

DATE: 12/18/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: James Schaefer, CPA-inactive, CFE
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

OVERVIEW: This hands-on course has two parts. First is a review of recent developments in SOC reports, SSARS engagements, financial reporting and auditing. The second is a refresher for some of the more important developments in financial accounting in the last few years. Topics include fair value measurement, accounting for intangible assets, and asset impairments. Options under special purpose frameworks will also be addressed. Numerous examples and case studies will be included.

PREREQUISITE: Experience in accounting and auditing

AUDIENCE: All CPAs

SOURCE: James Schaefer **LEVEL:** Update

Accounting & Auditing Update for Small Businesses

DATE: 10/20/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Martin Birr, CPA, CIA, CMA
LOCATION: INCPAS Learning Center, Indianapolis

DATE: 10/27/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Martin Birr, CPA, CIA, CMA
LOCATION: Indiana Wesleyan University's Merrillville Education & Conference Center, Merrillville

CPE: 8 | **MEMBER:** $384 | **NONMEMBER:** $543

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, as well as 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: 11/24/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Martin Birr, CPA, CIA, CMA
LOCATION: Grand Wayne Center, Fort Wayne

DATE: 12/8/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Martin Birr, CPA, CIA, CMA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | **MEMBER:** $384 | **NONMEMBER:** $543

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, revenue recognition, and grants and contracts standards are included in this course.

PREREQUISITE: Experience in the not-for-profit environment

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

SOURCE: AICPA **LEVEL:** Intermediate

NOTE: Qualifies for Yellow Book.

Advanced Audit of 401k Plans: Best Practices & Current Developments

DATE: 9/14/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Daryl Krause, CPA
LOCATION: Century Center, South Bend

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

OVERVIEW: As we saw from the recent United States Department of Labor review of employee benefit plan audits, auditors need to raise their game in order to provide the quality audits that plan stakeholders demand. The AICPA has reacted by issuing a proposed SAS that will significantly impact how audits of these plans will be performed. Now is the time to get up to speed on these issues and changes occurring in the world of 401k plan audits. In this advanced course, we will discuss both the existing and new rules and regulations unique to employee benefit plans as well as provide practical guidance on their application. The most common compliance issues identified in 401k audits will be explored along with recommended corrections. Auditors will identify best practices for handling specific issues that arise during the course of the engagement related to payroll and compensation, participant loans, hardship distributions, investments, plan mergers/acquisitions, etc. Efficient audit techniques that can be utilized in various audit engagements will also be identified. This is the course to take to help you improve the quality of your 401k benefit plan audits.

=Case Study =Live Simulcast

PREREQUISITE: Understanding of auditing defined contribution plans

AUDIENCE: Experienced practitioners responsible for planning and performing employee benefit plan audit engagements

SOURCE: Surgent **LEVEL:** Advanced

New Advanced Excel Data Magic: Managing, Analyzing & Reporting

DATE: 9/28/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Lawrence "Mac" McClelland, J.D., MBA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

OVERVIEW: If you are an experienced Excel user seeking to elevate your skills, join the K2 team for Advanced Excel. In this laptop-friendly program, you will learn critical advanced Excel skills in six key areas: collaborating with other users and securing workbooks; using tables to analyze and report data; integrating and manipulating data from external sources; creating and auditing complex formulas; advanced data analysis tools; and visualization techniques to analyze and communicate information.

PREREQUISITE: Experienced Excel user

AUDIENCE: Business professionals who work with Excel 2007 or newer

SOURCE: K2 Enterprises **LEVEL:** Advanced

NOTE: This course is part of the Becoming a Firm Leader micro-credential program. For details about this NEW opportunity and how to earn a digital badge see page 25. *Qualifies for 8 hours of A&A.*

Analyzing Financial Statements: A Guide

DATE: 12/1/20 **TIME:** 8:30–10:15 a.m.
INSTRUCTOR: James Hodge, CPA, CFE, CGFM
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 2 | **MEMBER:** $110 | **NONMEMBER:** $160

OVERVIEW: All accounting and financial professionals know how to analyze financial statements. Recent company examples of improper revenue recognition, low earnings quality and cash flow issues emphasize the importance of understanding financial statement relationships beyond traditional accrual analysis methods. This program covers analysis techniques that identify unusual or unexpected financial statement relationships and emphasizes cash flow analysis and industry data.

AUDIENCE: Industry accounting and financial professionals who analyze financial results, evaluate operational performance, perform acquisition due diligence and develop business strategies

SOURCE: Kaplan Financial Education powered by Loscalzo Institute

LEVEL: Basic

NOTE: Available as a Simulcast.

Annual Update for CPAs & Auditors

DATE: 11/30/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Daryl Krause, CPA
LOCATION: Tropicana Executive Conference Center, Evansville

DATE: 12/11/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Daryl Krause, CPA
LOCATION: Indiana Wesleyan University's Merrillville Education & Conference Center, Merrillville

CPE: 8 | **MEMBER:** $384 | **NONMEMBER:** $543

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. Let us sort through the complexities and help you identify and apply recently issued FASB, PCAOB, ARSC and ASB standards and guidance. With the rate of change in today's regulatory environment, you must stay current on the topics impacting the profession – don't get left behind.

PREREQUISITE: Previous experience in accounting and auditing

AUDIENCE: CPAs in public accounting or business and industry who want to remain up-to-date on accounting, auditing, preparation, compilation and review pronouncements

SOURCE: AICPA **LEVEL:** Update

Applying the Uniform Guidance in Your Single Audits

DATE: 11/11/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: James Schmutte, CPA, DBA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | **MEMBER:** $384 | **NONMEMBER:** $543

OVERVIEW: This course provides you with the knowledge to be more efficient and effective at planning and performing audits in accordance with the requirements of the Uniform Guidance and the Single Audit Act. Make sure your skills are up-to-date with the latest information in this challenging audit area.

PREREQUISITE: Background of not-for-profit or governmental accounting and auditing

AUDIENCE: Auditors performing single audit engagements, internal financial staff of governments, and staff of not-for-profit entities interacting with auditors

SOURCE: AICPA **LEVEL:** Intermediate

NOTE: Qualifies for Yellow Book.

New Assessing the Risk of Fraud in a Financial Statement Audit

DATE: 10/26/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: James Schaefer, CPA-inactive, CFE
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

OVERVIEW: The Association of Certified Fraud Examiners says there is fraud lurking in all businesses, including not-for-profit organizations. It often goes undetected for years and, when uncovered, management and the board may question why the auditor did not identify it. The auditor's responsibility in a financial statement audit is to assess risk and perform sufficient procedures to obtain reasonable assurance that the financial statements are free from material misstatement due to fraud or error. However, failure to perform an adequate fraud risk assessment and report deficiencies in internal control, such as lack of segregation of duties, can leave a firm vulnerable. This course will discuss the audit procedures that should be performed in accordance AU-240 as recently amended, best practices in performing fraud risk assessment procedures, when and how to report control deficiencies noted in an audit, and the most frequent types of fraud found in small- to mid-sized entities, along with internal controls that could be implemented to help prevent and detect them. This course features case studies.

AUDIENCE: CPAs in public accounting or business and industry with accounting, financial reporting or attest responsibilities

SOURCE: Surgent **LEVEL:** Basic

Audit Working Papers: Document & Reviewing Field Work

DATE: 9/28/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Anne Marchetti, CPA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | **MEMBER:** $384 | **NONMEMBER:** $543

OVERVIEW: Working papers are the building blocks of an audit. If it's not in the working papers, audit quality may suffer, as the manager and partner might not know about it, or its ramifications may not be fully considered. Understand the professional standards regarding working paper documentation. Make this course part of the firm's quality control system. Learn the fundamentals of working paper preparation — form and content — to make sure audit considerations, work performed and conclusions reached are properly documented. You will also explore examples which show field work supervisors what factors to consider and what steps to follow when reviewing working papers. In addition, typical working paper deficiencies are explained to help minimize potential liability.

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

SOURCE: AICPA **LEVEL:** Basic

Audit Workpapers: Documenting Fieldwork

DATE: 5/18/20 **TIME:** 8:30 a.m.–Noon
INSTRUCTOR: Mike Brand, CPA
LOCATION: Webinar

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

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 is 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 or seniors who supervise audit engagements

SOURCE: AICPA **LEVEL:** Basic

NOTE: This webinar counts as live CPE.

Audits of Defined Contribution Pension Plans, Emphasizing 401k Plans

DATE: 5/21/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Rebecca M. Lee, CPA, CGMA
LOCATION: Webinar

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

OVERVIEW: For the beginner, employee benefit plan audits have always presented unique challenges and practice risks. This 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 401k 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: None; however, some experience in conducting EBP audits would be helpful

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

SOURCE: Kaplan Financial Education powered by Loscalzo Institute

LEVEL: Basic

NOTE: This webinar counts as live CPE.

New Audits of Employee Benefit Plans Subject to ERISA

DATE: 12/4/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Daryl Krause, CPA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | **MEMBER:** $384 | **NONMEMBER:** $543

OVERVIEW: Employee benefit plan (EBP) audit engagements continue to be scrutinized by regulators and peer reviewers due to a history of noncompliance with applicable professional standards. Auditors require proper skills to perform EBP engagements effectively. You will work through the plan audit process from client acceptance/continuance through engagement archive. As the most common type of plans audited, you will take a deep dive into defined contribution plans to comply with professional standards, ERISA and SEC requirements. You will also obtain an awareness of additional considerations when auditing defined benefit pension plans and health and welfare benefit plans. Tap into ways to plan and conduct effective risk-based plan audits to comply with professional standards while maximizing efficiency.

ACCOUNTING & AUDITING

=Case Study =Live Simulcast

AUDIENCE: Auditors of employee benefit plans, practitioners considering the addition of EBP audits as a service offering, and CPAs in business and industry responsible for company benefits

SOURCE: AICPA **LEVEL:** Basic

New Avoiding Deficiencies in Peer Reviews: Focus on Engagement Quality

DATE: 11/20/20 **TIME:** 8:30 a.m.–Noon
INSTRUCTOR: James Schmutte, CPA, DBA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

OVERVIEW: With the AICPA's heightened focus on enhancing audit quality, increased oversight of the peer review process and the auditor's overall responsibility to provide high quality services, the focus on compliance with professional standards has never been greater. Recent peer reviews have indicated auditors are often failing to perform and/or document certain critical components of an audit, such as the auditor's assessment of risk and linking the results of the assessment to substantive procedures performed. In addition, auditors are not adequately documenting their consideration of fraud, expectations in analytical procedures and the appropriate level of work needed to understand an entity's internal control. Now is the time to revisit the way auditors are performing and documenting the work performed to meet professional standards since nonconforming engagements can result in an auditor's referral to the AICPA Ethics Committee. This course will focus on the most significant items resulting in deficiencies identified in the peer review process. We will also discuss the applicable audit standards, documentation requirements and best practices. The objective of the course is to provide the insights necessary to help an auditor improve not just the quality of their work but also the perception of the CPA profession as a whole.

PREREQUISITE: Experience in accounting and auditing

AUDIENCE: Accounting and auditing practitioners at all levels desiring to improve engagement quality

SOURCE: Surgent **LEVEL:** Intermediate

NOTE: Available as a Simulcast.

Blockchain Essentials: Impact on Modern Accounting

DATE: 12/17/20 **TIME:** 8:30 a.m.–Noon
INSTRUCTOR: Tom Gancarski, CPA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

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: Available as a Simulcast. This course is part of the Becoming a Technology Leader micro-credential program. For details about this NEW opportunity and how to earn a digital badge see page 67. *Qualifies for 2 hours of A&A.*

Business Intelligence, Featuring Microsoft's Power BI Tools

DATE: 10/27/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Lawrence "Mac" McClelland, J.D., MBA
LOCATION: Century Center, South Bend

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

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 unthinkable until recently.

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

AUDIENCE: Business professionals seeking to develop and implement BI solutions

SOURCE: K2 Enterprises **LEVEL:** Advanced

NOTE: *Qualifies for 8 hours of A&A.*

New Case Studies in Fraud & Technology Controls

DATE: 9/29/20 **TIME:** 8:30 a.m.–Noon
INSTRUCTOR: Lawrence "Mac" McClelland, J.D., MBA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

OVERVIEW: Fraud continues to plague businesses at epidemic levels and technology control failures are a large reason fraud occurs. Using a case study approach, in this course you will learn about the pervasiveness of fraud, the control failures that contribute to fraud, and what you can do to mitigate fraud risk.

PREREQUISITE: Fundamental understanding of internal controls

AUDIENCE: CPAs and other accounting, auditing and business professionals seeking to reduce fraud risk

SOURCE: K2 Enterprises **LEVEL:** Intermediate

NOTE: *Qualifies for 4 hours of A&A.*

Compilation & Review Practice Guide

DATE: 9/21/20 **TIME:** 8:30 a.m.–Noon
INSTRUCTOR: Rebecca M. Lee, CPA, CGMA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

OVERVIEW: This course is a scaled-down version of our popular 8-hour Compilation & Review Practice Guide. Compilation and review issues have dominated the profession during the past few years, and the codification of SSARS 21 in AR-C Sections 60, 70, 80 and 90. We will addresses these changes and current performance requirements in the compilation and review literature so that practitioners will be able to perform these services in compliance with SSARS 21–24, while applying best practices for both efficiency and effectiveness.

PREREQUISITE: Accounting experience

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

SOURCE: Kaplan Financial Education powered by Loscalzo Institute

LEVEL: Basic

NOTE: Available as a Simulcast.

Compilations, Reviews & Preparations: Engagement Performance & Annual Update

DATE: 10/26/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Daryl Krause, CPA
LOCATION: Century Center, South Bend

DATE: 10/27/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Daryl Krause, CPA
LOCATION: Grand Wayne Center, Fort Wayne

DATE: 11/11/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Daryl Krause, CPA
LOCATION: Tropicana Executive Conference Center, Evansville

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

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 cover 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, as well as in other areas relevant to SSARS No. 21 engagements. The course also 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. Lastly, we will review proposed changes to the SSARS in order to conform the guidance to international standards.

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

Financial Reporting for Not-for-Profit Entities

DATE: 12/14/20 **TIME:** 1–4:30 p.m.
INSTRUCTOR: Bruce Shepard, CPA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

OVERVIEW: Do you know what makes not-for-profit accounting and financial reporting different? This course will cover the requirements under FASB's financial statement standard and provide insight into what makes not-for-profit financial reporting different, such as accounting for grants and contracts. This course will train you to clear key hurdles in not-for-profit accounting and reporting in an efficient and effective manner. Avoid the potholes of confusion and provide a financial picture that end users can truly understand.

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.

Financial Reporting Update for Tax Practitioners

DATE: 9/17/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Martin Birr, CPA, CIA, CMA
LOCATION: Century Center, South Bend

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

OVERVIEW: Designed for all tax practitioners, including those who prepare tax basis financial statements for their clients, this course will replenish your accounting and reporting tank with an update of recent standard setting activities at the FASB and AISCPA. It will focus on the FASB's ASB and ARSC, including the new revenue recognition, lease and financial instruments and other significant new accounting standards, with a focus on how these new updates will impact income tax accounting. It will also review lessons learned from the adoption of Topic 606 with a focus on maintenance efforts in following the new revenue guidance, including the continuing income tax effects of the new standard. The course will address any changes to common book-tax temporary differences which will result from applying this new guidance and will utilize plenty of hands-on examples and illustrations to increase your overall understanding and application of the material. For tax practitioners, this is the one place to go in order to get up-to-date on what is going on in the world of financial reporting.

