CTCPA
Connecticut Society of CPAs

FEATURED

The AI Advantage for CPAs: An 8-Part Hands-on Series on Practical AI Applications, Responsble AI, and Emerging Technologies

Up to 16.00 Credits

$ Member Price: $529

Artificial intelligence is transforming the accounting profession, creating new opportunities to improve productivity, enhance client service, strengthen decision-making, and deliver greater value. Designed specifically for CPAs and accounting professionals, this comprehensive eight-part webinar series provides practical, hands-on guidance to help participants confidently navigate the rapidly evolving AI landscape and integrate AI into daily workflows.Led by nationally recognized technology thought leader John H. Higgins, CPA, CITP, the series explores the technologies, tools, and strategies that are reshaping accounting, tax, finance, and advisory services. Participants will build a strong foundation in AI concepts, learn best practices for responsible and ethical AI use, discover emerging innovations such as agentic AI, and gain practical experience with leading AI platforms through interactive bootcamp-style sessions.Whether you're just beginning your AI journey or looking to expand your organization's capabilities, you'll leave each session with actionable insights, real-world applications, and a roadmap for leveraging AI to work smarter, serve clients more effectively, and prepare for the future of the profession. Save more than 25% when you register for the series!

Class Pass 2026-27

Available Until Wednesday, Mar. 31, 2027

Purchase your professional development program credits in advance and enjoy significant savings! This year’s pass applies to seminars, CTCPA developed conferences, webinars, and livestream programs now through March 31, 2027. Class Pass is also a great way to get your staff the training they need at a discounted price. Note: Class Pass is for individuals - credits are not transferable to other employees within a firm or company. Class Pass Fee: $1,250

Firm/Company Coupon Book 2026-27

Available Until Wednesday, Mar. 31, 2027 Member Price: $2599

Purchase your firm/company professional development program credits in advance and $AVE! Coupon Books can be purchased in 80-credit increments and be used for any staff members of your firm/company. Coupon Book can be used in 2-credit increments for any seminars, conferences, and webinars, excluding other state CPA association conferences. Once a Coupon Book is purchased by a member of your firm/company, an email with be sent with your coupon numbers. These can then be applied at checkout for any programs with 2, 4, 6 or 8 CPE credits. Coupon Books expire one year from date of purchase.

LEARNING PATH: AI-Powered Accounting

Tuesday, Sep. 1 3:00am - Wednesday, Sep. 30 1:00pm Online 10.00 Credits Member Price: $259

REGISTRATION INSTRUCTIONS: This is a Learning Path which contains several courses for a total of 10 CPE. Once registered, detailed instructions will be emailed to sign up for each individual course. You must attend each course by April 30, 2027.

LEARNING PATH: Audit and Risk Fundamentals

Tuesday, Sep. 1 3:00am - Wednesday, Sep. 30 1:00pm Online 10.00 Credits Member Price: $259

REGISTRATION INSTRUCTIONS: This is a Learning Path which contains several courses for a total of 10 CPE. Once registered, detailed instructions will be emailed to sign up for each individual course. You must attend each course by April 30, 2027.

LEARNING PATH: Auditing Key Financial Statement Areas

Tuesday, Sep. 1 3:00am - Wednesday, Sep. 30 1:00pm Online 10.00 Credits Member Price: $259

REGISTRATION INSTRUCTIONS: This is a Learning Path which contains several courses for a total of 10 CPE. Once registered, detailed instructions will be emailed to sign up for each individual course. You must attend each course by April 30, 2027.

LEARNING PATH: Combatting Fraud

Tuesday, Sep. 1 3:00am - Wednesday, Sep. 30 1:00pm Online 10.00 Credits Member Price: $259

REGISTRATION INSTRUCTIONS: This is a Learning Path which contains several courses for a total of 10 CPE. Once registered, detailed instructions will be emailed to sign up for each individual course. You must attend each course by April 30, 2027.

LEARNING PATH: CPA to CFO Leadership

Tuesday, Sep. 1 3:00am - Wednesday, Sep. 30 1:00pm Online 10.00 Credits Member Price: $259

REGISTRATION INSTRUCTIONS: This is a Learning Path which contains several courses for a total of 10 CPE. Once registered, detailed instructions will be emailed to sign up for each individual course. You must attend each course by April 30, 2027.

