



LIVE WEBINAR CATALOG

MAY 2024 – APRIL 2025

OUR 2024-2025 COURSE CATALOG OFFERS 447 UNIQUE
WEBINARS, FROM 71 NATIONALLY RECOGNIZED EXPERTS IN
THEIR FIELD

Accounting Courses



Ref	Course Title	Instructor	CPE
1	2024 Accounting & Auditing Update for Small Businesses	Melisa F. Galasso	4
2	2024 Annual Update for Accountants & Auditors	Melisa F. Galasso	8
3	2024 PCAOB and SEC Update	Jennifer F. Louis	2
4	Accounting for and Auditing Cryptocurrency & Digital Assets	Jennifer F. Louis	2
5	Accounting in the Wake of COVID-19	Chris Harper	2
6	Activity-Based Costing: Is it Right for Your Organization?	Chris Harper	2
7	Advanced Budgeting - Balance Sheet and Cash Flow Projections	John L. Daly	1
8	An Exhaustive Look At Fraud and Ways To Control It	Karl Egnatoff	8
9	Analyzing Financial Statements	Keely Gohl	2
10	ASC 842, Leases: Implementation Issues and Lessons Learned	Allison M. Henry	2
11	Auditing, SSARS and Attest Update	Allison M. Henry	2
12	Becoming a Fraud Investigator	Tracy L. Coenen	2
13	Building Security and Efficiency With Internal Control	Karl Egnatoff	8
14	CFO Series: Measuring and Reporting - ESG and Sustainability	Don Minges	2
15	Combating Internal Fraud	Karl Egnatoff	2
16	Common Financial Statement Disclosures	Jennifer F. Louis	2
17	Communicating Financial Information to Non-Accountants	John L. Daly	2
18	Compilation, Preparation and Review Basics and Peer Reviews	Allison M. Henry	2
19	Comprehensive Accounting and Financial Reporting Update	Allison M. Henry	4
20	Controls to Secure the Growing Digital Footprint	Karl Egnatoff	4
21	Coping With the Growth of Online Fraud	Karl Egnatoff	4
22	Defining Where and Why Internal Controls are Needed	Karl Egnatoff	2
23	Exploring the New Lease Accounting Standard	Chris Harper	2
24	Financial & Tax Accounting for S Corporations & Partnerships	Steven C. Dilley	8
25	Financial Accounting for Related Party Transactions	Steven C. Dilley	2
26	Fixing Your Chart of Accounts	John L. Daly	1
27	Forensic Accounting: Court Approved Methods of Proof	Robert Nordlander	4
28	Forensic Accounting: When The Office Is A Crime Scene	Robert Nordlander	4
29	Forgotten Managerial Accounting Tools for CPAs	Chris Harper	2
30	Fraud Busters: Controls to Prevent & Detect Fraud	Keely Gohl	2

Accounting Courses



Ref	Course Title	Instructor	CPE
31	GAAP Alternatives: The Perfect Storm of Accounting Updates	Chris Harper	1
32	How AI Is Automating Internal Control	Karl Egnatoff	4
33	How Changes in Business Methods Affects Internal Control	Karl Egnatoff	8
34	How Fraud Can Affect Smaller Organizations	Karl Egnatoff	4
35	How to Double Your Firm's Revenue Through CFO and Advisory	Adam Lean	1
36	How to Start a CFO Service	Adam Lean	1
37	How-To Guide to Fraud Investigations	Tracy L. Coenen	2
38	Implementation Challenges with the New FASB Lease Standard	Allison M. Henry	2
39	Implementing and Maintaining an Internal Control System	Karl Egnatoff	8
40	Internal Control Changes for Remote Workers	Karl Egnatoff	2
41	Introduction to the Property & Casualty Insurance Industry	Keely Gohl	1
42	Keeping Up with the FASB	Chris Harper	2
43	Online Fraud Aimed at Individuals That Can Affect a Company	Karl Egnatoff	2
44	Operations Level Internal Control	Karl Egnatoff	4
45	Peer Reviews of SSARS Engagements	Allison M. Henry	2
46	QuickBooks - Know the Right Version for Your Client	Dawn W. Brolin	2
47	QuickBooks DESKTOP- Monthly Closeouts and Year-End Cleanups	Dawn W. Brolin	2
48	QuickBooks ONLINE - Monthly Closeouts and Year-End Cleanups	Dawn W. Brolin	2
49	Reporting the Results of a Fraud Investigation	Tracy L. Coenen	2
50	Shorten Month-End: Closing Best Practices	John L. Daly	4
51	Start a Forensic Accounting Practice with Confidence	Robert Nordlander	4
52	Starting a Fraud Investigation	Tracy L. Coenen	2
53	Steps to Stop External Fraud	Karl Egnatoff	2
54	Understanding and Creating an Internal Control System	Karl Egnatoff	8
55	Understanding Internal Control Constructs	Karl Egnatoff	4
56	Walter Haig's Business Financial Health Checkup	Walter J. Haig	8
57	Walter Haig's GAAP for SMEs, Tax & Cash Frameworks Update	Walter J. Haig	8
58	Walter Haig's Personal Financial Health Checkup	Walter J. Haig	8
59	Walter Haig's SSARS Prep, Comp and Review Update	Walter J. Haig	8
60	What You Can Learn From the Statement of Cash Flows	Chris Harper	2