PREREQUISITE: Experience in financial accounting and reporting

AUDIENCE: All tax practitioners who desire to remain up-to-date on recent accounting, reporting, and compilation and review activities

SOURCE: Surgent **LEVEL:** Update

=Case Study =Live Simulcast

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

DATE: 9/29/20 **TIME:** 1–4:30 p.m.
INSTRUCTOR: Thomas E. Newell, CPA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

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. It 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 accounting or business and industry involved in preparing financial statement disclosures for small- and medium-sized businesses

SOURCE: Surgent **LEVEL:** Basic

Financial Statement Fraud

DATE: 12/17/20 **TIME:** 1–4:30 p.m.
INSTRUCTOR: Tom Gancarski, CPA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

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 course, 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

NOTE: Available as a Simulcast.

New Focus on Engagement Quality: How to Avoid Deficiencies in Peer Reviews

DATE: 10/21/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: James Schmutte, CPA, DBA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

OVERVIEW: With the AICPA's heightened focus on enhancing audit quality, increased oversight of the peer review process and the auditor's overall responsibility to provide high quality services, the focus on compliance with professional standards has never been greater. Recent peer reviews have indicated auditors are often failing to perform and/or document certain critical components of an audit, such as the auditor's assessment of risk and linking the results of the assessment to substantive procedures performed. In addition, auditors are not adequately documenting their consideration of fraud, expectations in analytical procedures and the appropriate level of work needed to understand an entity's internal control. Now is time to revisit the way auditors are performing and documenting the work performed to meet professional standards since nonconforming engagements can result in an auditor's referral to the AICPA Ethics Committee. This course will focus on the most significant items resulting in deficiencies identified in the peer review process. We will also discuss the applicable audit standards, documentation requirements and best practices. The objective of the course is to provide the insights necessary to help an auditor improve not just the quality of their work but also the perception of the CPA profession as a whole.

PREREQUISITE: Experience in accounting and auditing

AUDIENCE: Accounting and auditing practitioners at all levels desiring to improve engagement quality

SOURCE: Surgent **LEVEL:** Intermediate

Fraud Update: Detecting & Preventing the Top 10 Fraud Schemes

DATE: 10/20/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: James Schaefer, CPA-inactive, CFE
LOCATION: Century Center, South Bend

DATE: 11/6/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: James Schaefer, CPA-inactive, CFE
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | **MEMBER:** $384 | **NONMEMBER:** $543

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 that 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 not-for-profit entities to identify and prevent these deceptive acts.

PREREQUISITE: Experience in accounting and reporting

AUDIENCE: Business owners, managers, supervisors, employees, CPAs and auditors

SOURCE: AICPA **LEVEL:** Intermediate

Guide & Update to Compilations, Reviews & Preparations

DATE: 9/30/20 **TIME:** 8:30 a.m.–Noon
INSTRUCTOR: Thomas E. Newell, CPA
LOCATION: Indiana Wesleyan University's Merrillville Education & Conference Center, Merrillville

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

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. 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. We will review proposed changes to the SSARS in order to conform the guidance to international standards. Lastly, not only will this course bring you up to date on SSARSs requirements and guidance, but it will provide you with practical examples and illustrations to help you effectively and efficiently perform compilation, preparation and review engagements.

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

Internal Controls for Industry: How to Implement & Maintain

DATE: 12/9/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Tom Gancarski, CPA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

OVERVIEW: This course is designed to help accounting and finance leaders of all-sized entities, both private and publicly traded, improve their leadership role by providing internal controls. This role includes custody of the organization's assets and proper financial reporting free from material misstatements. It provides detailed practical guidance and examples for dealing with the variety of items that come up in financial and internal control situations.

PREREQUISITE: Accounting, finance or internal audit experience

AUDIENCE: Chief financial officers, controllers, internal audit professionals, accountants and financial professionals that want to improve their organization's internal control structure

SOURCE: Kaplan Financial Education powered by Loscalzo Institute

LEVEL: Intermediate

NOTE: Available as a Simulcast.

Interpreting the New Revenue Recognition Standard: What All CPAs Need to Know

DATE: 10/28/20 **TIME:** 8:30 a.m.–Noon
INSTRUCTOR: Daryl Krause, CPA
LOCATION: Grand Wayne Center, Fort Wayne

DATE: 11/12/20 **TIME:** 8:30 a.m.–Noon
INSTRUCTOR: Daryl Krause, CPA
LOCATION: Tropicana Executive Conference Center, Evansville

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

OVERVIEW: The new accounting standard for revenue recognition was released in 2014 but its effective date is upon us. 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 five-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. Recent updates to this course include industry-specific examples taken from the AICPA Audit and Accounting Guide Revenue Recognition.

PREREQUISITE: Experience in the application of accounting standards

AUDIENCE: CPAs in public accounting or business and industry who need an update on the latest revenue recognition guidance

SOURCE: AICPA **LEVEL:** Intermediate

Latest Developments in Not-for-Profit Accounting & Auditing

DATE: 11/10/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Martin Birr, CPA, CIA, CMA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

OVERVIEW: This is another year of significant change in the world of not-for-profit 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 utilize a highly illustrative and innovative format. Over 30 focused exercises are included to provide an enhanced working knowledge of the latest developments in not-for-profit accounting and auditing.

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

AUDIENCE: Auditors and industry professionals working in the not-for-profit environment

SOURCE: Surgent **LEVEL:** Update

NOTE: Qualifies for Yellow Book.

ACCOUNTING & AUDITING

=Case Study =Live Simulcast

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

DATE: 9/24/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Martin Birr, CPA, CIA, CMA
LOCATION: INCPAS Learning Center, Indianapolis

DATE: 9/29/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Martin Birr, CPA, CIA, CMA
LOCATION: Indiana Wesleyan University's Merrillville Education & Conference Center, Merrillville

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

OVERVIEW: Even with the effective date of Topic 606, it continues to be a very dynamic time in the world of accounting and financial reporting, with many significant new accounting standards becoming effective around the same time. 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: leases, financial instruments, and sustaining the efforts related to revenue recognition. We will focus on recently issued Accounting Standards Updates, covering these critical areas of your practice or organization. We will provide deep-dive implementation guidance related to leases and financial instruments, including hedge and derivative accounting and impairment, as well as review best practices, lingering implementation issues and ways to sustain the recording of revenue under Topic 606. The course will use 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 in public accounting or business and industry; controllers, accountants and other financial accounting personnel involved in financial statement preparation and review

SOURCE: Surgent **LEVEL:** Intermediate

Leases: Mastering the New FASB Requirements

DATE: 6/26/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Daryl Krause, CPA
LOCATION: INCPAS Learning Center, Indianapolis

DATE: 10/19/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Daryl Krause, CPA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | **MEMBER:** $384 | **NONMEMBER:** $543

OVERVIEW: How do the leasing requirements in the new standard differ from current GAAP? This course addresses that question by examining the core principles of the new standard, including identification, recognition, measurement, presentation and disclosure requirements. Examples with journal entries are included to illustrate application of the new standard. This course explains the lessee accounting model, including lease classification, amortization of the right-of-use asset, and interest on the lease liability. This course also explains the lessor accounting model, including transfer of risk, profit recognition and collectability. Additional topics include short-term leases, purchase options, variable lease payments, and sale and leaseback transactions. In addition, this course addresses the business context of implementing the new standard by identifying key factors for managing this significant change.

PREREQUISITE: Experience in application of accounting standards

AUDIENCE: CPAs in public accounting or business and industry

SOURCE: AICPA **LEVEL:** Intermediate

Meeting Documentation Requirements in Your Workpapers

DATE: 9/21/20 **TIME:** 1–2:45 p.m.
INSTRUCTOR: Rebecca M. Lee, CPA, CGMA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 2 | **MEMBER:** $110 | **NONMEMBER:** $160

OVERVIEW: Peer reviewers have a saying "If it's not documented, the performance of procedures is considered not to have been done." This can lead to a non-conforming engagement. Various standard-setting bodies have expanded the requirements for both workpaper preparation and retention. This, coupled with recurring documentation deficiencies noted in peer review, increases the importance of adopting best practices for engagement documentation.

AUDIENCE: CPAs in public accounting

SOURCE: Kaplan Financial Education powered by Loscalzo Institute

LEVEL: Basic

NOTE: Available as a Simulcast.

Metrics Management: Choose & Use Key Performance Indicators

DATE: 12/9/20 **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:** $354 | **NONMEMBER:** $513

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 better control.

AUDIENCE: Current or aspiring upper-level financial managers

SOURCE: Executive Education **LEVEL:** Intermediate

Non-GAAP Financial Statement Options: Cash, Modified Cash & Tax Basis

DATE: 11/20/20 **TIME:** 1–4:30 p.m.
INSTRUCTOR: James Schmutte, CPA, DBA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

OVERVIEW: For many businesses, preparing financial statements using a special purpose framework may provide an alternative to the complexity of U.S. GAAP. This course will provide an overview and hands-on application for preparing financial statements using a special purpose framework. You will learn the unique measurement and disclosure requirements of various Special Purpose Framework (SPF) options using example financial statements and illustrative disclosures. The course also includes common practice issues encountered when preparing SPF financial statements, as well as an introduction to the AICPA's new SPF for small- and medium-sized entities–Financial Reporting Framework (FRF) for SMEsTM. We will also review recent updates to the standards for accounting and review services that impact engagements performed on SPF financial statements.

AUDIENCE: Practitioners and staff involved with the preparation of cash and tax basis financial statements

SOURCE: Surgent **LEVEL:** Basic

NOTE: Available as a Simulcast.

Not-for-Profit Accounting & Auditing Update

DATE: 8/27/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Martin Birr, CPA, CIA, CMA
LOCATION: INCPAS Learning Center, Indianapolis

DATE: 9/10/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Martin Birr, CPA, CIA, CMA
LOCATION: Indiana Wesleyan University's Merrillville Education & Conference Center, Merrillville

CPE: 8 | **MEMBER:** $384 | **NONMEMBER:** $543

OVERVIEW: The best avenue to success is to be indispensable to your clients. The best way to become 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: Accounting 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.

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

DATE: 10/22/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Martin Birr, CPA, CIA, CMA
LOCATION: Century Center, South Bend

DATE: 11/5/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Martin Birr, CPA, CIA, CMA
LOCATION: Grand Wayne Center, Fort Wayne

CPE: 8 | **MEMBER:** $384 | **NONMEMBER:** $543

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.

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.

Peer Review Deficiencies: How to Solve Them?

DATE: 9/21/20 **TIME:** 3–4:45 p.m.
INSTRUCTOR: Rebecca M. Lee, CPA, CGMA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 2 | **MEMBER:** $110 | **NONMEMBER:** $160

OVERVIEW: Peer review this year? Again, so soon? Don't miss this course that will address the most common peer review matters as identified by the AICPA and the PCAOB. Even though these deficiencies are common doesn't mean they are new. However, they can contribute to a non-conforming engagement which can result in peer review results of pass with deficiency or, worse–a failed peer review. Don't fall victim to these deficiencies. Join this session to explore the issues and find common-sense solutions.

AUDIENCE: Practitioners in public practice responsible for the preparation of non-public financial statements

SOURCE: Kaplan Financial Education powered by Loscalzo Institute

LEVEL: Basic

NOTE: Available as a Simulcast, Qualifies for Yellow Book.

Preparation, Compilation & Review Engagement Update & Review

DATE: 12/14/20 **TIME:** 8:30 a.m.–Noon
INSTRUCTOR: David Peters, CPA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

OVERVIEW: If you supervise preparation, compilation and review engagements, this course will help you comply with the professional standards by informing you of the latest developments and issues relevant to these engagements. Learn about the U.S. business economy, peer review, FASB updates and other areas affecting preparation, compilation and review engagements.

PREREQUISITE: Experience with engagements performed in accordance with SSARS

AUDIENCE: CPA firm seniors and above who manage engagements performed in accordance with SSARS

SOURCE: AICPA **LEVEL:** Update

NOTE: Available as a Simulcast.

ACCOUNTING & AUDITING

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

DATE: 11/12/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Martin Birr, CPA, CIA, CMA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

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. 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 applying the requirements. The course also examines other key changes affecting not-for-profits relating to revenue recognition, contributions (ASU No. 2018-08, Clarifying the Scope and the Accounting Guidance for Contributions Received and Contributions Made) and leases. The course materials utilize 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.

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

DATE: 8/31/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: James Schaefer, CPA-inactive, CFE
LOCATION: Indiana Wesleyan University's Merrillville Education & Conference Center, Merrillville

DATE: 12/15/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: James Schaefer, CPA-inactive, CFE
LOCATION: Tropicana Executive Conference Center, Evansville

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

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 Law and other common forensic accounting techniques. Cybersecurity, money laundering and insurance fraud also will be addressed.

AUDIENCE: CPA in all practice areas

SOURCE: James Schaefer **LEVEL:** Basic

Real-World Frauds Found in Not-for-Profits

DATE: 12/14/20 **TIME:** 8:30 a.m.–Noon
INSTRUCTOR: Bruce Shepard, CPA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

OVERVIEW: Due to the nature of not-for-profits, fraud may be more common than it seems. Through a comprehensive learning approach using real-world examples, explanations of audit standards and informative case studies, learn how to recognize red flags of frauds, including cyber fraud. This course analyzes several unique frauds which occurred in organizations.

PREREQUISITE: Knowledge of not-for-profit sector

AUDIENCE: Auditors and accounting and financial professionals of not-for-profit entities

SOURCE: AICPA **LEVEL:** Intermediate

NOTE: Qualifies for Yellow Book.

Recent Compilation & Review Issues

DATE: 12/1/20 **TIME:** 10:30 a.m.–12:15 p.m.
INSTRUCTOR: James Hodge, CPA, CFE, CGFM
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 2 | **MEMBER:** $110 | **NONMEMBER:** $160

OVERVIEW: This course covers how SSARS 21, along with SSARS 22, 23 and 24, have radically changed the way SSARS engagements are conducted. In addition to compilation and review services, practitioners can now offer preparation services that allow them to offer financial statement services in streamlined and more flexible procedures.

AUDIENCE: Practitioners who perform preparations, compilations and reviews for non-public clients

SOURCE: Kaplan Financial Education powered by Loscalzo Institute

LEVEL: Basic

NOTE: Available as a Simulcast.

Revenue Recognition: Mastering the New FASB Requirements

DATE: 6/24/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Daryl Krause, CPA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | **MEMBER:** $384 | **NONMEMBER:** $543

OVERVIEW: The effective date of the new accounting standard for revenue recognition is upon us. With the issuance of FASB ASU No. 2014-09, Revenue from Contracts with Customers, FASB has completed a convergence project with the IASB to improve financial reporting by creating common revenue recognition guidance for U.S. GAAP and IFRS. For years, revenue recognition has been the cause of audit failures and the focus of corporate abuse and fraud allegations. This course will provide an in-depth understanding of the framework for revenue recognition built around the core principle applied in a five-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. In addition, you will understand how the new guidance impacts certain industries as a result of new criteria for recognizing revenue and changes in disclosure requirements. Recent updates to this course include industry-specific examples taken from the AICPA Audit and Accounting Guide Revenue Recognition.