LEARNING PATH: Ethics and Professional Responsibility

Tuesday, Sep. 1 3:00am - Wednesday, Sep. 30 1:00pm Online 10.00 Credits Member Price: $259

REGISTRATION INSTRUCTIONS: This is a Learning Path which contains several courses for a total of 10 CPE. Once registered, detailed instructions will be emailed to sign up for each individual course. You must attend each course by April 30, 2027.

LEARNING PATH: Financial Strategy and Analysis

Tuesday, Sep. 1 3:00am - Wednesday, Sep. 30 1:00pm Online 10.00 Credits Member Price: $259

REGISTRATION INSTRUCTIONS: This is a Learning Path which contains several courses for a total of 10 CPE. Once registered, detailed instructions will be emailed to sign up for each individual course. You must attend each course by April 30, 2027.

LEARNING PATH: Government and NFP Specialist

Tuesday, Sep. 1 3:00am - Wednesday, Sep. 30 1:00pm Online 10.00 Credits Member Price: $259

REGISTRATION INSTRUCTIONS: This is a Learning Path which contains several courses for a total of 10 CPE. Once registered, detailed instructions will be emailed to sign up for each individual course. You must attend each course by April 30, 2027.

LEARNING PATH: Staff Accountant Core Foundations

Tuesday, Sep. 1 3:00am - Wednesday, Sep. 30 1:00pm Online 10.00 Credits Member Price: $259

REGISTRATION INSTRUCTIONS: This is a Learning Path which contains several courses for a total of 10 CPE. Once registered, detailed instructions will be emailed to sign up for each individual course. You must attend each course by April 30, 2027.

LEARNING PATH: Strategic Growth and Personal Development

Tuesday, Sep. 1 3:00am - Wednesday, Sep. 30 1:00pm Online 10.00 Credits Member Price: $259

REGISTRATION INSTRUCTIONS: This is a Learning Path which contains several courses for a total of 10 CPE. Once registered, detailed instructions will be emailed to sign up for each individual course. You must attend each course by April 30, 2027.

LEARNING PATH: Technology and Innovation

Tuesday, Sep. 1 3:00am - Wednesday, Sep. 30 1:00pm Online 10.00 Credits Member Price: $259

REGISTRATION INSTRUCTIONS: This is a Learning Path which contains several courses for a total of 10 CPE. Once registered, detailed instructions will be emailed to sign up for each individual course. You must attend each course by April 30, 2027.

LEARNING PATH: Compliance in a Box

Tuesday, Sep. 1 3:00am - Wednesday, Sep. 30 11:00pm Online 20.00 Credits Member Price: $449

REGISTRATION INSTRUCTIONS: This is a Learning Path which contains several courses for a total of 20 CPE. Once registered, detailed instructions will be emailed to sign up for each individual course. You must attend each course by April 30, 2027.

CPA Crossings Unlimited Webinars

Tuesday, Sep. 1 9:00am - Wednesday, Sep. 30 10:00am Online 1.00 Credits Member Price: $649

REGISTRATION INSTRUCTIONS: This is an UNLIMITED Learning Path, sign up and get unlimited CPE on our platform! Once registered, detailed instructions will be emailed to sign up for each individual course. You must attend each course by April 30, 2027.

BUNDLE: CFO Series - September 2026

Friday, Sep. 4 11:00am - Thursday, Sep. 24 7:00pm Online 8.00 Credits Member Price: $249

Individual Class Pass Company Coupon Book

This series includes four 2-hour consecutive Friday sessions, airing live beginning September 4, for a total of 8 CPE. Once registered for this bundle, log in instructions will be emailed to you separately for each individual course. You receive significant savings when purchasing these webinars as a bundle. The CFO Series provides a convenient, one-stop way for senior level financial managers and executives, CFOs and those who aspire to be CFOs, to attend multiple webinars of CPE with a single decision. The CFO Series features high-quality presentations and an interactive, executive level colleague-to-colleague approach with case studies, group discussions, and team exercises. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Surgent's Essential Depreciation and Expensing Update

Wednesday, Sep. 16 9:00am - 12:30pm Online 4.00 Credits Member Price: $159

Individual Class Pass Company Coupon Book

This course offers a comprehensive analysis of the evolving rules surrounding depreciation, amortization, and property transactions, incorporating the latest inflation adjustments and technical corrections. It offers practical guidance through real-world examples and case studies to clarify

complex rules and help professionals stay compliant and informed amid ongoing change.