Accounting Courses



Ref	Course Title	Instructor	CPE
61	What's Going on at the FASB (2024)	Melisa F. Galasso	4

Accounting (Gov) Courses



Ref	Course Title	Instructor	CPE
1	2024 Annual Update for Governmental Accountants & Auditors	Melisa F. Galasso	8
2	2024 Annual Update for Governments & Not-for-Profits	Melisa F. Galasso	8
3	2024 Annual Update for Not-for-Profit Accountants & Auditors	Melisa F. Galasso	8
4	2024 Governmental GAAP Update	Melisa F. Galasso	2
5	2024 Not-for-Profit GAAP Update	Melisa F. Galasso	2
6	Exchange Transactions vs. Contribution for NPOs	Daniel W. Bradley	2
7	Introduction to Yellow Book: 8-Credit Boot Camp	Melisa F. Galasso	8
8	Vexing Issues Facing Not-for-Profit Accountants	Daniel W. Bradley	2
9	What's Changing in A&A for Governmental Entities (2024)	Melisa F. Galasso	4
10	What's Going on at the GASB (2024)	Melisa F. Galasso	4

Auditing Courses



Ref	Course Title	Instructor	CPE
1	AICPA Audit Quality Update and Quality Management Standards	Allison M. Henry	2
2	Analytical Procedures: Practical Applications and Standards	Chris Harper	2
3	Audit 102: Professional Skepticism - Finding Fraud and Error	Jennifer F. Louis	2
4	Audit 103: Adapting to the Engagement - Complying with SSARS	Jennifer F. Louis	2
5	Audit 104: Audit Documentation - Workpapers To Pass Review	Jennifer F. Louis	2
6	Audit 105: The Audit Risk Model - Foundational Principles	Jennifer F. Louis	2
7	Audit 106: Internal Control Fundamentals - Evaluating Design	Jennifer F. Louis	2
8	Audit 107: Auditing Cash - Applying Basic Audit Skills	Jennifer F. Louis	2
9	Audit 108: Auditing PP&E and Leases - Common Risks	Jennifer F. Louis	2
10	Audit 201: Fraud Risk - Minimum Audit Requirements	Jennifer F. Louis	2
11	Audit 202: Applying Audit Risk to the Detailed Audit Plan	Jennifer F. Louis	2
12	Audit 203: Auditing Accounts Receivable - Common Risks	Jennifer F. Louis	2
13	Audit 204: Auditing Basic Inventory - Focus on Observations	Jennifer F. Louis	2
14	Audit 205: Auditing Liabilities and Long-Term Debt Risks	Jennifer F. Louis	2
15	Audit 206: Analytical Procedures - Audit Fundamentals	Jennifer F. Louis	2
16	Audit 207: Sampling - Avoiding Common Mistakes on Audits	Jennifer F. Louis	2
17	Audit 208: Audit Reporting Basics - Report Issuance Process	Jennifer F. Louis	2
18	Audit 302: Planning Effective and Efficient Audits	Jennifer F. Louis	2
19	Audit 303: Internal Controls - Required Communications	Jennifer F. Louis	2
20	Audit 304: Auditing Basic Investments - Common Risks	Jennifer F. Louis	2
21	Audit 305: Strengthening Substantive Analytic Procedures	Jennifer F. Louis	2
22	Audit 306: Reviewing Workpapers - A Role in Quality Control	Jennifer F. Louis	2
23	Audit 308: Audit Reporting and General Audit Procedures	Jennifer F. Louis	2
24	Audit 402: Audit Quality Control - Avoid Peer Review Issues	Jennifer F. Louis	2
25	Audit 403: Fraud Trends - Applying Real-Life Lessons	Jennifer F. Louis	2
26	Audit 404: Maximizing Analytic Procedure Evidence on Audits	Jennifer F. Louis	2
27	Audit 405: Designing Internal Controls for Smaller Entities	Jennifer F. Louis	2
28	Audit 406: Auditing Revenue Recognition - Common Risks	Jennifer F. Louis	2
29	Audit 407: Auditing Contingencies and Going Concern	Jennifer F. Louis	2
30	Auditing Impairment of Long-Lived Assets	Jennifer F. Louis	2