PREREQUISITE: Experience in the application of accounting standards

AUDIENCE: CPAs in public accounting or business and industry who need an update on the latest revenue recognition guidance

SOURCE: AICPA **LEVEL:** Intermediate

Risk-Based Audit Standards: Effective Utilization

DATE: 11/30/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: James Hodge, CPA, CFE, CGFM
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

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 — specifically, how AI will change fundamental components of the risk-based audit process.

PREREQUISITE: Basic auditing course or equivalent experience

AUDIENCE: Audit practitioners having responsibility for planning and supervising audits, as well as other members of audit engagement teams involved with audits of non-public entities

SOURCE: Kaplan Financial Education powered by Loscalzo Institute

LEVEL: Intermediate

NOTE: Available as a Simulcast, Qualifies for Yellow Book.

Shorten Month-End: Closing Best Practices

DATE: 5/20/20 **TIME:** 1–4:30 p.m.
INSTRUCTOR: John L. Daly, CPA, CMA, CPIM, MBA
LOCATION: Webinar

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

OVERVIEW: Surveys show that the average North American company completes its monthly financial statement closing in six days. However, some companies can close their books in one day or less. You don't have to sacrifice accuracy for speed. This session will show you how to close month-end faster, better and cheaper.

AUDIENCE: Corporate financial managers

SOURCE: Executive Education **LEVEL:** Intermediate

NOTE: This webinar counts as live CPE.

The Bottom Line on the New Lease Accounting Requirements

DATE: 10/28/20 **TIME:** 1–4:30 p.m.
INSTRUCTOR: Daryl Krause, CPA
LOCATION: Grand Wayne Center, Fort Wayne

DATE: 11/12/20 **TIME:** 1–4:30 p.m.
INSTRUCTOR: Daryl Krause, CPA
LOCATION: Tropicana Executive Conference Center, Evansville

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

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. This course also discusses the lessor accounting model, including profit recognition and collectability.

PREREQUISITE: Experience in the application of accounting standards

AUDIENCE: CPAs in public accounting or business and industry

SOURCE: AICPA **LEVEL:** Intermediate

New The New Yellow Book: Government Auditing Standards (2018 Revision)

DATE: 10/26/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: James Schmutte, CPA, DBA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | **MEMBER:** $384 | **NONMEMBER:** $543

OVERVIEW: Do you want to learn about the 2018 revision to Government Auditing Standards (GAGAS or GAS or the "Yellow Book")? This course is based on Government Auditing Standards, 2018 Revision, which is effective for financial audits of fiscal years ending on or after June 30, 2020. It provides an excellent baseline of information for CPAs as it relates to understanding the guidance in the new Yellow Book. It also provides detailed information regarding auditor independence as found in Government Auditing Standards, 2018 Revision. It is essential for all auditors planning and conducting engagements in accordance with the new Yellow Book to understand and be able to discern requirements related to independence as found in Government Auditing Standards, 2018 Revision, because those independence standards became effective for fiscal years beginning July 1, 2019.

AUDIENCE: Government auditors and public practice CPAs that will be planning or conducting engagements in accordance with Government Auditing Standards, 2018 Revision ("Yellow Book")

SOURCE: AICPA **LEVEL:** Basic

NOTE: Qualifies for Yellow Book.

ACCOUNTING & AUDITING

=Case Study =Live Simulcast

New Update on Recent AICPA Standard Setting: Staying Current in a Changing Environment

DATE: 9/29/20 **TIME:** 8:30 a.m.–Noon
INSTRUCTOR: Thomas E. Newell, CPA
LOCATION: INCPAS Learning Center, Indianapolis

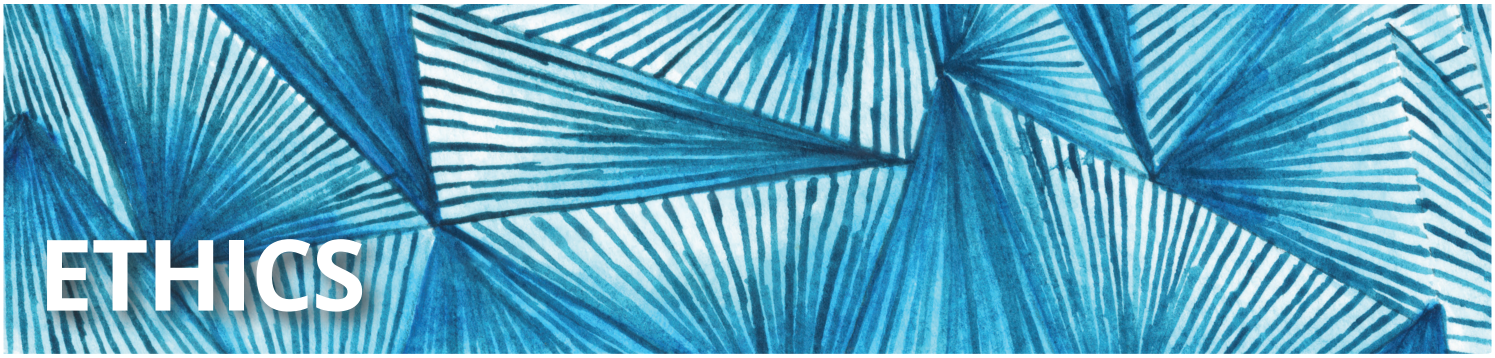
CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

OVERVIEW: Professional standards are changing with the times, and the AICPA's desire to move the profession into a new era in which data analytics and artificial intelligence will play a key role in an audit. We are seeing changes already as the AICPA has recently issued standards that significantly modify the form of the independent auditor's report. In addition, its Omnibus standard modifies several professional standards including those on related parties, consideration of fraud and the auditor's communication to those charged with governance. The new auditing standard on employee benefit plan audits makes significant changes in the auditor's report as well as other aspects of an employee benefit plan audit. Recently issued Statements on Standards for Accounting and Review Services (SSARS) have addressed the consideration of going concern and other significant issues. In addition, the AICPA has proposed a new SSARS that will conform its standards with international standards for such engagements. Clearly, with regard to professional standards, the only constant is change. This course will review recently issued SASs and SSARS and provide both insights into the new standards including how to best implement them.

PREREQUISITE: Experience in accounting and auditing

AUDIENCE: Accounting and auditing practitioners at all levels wanting to stay current on AICPA professional standards

SOURCE: Surgent **LEVEL:** Intermediate



ETHICS

Business Ethics

DATE: 8/21/20 **TIME:** 8:30 a.m.–Noon
INSTRUCTOR: Don Minges, MBA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

OVERVIEW: Being consistently ethical is a challenge. Most of us have had to make tough choices. Being ethical is not the same as complying with the law, and ethical issues are not always black and white. This course will review different professional ethical standards and discuss real-world cases involving thorny ethical dilemmas and how to resolve them.

PREREQUISITE: Some corporate finance classwork or experience

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

SOURCE: The Knowledge Institute **LEVEL:** Intermediate

Cases in Corporate Ethics

DATE: 5/20/20 **TIME:** 8:30 a.m.–Noon
INSTRUCTOR: John L. Daly, CPA, CMA, CPIM, MBA
LOCATION: Webinar

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

OVERVIEW: Anyone who has ever 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.

AUDIENCE: Corporate financial managers

SOURCE: Executive Education **LEVEL:** Intermediate

NOTE: This webinar counts as live CPE.

Ethical Leadership: Power, Influence, Integrity & Trust

DATE: 11/13/20 **TIME:** 8:30 a.m.–Noon
INSTRUCTOR: Don Minges, MBA
LOCATION: Grand Wayne Center, Fort Wayne

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

OVERVIEW: Leaders naturally wield power and influence at work, but not all use those invaluable tools with integrity. Leaders are constantly tempted to abuse their power, sometimes in ways that inflict great harm. Betraying trust can destroy careers, whole organizations and lives. This is why trust is a top prerequisite for principled and ethical leadership. Trust changes everything. Research shows leaders who continually work to earn and keep authentic trust reap enormous payback in all aspects of doing business.

PREREQUISITE: Management experience helpful

AUDIENCE: Corporate financial managers

SOURCE: The Knowledge Institute **LEVEL:** Intermediate

Ethics & Professional Conduct: Updates & Practical Applications

DATE: 5/18/20 **TIME:** 1–4:30 p.m.
INSTRUCTOR: Mike Brand, CPA
LOCATION: Webinar
NOTE: This webinar counts as live CPE.

DATE: 12/14/20 **TIME:** 1–4:30 p.m.
INSTRUCTOR: David Peters, CPA
LOCATION: INCPAS Learning Center, Indianapolis
NOTE: Available both in-person and as a Simulcast. This course is part of the Becoming a Firm Leader micro-credential program. For details about this NEW opportunity and how to earn a digital badge see page 25.

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

OVERVIEW: This course provides a timely update and refresher on the AICPA Code of Professional Conduct, including the conceptual framework and independence provisions for nonattest services, personal independence and other critical matters. It reviews the basic tenets of ethical and professional conduct (including the principles upon which the code rests), 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.

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

=Case Study =Live Simulcast

New Ethics & Technology

DATE: 9/29/20 **TIME:** 1–4:30 p.m.
INSTRUCTOR: Lawrence A. McClelland, MBA, J.D.
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

OVERVIEW: With the explosion of technology in the workplace that has occurred over the past 30 years, a fair question to ask is "what are the ethical considerations and impacts related to this technology?" Practical technology issues such as data privacy and security no doubt carry ethical considerations, but technology also affects the ethics associated with issues such as work-life balance, the digital divide, training needs, copyrights and fraud.

AUDIENCE: CPAs who desire a deeper understanding of key ethical issues facing the profession today

SOURCE: K2 Enterprises **LEVEL:** Basic

NOTE: This course is part of the Becoming a Technology Leader micro-credential program. For details about this NEW opportunity and how to earn a digital badge see page 67.

Ethics in the Real World: Living Values for Today

DATE: 11/20/20 **TIME:** 8:30 a.m.–Noon
INSTRUCTOR: Richard A. Karwic, MBA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

OVERVIEW: Business ethics is not just something “nice to do.” It can create long-term, competitive advantage and be a differentiating factor in today’s increasingly competitive environment.

AUDIENCE: Corporate financial managers

SOURCE: The Knowledge Institute **LEVEL:** Intermediate

Heartfelt Leadership: How Ethical Leaders Build Trusting Organizations

DATE: 12/16/20 **TIME:** 8:30 a.m.–Noon
INSTRUCTOR: Don Minges, MBA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

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.

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

SOURCE: The Knowledge Institute **LEVEL:** Intermediate

NOTE: This course is part of the Becoming a Leader in Business & Industry micro-credential program. For details about this NEW opportunity and how to earn a digital badge see page 51.

Professional Ethics Update

DATE: 6/3/20 **TIME:** 1–4:30 p.m.
INSTRUCTOR: James Schmutte, CPA, DBA
LOCATION: Tropicana Executive Conference Center, Evansville

DATE: 6/10/20 **TIME:** 1–4:30 p.m.
INSTRUCTOR: James Schmutte, CPA, DBA
LOCATION: Century Center, South Bend

DATE: 6/12/20 **TIME:** 1–4:30 p.m.
INSTRUCTOR: James Schaefer, CPA-inactive, CFE
LOCATION: Grand Wayne Center, Fort Wayne

DATE: 6/17/20 **TIME:** 1–4:30 p.m.
INSTRUCTOR: James Schmutte, CPA, DBA
LOCATION: INCPAS Learning Center, Indianapolis
NOTE: Available both in-person and as a Simulcast.

DATE: 6/26/20 **TIME:** 1–4:30 p.m.
INSTRUCTOR: James Schaefer, CPA-inactive, CFE
LOCATION: Indiana Wesleyan University's Merrillville Education & Conference Center, Merrillville

DATE: 6/30/20 **TIME:** 1–4:30 p.m.
INSTRUCTOR: James Schaefer, CPA-inactive, CFE
LOCATION: Monroe Convention Center, Bloomington

DATE: 10/30/20 **TIME:** 8:30 a.m.–Noon
INSTRUCTOR: James Schmutte, CPA, DBA
LOCATION: Webinar
NOTE: This date is a Webinar LIVE REPLAY.

DATE: 11/30/20 **TIME:** 8:30 a.m.–Noon
INSTRUCTOR: James Schmutte, CPA, DBA
LOCATION: Webinar
NOTE: This date is a Webinar LIVE REPLAY.

CPE: 4 | **MEMBER:** $124 | **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 three-year reporting period requirement.

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

SOURCE: Indiana CPA Society **LEVEL:** Update

MANAGEMENT

Advanced Leadership Skills: Emotional Intelligence, Innovation, Troubled Employees, Team Culture & Project/Change Management

DATE: 5/20/20 **TIME:** 1–4:30 p.m.
INSTRUCTOR: Jim Lindell, CPA, CGMA, CSP, MBA
LOCATION: Webinar

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

OVERVIEW: This standalone course is the second in a series of Leadership Skills that has been well received in the accounting CPE environment. Advanced Personal Leadership Skills attendees will improve their leadership and managerial skills to achieve their business and personal goals better.

AUDIENCE: Anyone interested in improving their overall daily effectiveness at work or home; the tools and techniques are applicable for all levels of individuals

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

NOTE: This webinar counts as live CPE.

Analytics & Big Data for CPAs

DATE: 9/28/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: John Minnich, CPA, CGMA, CFRM, Macct
LOCATION: Century Center, South Bend

DATE: 10/27/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: John Minnich, CPA, CGMA, CFRM, Macct
LOCATION: INCPAS Learning Center, Indianapolis
NOTE: This course is part of the Becoming a Leader in Business & Industry micro-credential program. For details about this NEW opportunity and how to earn a digital badge see page 51.

CPE: 8 | **MEMBER:** $384 | **NONMEMBER:** $543

OVERVIEW: Analytics is the new force driving business. Tools have been created to measure program impacts and ROI, visualize data and business processes, and uncover the relationship between key performance indicators, many utilizing the unprecedented amount of data now flowing into organizations. In this course you will discuss leading-edge topics in analytics and finance in a session packed with useful tips and practical guidance that you can apply immediately.

AUDIENCE: CFOs, controllers, treasurers and other financial managers

SOURCE: AICPA **LEVEL:** Basic

New Annual CFO Forum: Developing Credibility

DATE: 12/8/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Dana Johnson, CPA, CMA, Ph.D.
LOCATION: Century Center, South Bend

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

OVERVIEW: Today's effective financial leader must establish on-going credibility and adaptability to be effective. Finance professionals operate in a landscape of constant flux, yet financial management's fundamental success skills do not vary. Hear a veteran financial executive discuss why some financial managers succeed while others fail. Learn some practical tips on how to move from being a CF-No to a CF-Oh! Uncover the attributes of the "What and How" of financial management success and how action moves people better than unfulfilled ideas. Actionable concepts vs. "cheap talk" serve as a catalyst for change. This session will assist you in developing actionable messages and achieve buy-in as you implement new processes.