Surgent's The One Big Beautiful Bill Act (OBBBA): What You Need To Know

Wednesday, Sep. 16 9:00am - 12:30pm Online 4.00 Credits Member Price: $199

Individual Class Pass Company Coupon Book

Many accounting and finance practitioners have had difficulty understanding and applying the One Big Beautiful Bill Act (OBBBA). Accounting and finance practitioners are still confused and challenged by many of the new and extended tax provisions that the OBBBA delivered. Mastering these crucial provisions requires multiple exposures to these challenging tax changes. This program is a four-hour review and analysis of the most important changes from the OBBBA that impact both individual and business taxpayers. This course affords accounting and finance practitioners an opportunity to gain a broader, deeper understanding of this wide-ranging set of new tax rules, to grasp what is new and what is a continuance of prior rules, and to develop deeper planning insights into the many changes that the OBBBA contains. To the extent that the Treasury has provided guidance relating to OBBBA changes, we will discuss that guidance. We will also point out areas where Treasury guidance would be useful and areas where guidance is expected.

Surgent's Top Ten Questions from Partnership Clients Regarding the Section 754 Election

Wednesday, Sep. 16 9:00am - 12:30pm Online 4.00 Credits Member Price: $159

Individual Class Pass Company Coupon Book

This program is an in-depth analysis of the Section 754 election and the two adjustments associated with the election under Section 743(b) and Section 734(b). The 754 election is a highly technical provision that provides great tax benefits to the owners of the partnership, and particularly in the case of Section 743(b), a new partner. This course covers the most common questions encountered by practitioners in their daily practices. The program includes a number of examples that provide insights into the mechanics of the two adjustments that follow upon a Section 754 election.

2024 Revision to Government Auditing Standards Impact

Wednesday, Sep. 16 9:00am - 1:00pm Online 4.00 Credits Member Price: $149

Individual Class Pass Company Coupon Book

This course will provide an update of Government Auditing Standards as a result of the GAO's issuance of the 2024 Revision to Government Auditing Standards. The course will focus on the Revisions impact on financial statement audits. The course will also focus on the impact of Quality Management Standards as well as clarify as to when the concept of reporting key audit matters might apply for financial audits. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Implementing and Maintaining an Internal Control System

Wednesday, Sep. 16 9:00am - 5:00pm Online 8.00 Credits Member Price: $239

Individual Class Pass Company Coupon Book

Many organizations are successful as they create a system of internal controls, however some fail to properly implement the measures that are established. Moreover, entities regularly neglect the important process of testing, monitoring, and updating control procedures, which weakens the entire internal control structure. This session provides an overview of control creation methods and discusses ways to successfully implement policies and procedures. Additionally, it includes an array of control maintenance checklists that participants can take and adapt to their organization as they work to improve policies and procedures. Finally, it provides an understanding of the need for dynamic, fluid controls that adapt to changes in business tools and methods. Participants that take this course will have a strengthened ability to implement and maintain an internal control system. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

ChatGPT Deep-Dive Hands-on Bootcamp for CPAs

Wednesday, Sep. 16 10:00am - 12:00pm Online 2.00 Credits Member Price: $89

Individual Class Pass Company Coupon Book

ChatGPT has grown its user base to over 800 million active users per week. As a leader in the generative market, it a tool that every CPA should have a basic understanding of how to use and

apply in business. This course will provide a comprehensive review and demonstration of how to put ChatGPT to work for you and your clients. It is designed as a "hands-on" course that facilitates following along with the presenter to apply the features of ChatGPT on your computer. Practice files will be provided so you don't have to expose your confidential data. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Surgent's Ethical Considerations for CPAs

Wednesday, Sep. 16 10:00am - 12:00pm Online 2.00 Credits Member Price: $99

Individual Class Pass Company Coupon Book

As accounting firms' non-attest offerings to their attest clients become more diversified, such engagements increase firms' exposure to independence violations. In order to thread the needle of providing value-added services and upholding their independence obligations, firms need to have a strong foundational understanding of the applicable ethical and independence rules which govern these engagements. In this course, we'll review the relevant sections of the AICPA Code of Professional Conduct regarding independence, objectivity, and conflicts of interest. The course will focus on the Code's Independence Rule and common threats to auditor's independence. In particular, the course will focus on those unique considerations related to non-attest services, both from the perspective of AICPA interpretations and other applicable rules and regulations. PLEASE NOTE: THIS COURSE COVERS GENERAL ETHICS AND IS APPLICABLE IN STATES IN WHICH STATE-SPECIFIC ETHICS IS NOT REQUIRED.