Auditing Courses



Ref	Course Title	Instructor	CPE
31	CFO Series: Aren't We All Auditors All the Time?	Don Minges	2
32	CFO Series: Audits Begin with The Right Questions: Listen!	Robert Mims	2
33	CFO Series: Tactics to Reduce Risk: 3rd Strategy to Help ROI	Brian Maturi	2
34	Common Deficiencies in EBP Audits	Melissa Critcher	2
35	Compilations, Reviews, and Audits: How They Differ	Chris Harper	1
36	Data Analytics: Practical Insights for Today's Accountant	Chris Harper	2
37	Deep Dive Into Common Auditing Deficiencies	Melisa F. Galasso	4
38	Electronic Audit Evidence in Employee Benefit Plans	Melissa Critcher	2
39	Exploring Internal Controls That Could Have Prevented Frauds	Chris Harper	2
40	Finding Errors in Excel Spreadsheets	Bryan L. Smith	2
41	Fraud, Controls & Ethics: Best Practices & Case Studies	Chris Harper	4
42	Grading Your Auditors - Are You Getting the Most Value?	Jennifer F. Louis	2
43	Hold Your Horses! How Landmark Fraud May Have Been Avoided	Chris Harper	2
44	How SAS Nos. 134-145 Improve Risk-Based Audits	Jennifer F. Louis	4
45	Improve Spreadsheets by Building Controls in Excel	Bryan L. Smith	2
46	Internal Control - Testing for Operating Effectiveness	Jennifer F. Louis	2
47	NFP Reporting and Presentation	Adelina Burke	2
48	Risk Assessment for Small Business Audits	Michael Ramos	2
49	Risk Assessment Under SAS No. 145: The Key to Audit Quality?	Heather Trower	2
50	SAS 134: Exploring the New Audit Report	Chris Harper	1
51	The Impact of ESG Matters on Financial Reporting and Audits	Jennifer F. Louis	2
52	The New Psychology of Fraud with Dr. Toby Groves	Toby Groves	2
53	The Role of Internal Control in the Risk-Based Audit	Chris Harper	4
54	Thinking Like a Quality Control Reviewer	Chris Harper	2
55	Walter Haig's AICPA Auditing Standards Update	Walter J. Haig	8

Auditing (Gov) Courses



Ref	Course Title	Instructor	CPE
1	2024 Revision to Government Auditing Standards Impact	Daniel W. Bradley	4
2	2024 Single Audit Update	Melisa F. Galasso	2
3	2024 Yellow Book Update	Melisa F. Galasso	2
4	A Review of the Uniform Guidance Requirements	Daniel W. Bradley	2
5	Common Findings in Single Audits	Adelina Burke	1
6	Consideration of Fraud in a Financial Statement Audit	Daniel W. Bradley	2
7	Current Issues in Performing Yellow Book Audits	Jennifer F. Louis	2
8	Current Nonprofit Fraud Trends	Jennifer F. Louis	4
9	Presentation Skills for Auditors	Jim Comer	2
10	Yellow Book Independence and Single Audit Fundamentals	Adelina Burke	4

Behavioral Ethics Courses



Ref	Course Title	Instructor	CPE
1	A Culture of Regulatory Ethics: A Competitive Advantage	David Peters	4
2	Accounting of the Soul: Making the World a Better Place	Robbie Glantz	1
3	An Ethical Approach to Mental Health Issues at Work	Robbie Glantz and Jennifer Sullivan	2
4	Bounded Ethicality: Exploring the Limits of Ethical Behavior	Toby Groves	1
5	Business and Government Investigations	Justin Paperny	2
6	Circular 230 and Rogue Return Preparers	Robert Nordlander	2
7	Cognitive Biases for Accountants	Garrett Wasny	2
8	Creating an Ethical Work Environment	Robbie Glantz	2
9	Ethical Performance Management	Robbie Glantz	2
10	Ethics at Work: Diversity, Equity and Inclusion	Robbie Glantz and Jennifer Sullivan	2
11	Ethics Based Leadership for Women	Robbie Glantz and Jennifer Sullivan	2
12	Ethics Case Studies: Remaining Ethical in the Age of Oversharing	Albert D. Spalding	2
13	Ethics of AI: A CPA's Guide	John Higgins	2
14	Ethics: 10 Crucial Qualities of High Character CPAs	Bruce Weinstein	2
15	Ethics: 10 Essential Movies, TV Shows, and Books for CPAs	Bruce Weinstein	1
16	Ethics: Get Rich, Lose Weight, and Enjoy True Love	Bruce Weinstein	2
17	Ethics: Giving Thanks - How to Master the Art of Gratitude	Bruce Weinstein	2
18	Ethics: How Successful CPAs Use AI The Right Way	Bruce Weinstein	1
19	Ethics: How to Ensure Zombie Ethics Won't Kill Your Business	Bruce Weinstein	2
20	Ethics: How to Give and Receive Criticism the Right Way	Bruce Weinstein	2
21	Ethics: IRS Behavioral Insights for Accountants	Garrett Wasny	2
22	Ethics: IRS Criminal Investigations: Key Lessons for Accountants	Garrett Wasny	2
23	Everyday Ethics at Work: Don't be the Next News Story!	Jennifer Elder	2
24	Financial Decisions that Led Two Businessmen to Prison	Justin Paperny	2
25	How Much Are Your Ethics Worth?	Keely Gohl	2
26	Leadershift Ethics: Things Must Change!	Tammy Daugherty	2
27	Leadershift: Drive Results Through Ethical Performance Mgmt	Tammy Daugherty	4
28	Lessons on Fraud Prevention from Sam Bankman-Fried's Crypto	Justin Paperny	2
29	Love it or Leave It: Engagement and Retention at Work	Robbie Glantz and Jennifer Sullivan	2
30	Mail Fraud and Wire Fraud: Why Business Owners go to Prison	Justin Paperny	2