PREREQUISITE: Management experience preparing or reviewing accounting processes and reports; experience working with internal or external clients and business leaders

AUDIENCE: People who are, or aspire to be, chief financial officers; discussions targeted to medium-sized organizations

SOURCE: The Knowledge Institute **LEVEL:** Intermediate

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

New Annual CFO Forum: Emotional Intelligence

DATE: 12/7/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Dana Johnson, CPA, CMA, Ph.D.
LOCATION: Century Center, South Bend

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

OVERVIEW: Emotional Intelligence (EI) is an individual's capacity to understand both their own and other people's emotions, as well as how to react to these feelings in an appropriate manner. Research proves EI is a compelling predictor of personal, professional and social success. Every business leader can improve theirs, including you. Many businesses utilize EI for promotions and hiring. This session will discuss the 12 keys to EI and proven tactics to help every aspiring leader "work smarter."

PREREQUISITE: Management experience working with internal or external clients and business leaders

AUDIENCE: People who are, or aspire to be, chief financial officers; discussions targeted to medium-sized organizations

SOURCE: The Knowledge Institute **LEVEL:** Intermediate

NOTE: Bring a laptop. This seminar includes extensive case study analysis and many opportunities for group discussion. *Qualifies for 2 hours of Ethics.*

Annual Update for Controllers

DATE: 10/9/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: John Minnich, CPA, CGMA, CFRM, Macct
LOCATION: Grand Wayne Center, Fort Wayne

DATE: 11/9/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: John Minnich, CPA, CGMA, CFRM, Macct
LOCATION: Tropicana Executive Conference Center, Evansville

DATE: 11/23/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: John Minnich, CPA, CGMA, CFRM, Macct
LOCATION: Indiana Wesleyan University's Merrillville Education & Conference Center, Merrillville

CPE: 8 | **MEMBER:** $384 | **NONMEMBER:** $543

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

Balance Sheet Management

DATE: 8/21/20 **TIME:** 1–4:30 p.m.
INSTRUCTOR: Don Minges, MBA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

OVERVIEW: Most organizations manage their income statement, but many virtually ignore the balance sheet until balance sheet problems create seemingly insurmountable emergencies. This session discusses how to analyze and manage your financial statements more holistically, allowing you to identify and correct balance sheet issues early. How do you choose whether to raise debt or equity? What are the key considerations and the advantages of each? What is the cost of capital? What are the "hidden" balance sheet risks? We will also examine several crucial ideas you can incorporate into your analyses to enhance performance and reduce risk. If you want to enhance your corporate finance skills, this course is for you.

PREREQUISITE: Some corporate finance classwork or experience would be helpful

AUDIENCE: CEOs, CFOs, controllers, business owners, board members, corporate financial managers and professionals who advise them

SOURCE: The Knowledge Institute **LEVEL:** Intermediate

Business Valuation Issues

DATE: 12/17/20 **TIME:** 1–4:30 p.m.
INSTRUCTOR: Don Minges, MBA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

OVERVIEW: Every business needs capital, and capital has a cost. Debt and equity providers demand a return, and the combination is the organization's cost of capital. Even if you are not yet the CFO, you need to thoroughly understand the cost of capital and its use. Knowing the cost allows you to "get the biggest bang for the buck." Various business valuation methods are covered, whether for a start-up, spin-off or acquisition at any stage. If you want to enhance your corporate finance skills, this session is for you.

PREREQUISITE: Management experience helpful

AUDIENCE: Corporate financial managers

SOURCE: The Knowledge Institute **LEVEL:** Intermediate

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

New CFO Leadership Series: Advanced Skills, Made Easy

DATE: 12/8/20 **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:** $354 | **NONMEMBER:** $513

OVERVIEW: This is Day 5 of five in Indianapolis for the popular series designed specifically for current and aspiring CFOs. It will be divided into four topics consisting of 2 hours each. Learn how to create projected balance sheet and cash flow statements; use advanced methods for assigning overhead; fix a poorly organized chart of accountants; and create better PowerPoint presentations. The course will provide extensive case study analysis and many opportunities for group discussion on essential skills.

PREREQUISITE: Management experience preparing or reviewing cost accounting reports; experience preparing or reviewing accounting processes and reports; experience making presentations to business leaders

AUDIENCE: Current and aspiring chief financial officers; discussions targeted for people in medium-sized organizations

SOURCE: Executive Education **LEVEL:** Intermediate

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

=Case Study =Live Simulcast

CFO Leadership Series: Balance Sheet Management

DATE: 11/12/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Don Minges, MBA
LOCATION: Grand Wayne Center, Fort Wayne

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

OVERVIEW: This is Day 2 of three in Fort Wayne for the popular series designed specifically for current and aspiring CFOs. It will be divided into four topics consisting of 2 hours each. 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. The course will provide extensive case study analysis and many opportunities for group discussion on essential skills.

PREREQUISITE: Management experience helpful

AUDIENCE: Current and aspiring chief financial officers; discussions targeted for people in medium-sized organizations

SOURCE: The Knowledge Institute **LEVEL:** Intermediate

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

New CFO Leadership Series—Become More Effective

DATE: 9/23/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Bob Mims, CPA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

OVERVIEW: This is Day 2 of five in Indianapolis for the popular series designed specifically for current and aspiring CFOs. It will be divided into four different topics consisting of 2 hours each. Learn how to think critically; network more effectively; manage compensation and bonus plans; and use advanced features in MS Word. The course will provide extensive case study analysis and many opportunities for group discussion on essential skills.

PREREQUISITE: Experience with management, Microsoft Word, preparing or reviewing accounting processes and reports, and working with internal or external clients and business leaders

AUDIENCE: Current and aspiring chief financial officers; discussions targeted for people in medium-sized organizations

SOURCE: The Knowledge Institute **LEVEL:** Intermediate

NOTE: Bring a laptop. This seminar includes extensive case study analysis and many opportunities for group discussion. This course is part of the Becoming a Leader in Business & Industry micro-credential program. For details about this NEW opportunity and how to earn a digital badge see page 51.

New CFO Leadership Series: Cash Management—Managing the Lifeblood of the Business

DATE: 11/19/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Richard A. Karwic, MBA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

OVERVIEW: This is Day 4 of five in Indianapolis for the popular series designed specifically for current and aspiring CFOs. It will be divided into four topics consisting of 2 hours each. Learn how to manage AR and AP more effectively; use better methods for cash management; apply new cash forecasting techniques; and make meetings more productive (and fun!). The course will provide extensive case study analysis and many opportunities for group discussion on essential skills.

PREREQUISITE: Management experience in the Treasury function and managing cash flow, either for internal use or external clients; experience working with internal or external clients and business leaders

AUDIENCE: Current and aspiring chief financial officers; discussions targeted for people in medium-sized organizations

SOURCE: The Knowledge Institute **LEVEL:** Intermediate

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

New CFO Leadership Series: Developing Credibility—Inside & Outside the Organization

DATE: 10/22/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: William F. O'Brien, CPA, MBA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

OVERVIEW: This is Day 3 of five in Indianapolis for the popular series designed specifically for current and aspiring CFOs. It will be divided into four topics consisting of 2 hours each. Learn how to earn respect for you and your team; plan and get buy-in on more actionable messaging; create effective reports and presentations; and what to do—and not do—to be a successful financial manager. The course will provide extensive case study analysis and many opportunities for group discussion on essential skills.

PREREQUISITE: Management experience preparing or reviewing accounting processes and reports; experience working with internal or external clients and business leaders

AUDIENCE: Current and aspiring chief financial officers; discussions targeted for people in medium-sized organizations

SOURCE: The Knowledge Institute **LEVEL:** Intermediate

NOTE: Bring a laptop. This seminar includes extensive case study analysis and many opportunities for group discussion. This course is part of the Becoming a Leader in Business & Industry micro-credential program. For details about this NEW opportunity and how to earn a digital badge see page 51. *Qualifies for 2 hours of A&A.*

New CFO Leadership Series: Emotional Intelligence—What Makes Leaders Great?

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

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

OVERVIEW: This is Day 1 of five in Indianapolis for the popular series designed specifically for current and aspiring CFOs. It will be divided into four topics consisting of 2 hours each. Learn why emotional intelligence is the critical factor to success; how to motivate the right way; more effective ways to deliver bad news; and evaluate real-world ethical dilemmas. The course will provide extensive case study analysis and many opportunities for group discussion on essential skills.

PREREQUISITE: Management experience working with internal or external clients and business leaders

AUDIENCE: Current and aspiring chief financial officers; discussions targeted for people in medium-sized organizations

SOURCE: The Knowledge Institute **LEVEL:** Intermediate

NOTE: Bring a laptop. This seminar includes extensive case study analysis and many opportunities for group discussion. This course is part of the Becoming a Leader in Business & Industry micro-credential program. For details about this NEW opportunity and how to earn a digital badge see page 51. *Qualifies for 2 hours of Ethics.*

CFO Leadership Series: Managing People

DATE: 12/10/20 **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:** $354 | **NONMEMBER:** $513

OVERVIEW: This is Day 3 of three in Fort Wayne for the popular series designed specifically for current and aspiring CFOs. It will be divided into four topics consisting of 2 hours each. 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 considerate conduct. The course will provide extensive case study analysis and many opportunities for group discussion on essential skills.

PREREQUISITE: Management experience helpful

AUDIENCE: Current and aspiring chief financial officers; discussions targeted for people in medium-sized organizations

SOURCE: Executive Education **LEVEL:** Intermediate

NOTE: Bring a laptop. This seminar includes extensive case study analysis and many opportunities for group discussion. *Qualifies for 2 hours of Ethics.*

CFO Leadership Series: Strategy & Critical Thinking Skills

DATE: 9/24/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Bob Mims, CPA
LOCATION: Grand Wayne Center, Fort Wayne

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

OVERVIEW: This is Day 1 of three in Fort Wayne for the popular series designed specifically for current and aspiring CFOs. It will be divided into four topics consisting of 2 hours each. 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. The course will provide extensive case study analysis and many opportunities for group discussion on essential skills.

PREREQUISITE: Management experience helpful

AUDIENCE: Current and aspiring chief financial officers; discussions targeted for people in medium-sized organizations

SOURCE: The Knowledge Institute **LEVEL:** Intermediate

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

Coaching Skills for CPAs, Controllers & Financial Managers

DATE: 5/20/20 **TIME:** 8:30 a.m.–Noon
INSTRUCTOR: Jim Lindell, CPA, CGMA, CSP, MBA
LOCATION: Webinar

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

OVERVIEW: Professional athletes have multiple coaches, while business people rarely utilize coaches. This course will focus on creating the coaching skills required to raise the performance of your employees. It will include the use of: coaching models and strategies, successful communication techniques, root cause analysis, performance gap analysis and personality impact on coaching model.

AUDIENCE: Anyone who has the responsibility of developing staff for improved performance, including CPAs, accountants, controllers, treasurers and CFOs

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

NOTE: This webinar counts as live CPE.

Construction Conference

DATE: 11/10/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Various
LOCATION: Ritz Charles, Carmel

CPE: 8 | **MEMBER:** $364 | **NONMEMBER:** $514

OVERVIEW: Give CPAs working in, or with, the construction industry the specialized education they need and a chance to gather with other CPAs who do what they do. This conference will provide general and breakout sessions on specific construction-related topics and general topics like tax and economic updates but with a focus on the perspective of the construction financial manager.

AUDIENCE: CPAs with construction-related clients or CPAs working in the construction industry

SOURCE: Indiana CPA Society **LEVEL:** Intermediate

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

=Case Study =Live Simulcast

Controllers Conference

DATE: 6/8/20 **TIME:** 8 a.m.–4 p.m.
INSTRUCTOR: Various
LOCATION: Ritz Charles, Carmel

CPE: 8 | **MEMBER:** $364 | **NONMEMBER:** $514

OVERVIEW: This conference will provide important updates on emerging issues to CPAs responsible for managing financial risks, financial planning, and financial reporting and analysis for Indiana corporations. Learn valuable insights on how to thrive in your role wherever you are in your career.

AUDIENCE: Current or aspiring controllers, financial managers and CFOs in business/industry

SOURCE: Indiana CPA Society **LEVEL:** Intermediate

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

Controller's Update: Today's Latest Trends

DATE: 5/19/20 **TIME:** 1–4:30 p.m.
INSTRUCTOR: Mike Ussery, CPA
LOCATION: Webinar

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

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 that is packed with useful tips and practical guidance that you can apply immediately.

AUDIENCE: Management experience in accounting, finance or operations

SOURCE: AICPA **LEVEL:** Update

NOTE: This webinar counts as live CPE.

Critical Thinking Skills for Financial Professionals

DATE: 11/20/20 **TIME:** 1–4:30 p.m.
INSTRUCTOR: Richard A. Karwic, MBA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

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.

AUDIENCE: Corporate financial managers

SOURCE: The Knowledge Institute **LEVEL:** Intermediate

Employment Law Update: Key Risks & Recent Trends

DATE: 8/27/20 **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: 8/31/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: William Murphy, CPA, CGMA, ABV, CFF, CVA, PFS
LOCATION: Century Center, South Bend

CPE: 8 | **MEMBER:** $384 | **NONMEMBER:** $543

OVERVIEW: Businesses and not-for-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: cyber issues 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 and 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 not-for-profits

AUDIENCE: CPAs in business and industry, not-for-profits or in public practice who want to increase their knowledge of employment law issues encountered by businesses and not-for-profits

SOURCE: AICPA **LEVEL:** Advanced

Employment Law Update: Reducing Employer Liability

DATE: 12/15/20 **TIME:** 8:30 a.m.–Noon
INSTRUCTOR: William Murphy, CPA, CGMA, ABV, CFF, CVA, PFS
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

OVERVIEW: Employment law issues affect virtually every business, governmental entity and not-for-profit organization. This update examines trends in employment-related claims and settlements including: members of protected classes and the implications of that membership; analysis of state trends in employment litigation; e-employment and cyber issues such as employee and employer social media rights; device and internet use and monitoring; employer liability issues for employee internet use; telecommuting and "off-the-clock" work issues; wrongful termination; bullying and its implications; harassment; and retaliation. This course also introduces you to the Employment Claim Risk Assessment Tool, which provides a framework to analyze your organization's or your client's exposures to employment-related claims.

PREREQUISITE: Experience in, and knowledge of, employment law issues encountered by businesses and not-for-profits

AUDIENCE: CPAs in business and industry, not-for-profits or in public practice who want to increase their knowledge of employment law issues encountered by businesses and not-for-profits

SOURCE: AICPA **LEVEL:** Advanced

NOTE: Available as a Simulcast.

Honing Your Management Style

DATE: 12/17/20 **TIME:** 8:30 a.m.–Noon
INSTRUCTOR: Don Minges, MBA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

OVERVIEW: Learn how business leaders harness their introversion for success, techniques to build a trusting team and action plan that will increase cohesion and competitive advantage, and ways to identify and deal with "snakes in suits."