Surgent's Exploring Client Advisory Services: Tax Due Dates and Penalties/Where Do I Need To File?

Wednesday, Sep. 16 10:00am - 12:00pm Online 2.00 Credits Member Price: $99

Individual Class Pass Company Coupon Book

This course provides essential knowledge for Client Advisory Services (CAS) professionals navigating multistate taxation and managing tax deadlines. We'll start by exploring the implications of the Wayfair decision, focusing on general rules for sales and income tax nexus across states. You'll learn what to look for in state statutes and gain a solid foundation for filing requirements. Additionally, we'll cover key tax due dates, how to handle missed deadlines, and potential relief options. Whether you're new to the field or running your own practice, this course will equip you with the tools to succeed.

Surgent's Guide to the AICPA Quality Management Standards

Wednesday, Sep. 16 10:00am - 12:00pm Online 2.00 Credits Member Price: $99

Individual Class Pass Company Coupon Book

The Quality Management Suite of Standards was required to be implemented by December 15, 2025. The standards modernize the firm's approach to quality to reflect an increased focus on risk assessment, technology use, and the presence of outside experts on many engagements. Beginning with performing a risk-based approach, the standards provide accounting firms with the ability to enhance their quality control by shifting their focus to a proactive approach (management) from a reactive approach (control). The results of the firm's risk assessment will form the basis of its new Quality Management document. This is not just a tweak of the old document but a more robust document that adds new requirements from the new standards. We will cover how to perform a risk assessment, including the key provisions of the standards, and how to effectively implement a monitoring plan. We will also review how the firm will evaluate its System of Quality Management beginning in 2026.

Surgent's Where To Live in Retirement

Wednesday, Sep. 16 10:00am - 12:00pm Online 2.00 Credits Member Price: $119

Individual Class Pass Company Coupon Book

Deciding where to live in retirement is a challenge that involves a multitude of factors that differ for everyone. Each person and couple should evaluate their current living situation to see where their goals and lifestyles in retirement can best be met. The program covers the various factors that most people should consider when thinking about where to spend their retirement years.

Multi Year Failure to File: Getting into Compliance

Wednesday, Sep. 16 10:00am - 6:00pm Online 8.00 Credits Member Price: $239

Individual Class Pass Company Coupon Book

This comprehensive program equips CPAs with the knowledge and practical tools to handle clients who have failed to file tax returns for multiple years. The course covers every stage of the process-from client onboarding and transcript analysis to risk assessment, ethical considerations, and

resolution strategies. Participants will learn how to manage cases involving individuals, married couples, businesses, payroll taxes, and S corporations, including situations with missing records and potential criminal exposure. Real-world examples, IRS references, and best practices are integrated throughout to ensure confidence and compliance. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Surgent's Audits of 401(k) Plans: New Developments and Critical Issues

Wednesday, Sep. 16 10:00am - 6:00pm Online 8.00 Credits Member Price: $299

Individual Class Pass Company Coupon Book

One of the most favored employee benefit plans, the 401(k) plan, provides unique challenges for auditors. Through this course, auditors will obtain an understanding of the rules and regulations unique to employee benefit plans and obtain practical guidance on applying them. Auditors will enhance their knowledge of the performance and reporting requirements through real-world examples, best practices, and efficient audit techniques that can be utilized in various audit engagements. Make sure your audits don't trigger a DOL inspection by conforming to all applicable rules and regulations.

CFO and Controller Critical Skills: Budgeting and Forecasting

Wednesday, Sep. 16 10:30am - 12:30pm Online 2.00 Credits Member Price: $89

Individual Class Pass Company Coupon Book

The budget and the forecast are two common tools used by controllers and CFOs across almost every industry. However, are we really getting the most out of these tools? Or are we merely replicating whatever was done last year? In this course, we will use examples and illustrations to demonstrate various budgeting and forecasting techniques. We will discuss traditional approaches, as well as newer approaches such as flexible budgeting, in an effort to show how companies can gain more value. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Supporting Mental Wellness to Thrive in Work and Life

Wednesday, Sep. 16 11:00am - 1:00pm Online 2.00 Credits Member Price: $89

Individual Class Pass Company Coupon Book

In today's fast-paced world, maintaining a healthy work-life balance is essential for mental wellness. This course is designed to provide practical tools and strategies to help you create a balanced, fulfilling life. You'll learn actionable techniques for improving sleep hygiene, incorporating proper nutrition, fostering open communication, and managing stress. Whether you're struggling with burnout, seeking better work-life harmony, or simply looking to improve your overall well-being, this course offers valuable insights and tools to help you thrive. Designed to fit into your busy schedule, it delivers the guidance you need to make practical, sustainable changes in your life, starting today. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Generative AI Strategy for Accountants