Behavioral Ethics Courses



Ref	Course Title	Instructor	CPE
31	Mental Models for CPAs: How to Use Cognitive Frameworks	Garrett Wasny	2
32	Money Laundering Awareness for Accountants	Garrett Wasny	2
33	Payroll Essentials: Ethics in Payroll	Elizabeth Bystrom	2
34	PPP Fraud and Financial Professionals	Justin Paperny	2
35	Supervision/Management Competencies: An Ethical Approach	Robbie Glantz and Jennifer Sullivan	2
36	The Aftermath of Government Investigations: Varsity Blues	Justin Paperny	2
37	The Bookkeeper Goes to Prison	Justin Paperny	2
38	The CFO Who Went to Prison	Justin Paperny	2
39	The Ethic of Recruitment and Selection	Robbie Glantz and Jennifer Sullivan	2
40	The Ethic of Self-Esteem For Women	Robbie Glantz	2
41	The Ethical Management of Conflict	Robbie Glantz	2
42	The Ethics of Care in the Workplace	Robbie Glantz	2
43	Todd and Julie Chrisley Go to Prison	Justin Paperny	2
44	Watch Your Mouth! Microaggression Awareness for CPAs	Garrett Wasny	2
45	Whistleblowers and the Law	Justin Paperny	2
46	Why People Are Irrational, Biased and Emotional With Money	Garrett Wasny	2
47	Will Your Ethics Be Burned by Burnout?	Jennifer Elder	2

Business Management Courses



Ref	Course Title	Instructor	CPE
1	A 7-Step Framework for Marketing Client Accounting Services	Gaynor Hardy (Meilke)	1
2	Advanced Negotiations: Beyond Getting to Yes	John L. Daly	1
3	Avoid Merging: Transformation Strategies to Stay Independent	Jen Wilson/Renee Moelders	2
4	CFO Series: Accepting Perfectionists: Understand & Adapting	Don Minges	2
5	CFO Series: Advancing Your Role as a Business Leader	Don Minges	2
6	CFO Series: Are Employees Assets? Today's New Employment!	Robert Mims	2
7	CFO Series: Bridging the Gap with Marketing Mgt: the Four Ps	Brian Maturi	2
8	CFO Series: Enhancing Sales: Work with Sales to Drive Result	Jane Mims	2
9	CFO Series: Five Management Superpowers	Jane Mims	2
10	CFO Series: Ready to be an Effective CFO? Skills to Succeed	Anita Layton	2
11	CFO Series: Re-invigorating Your Career: Planning Your Path	Robert Mims	2
12	CFO Series: The ROI on Your People? Maximizing Returns!	Robert Mims	2
13	Change: Embrace & Enjoy - It Is Inevitable	Don Minges	2
14	Critical Thinking for Financial Professionals	John L. Daly	1
15	Emotional Intelligence: The Critical Factor in Success	Don Minges	2
16	How to Create an ROI-Based Marketing Plan for Your Firm	Gaynor Hardy (Meilke)	1
17	Implementing System Changes: Success Planning & Leadership	Anita Layton	2
18	Leadershift: How to Embrace Disruption and Lead Change	Tammy Daugherty	1
19	Managing with a CEO Mentality	Sharrin Fuller	1
20	Motivating the Right Way - Get the Most From Your Staff!	Don Minges	2
21	Moving Away from Time-Based KPIs: Five P's to Get You There	Jennifer Wilson & Tamera Loerzel	2
22	Owning an Electric Vehicle: Costs and Considerations	John L. Daly	2
23	Project Management: Employ Best Practices & Mindset	Samantha Mansfield/Jessica Hartsfield	2
24	Project Management: Enhancing Ongoing Client Engagements	Samantha Mansfield/Jessica Hartsfield	2
25	Project Management: Getting the Best Out of Your Team	Samantha Mansfield/Jessica Hartsfield	2
26	Project Management: Making Ideas a Reality	Samantha Mansfield/Jessica Hartsfield	2
27	Project Management: Planning Skills - Supervisors & Managers	Samantha Mansfield/Jessica Hartsfield	2
28	Recruit. Retain. Engage. Mastering LinkedIn for HR Success	Sandra Long	2
29	Selling to Target Accounts to Close More "A" Clients	Renee Moelders/Samantha Mansfield	2
30	Servant Leadership 101	Jim Bitterle	1

Business Management Courses



Ref	Course Title	Instructor	CPE
31	Solving the Capacity Challenge	Tamera Loerzel/Samantha Mansfield	2
32	Transforming CAS Pricing and Packaging	Renee Moelders/Samantha Mansfield	2

Comms & Marketing Courses



Ref	Course Title	Instructor	CPE
1	Communication Skills for Introverts	Jennifer Elder	2
2	Leveraging Marketing Automation for Accounting Firm Growth	Gaynor Hardy (Meilke)	1
3	LinkedIn Profile Secrets for CPAs	Sandra Long	2
4	Talk This Way - Communication Skills for the CPA	Chris Harper	2
5	The Social Media Blueprint for Accounting Firms	Gaynor Hardy (Meilke)	1