PREREQUISITE: Management experience helpful

AUDIENCE: Corporate financial managers

SOURCE: The Knowledge Institute **LEVEL:** Intermediate

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

New INCPAS Convention

DATE: 12/2–3/20 **TIME:** 8 a.m.–5 p.m.
INSTRUCTOR: Various
LOCATION: JW Marriott, Indianapolis

CPE: 16 | **PRICING:** Visit incpas.org/Convention for pricing options.

OVERVIEW: This 2-day event will provide more people, programming and fun for Indiana CPAs in all areas of practice. Each day offers up to 5 tracks covering A&A, Business & Industry, Tax, Management & Leadership and Technology, all led by top-rated national presenters, as well as trusted local experts. Day 1 will be followed by a networking reception and tours at Lucas Oil Statidum.

AUDIENCE: Anyone in search of one event with a variety of topics and chance to connect with other CPAs

SOURCE: Indiana CPA Society **LEVEL:** Intermediate

NOTE: A&A and Ethics hours will be offered. Continental breakfast and lunch are provided in the cost of the registration.

New Industry Spring Forum

DATE: 5/21/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Various
LOCATION: Virtual

CPE: 5 | **MEMBER/NONMEMBER:** $300

OVERVIEW: As a CPA in business and industry, you are no longer just a number cruncher who lives in spreadsheets. Today you are expected to use a forward-looking and big-picture approach to review financial statements to gain perspective on past performance. You are expected to analyze information and work closely with operations and management to develop and implement strategy for the organization to achieve its goals. Join us in this first-ever Industry Spring Forum where colleagues will provide insight into how they are handling the changing economy and their changing roles.

AUDIENCE: CPAs in business or industry

SOURCE: Indiana CPA Society **LEVEL:** Intermediate

Lean Accounting & Management: Saving Money by Streamlining Operations

DATE: 5/19/20 **TIME:** 8:30 a.m.–Noon
INSTRUCTOR: Mike Ussery, CPA
LOCATION: Webinar

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

OVERVIEW: Companies using Lean Accounting have better information for decision making, have simple and timely reports that are clearly understood by everyone in the company, and they focus their business around the value created from their customers. Learn to minimize waste and create wealth in your organization through a lean accounting and management approach that improves profitability by streamlining operations. Improve flow through capacity management. Achieve perfection through continuous process improvement. Those in both manufacturing and service industries can benefit from the techniques presented in this course.

PREREQUISITE: Management responsibility in finance, operations or planning

AUDIENCE: Industry CPAs in middle and upper management,and public practitioners responsible for productivity improvement

SOURCE: AICPA **LEVEL:** Advanced

NOTE: This webinar counts as live CPE.

New Organizational Leadership for Financial Executives

DATE: 11/16/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Jim Lindell, CPA, CGMA, CSP, MBA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

OVERVIEW: The purpose of this course is to enhance your leadership skills as they apply to the accounting, finance and treasury functions, as well as overarching organizational leadership of the whole company. A recent survey of CEOs indicated one of the their most pressing and worrisome concerns is with regards to the next generation leaders. In this course, we will examine leadership skills to help the attendee improve their skill level to serve their organization more effectively.

AUDIENCE: Financial executives looking to strengthen, expand and build on their leadership skills

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

MANAGEMENT

=Case Study =Live Simulcast

Risk, Cost & Cash Management for Controllers & Financial Managers

DATE: 5/18/20 **TIME:** 8:30 a.m.–Noon
INSTRUCTOR: Mike Ussery, CPA
LOCATION: Webinar

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

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. 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

NOTE: This webinar counts as live CPE.

Small Firm Summit

DATE: 8/20/20 **TIME:** 8:30 a.m.–4:45 p.m.
INSTRUCTOR: Various
LOCATION: Ritz Charles, Carmel

CPE: 8 | **MEMBER:** $259 | **NONMEMBER:** $404

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 and small firms with 10 employees or less

SOURCE: Indiana CPA Society **LEVEL:** Intermediate

NOTE: Continental breakfast and lunch are provided in the cost of the registration. This course is part of the Becoming a Firm Leader micro-credential program. For details about this NEW opportunity and how to earn a digital badge see page 25.

Staff Retention: Attract & Keep the Best People

DATE: 12/16/20 **TIME:** 1–4:30 p.m.
INSTRUCTOR: Don Minges, MBA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

OVERVIEW: Does it seem like you spend far too much time recruiting? Do your people leave just as they become productive? If you think your turnover is because Millennials are different from earlier generations, you probably are not looking at the real source of your problem.

PREREQUISITE: Management experience helpful

AUDIENCE: Corporate and public practice managers who have professional staff working for them

SOURCE: The Knowledge Institute **LEVEL:** Intermediate

NOTE: This course is part of the Becoming a Leader in Business & Industry micro-credential program. For details about this NEW opportunity and how to earn a digital badge see page 51.

The 8-Hour MBA for CPAs

DATE: 8/17/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: James Schaefer, CPA-inactive, CFE
LOCATION: Indiana Wesleyan University's Merrillville Education & Conference Center, Merrillville

DATE: 9/17/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: James Schaefer, CPA-inactive, CFE
LOCATION: INCPAS Learning Center, Indianapolis

DATE: 9/29/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: James Schaefer, CPA-inactive, CFE
LOCATION: Century Center, South Bend

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

OVERVIEW: This course is designed specifically for CPAs 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 Changing Role of the Controller: Advancing from Tactical to Strategic

DATE: 5/18/20 **TIME:** 1–4:30 p.m.
INSTRUCTOR: Mike Ussery, CPA
LOCATION: Webinar

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

OVERVIEW: Are you ready to take your role as controller to the next level while adding significant value to the organization? A successful controller will go beyond financial statements, internal controls and general accounting to create new value for the organization. We'll explore new additional roles that controllers are now accepting and outline a roadmap you can use to expand your role as a controller from simply internal process/transaction-oriented to externally focused on understanding industry and macro trends.

PREREQUISITE: Experience in financial management of a medium or small company

AUDIENCE: CFOs, controllers and management accountants who want to improve the value-add and impact of their skillset in order to drive the financial performance of an organization

SOURCE: AICPA **LEVEL:** Intermediate

NOTE: This webinar counts as live CPE.

The Competent CPA: Mastering The Controller/ CFO Role

DATE: 8/7/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Jim Lindell, CPA, CGMA, CSP, MBA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

OVERVIEW: This seminar is split into two parts. In the first, you will assess your business and technical skills. In the second, you will assess your leadership and people skills. Throughout both, you will learn what else you can do to build successful business and leadership skills that go beyond day-to-day work or management.

AUDIENCE: CPAs in public accounting or business and industry who want to understand how to move to the next level within their organization

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

NOTE: This course is part of the Becoming a Leader in Business & Industry micro-credential program. For details about this NEW opportunity and how to earn a digital badge see page 51.

The Strategic CFO: Big Picture Skills

DATE: 10/23/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: William F. O'Brien, CPA, MBA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

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: People who are, or aspire to be, chief financial officers

SOURCE: The Knowledge Institute **LEVEL:** Intermediate

NOTE: Bring a laptop. This seminar includes extensive case study analysis and many opportunities for group discussion. *Qualifies for 4 hours of A&A.*

The Tactical CFO: Make Your Business Processes Work For You

DATE: 5/19/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: John L. Daly, CPA, CMA, CPIM, MBA
LOCATION: Webinar

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

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.

AUDIENCE: People who are, or aspire to be, chief financial officers

SOURCE: Executive Education **LEVEL:** Intermediate

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

NOTE: This webinar counts as live CPE.

New Thriving in Recessionary Times

DATE: 11/17/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Jim Lindell, CPA, CGMA, CSP, MBA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

OVERVIEW: The news is alive with the potential of the next recession. Where are we now? How soon will the next recession occur? How will it impact my business, surrounding stakeholders and influencers? This course will explore how to understand business cycles and recessions, and — most importantly — how to position your organization to successfully navigate through tougher economic times.

AUDIENCE: CPAs in public accounting or business and industry wanting to understand how to move to the next level within their organization

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

Valuing a Business: What Is This Company Worth?

DATE: 11/13/20 **TIME:** 1–4:30 p.m.
INSTRUCTOR: Don Minges, MBA
LOCATION: Grand Wayne Center, Fort Wayne

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

OVERVIEW: What is your company worth? Is business value the single most important metric? This course 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: None, but some corporate finance classwork or experience helpful

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

SOURCE: The Knowledge Institute **LEVEL:** Intermediate

MANAGEMENT

=Case Study =Live Simulcast

New Young Pros Forum

DATE: 6/25/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Various
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 4 | **MEMBER:** $174 | **NONMEMBER:** $224

OVERVIEW: Join us at this first-ever Young Pros Forum. Networkand learn from a panel of local experts that will share their experience on building meaningful and important connections. We will then connect with others in an afternoon service project at a local not-for-profit organization.

AUDIENCE: Any young professional age 35 and under looking to connect and network with others

SOURCE: Indiana CPA Society **LEVEL:** Intermediate

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

New INCPAS Micro-Credential Program

IN CPA SOCIETY

Becoming a Leader in Business & Industry

Leading an organization is no easy feat, let alone figuring out what you need to know to do it well—we can help with that. Commit to your growth with our customized CPE package and save at least $200 on average.

Level II

This program is designed for new or aspiring controllers/CFOs. It will outline the technical knowledge, people skills and processes you need to know and implement to build the foundation for a successful team.

August 7
The Competent CPA: Mastering the Controller/CFO Role *(8 hours CPE)*
Learn about the skills and resources necessary to lead your organization and accounting/finance department.

October 27
Analytics & Big Data for CPAs *(8 hours CPE)*
Acquaint yourself with tools to measure program impact and ROI, visualize data and business processes, and uncover the relationship between KPIs.

December 16
Heartfelt Leadership: How Ethical Leaders Build Trusting Organizations *(4 hours CPE)*
Discover how to create a culture, values and incentives that foster and encourage innovation.

December 16
Staff Retention: Attract & Keep the Best People *(4 hours CPE)*
Avoid turnover by identifying the real source of employee exits and the key changes you can implement now.

Level III

This program is designed for CFOs who are not new to their roles but want to enhance their leadership skills. It will dig into the "human element" so you can better understand yourself and your team, then lead accordingly.

August 20
CFO Leadership Series: Emotional Intelligence—What Makes Leaders Great? *(8 hours CPE)*
Discuss why EI is critical to your success, how to motivate your team the right way, and also the best way to deliver bad news.

September 23
CFO Leadership Series: Become More Effective *(8 hours CPE)*
Learn how think and network more effectively, as well as Microsoft-based tools that can help keep you on track.

October 22
CFO Leadership Series: Developing Credibility — Inside & Outside the Organization *(8 hours CPE)*
Find out how to communicate your messages quickly and clearly, and leave with 10 Tips for Success and 13 Signs of Failure.

Program Benefits & Details

- 24 hours CPE
- "Business & Industry Leader" Digital Badge upon completion

DISCOUNTED PACKAGE PRICE: $899

▶ Register at incpas.org/MicroCredential.

NOT-FOR-PROFIT & GOVERNMENT

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.

A Complete Guide to the New Yellow Book

DATE: 9/16/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: James Schmutte, CPA, DBA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

OVERVIEW: The new Yellow Book is effective for audits of financial statements for periods ending on or after June 30, 2020. Save yourself the time and stress of trying to understand the new Yellow Book alone. This course will equip you with comprehensive knowledge that will enable you to confidently implement the requirements. Course materials utilize a highly illustrative and innovative format, including over 25 focused exercises on key practice issues.

PREREQUISITE: Basic audit knowledge

AUDIENCE: Auditors performing Yellow Book engagements

SOURCE: Surgent **LEVEL:** Basic

NOTE: Qualifies for Yellow Book.

Accounting & Reporting for Not-for-Profit Organizations

DATE: 11/24/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Martin Birr, CPA, CIA, CMA
LOCATION: Grand Wayne Center, Fort Wayne

DATE: 12/8/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Martin Birr, CPA, CIA, CMA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | **MEMBER:** $384 | **NONMEMBER:** $543

OVERVIEW: Do you need to enhance your not-for-profit accounting skills? Through a case study-intense, highly interactive, classroom environment, this course provides 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, revenue recognition, and grants and contracts standards are included.

PREREQUISITE: Experience in the not-for-profit environment

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

SOURCE: AICPA **LEVEL:** Intermediate

NOTE: Qualifies for Yellow Book.

Applying the Uniform Guidance in Your Single Audits

DATE: 11/11/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: James Schmutte, CPA, DBA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | **MEMBER:** $384 | **NONMEMBER:** $543

OVERVIEW: This course provides you with the knowledge to be more efficient and effective at planning and performing audits in accordance with the requirements of the Uniform Guidance and the Single Audit Act. Make sure your skills are up-to-date with the latest information in this challenging audit area.

PREREQUISITE: Background of not-for-profit or governmental accounting and auditing

AUDIENCE: Auditors performing single audit engagements, internal financial staff of governments, and staff of not-for-profit entities interacting with auditors

SOURCE: AICPA **LEVEL:** Intermediate

NOTE: Qualifies for Yellow Book.

Financial Reporting for Not-for-Profit Entities

DATE: 12/14/20 **TIME:** 1–4:30 p.m.
INSTRUCTOR: Bruce Shepard, CPA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

OVERVIEW: Do you know what makes not-for-profit accounting and financial reporting different? This course will cover the requirements under FASB's financial statement standard and provide insight into what makes not-for-profit financial reporting different, such as accounting for grants and contracts.

This course will train you to clear key hurdles in not-for-profit accounting and reporting in an efficient and effective manner. Avoid the potholes of confusion and provide a financial picture that end users can truly understand.

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.

Latest Developments in Not-for-Profit Accounting & Auditing

DATE: 11/10/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Martin Birr, CPA, CIA, CMA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

OVERVIEW: This is another year of significant change in the world of not-for-profit 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 utilize a highly illustrative and innovative format. Over 30 focused exercises are included to provide an enhanced working knowledge of the latest developments in not-for-profit accounting and auditing.

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

AUDIENCE: Auditors and industry professionals working in the not-for-profit environment

SOURCE: Surgent **LEVEL:** Update

NOTE: Qualifies for Yellow Book.

Not-for-Profit Accounting & Auditing Update

DATE: 8/27/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Martin Birr, CPA, CIA, CMA
LOCATION: INCPAS Learning Center, Indianapolis

DATE: 9/10/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Martin Birr, CPA, CIA, CMA
LOCATION: Indiana Wesleyan University's Merrillville Education & Conference Center, Merrillville

CPE: 8 | **MEMBER:** $384 | **NONMEMBER:** $543

OVERVIEW: The best avenue to success is to be indispensable to your clients. The best way to become 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: Accounting 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.

Not-for-Profit Conference

DATE: 7/23/20 **TIME:** 8:30 a.m.–4:35 p.m.
INSTRUCTOR: Various
LOCATION: Embassy Suites Noblesville, Noblesville

CPE: 8 | **MEMBER:** $259 | **NONMEMBER:** $404

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: Indiana CPA Society **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 the registration.