Wednesday, Sep. 16 11:30am - 1:30pm Online 2.00 Credits Member Price: $89

Individual Class Pass Company Coupon Book

This course empowers accountants with the knowledge and skills needed to strategically implement generative AI within their firms, positioning them at the forefront of innovation and operational efficiency. As generative AI platforms like ChatGPT, Claude, and Gemini transform business practices, accountants will learn to harness these tools to drive value, streamline processes, and enhance decision-making. Through examination of the current AI landscape, practical frameworks, and real-world applications, participants will learn how to leverage AI technologies to enhance accounting operations while maintaining professional standards and ethical considerations. The course emphasizes a balanced approach to AI adoption that focuses on augmenting human capabilities rather than replacement. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

The Best Federal Tax Update Course by Surgent

Wednesday, Sep. 16 11:30am - 7:30pm Online 8.00 Credits Member Price: $299

Individual Class Pass Company Coupon Book

In this continually revised course, tax advisors will be fully updated on the most recent enacted legislation and IRS guidance, as well as major trends on the horizon with a view toward planning considerations. This update course is designed for all practitioners, both those working in public

accounting as well as those in private industry, who need the latest information on tax changes. Please Note: Due to content overlap, it is recommended that this course NOT be taken together with BITU.

Basic Individual Taxation Course

Wednesday, Sep. 16 12:30pm - 2:30pm Online 2.00 Credits Member Price: $89

Individual Class Pass Company Coupon Book

Please join us for an introductory course on the fundamentals of preparing and filing an individual federal income tax return. We will cover topics such as what the federal income tax is and how it is computed. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Ethics: 10 Crucial Qualities of High Character CPAs

Wednesday, Sep. 16 1:00pm - 3:00pm Online 2.00 Credits Member Price: $89

Individual Class Pass Company Coupon Book

What can you do to enhance your commitment to the highest ethical standards of the profession? How will doing so bring you more business? In this unique and engaging ethics course, the instructor, Dr. Bruce Weinstein, The Ethics Guy (R), reveals ten crucial qualities of CPAs. They are: 1. Honesty 2. Accountability 3. Care 4. Courage 5. Fairness 6. Gratitude 7. Humility 8. Loyalty 9. Patience 10. Presence (focus or mindfulness) You're already a good CPA and a good person. This course will show you how to be even better. The result will be greater satisfaction in your professional relationships, a deeper commitment to the profession of accounting, and much more business. Please note that this is a stand-alone course for 2 CPE credits in Behavioral Ethics, but you'll maximize your ROI by also taking "Ethics: How to Build and Keep Your A-Team". Together these courses are two of the surest pathways to sustained success in accounting. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Surgent's Hiring and Firing of Employees - What You Can and Cannot Do

Wednesday, Sep. 16 1:00pm - 3:00pm Online 2.00 Credits Member Price: $99

Individual Class Pass Company Coupon Book

There are numerous federal laws that restrict what businesses can do in terms of hiring and firing employees. Many of these laws impose significant penalties if employers violate them. Accordingly, it is crucial that all employers and their professional advisors understand these laws and apply them to their employment practices.

Surgent's Making Sense of Essential OBBBA Provisions

Wednesday, Sep. 16 1:00pm - 3:00pm Online 2.00 Credits Member Price: $119

Individual Class Pass Company Coupon Book

When clients ask questions about the impact of new tax legislation embodied in OBBBA, it is important that accounting and finance practitioners can reply with accurate and relevant planning strategies. This program prepares accounting and finance practitioners with the knowledge and insights to help their clients apply the new law to their advantage. This program is an introduction and review of some of these critical changes and their impact on individual and business taxpayers. By taking this program, accounting and finance practitioners will have a broader, deeper understanding of many of the OBBBA changes that impact their clients. This course is a two-hour review and analysis of what we consider some of the most important changes from the OBBBA impacting clients and perhaps their businesses.

Surgent's Privacy and Security Training: Obligations of Confidentiality and Safekeeping

Wednesday, Sep. 16 1:00pm - 3:00pm Online 2.00 Credits Member Price: $99

Individual Class Pass Company Coupon Book

Spear phishing. Ransomware. Malware. Like the threats your business faces, the cybersecurity lexicon is constantly evolving. This comprehensive presentation imparts practical privacy and data security know-how and creates fluency with the latest terminology. Learn best practices for cybersecurity safety, as well as tailored training for those in positions responsible for implementing security policies. It is just as important to be diligent, safe, and well-versed in the attacks that we face in our personal lives.