Computer Software Courses



Ref	Course Title	Instructor	CPE
1	Adobe Acrobat - Increase Your Productivity With PDF Files	John H. Higgins	4
2	Adobe Acrobat Tips for Working with PDF Files	John H. Higgins	2
3	Advanced Excel: Hidden Secrets and Gems	Chris Harper	2
4	Become a Data Analysis Expert	Bryan L. Smith	2
5	Build a Data Model for Analysis in Power BI	Bryan L. Smith	4
6	ChatGPT Bootcamp for CPAs with John Higgins	John H. Higgins	4
7	ChatGPT: What Every CPA Should Know-Updated	John H. Higgins	2
8	Clean, Transform & Load Data in Power BI	Bryan L. Smith	2
9	Create Measures in Power BI that Define Your Metrics	Bryan L. Smith	4
10	Create Paginated Reports with Power BI Report Builder	Bryan L. Smith	2
11	Create Visuals in Power BI to Successfully Analyze Data	Bryan L. Smith	4
12	Digging Deep with Excel Pivot Tables	Chris Harper	1
13	Engagement Management with the Microsoft 365 Planner App	John H. Higgins	2
14	Excel - Working with Text, Date & Time Functions & Formulas	Bryan L. Smith	2
15	Excel - Advanced Financial and Statistical Calculations	Bryan L. Smith	2
16	Excel - Advanced Formatting to Improve Your Spreadsheets	Bryan L. Smith	2
17	Excel - Advanced Spreadsheet Troubleshooting Techniques	Bryan L. Smith	2
18	Excel - Auditing Your Spreadsheets for Maximum Accuracy	Bryan L. Smith	2
19	Excel - Building Powerful Lookup & Reference Formulas	Bryan L. Smith	2
20	Excel - Create KPI Dashboards for Maximum Impact	Bryan L. Smith	2
21	Excel - Feature Review in 100 minutes	Bryan L. Smith	2
22	Excel - From a Blank Sheet to a Finished Workbook	Bryan L. Smith	2
23	Excel - Functions and Formula Shootout	Bryan L. Smith	2
24	Excel - Fundamentals, Data Entry and Basic Formulas	Bryan L. Smith	2
25	Excel - Two Must Know Features: Defined Names & Tables	Bryan L. Smith	2
26	Excel - Using Charts for a Non-Financial Audience	Bryan L. Smith	2
27	Excel - Using PivotTables for Data Analysis	Bryan L. Smith	4
28	Excel for Staff Level 1 - What You Never Learned	Bryan L. Smith	2
29	Excel for Staff Level 2 - Getting More Out of Excel	Bryan L. Smith	2
30	Get started with Power BI	Bryan L. Smith	2

Computer Software Courses



Ref	Course Title	Instructor	CPE
31	How To Use Microsoft 365 Forms to Create Online Surveys	John Higgins	1
32	If You Only Knew What Microsoft Word Could Do	Karl Egnatoff	2
33	Improve Design and Productivity with Excel Tables	Bryan L. Smith	2
34	Leverage PowerBI.com to Create Data Analysis for Others	Bryan L. Smith	2
35	Mastering the Excel Lookup Functions	Bryan L. Smith	2
36	Microsoft 365 Application Lightning Round Review-Updated	John Higgins	1
37	Microsoft 365 Deployment Best Practices	John Higgins	2
38	Microsoft 365 Deployment Bootcamp for Your Practice	John Higgins	4
39	Microsoft Outlook "Must Know" Email Tips	John Higgins	2
40	Microsoft Teams Deployment Best Practices-Updated	John Higgins	2
41	Microsoft Teams Features Every User Should Know	John Higgins	2
42	Moving Beyond the Basics of Excel	Chris Harper	2
43	Office 365 Teams App - Optimizing Your Setup & Configuration	John H. Higgins	4
44	OneNote - Mastering Organization of Notes & Correspondence	John H. Higgins	2
45	Outlook - Manage Your Inbox With Maximum Efficiency	John H. Higgins	4
46	Power BI - Advanced Data Analytics with Power Pivot	Bryan L. Smith	8
47	Power BI - Analyze Your Data With Excel Pivot Tables	Bryan L. Smith	4
48	Power BI - OLAP Formulas & More Time Intelligent Functions	Bryan L. Smith	2
49	PowerPoint for Accountants	Chris Harper	2
50	PowerPoint Fundamentals - Create Engaging Presentations	John Higgins	2
51	Securing Your Data with a Password Management App - Updated	John Higgins	2
52	Shortcuts that Excel Users Love	Karl Egnatoff	2
53	Simplify Outlook Meeting Scheduling with Office 365 Bookings	John Higgins	1
54	Synchronize Your Files to the Cloud with SharePoint -Updated	John Higgins	2
55	The 10 Must Know Excel Features	Bryan L. Smith	2
56	Transform Your Organization With Office 365 and Teams	John Higgins	8
57	Using ChatGPT with Excel	Bryan L. Smith	2
58	Using e-Signature Software to Process Agreements-Updated	John Higgins	2
59	Using Microsoft Teams to Host Virtual Meetings-Updated	John Higgins	1
60	What's New in Excel	Karl Egnatoff	2

Computer Software Courses



Ref	Course Title	Instructor	CPE
61	You Don't Know What You Don't Know About Microsoft Excel	Karl Egnatoff	8

Finance Courses



Ref	Course Title	Instructor	CPE
1	Building a Better Budget in a Time of Uncertainty	David Peters	4
2	CFO Series: Growth Opportunities for CFOs: Value Added CFOs	Gary Cokins	2
3	CFO Series: Tactics to Improve Bottom Line: 1st Improve ROI	Steven R. Bousom	2
4	CFO Series: Tactics to Reduce Investment: 2nd Strategy ROI	Brian Maturi	2
5	Seeing Beyond the Numbers: Analysis for CFOs & Controllers	David Peters	4