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

DATE: 10/22/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Martin Birr, CPA, CIA, CMA
LOCATION: Century Center, South Bend

DATE: 11/5/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Martin Birr, CPA, CIA, CMA
LOCATION: Grand Wayne Center, Fort Wayne

CPE: 8 | **MEMBER:** $384 | **NONMEMBER:** $543

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.

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.

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

DATE: 11/12/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Martin Birr, CPA, CIA, CMA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

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. 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 applying the requirements. The course also examines other key changes affecting not-for-profits relating to revenue recognition, contributions (ASU No.

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NFP/GOVERNMENT

2018-08, Clarifying the Scope and the Accounting Guidance for Contributions Received and Contributions Made) and leases. The course materials utilize 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.

Real-World Frauds Found in Not-for-Profits

DATE: 12/14/20 **TIME:** 8:30 a.m.–Noon
INSTRUCTOR: Bruce Shepard, CPA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

OVERVIEW: Due to the nature of not-for-profits, fraud may be more common than it seems. Through a comprehensive learning approach using real-world examples, explanations of audit standards and informative case studies, learn how to recognize red flags of frauds, including cyber fraud. This course analyzes several unique frauds which occurred in organizations.

PREREQUISITE: Knowledge of not-for-profit sector

AUDIENCE: Auditors and accounting and financial professionals of not-for-profit entities

SOURCE: AICPA **LEVEL:** Intermediate

NOTE: Qualifies for Yellow Book.

New The New Yellow Book: Government Auditing Standards (2018 Revision)

DATE: 10/26/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: James Schmutte, CPA, DBA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | **MEMBER:** $384 | **NONMEMBER:** $543

OVERVIEW: Do you want to learn about the 2018 revision to Government Auditing Standards (GAGAS or GAS or the "Yellow Book")? This course is based on Government Auditing Standards, 2018 Revision, which is effective for financial audits of fiscal years ending on or after June 30, 2020. It provides an excellent baseline of information for CPAs as it relates to understanding the guidance in the new Yellow Book. It also provides detailed information regarding auditor independence as found in Government Auditing Standards, 2018 Revision. It is essential for all auditors planning and conducting engagements in accordance with the new Yellow Book to understand and be able to discern requirements related to independence as found in Government Auditing Standards, 2018 Revision, because those independence standards became effective for fiscal years beginning July 1, 2019.

AUDIENCE: Government auditors and public practice CPAs that will be planning or conducting engagements in accordance with Government Auditing Standards, 2018 Revision ("Yellow Book")

SOURCE: AICPA **LEVEL:** Basic

NOTE: Qualifies for Yellow Book.

TAXATION

4 Tiers of Loss Limitations: Guide to the New Rules for Pass-Through Entities

DATE: 12/7/20 **TIME:** 1–4:30 p.m.
INSTRUCTOR: Michael A. Frost, CPA
LOCATION: Tropicana Executive Conference Center, Evansville

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

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 increasing 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 desire a refresher on loss limitations and an analysis of the new rules; inexperienced practitioners who desire to learn the basics of all 4 pass-through loss limitations and their interactions

SOURCE: Surgent **LEVEL:** Intermediate

Buying & Selling a Business: Critical Tax & Structuring Issues

DATE: 10/27/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: John N. Sherrick, CPA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

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.

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

Construction Contractors: Critical Accounting, Auditing & Tax Issues

DATE: 12/1/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Martin Birr, CPA, CIA, CMA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

OVERVIEW: Accounting and financial reporting for construction contractors may be the most difficult area to be in compliance with the various standards. Construction engagements are, in many instances, more "dangerous" than most lines of businesses due to the many users of the financial statements. In this course, we will discuss why construction accounting and financial reporting are so complex, and discuss the relationship between the contractor and the surety, both from an underwriting and claims perspective. We will also explore what the surety looks for in order to maximize potential bond credit, and we will discuss key areas of tax compliance concentrating on those areas which make construction unique, including the impact of TCJA on the construction industry.

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

AUDIENCE: Practitioners who have construction clients and professionals in the construction industry who need to be up-to-date on the latest information

SOURCE: Surgent **LEVEL:** Intermediate

NOTE: *Qualifies for 6 hours of A&A.*

Employer's Handbook: Health Care, Retirement & Fringe Benefit Tax Issues

DATE: 11/16/20 **TIME:** 1–4:30 p.m.
INSTRUCTOR: William Murphy, CPA, CGMA, ABV, CFF, CVA, PFS
LOCATION: Century Center, South Bend

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

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 and tax issues associated with all aspects of employment. This course provides timely and 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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Estate Life Planning Issues for Middle-Income Client

DATE: 10/28/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: William Murphy, CPA, CGMA, ABV, CFF, CVA, PFS
LOCATION: Indiana Wesleyan University's Merrillville Education & Conference Center, Merrillville

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

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 course is a must-attend for all CPAs who work with middle-income clients and are looking for ways to provide additional quality services. The content is continually updated with the latest guidance.

AUDIENCE: CPAs who advise clients on estate tax planning

SOURCE: Surgent **LEVEL:** Basic

Federal Tax Update with Pat Garverick

DATE: 11/16–17/20 **TIME:** 8 a.m.–4 p.m.
INSTRUCTOR: J. Patrick Garverick, CPA, CFP, MT
LOCATION: Tropicana Executive Conference Center, Evansville

DATE: 1/5–6/21 **TIME:** 8 a.m.–4 p.m.
INSTRUCTOR: J. Patrick Garverick, CPA, CFP, MT
LOCATION: Ritz Charles, Carmel

CPE: 16 | **MEMBER:** $544 | **NONMEMBER:** $789

OVERVIEW: With the increasing complexity and ever-changing nature of tax laws and issues, today's CPA needs this 2-Day Federal Tax Update focusing on individual and business income tax issues. This comprehensive course 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. Itis a must-attend 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 accounting or business and industry 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.*

Federal Tax Update with Ron Roberson

DATE: 11/4–5/20 **TIME:** 8 a.m.–4 p.m.
INSTRUCTOR: Ron Roberson, CPA
LOCATION: Marriott East, Indianapolis

DATE: 12/7–8/20 **TIME:** 8 a.m.–4 p.m.
INSTRUCTOR: Ron Roberson, CPA
LOCATION: Grand Wayne Center, Fort Wayne

DATE: 12/9–10/20 **TIME:** 8 a.m.–4 p.m.
INSTRUCTOR: Ron Roberson, CPA
LOCATION: Century Center, South Bend

CPE: 16 | **MEMBER:** $544 | **NONMEMBER:** $789

OVERVIEW: Each year there is one must-do tax education seminar, and this is it. This 2-day Federal Tax Update will be taught in an understandable, high tech, and sometimes humorous manner. All the latest tax developments impacting individual, partnership and corporate tax returns will be covered. Join us for cutting-edge tax planning strategies and real-life experiences that will make complicated tax topics understandable. Use of in-depth examples, analysis and discussion will ensure you understand the law and the planning ideas that are applicable. Info presented during the seminar will be up to date through the day before you attend class. Each participant will receive a complete and up-to-date manual in both physical and electronic format. Our print 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. Our electronic manual also includes numerous hyperlinks to the Internal Revenue Code, court cases and other documents that are available on the internet.

AUDIENCE: CPAs in public accounting or business and industry 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.*

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

DATE: 11/20/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Edward A. Harter, CPA
LOCATION: Grand Wayne Center, Fort Wayne

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

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. It includes a practical, over 300-page manual that is an excellent reference source for your practice and 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 income tax returns

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

SOURCE: Surgent **LEVEL:** Intermediate

NOTE: *Qualifies for CFP.*

Form 1065 Boot Camp: Step-By-Step Preparation with Completed Forms

DATE: 1/7/21 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Sali L. Sheafor, CPA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

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 are 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:** Basic

Hottest Tax Planning Developments Under the Current Tax Law

DATE: 12/15/20 **TIME:** 1–4:30 p.m.
INSTRUCTOR: William Murphy, CPA, CGMA, ABV, CFF, CVA, PFS
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

OVERVIEW: Are you up-to-date on the latest tax planning developments for 2020? This course, authored by Margaret F. Suralik, CPA/ABV, ASA, explores the big tax topics that will impact you and your clients. Discover how they may impact tax planning strategies and be in a position to help minimize your client's tax bill. Course materials include the impact of tax reform.

PREREQUISITE: Basic understanding of individual and business taxation

AUDIENCE: All practitioners

SOURCE: AICPA **LEVEL:** Intermediate

NOTE: Available as a Simulcast.

Individual Income Tax Update Course

DATE: 12/7/20 **TIME:** 8:30 a.m.–Noon
INSTRUCTOR: Michael A. Frost, CPA
LOCATION: Tropicana Executive Conference Center, Evansville

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

OVERVIEW: This highly informative course will bring you up-to-speed on the latest in individual tax law developments and the corresponding or responsive planning opportunities available to your clients. You will leave prepared to educate your individual tax clients and implement tax-savings ideas to serve their ever-evolving needs.

PREREQUISITE: Experience in individual tax planning

AUDIENCE: All tax practitioners in public accounting and or business and industry who need the latest information on tax changes affecting their individual clients

SOURCE: Surgent **LEVEL:** Update

Mastering Basis Issues for S Corporations, Partnerships & LLCs

DATE: 11/19/20 **TIME:** 1–4:30 p.m.
INSTRUCTOR: Edward A. Harter, CPA
LOCATION: Grand Wayne Center, Fort Wayne

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

OVERVIEW: The most difficult concepts to master when dealing with flow-through business entities are the basis and distribution concepts. Major errors 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 flowthrough business entity tax returns and need a thorough grasp of these significant issues

SOURCE: Surgent **LEVEL:** Intermediate

Multistate Tax Update

DATE: 9/23/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Pamela Davis-Vaughn, CPA
LOCATION: INCPAS Learning Center, Indianapolis

DATE: 9/24/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Pamela Davis-Vaughn, CPA
LOCATION: Indiana Wesleyan University's Merrillville Education & Conference Center, Merrillville

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

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 looking for additional forms of revenue. You can't afford to ignore recent changes in state and local tax. Even tax-savvy businesses and their advisors often neglect to consider the consequences of state and local taxes. Multistate taxation is more complex and demanding than ever before. In addition to having their own unique tax laws, states have been more focused on enforcement. Plan to attend this fast-paced course that covers developing topics in state taxation, ranging from individuals to pass-through entities to corporate taxpayers. It 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

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

DATE: 12/18/20 **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:** $384 | **NONMEMBER:** $543

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 course 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 accounting who want to expand the scope of services they provide to clients; CPAs in business and industry who want to understand their exposure to nexus issues

SOURCE: AICPA **LEVEL:** Intermediate

New Partnership & LLC (Form 1065) Tax Return Review & Case Study

DATE: 10/22/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: J. Patrick Garverick, CPA, CFP, MT
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

OVERVIEW: With the increasing complexity and ever-changing nature of tax laws and issues, today's CPA needs a partnership/LLC course focusing on the hottest tax topics and most frequently encountered issues. This case-driven course will deal with both partnership/LLC and partner/member developments addressing the most common yet complex Federal partnership/LLC issues and problems.

PREREQUISITE: Background in partnership and individual income tax law

AUDIENCE: Tax professionals in public accounting or business and industry seeking a case-driven income tax return course addressing the most common yet complex Federal partnership and LLC issues and problems

SOURCE: Phoenix Beach, LLC **LEVEL:** Intermediate

NOTE: Available as a Simulcast.

Preparing Individual Tax Returns for New Staff & Para-Professionals

DATE: 1/8/21 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Sali L. Sheafor, CPA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

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: Surgent **LEVEL:** Basic

Real Estate Tax Boot Camp

DATE: 10/28/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: John N. Sherrick, CPA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

OVERVIEW: This course is a "deep dive" into all things real estate tax related for the mid-level practitioner moving into this complex area. This course will deepen your understanding of the complex considerations and strategies individuals must navigate in acquiring, holding, managing, constructing and disposing of real estate. Learn how to navigate critical issues associated with the relevant returns and plan strategically for your company or clients. We will discuss in detail the impact the TCJA has had on the real estate industry.

PREREQUISITE: Some experience preparing tax returns involving real estate holdings

AUDIENCE: CPAs who advise clients or their company on issues related to the acquisition, holding, management and disposition of real estate

SOURCE: Surgent **LEVEL:** Intermediate

Reviewing Individual Tax Returns: What Are You Missing?

DATE: 12/15/20 **TIME:** 8:30 a.m.–Noon
INSTRUCTOR: Tom Prieto, CPA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

OVERVIEW: The sheer mass of Internal Revenue Code provisions affecting individual taxpayers presents a considerable challenge for CPA's and tax professionals. Combine that with the potential for input error when utilizing the array of income tax software available creates the potential for a multitude of errors that can occur on the final tax return forms. This course will address 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. 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

Reviewing Partnership Tax Returns: What Are You Missing?

DATE: 12/15/20 **TIME:** 1–4:30 p.m.
INSTRUCTOR: Tom Prieto, CPA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

OVERVIEW: The partnership section of the Internal Revenue Code is arguably one of the most difficult sections to comprehend. That complexity, and the reliability of tax software to properly handle it, can create many issues for you and your staff when processing you client's LLC and partnership tax returns. This course will address the common errors practitioners make on partnership 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 income, deductions, K-1 reporting, and more! This course follows a highly illustrative case study format to increase participant comprehension and retention.

PREREQUISITE: Basic knowledge of partnership income taxation

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

SOURCE: AICPA **LEVEL:** Intermediate

Reviewing S Corporation Tax Returns: What Are You Missing?

DATE: 12/16/20 **TIME:** 1–4:30 p.m.
INSTRUCTOR: Tom Prieto, CPA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

OVERVIEW: The complexity of S corporation tax law creates a formidable challenge to the tax practitioner for accurate compliance and reporting of their client's S corporation activities. This course will address the common errors practitioners make on S corporation 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 income, deductions, K-1 reporting, and more. This course follows a highly illustrative case study format to increase participant comprehension and retention.

PREREQUISITE: Basic knowledge of S corporation income taxation

AUDIENCE: CPAs working with clients requiring up-to-date expertise in S corporation taxation for the current tax season

SOURCE: AICPA **LEVEL:** Intermediate

New S Corporation (Form 1120S) Tax Return Review & Case Study

DATE: 10/21/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: J. Patrick Garverick, CPA, CFP, MT
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

OVERVIEW: With the increasing complexity and ever-changing nature of tax laws and issues, today's CPA needs an S corporation training focusing on the hottest tax topics and most frequently encountered issues. This case-driven course will deal with both S corporation and shareholder developments addressing the most common yet complex Federal S corporation issues and problems.

PREREQUISITE: Background in S corporation and individual income tax law

AUDIENCE: Tax professionals in public accounting or business and industry seeking a case-driven income tax return course addressing the most common yet complex Federal S corporation issues and problems

SOURCE: Phoenix Beach, LLC **LEVEL:** Intermediate

NOTE: Available as a Simulcast.

S Corporation Taxation: Advanced Issues

DATE: 11/18/20 **TIME:** 1–4:30 p.m.
INSTRUCTOR: Edward A. Harter, CPA
LOCATION: Century Center, South Bend

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

OVERVIEW: This course goes beyond the basics and addresses important practical issues that an experienced practitioner must know about S corporations.

PREREQUISITE: Experience in S corporation tax return preparation

AUDIENCE: CPAs whose practices include S corporations and their shareholders

SOURCE: Surgent **LEVEL:** Advanced

Section 199A: Applications & Challenges

DATE: 12/14/20 **TIME:** 8:30 a.m.–Noon
INSTRUCTOR: John N. Sherrick, CPA
LOCATION: Grand Wayne Center, Fort Wayne

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

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

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cannot afford to be uninformed on Section 199A. This program incorporates the experiences many tax practitioners had over the last tax season calculating and applying this deduction. This course will cover all relevant facets and nuances of the deduction, as well as implementation issues and lessons that will be useful in advising clients this year. This program will include all relevant IRS guidance.

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

AUDIENCE: Tax practitioners wanting to understand and apply the §199A deduction

SOURCE: Surgent **LEVEL:** Update

NOTE: *Qualifies for CFP.*

New Section 199A: Schedule K-1 Reporting by Relevant Passthrough Entities

DATE: 12/14/20 **TIME:** 1–4:30 p.m.
INSTRUCTOR: John N. Sherrick, CPA
LOCATION: Grand Wayne Center, Fort Wayne

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

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 program incorporates the experiences many tax practitioners had over the last tax season calculating and applying this deduction. This course will cover all relevant facets and nuances of the deduction, as well as implementation issues and lessons that will be useful in advising clients this year. This program will include all relevant IRS guidance.

PREREQUISITE: Basic understanding of the §199A deduction

AUDIENCE: Tax practitioners seeking better knowledge of the Schedule K-1 reporting requirements related to §199A

SOURCE: Surgent **LEVEL:** Intermediate

Securing a Comfortable Retirement in the Age of Spending

DATE: 10/19/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: William Murphy, CPA, CGMA, ABV, CFF, CVA, PFS
LOCATION: Grand Wayne Center, Fort Wayne

DATE: 11/9/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: William Murphy, CPA, CGMA, ABV, CFF, CVA, PFS
LOCATION: Indiana Wesleyan University's Merrillville Education & Conference Center, Merrillville

DATE: 12/4/20 **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:** $354 | **NONMEMBER:** $513

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, and CPAs looking for effective strategies for their own retirement

SOURCE: Surgent **LEVEL:** Intermediate

NOTE: *Qualifies for CFP.*

Social Security & Medicare: Maximizing Retirement Benefits

DATE: 12/16/20 **TIME:** 8:30 a.m.–Noon
INSTRUCTOR: Tom Prieto, CPA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

OVERVIEW: Our Social Security system provides retirement, disability, and survivor benefits to millions of Americans. The long-term future of Social Security and Medicare is uncertain, triggering concerns for many workers who are now paying into the system. Attend this course to learn about FICA, the Medicare tax and more. You will cover real-world situations and use the tools provided to advise your clients to make optimal decisions when it comes to Social Security and Medicare.

PREREQUISITE: Basic knowledge of Social Security and Medicare

AUDIENCE: CPAs, professional accountants and financial advisors

SOURCE: AICPA **LEVEL:** Intermediate

NOTE: Available as a Simulcast.

Social Security & Medicare: Planning for You & Your Clients

DATE: 11/19/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: William Murphy, CPA, CGMA, ABV, CFF, CVA, PFS
LOCATION: INCPAS Learning Center, Indianapolis

DATE: 11/23/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: William Murphy, CPA, CGMA, ABV, CFF, CVA, PFS
LOCATION: Grand Wayne Center, Fort Wayne

DATE: 12/11/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: William Murphy, CPA, CGMA, ABV, CFF, CVA, PFS
LOCATION: Tropicana Executive Conference Center, Evansville

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

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 both the background information on the Social Security system and 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 **LEVEL:** Basic

NOTE: *Qualifies for CFP.*

New Succession Planning for the Small Business Owner: Finding the Exit Ramp

DATE: 11/18/20 **TIME:** 8:30 a.m.–Noon
INSTRUCTOR: Edward A. Harter, CPA
LOCATION: Century Center, South Bend

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

OVERVIEW: The life cycle of the small business can be summed up in three segments: starting the business, operating the business and getting out of the business. This course focuses on getting out of the business. The most elusive element of owning a small business can be finding the proper exit strategy. This course is designed to provide the business consulting practitioner with tools and concepts to advise the small business owner and assist them in developing the right exit strategy. The course covers exit strategies related to third-party sales and succession planning within a family.

PREREQUISITE: Basic understanding of business entity types and taxation of sales of businesses

AUDIENCE: Practitioners with small business clients that will eventually sell that business to third parties or family members that need advice regarding exiting the business

SOURCE: Surgent **LEVEL:** Intermediate

New Tax Cuts & Jobs Act and Farm Taxation

DATE: 7/22/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Paul Neiffer, CPA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

OVERVIEW: This session will focus on the TCJA and its effect on taxation for agricultural producers and processors. This seminar is presented by CPAs and agribusiness professionals active in public accounting. Our instructors have many years of experience in farm taxation as well as experience in agricultural processing and distribution; they 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

NOTE: Available as a Simulcast.

The Best Federal Tax Update Course

DATE: 12/8/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Michael A. Frost, CPA
LOCATION: Monroe Convention Center, Bloomington

DATE: 12/15/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: John N. Sherrick, CPA
LOCATION: Indiana Wesleyan University's Merrillville Education & Conference Center, Merrillville

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

OVERVIEW: We now have the benefit of going through a couple tax seasons since the issuance of the Tax Cuts & Jobs Act. In this course, you will learn the important aspects of tax reform as well as major trends on the horizon with a view toward planning post-reform. Content will be updated as both formal and informal guidance is issued.

PREREQUISITE: Experience with individual and business clients

AUDIENCE: CPAs needing to know the latest tax law changes in all areas of practice

SOURCE: Surgent **LEVEL:** Update

NOTE: *Qualifies for CFP.*

The Essentials Multistate Tax Update

DATE: 11/16/20 **TIME:** 8:30 a.m.–Noon
INSTRUCTOR: William Murphy, CPA, CGMA, ABV, CFF, CVA, PFS
LOCATION: Century Center, South Bend

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

OVERVIEW: With the largest overhaul of the Federal income tax code in 30 years and the repeal of the physical presence nexus standards for sales tax in the Wayfair case, the states are working fast and furious to overhaul their tax laws. As some states scramble to fund their budgets, they continue looking 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 wanting 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: 11/19/20 **TIME:** 8:30 a.m.–Noon
INSTRUCTOR: Edward A. Harter, CPA
LOCATION: Grand Wayne Center, Fort Wayne

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

OVERVIEW: Partnerships and LLCs involve unique problems that require careful attention. This course covers selected critical

=Case Study =Live Simulcast

tax issues practitioners need to know when working with partnerships and limited liability companies, with a focus on planning opportunities and pitfalls.

PREREQUISITE: Basic course in partnerships or experience in tax compliance or planning for partnerships and LLCs

AUDIENCE: CPAs wanting a more in-depth understanding of LLC and partnership tax law

SOURCE: Surgent **LEVEL:** Intermediate

TECHNOLOGY

New 2020 Technology Trends Update

DATE: 10/28/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: John H. Higgins, CPA, CITP
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

OVERVIEW: One of the biggest professional challenges for CPAs, CFOs, controllers and auditors today is keeping up with the rapid pace of information technology. This course will get you up to date on all the new and emerging technologies that impact the fields of accounting, finance, auditing and business in general. We will cover the full landscape, from the ground level of personal computer technology to the 5,000-foot level of emerging mega-technologies such as blockchain, artificial intelligence, data analytics, robotic process automation 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 the topics related to information technology.

AUDIENCE: Anyone in an organization who would like to know more on new and emerging technologies

SOURCE: CPA Crossings **LEVEL:** Basic

NOTE: This course is part of the Becoming a Technology Leader micro-credential program. For details about this NEW opportunity and how to earn a digital badge see page 67.

New Advanced Excel Data Magic: Managing, Analyzing & Reporting

DATE: 9/28/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Lawrence "Mac" McClelland, J.D., MBA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

OVERVIEW: If you are an experienced Excel user seeking to elevate your skills, join the K2 team for Advanced Excel. In this laptop-friendly program, you will learn critical advanced Excel skills in six key areas: collaborating with other users and securing workbooks; using tables to analyze and report data; integrating and manipulating data from external sources; creating and auditing complex formulas; advanced data analysis tools; and visualization techniques to analyze and communicate information.

PREREQUISITE: Experienced Excel user

AUDIENCE: Business professionals who work with Excel 2007 or newer

SOURCE: K2 Enterprises **LEVEL:** Advanced

NOTE: This course is part of the Becoming a Firm Leader micro-credential program. For details about this NEW opportunity and how to earn a digital badge see page 25. *Qualifies for 8 hours of A&A.*

Business Intelligence, Featuring Microsoft's Power BI Tools

DATE: 10/27/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Lawrence "Mac" McClelland, J.D., MBA
LOCATION: Century Center, South Bend

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

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 unthinkable until recently.

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

AUDIENCE: Business professionals seeking to develop and implement BI solutions

SOURCE: K2 Enterprises **LEVEL:** Advanced

NOTE: *Qualifies for 8 hours of A&A.*

New Case Studies in Fraud & Technology Controls

DATE: 9/29/20 **TIME:** 8:30 a.m.–Noon
INSTRUCTOR: Lawrence "Mac" McClelland, J.D., MBA.
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

OVERVIEW: Fraud continues to plague businesses at epidemic levels and technology control failures are a large reason fraud occurs. Using a case study approach, in this course you will learn about the pervasiveness of fraud, the control failures that contribute to fraud, and what you can do to mitigate fraud risk.

PREREQUISITE: Fundamental understanding of internal controls

=Case Study =Live Simulcast

AUDIENCE: CPAs and other accounting, auditing and business professionals seeking to reduce fraud risk

SOURCE: K2 Enterprises **LEVEL:** Intermediate

NOTE: *Qualifies for 4 hours of A&A.*

Cybersecurity Conference

DATE: 10/29/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Various
LOCATION: Ritz Charles, Carmel

CPE: 8 | **MEMBER:** $364 | **NONMEMBER:** $514

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 latest trends in fraud, forensics, cybersecurity and emerging technology

SOURCE: Indiana CPA Society **LEVEL:** Intermediate

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

Data Analytics & Dashboards

DATE: 8/17–18/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Bryan L. Smith, CPA, CISA, CITP
LOCATION: INCPAS Learning Center, Indianapolis

DATE: 11/16–17/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Bryan L. Smith, CPA, CISA, CITP
LOCATION: INCPAS Learning Center, Indianapolis
NOTE: This course is part of the Becoming a Technology Leader micro-credential program. For details about this NEW opportunity and how to earn a digtial badge see page 67.

CPE: 16 | **MEMBER:** $544 | **NONMEMBER:** $789

OVERVIEW: Two of the most important skills very CFO, CPA or auditor should develop are applying data analytics and creating visual dashboard reporting models. This 2-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. We will provide practice materials for you to follow along with the instructor.

AUDIENCE: Anyone in an organization either considering or currently deploying Office 365

SOURCE: CPA Crossings **LEVEL:** Intermediate

Emerging Technologies, Including Blockchain & Cryptocurrencies

DATE: 10/29/20 **TIME:** 8:30 a.m.–Noon
INSTRUCTOR: Lawrence "Mac" McClelland, J.D., MBA
LOCATION: Grand Wayne Center, Fort Wayne

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

OVERVIEW: Unlike technologies we use every day, many of the currently emerging technologies have the potential to change how we work in the future. This course will cover an assortment of technologies which are nearing mainstream adoption and help you understand what they do, how they work, as well as some of the potential risks and rewards they offer potential users.

PREREQUISITE: Basic knowledge of technology strategy and standards

AUDIENCE: Practitioners and business executives who need to know more about emerging technologies

SOURCE: K2 Enterprises **LEVEL:** Intermediate

New Ethics & Technology

DATE: 9/29/20 **TIME:** 1–4:30 p.m.
INSTRUCTOR: Lawrence "Mac" McClelland, J.D., MBA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

OVERVIEW: With the explosion of technology in the workplace that has occurred over the past 30 years, a fair question to ask is "what are the ethical considerations and impacts related to this technology?" Practical technology issues such as data privacy and security no doubt carry ethical considerations, but technology also affects the ethics associated with issues such as work-life balance, the digital divide, training needs, copyrights and fraud.

AUDIENCE: CPAs who desire a deeper understanding of key ethical issues facing the profession today

SOURCE: K2 Enterprises **LEVEL:** Basic

NOTE: This course is part of the Becoming a Technology Leader micro-credential program. For details about this NEW opportunity and how to earn a digital badge see page 67.
Qualifies for 4 hours of Ethics.

New Excel Charting & Visualizations

DATE: 10/30/20 **TIME:** 8:30 a.m.–Noon
INSTRUCTOR: Lawrence "Mac" McClelland, J.D., MBA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

OVERVIEW: Charts and graphs are nothing new. However, many professionals struggle with building effective visualizations. If that statement describes you, take part in this course to improve your skills when building charts and other visualizations in Excel. As a result of doing so, you will be able to create visualizations that will enhance your communication skills.

PREREQUISITE: Fundamental understanding of creating charts in Microsoft Office applications

AUDIENCE: CPAs and other accounting, financial and business professionals

SOURCE: K2 Enterprises **LEVEL:** Intermediate

NOTE: This course is part of the Becoming a Technology Leader micro-credential program. For details about this NEW opportunity and how to earn a digital badge see page 67.

Internal & External Fraud: Understanding It & Working to Control It

DATE: 11/11/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Karl Egnatoff, CPA, CITP
LOCATION: Grand Wayne Center, Fort Wayne

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

OVERVIEW: All organizations, regardless of size, must be aware of the risks associated with intentional fraudulent acts. Fraud activities can be executed from within an organization, by parties outside an entity, or by both. One of the primary ways to thwart fraud is to understand how and why it occurs. In this course, we will delve into the reasons that both internal and external intentional defalcations take place. The materials discusses how difficult it can be to see some of the motives driving those that undertake fraud. We then discuss measures organizations can implement to help stop fraud activities and add security to the entire enterprise.

PREREQUISITE: Basic understanding of internal control concepts

AUDIENCE: Accounting and other business professionals with a need to understand ways to thwart fraud

SOURCE: Phoenix Beach, LLC **LEVEL:** Intermediate

New Remote Access to Small Businesses

DATE: 10/30/20 **TIME:** 1–4:30 p.m.
INSTRUCTOR: Lawrence "Mac" McClelland, J.D., MBA
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

OVERVIEW: Small businesses have unique and specific technology needs, including those around remote access. Whether team members need remote access to desktops, data, voice services, instant messaging or Cloud-based services, sometimes the list of available options can be overwhelming and we will cover them in this course.

PREREQUISITE: Fundamental understanding of personal computer operations

AUDIENCE: CPAs and other accounting, financial and business professionals who want to work efficiently and securely from remote locations

SOURCE: K2 Enterprises **LEVEL:** Intermediate

NOTE: This course is part of the Becoming a Technology Leader micro-credential program. For details about this NEW opportunity and how to earn a digital badge see page 67.