Information Technology Courses



Ref	Course Title	Instructor	CPE
1	Accountants, Meet Chatbot: Starting ChatGPT Conversations	Garrett Wasny	2
2	Advanced ChatGPT for Accountants	Garrett Wasny	2
3	Advanced Googling for Accountants	Garrett Wasny	2
4	Best Non-Google Search Tools for Accountants	Garrett Wasny	2
5	CFO Series: Successful System Implementations: Planning!	Tracy Cooper	2
6	ChatGPT and Advanced Financial Analysis for Accountants	Garrett Wasny	2
7	ChatGPT and Complex Financial and HR Conversations	Garrett Wasny	2
8	ChatGPT and IRS Taxation Law Research	Garrett Wasny	2
9	ChatGPT and the ELI5 Approach for Accounting Professionals	Garrett Wasny	2
10	ChatGPT for Accountants: 50+ Use Cases	Garrett Wasny	2
11	Cyber Attacks Through Impersonation	Petrina Youhan	1
12	Cybersecurity 101 for CPAs	Petrina Youhan, Kenneth W. Cooper	2
13	Data Visualization and Mapping Tools for Accountants	Garrett Wasny	2
14	Google Sheets for Accountants	Garrett Wasny	2
15	How Machines Are Coming Alive and Ruling the World	Garrett Wasny	2
16	Key Cybersecurity Controls for CPAs	Petrina Youhan, Kenneth W. Cooper	2
17	Leveraging ChatGPT for Innovative Business Advisory Services	Garrett Wasny	2
18	Technology Trends Update for CPAs with John Higgins	John Higgins	4
19	The Dark Web & Cybersecurity for Tax and Accounting Pros	Garrett Wasny	2
20	The Omniverse and Metaverse for Accountants	Garrett Wasny	2

Management Services Courses



Ref	Course Title	Instructor	CPE
1	Enterprise-Wide Risk Management in Accounting and Finance	Jennifer F. Louis	4
2	More Money: Strategic Ways to Improve Cash Flow	David Peters	4

Personal Development Courses



Ref	Course Title	Instructor	CPE
1	Audit 307: Client and Profitable Engagement Management	Jennifer F. Louis	2
2	Audit 401: Critical Traits of a Thinking Auditor	Jennifer F. Louis	2
3	Audit 408: Coaching Staff to Stay on the Right Track	Jennifer F. Louis	2
4	Audit 501: Personality Styles - Improving Your Interactions	Jennifer F. Louis	2
5	Audit 502: The Art of Discipline and Getting Things Done	Jennifer F. Louis	2
6	Audit 503: Management - Being a Balanced Leader-Manager	Jennifer F. Louis	2
7	Audit 504: Making Rain - Success with Clients and Prospects	Jennifer F. Louis	2
8	Becoming a Powerful and Effective Delegator	Renee Moelders/Samantha Mansfield	2
9	Becoming Conflict Competent	Julie G. Holunga, Stephanie Wachman	2
10	Beyond the Numbers: Success Strategies for Female CPAs	Tara Whitney	2
11	CFO Career Upgrade with LinkedIn	Sandra Long	2
12	CFO Series: Understand and Enhance the Employee Life Cycle	Robert Mims	2
13	CFO Series: Why You Should Be a Learnaholic: Staying Ahead!	Jane Mims	2
14	Critical Thinking Masterclass	Toby Groves	2
15	Delivering Transformative Feedback to Your Team	Renee Moelders/Samantha Mansfield	2
16	Developing a Culture of Ownership and Accountability	Renee Moelders/Samantha Mansfield	2
17	Effectively Communicating Change	Tamera Loerzel/Samantha Mansfield	2
18	How To Build High-Performing Teams in Challenging Times	Julie G. Holunga, Stephanie Wachman	2
19	Invest in Your Mental Health and Avoid Burnout	Tara Whitney	2
20	Tactics to Find Work Life Balance in a Complex World	Ronald L Seigneur	1
21	Take Command of your Time	Stephanie Wachman	2
22	Teaching CPAs to be Better Thinkers	Toby Groves	1
23	The Art of Engaging in Difficult Conversations	Julie G. Holunga, Stephanie Wachman	2
24	The Leadership Skills of Tomorrow: Delegate and Listen	Julie G. Holunga, Stephanie Wachman	2

Personnel / HR Courses



Ref	Course Title	Instructor	CPE
1	2024 Anytime, Anywhere Work(TM) Survey Findings for CPA Firms	Jen Wilson/Renee Moelders	2
2	Are Your Leaders Causing Talent to Leave?	Renee Moelders/Tamera Loerzel	2
3	Busy Season Survival Strategies	Renee Moelders/Samantha Mansfield	2
4	Coaching the Next Generation of CPAs	Jennifer F. Louis	2
5	Creating a High Performance Culture - Post Pandemic	Jim Bitterle	1
6	Cultural Transformation	Jim Bitterle	1
7	Performance Management in Challenging Times	Jennifer Elder	2
8	Retaining Talent in a Competitive Marketplace	David Peters	4

Regulatory Ethics Courses



Ref	Course Title	Instructor	CPE
1	2024 AICPA Regulatory Ethics Update	Melisa F. Galasso	2
2	About the TIGTA: Who Watches the IRS?	Garrett Wasny	2
3	Accountants and Malpractice: Can We Get Sued for This?	Allison M. McLeod	2
4	An Ethical Framework - How It Works	Albert D. Spalding	2
5	Assessing Independence Under the New Yellow Book	Melisa F. Galasso	1
6	Audit 101: AICPA's Code of Professional Conduct Principles	Jennifer F. Louis	2
7	Audit 301: Code of Professional Conduct - Key for Auditors	Jennifer F. Louis	2
8	Beware the Tax Enforcers: How the US Prosecutes Tax Evaders	Garrett Wasny	2
9	Bumper Sticker Ethics v. Professional Ethics	Albert D. Spalding	1
10	Case Study Ethics for Today's Accountant	Chris Harper	1
11	Cases in Corporate Ethics: Discuss Real Life Conflicts	John L. Daly	4
12	CPA Ethics in a Crisis World: Tales From the Front	Steven C. Dilley	2
13	Creating a Culture of Trust in a Fraud-filled World	Allison M. Henry	2
14	Ethical Considerations in Working with Cannabis	Ronald L Seigneur	1
15	Ethics - Regulatory and Standards Update	Allison M. Henry	2
16	Ethics and Technology for CPAs	Allison M. Henry	2
17	Ethics: Environmental, Social and Governance for Accountants	Garrett Wasny	2
18	Ethics: Plain Talk About IRS Ethics and Conduct	Garrett Wasny	2
19	Ethics: What a CPA in Business & Industry Needs to Know	Albert D. Spalding	2
20	Ethics: What a CPA in Public Practice Needs to Know	Albert D. Spalding	2
21	Fraud & Embezzlement: Case Studies from the Trenches	Allison M. McLeod	2
22	I Spy with My Little Eye ... an Illegality	Albert D. Spalding	1
23	Independence and Conflicts of Interest	Allison M. McLeod	1
24	Integrity, Objectivity and Judgment: Values in Action	Allison M. McLeod	1
25	IRS Strategic Plan 2023-2026 and Impacts on US Tax Pros	Garrett Wasny	2
26	Practical Insights Gleaned from the AICPA's Code of Conduct	Chris Harper	2
27	Professional Skepticism	Albert D. Spalding	2
28	Roadmap to Ethical Decision Making	Chris Harper	2

Specialized Knowledge Courses



Ref	Course Title	Instructor	CPE
1	AI, RPA...The Transformation is Now	Jen Wilson/Samantha Mansfield	2
2	Bitcoin Fundamentals - What Every CPA Should Know	John H. Higgins	2
3	Blockchain Technology: What Every CPA Should Know	John H. Higgins	2
4	Communicating Financial Data to Non-Financial Audiences	Keely Gohl	1
5	Cybersecurity Fundamentals for CPAs	Tiauna N. Ross	2
6	Determining Reasonable Compensation for Owner Employees	Ronald L Seigneur	1
7	Getting Started with ESG	Jennifer Elder	2
8	Illicit to Essential: Marijuana & Hemp/CBD Evolving Issues	Ronald L Seigneur	2
9	Integrate ChatGPT into Your Client Advisory Services-Updated	John Higgins	2
10	Key Considerations For Setting Up A Crypto Payment System	Sean Stein Smith	1
11	Legal Planning for Care Giving of Elderly/Disabled Clients	Matthew M. Wallace	1
12	Long-Term Care Insurance: Make the Switch	Katana Abbott	1
13	Managing Current Fraud Trends in a Shifting Environment	Jennifer F. Louis	8
14	Money Laundering 101 for CPAs	Robert Nordlander	4
15	Retirement Planning: Next Stage for You or Your Client	Tom Wilson	2
16	Sustainability: Doing Well by Doing Good	Jennifer Elder	2
17	Valuing Cannabis 2.0: Unique Marijuana Appraisal Challenges	Ronald L Seigneur	2
18	Why Cybersecurity Matters to CPAs	Petrina Youhan, Kenneth W. Cooper	2

Taxes Courses



Ref	Course Title	Instructor	CPE
1	2024 Year-End Payroll Update	Elizabeth Bystrom	2
2	Basic Individual Taxation Course	Allison M. McLeod	2
3	Best Practices For An IRS Levy Or Wage Garnishment	Billy L. Fauller, III	1
4	Business Tax Update: Recent Developments	Steven C. Dilley	2
5	CFO Series: What We Can Do to Minimize Taxes: Without Danger	Steven R. Bousom	2
6	CFO Solutions to IRS Problems	Robert Nordlander	4
7	Criminal Tax: How CPAs Bring Value to Defense Attorneys	Robert Nordlander	2
8	Entertainment, Meals & Travel Expenses: Review and Update	Steven C. Dilley	2
9	Erase the Mark: Best Practices in Penalty Abatement	Robert Nordlander	2
10	Everything There is to Know About Summoning	Billy L. Fauller, III	1
11	Individual Tax Update: Recent Developments	Steven C. Dilley	2
12	Inflation Reduction Act of 2022: Explanation and Planning	Steven C. Dilley	2
13	IRS Case Roadblocks	Billy L. Fauller, III	1
14	IRS Highly Effective Penalty Relief Strategies	Billy L. Fauller, III	1
15	IRS Penalties and Abatements	Allison M. McLeod	2
16	IRS Revenue Officers, Field Collection, and Best Practices	Billy L. Fauller, III	1
17	Like-kind Exchanges in Real Estate Transactions	Allison M. McLeod	2
18	Monthly Federal Tax Updates - April 2025	Allison M. McLeod	2
19	Monthly Federal Tax Updates - August 2024	Allison M. McLeod	2
20	Monthly Federal Tax Updates - December 2024	Allison M. McLeod	2
21	Monthly Federal Tax Updates - February 2025	Allison M. McLeod	2
22	Monthly Federal Tax Updates - January 2025	Allison M. McLeod	2
23	Monthly Federal Tax Updates - July 2024	Allison M. McLeod	2
24	Monthly Federal Tax Updates - June 2024	Allison M. McLeod	2
25	Monthly Federal Tax Updates - March 2025	Allison M. McLeod	2
26	Monthly Federal Tax Updates - May 2024	Allison M. McLeod	2
27	Monthly Federal Tax Updates - November 2024	Allison M. McLeod	2
28	Monthly Federal Tax Updates - October 2024	Allison M. McLeod	2
29	Monthly Federal Tax Updates - September 2024	Allison M. McLeod	2
30	Partnership & S Corporation Checkup: Key Developments	Steven C. Dilley	2