Technology for CPAs: Don't Get Left Behind

DATE: 10/28/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Lawrence "Mac" McClelland, J.D., MBA
LOCATION: Century Center, South Bend

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

OVERVIEW: In this fast-paced, update-style course, you will survey today's IT environment, learning about computer hardware, software (including Office 2016), 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 they present. 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.

AUDIENCE: Accounting and financial professionals seeking to improve their knowledge of technology and the return on their investment in technology

SOURCE: K2 Enterprises **LEVEL:** Basic

Testing & Auditing Excel Workbooks

DATE: 10/29/20 **TIME:** 1–4:30 p.m.
INSTRUCTOR: Lawrence "Mac" McClelland, J.D., MBA
LOCATION: Grand Wayne Center, Fort Wayne

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

OVERVIEW: Excel errors continue to plague organizations of all sizes and as spreadsheets become ever-more common, and the effects of these errors will continue to impact 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.

PREREQUISITE: Fundamental understanding of Microsoft Excel 2010 and newer

AUDIENCE: Business professionals seeking to reduce errors and improve accuracy and efficiency when working with Excel

SOURCE: K2 Enterprises **LEVEL:** Intermediate

New Top 10 Technology Risks & Trends Every CPA Should Know

DATE: 9/30/20 **TIME:** 1–4:30 p.m.
INSTRUCTOR: Thomas E. Newell, CPA
LOCATION: Indiana Wesleyan University's Merrillville Education & Conference Center, Merrillville

CPE: 4 | **MEMBER:** $200 | **NONMEMBER:** $290

OVERVIEW: The use of technology by businesses of all types, including CPA firms, has exploded in recent years, creating the need for proactive and robust cybersecurity risk management practices. This course will explore the most common technology risks and trends every CPA should know to better advise and serve clients. In addition, this course explores audit procedures that can be performed to address the risk in this area.

AUDIENCE: CPAs in public accounting or business and industry with accounting, financial reporting or attest responsibilities

SOURCE: Surgent **LEVEL:** Basic

Transform Your Organization with Office 365 & Teams

DATE: 9/16/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: John H. Higgins, CPA, CITP
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

OVERVIEW: We are now officially in the era of digital communications, collaboration and knowledge sharing. Is your organization prepared to embrace it? This course will show you how to do just that by strategically deploying the Microsoft Office 365 ecosystem of applications with the Teams app at the core. Office 365 provides the tools to digitally transform your workflows to increase efficiency, and also provides the ability for your team to work from anywhere, at any time, on any device. We will review how you can leverage specific Office 365 apps to foster online communication, collaboration and knowledge sharing among your team members, as well as externally with clients, customers and service providers. Gain a solid understanding of how to tap into Office 365 to take your business digital.

AUDIENCE: Anyone considering or currently deploying Office 365

SOURCE: CPA Crossings **LEVEL:** Basic

New Using Internal Controls to Strengthen Security, Efficiency & Employee Conduct

DATE: 11/12/20 **TIME:** 8:30 a.m.–4:30 p.m.
INSTRUCTOR: Karl Egnatoff, CPA, CITP
LOCATION: INCPAS Learning Center, Indianapolis

CPE: 8 | **MEMBER:** $354 | **NONMEMBER:** $513

OVERVIEW: Many leaders in business organizations of all sizes view the system of Internal Control primarily as a protective security measure. This is a great first step, however a well designed internal controls system can and will drive all entity objectives. This session uses information gathered from years of creating internal control systems, as well as concepts from well-respected authoritative pronouncements and frameworks to illustrate the power of a strong and well-supported control system–plus the actions that can help establish such a system. This material is becoming more and more beneficial as companies strive to address many new business challenges such as evolving markets, the rapid rate of change in the business world and the notable increase in governmental and industry-based regulation. Those that work with internal controls and regularly consider ways to improve the functionality of internal control systems should strongly consider this session.

PREREQUISITE: Basic understanding of internal control concepts

AUDIENCE: Accounting and other business professionals wanting to know more about controls that drive all entity objectives

SOURCE: Phoenix Beach, LLC **LEVEL:** Intermediate

New INCPAS Micro-Credential Program

IN CPA SOCIETY

Becoming a Technology Leader

It's hard to determine what technology is a fad vs. what's here to stay. But regardless of whether or not you're using tools like blockchain or AI, you need to at least understand them and the opportunities they present—we can help with that. Commit to better understanding and implementing technology with our customized CPE package and save at least $200 on average.

Level I

This program is designed for CPAs who are interested in becoming tech savvy but don't know where to start. These courses will give you an overview of basic trends affecting the profession and explain how the technologies can benefit your firm.

August 5
Webinar* In the Know: Developing a Digital Mindset *(1 hour CPE)
Find out which technologies will require new and continuous learning for your team to keep up with the rapid pace of change.

August 19
Breakfast & Learn* What Do CPAs Really Need to Know About Cybersecurity? *(1 hour CPE)
Know the challenges of protecting against increasing cybercrime, the steps regulators are taking to protect consumer data and companies, and what it means for the CPA profession.

September 29
Ethics & Technology *(4 hours CPE)*
Address the ethics associated with technology issues such as work-life balance, the digital divide, training needs, copyrights and fraud.

October 28
2020 Technology Trends Update *(8 hours CPE)*
Understand the emerging technologies that will impact your firm, finance, auditing and business in general.

October 30
Remote Access to Small Businesses *(4 hours CPE)*
Review your options for remote access to desktops, data, voice services, instant messaging and Cloud-based services.

October 30
Excel Charting & Visualizations *(4 hours CPE)*
Learn how to create advanced charts that are interactive, dynamic, and aesthetically pleasing, as well as how to ensure your readers and audience understand the data you are presenting.

Ongoing
CPA Excellence: Communication in Organizations *(2-hour CPE waiver)*
Determine how to tailor your communications, ask the right questions, have practical strategies for conducting one-on-one meetings, and ways to work with team members who have poor communications skills.

Level II

This program is designed for CPAs who want to make efficiencies in their firm but aren't sure which tech is the best fit. You'll not only learn which technologies are right for your firm's needs, but also how to get your team on board.

September 21
Lunch & Learn* Artificial Intelligence & Machine Learning: Know Before You "Go" *(1 hour CPE)
Discuss AI & ML solutions for CPAs, how they will impact your people, processes and performance strategies, and whether your organization is ready to use them.

October 21
Webinar* In the Know: Robotics Process Automation—There's a BOT for That? *(1 hour CPE)
Learn what RPA is, and how it can empower you to free up your team for higher-level thinking and tasks.

November 16–17
Data Analytics & Dashboards *(16 hours CPE)*
Ramp up your data analytics and visual dashboard reporting models using Excel's Power BI, Power Query and Power BI Services.

December 17
Blockchain Essentials: Impact on Modern Accounting *(4 hours CPE)*
Find out the history behind this technology and its major components, how it challenges the accounting status quo, and ways to handle issues surrounding auditing and assurance in the blockchain era.

Ongoing
CPA Excellence: Leading for Action *(2-hour CPE waiver)*
Compare the views of leaders and followers, explore how feedback and self-reflection can improve your performance, and learn more about your own leadership qualities.

Program Benefits & Details

- 24 hours CPE
- "Technology Leader" Digital Badge upon completion

DISCOUNTED PACKAGE PRICE: $605

▶ Register at incpas.org/MicroCredential.

TECHNOLOGY

=Case Study =Live Simulcast

EDUCATION REQUIREMENTS

	INDIANA BOARD OF ACCOUNTANCY	AICPA	GAO YELLOW BOOK	INCPAS
CPAS IN PUBLIC PRACTICE	120 hrs/3 yrs minimum 20 hrs/yr	120 hrs/3 yrs	80 hrs/2 yrs minimum 20 hrs/yr	No CPE requirements
CPAS IN INDUSTRY	120 hrs/3 yrs minimum 20 hrs/yr	120 hrs/3 yrs	N/A	No CPE requirements
A&A REQUIREMENTS	10% (or 12 hrs.) of the total required hours/3 yrs	N/A	N/A	N/A
ETHICS	4 hrs/3 yrs*	N/A	N/A	N/A
SELF-STUDY RESTRICTIONS	No more than 50% (60 hrs) can be attained through self-study	N/A	N/A	N/A
REPORTING CYCLE	1/1/2018 to 12/31/2020	Cycle begins the calendar year after joining the AICPA	Year end**	N/A

NEED MORE INFORMATION?

Indiana Board of Accountancy
Visit in.gov/pla/accountancy.htm or contact the Indiana Board of Accountancy at (317) 234-8800 or pla14@pla.in.gov.

Yellow Book
Visit gao.gov/yellowbook or contact the Office of Public Affairs at (202) 512-4800.

AICPA
Visit aicpa.org or call 1-888-777-7077.

See page 71 for more information.

** 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

Contact IPLA to confirm special requirements for A&A and Ethics.

Authority: IC 25-2.1-2-15 Affected: IC 25-2.1-4-5
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:

DATE OF ISSUANCE OF CERTIFICATE	REQUIRED HOURS FOR THREE YEAR REPORTING CYCLE	REQUIRED MINIMUM HOURS FOR THE YEAR OF ISSUANCE OR REACTIVATION
01/01–03/31 first year of the reporting period	120	20
04/01–06/30 first year of the reporting period	110	15
07/01–09/30 first year of the reporting period	100	10
10/01–12/31 first year of the reporting period	90	0
01/01–03/31 second year of the reporting period	80	20
04/01–06/30 second year of the reporting period	70	15
07/01–09/30 second year of the reporting period	60	10
10/01–12/31 second year of the reporting period	50	0
01/01–03/31 third year of the reporting period	40	N/A
04/01–06/30 third year of the reporting period	30	N/A
07/01–09/30 third year of the reporting period	20	N/A
10/01–12/31 third year of the reporting period	0	0

** 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

HOURS	MEMBER PRICE	NONMEMBER PRICE
16-hour courses	$544	$789
8-hour courses	$354	$513
4-hour courses	$200	$290
4-hour A&A Update and Professional Ethics Update courses	$124	$199
2-hour courses	$110	$160

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.

Members may purchase a FlexPass package for a discount on INCPAS courses. FlexPass applies to all INCPAS live seminars, conferences, simulcasts, webinars, breakfast and lunch and learns, and CPA Center of Excellence® Online Interactive Courses offered through January 31, 2021. **FlexPass purchasers may transfer his or her registration to another live seminar and conference without a penalty. FlexPass excludes any free CPE opportunities and self study. Must be purchased by December 31, 2020.**

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.

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.

POLICIES & PROCEDURES, CONTINUED

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 event due to inclement weather, they must notify the Society the day of the scheduled event. Cancellation will not be accepted 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, 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.

IMPORTANT INDIANA STATUTES, CHANGES

Excerpt from HEA 1148 effective June 1, 2020

SECTION 1. [EFFECTIVE JUNE 1, 2020]

(e) Not later than sixty (60) days immediately following the taking of the first of four (4) examination sections, a candidate who applied to sit for the examination under subsection (c) shall submit to the board, or the board's designee, all final official transcripts and applicable supporting documentation indicating that the candidate has met all of the education requirements set forth in 872 IAC 1-1-6.1 through 872 IAC 1-1-6.6.

(m) The board shall adopt rules under IC 4-22-2 necessary to implement this SECTION.

(n) This SECTION expires July 1, 2021.

SECTION 2. [EFFECTIVE JUNE 1, 2020]

(a) 872 IAC 1-1-9.5, 872 IAC 1-1-14, and 872 IAC 1-1-19 are void. The publisher of the Indiana Administrative Code and Indiana Register shall removethese sections from the Indiana Administrative Code.

(b) This SECTION expires July 1, 2021.

SECTION 3.

An emergency is declared for this act.

REFERENCE

IN CPA SOCIETY Transforming Business

Membership Application 2020–21

First MI Last

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

_____**First-Time Applicants—PAY ONLY $150**

Check here and choose a member type below:

○ Resident
○ Non-Resident
○ Government or Education
○ Associate
○ CPA Candidate
○ Affiliate *(specialty below)*
☐ Business Partner
☐ Firm Administrator
☐ Non-CPA Accounting Professional
☐ Paraprofessional
○ Senior

_____**Resident — $435**
Holder of CPA license, lives or works in Indiana

_____**Non-Resident — $295**
Holder of CPA license, does not live or work in Indiana

_____**Government — $335**
Holder of CPA license, works in a government position

_____**Education — $335**
Holder of CPA license, works in a education position

_____**Associate — $340**
Does not hold an active CPA license, but successfully completed CPA Exam

_____**CPA Candidate — $190**
Pursuing successful completion of the CPA Exam

_____**Affiliate — $340**
Working with the CPA profession and not eligible for other categories of membership

_____Business Professional

_____Firm Administrator

_____Non-CPA Accounting Professional

_____Paraprofessional

_____**Senior — $190**
Must be retired

Students — Call the Indiana CPA Society for a free student membership application or visit incpas.org

_____**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

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(effective July 1, 2020)

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(effective July 1, 2019–June 30, 2020)

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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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Serves as the guiding coalition of Society and public members to increasing ethnic diversity within the Society and the CPA profession in Indiana.

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Promotes the ethical practice of the CPA profession through education and enforcement activities.

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(effective July 1, 2019–June 30, 2020)

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Monitors issues and trends in the profession that could create opportunity for innovation for members or INCPAS.

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(effective July 1, 2019–June 30, 2020)

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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) 613-1840

Counsel ....(317) 613-1867

Criminal Investigation Division.................... (317) 226-7757

Small Business/Self Employed Operating Division
Collections Division..................................(317) 613-1654

Liaison and Disclosure, Governmental Liaison ....(317) 613-1764

Stakeholder Liaison Field – Stakeholder Liaison.......... (513) 975-6429

Examination Division..................................(317) 613-1777

Specialty Programs Employment ....(616) 235-1555

Tax Exempt/Government Entities Organization ....(317) 613-1698

Local Taxpayer Advocate ....(877) 777-4778

Tax Payer Advocate Office ....(317) 613-1792

Treasury Inspector General for Tax Administration.....(317) 226-0479

IRS Phone Numbers Outside of Indianapolis

Bloomington.......................................(812) 337-7600

Columbus..(812) 379-7400

Evansville..(812) 474-4800

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)

Tax Practitioners Dedicated Fax
(317) 972-3241

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 credit, 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

IPLA Director
Rae Harmon
(317) 234-8800

IPLA Compliance Officer
Rachelle Canon-Mason
(317) 234-3025
rcannonmason@pla.in.gov
You may contact her anonymously.

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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Jennifer Briggs, CAE
INCPAS President and CEO

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- CAMICO's depth of services for CPA firms is unmatched by other insurance programs.
- Policyholders can call CAMICO as often as needed and consult with in-house experts on loss prevention, tax, and accounting and auditing issues — all at no additional cost.
- CAMICO policyholders have unlimited access to proactive loss prevention and potential claims assistance.

These are just a few of the reasons why INCPAS selected CAMICO as the Society's sponsored provider of Professional Liability Insurance.

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