Taxes Courses



Ref	Course Title	Instructor	CPE
31	Partnership/LLC Taxation: Tax Basis Capital Accounts	Steven C. Dilley	2
32	Partnerships: How to Calculate Partner Basis	Steven C. Dilley	2
33	Payroll Essentials: De-mystifying Form W-4	Elizabeth Bystrom	2
34	Payroll Essentials: Fringe Benefits: Taxable or Not?	Elizabeth Bystrom	2
35	Payroll Essentials: Getting to Know Payroll Taxes	Elizabeth Bystrom	2
36	Payroll Essentials: Payroll Returns Done Right	Elizabeth Bystrom	2
37	Payroll Essentials: The Payroll Cycle of Life	Elizabeth Bystrom	2
38	Real Estate Professionals, Passive Activity and Section 199A	Steven C. Dilley	2
39	Reasonable Compensation for S Corps	Paul Hamann	2
40	Retirement Planning: IRAs	David Peters	1
41	S Corporations: Calculating Shareholder Basis	Steven C. Dilley	2
42	Schedule C of Form 1040	Allison M. McLeod	2
43	Section 174: New Rules for Research & Experimentation	Steven C. Dilley	1
44	Section 199A Deduction: Rules & Forms Reporting	Steven C. Dilley	2
45	Self-Rental Real Estate: Passive Activity & Section 199A	Steven C. Dilley	2
46	Spring Tax Update with Steve Dilley	Steven C. Dilley	8
47	Tales from the Darkside: IRS Enforcement of Cryptocurrency	Robert Nordlander	2
48	Tax Depreciation: Review and Update	Steven C. Dilley	2
49	Tax Implications of Cryptocurrency	Allison M. McLeod	2
50	Tax Season Update for Business with Steve Dilley	Steven C. Dilley	4
51	Tax Season Update for Individuals with Steve Dilley	Steven C. Dilley	4
52	Taxation of Business Entities	Allison M. McLeod	2
53	Taxation of Judgements and Settlements	Allison M. McLeod	2
54	The Choice of Entity Decision: What is Best for Your Client	Steven C. Dilley	2
55	The Lifecycle of a Criminal Tax Investigation	Robert Nordlander	2
56	Top 10 Payroll Questions You Didn't Even Know You Had	Elizabeth Bystrom	1
57	Trust Fund Recovery Penalty And Request For Refund	Billy L. Fauller, III	1
58	Understanding the "Most Common" Form 990 Schedules: A,B & C	Eve R. Borenstein	3
59	Understanding the Form 990 and its Preparation Prerequisites	Eve R. Borenstein	2
60	Understanding the New Forms K-2 and K-3	Allison M. McLeod	2

Taxes Courses



Ref	Course Title	Instructor	CPE
61	What If Your Client Didn't Take Reasonable Compensation	John Morse	1

Bundles & Subscriptions



Bundles and Subscriptions are additional options for users to buy a series of connected courses at a discounted price. For details about each of the below, including the courses and fields of study contained within, visit www.cpacrossings.com.

Ref	Course Title	Instructor	CPE
1	Advanced Managerial Skills for Auditors	Jennifer F. Louis	8
2	Audit Skills for Beginners	Jennifer F. Louis	16
3	Audit Skills for Client Management	Jennifer F. Louis	16
4	Audit Skills for Emerging Leaders	Jennifer F. Louis	16
5	Audit Skills for Experienced Staff	Jennifer F. Louis	16
6	CFO Series - Monthly Bundle	Various Instructors	8
7	Getting Started With Microsoft Power BI	Bryan L. Smith	14
8	Investigating Fraud	Tracy L. Coenen	8
9	Microsoft 365 Digital Skills Series for CPAs	John Higgins	9
10	Payroll Essentials	Elizabeth Bystrom	12
11	Project Management Skills	Samantha Mansfield/Jessica Hartsfield	4
12	Taking Power BI To The Next Level	Bryan L. Smith	14
13	Talent Development	Renee Moelders/Samantha Mansfield	6