Finding Errors in Excel Spreadsheets

Wednesday, Sep. 16 1:30pm - 3:30pm Online 2.00 Credits Member Price: $89

Individual Class Pass Company Coupon Book

This intensive two-hour course addresses the critical need for accuracy and efficiency when developing spreadsheets using Microsoft Excel. Recognizing that even minor errors can have significant implications, this course delves deep into strategies and skills required to detect and correct errors in Excel. By the end of this course, participants will have a comprehensive understanding of how to efficiently identify and correct errors in Excel spreadsheets, enhancing their overall productivity and accuracy in their professional roles. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Surgent's Federal Tax Update

Wednesday, Sep. 16 1:30pm - 5:00pm Online 4.00 Credits Member Price: $159

Individual Class Pass Company Coupon Book

Both businesses and individual clients face major changes as a result of new legislation, and tax professionals face the considerable challenge of delivering effective planning advice and services to address this myriad of recent developments. This course addresses this challenge and also encompasses the latest cases and rulings applicable to individual and business clients. Continually updated to reflect enacted legislation. Please Note: Due to content overlap, it is recommended that this course NOT be taken together with BIT4.

Surgent's Mastering Accounting for Income Taxes

Wednesday, Sep. 16 1:30pm - 5:00pm Online 4.00 Credits Member Price: $159

Individual Class Pass Company Coupon Book

Since its inception nearly 30 years ago, many have continued to struggle with applying the current model for accounting for income taxes, ASC 740. But this does not have to be you. This course will provide you with the basic knowledge necessary to understand the complexities of this challenging topic. Through discussions and the use of exercises, this course will analyze the authoritative literature to provide a thorough understanding of such topics as deferred taxes, income tax expense,

uncertain tax positions, and other classification and disclosure requirements. We will also explore some specialized areas of income tax accounting, such as intraperiod allocations of income tax expense, global minimum tax developments, and the financial reporting impact of the One Big Beautiful Bill Act (OBBBA) signed into law in July 2025, and review finalized and emerging updates to ASC 740, including expanded disclosure requirements under ASU 2023-09. In summary, this course is the place to be to enhance your accounting for income taxes IQ.

Forensic Accounting: When the Office Is a Crime Scene

Wednesday, Sep. 16 1:30pm - 5:30pm Online 4.00 Credits Member Price: $149

Individual Class Pass Company Coupon Book

Embezzlement happens often to many small businesses. Unfortunately, the lack of internal controls allow the embezzlement to remain undetected for years. But when it is discovered, the small business owner will most likely contact their CPA for advice. What should you do when your client contacts you about their employee embezzling money from their business? What options should you present to your client? How can your client protect themselves, while investigating the embezzlement? What steps need to be taken about preserving any documents, emails, texts, or phone calls? This course teaches how to engage the client, properly identify the evidence needed to prove the crime, how to write the report for civil and criminal trial, and best practices in preserving electronic and paper evidence. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Best Practices: Conducting Meaningful Walkthroughs

Wednesday, Sep. 16 2:00pm - 4:00pm Online 2.00 Credits Member Price: $89

Individual Class Pass Company Coupon Book

This course will serve as an introduction to conducting effective walkthroughs to gain an understanding of the client's transaction processes as well as identifying internal controls within each process. This course will review the procedures, questions to ask, and documentation requirements of walkthroughs. It will also include real-world examples of the red flags that may arise while executing a walkthrough. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Surgent's Lessons Learned From Recent Accounting Malpractice Actions

Wednesday, Sep. 16 2:00pm - 4:00pm Online 2.00 Credits Member Price: $119

Individual Class Pass Company Coupon Book

Recent economic volatility has created added stress on accounting and finance professionals and their clients. When individuals or businesses lose money, they often blame others for their misfortune. Business disputes can sometimes lead to accounting malpractice claims. Understanding the most common types of accounting malpractice claims provides a roadmap of what not to do. This course provides a current overview of accounting malpractice litigation throughout the United States. The goal is to learn about the types of claims asserted against CPA firms and strategies to employ to avoid such claims. Reviewing malpractice claims allows us to identify patterns of behavior that may reduce litigation risk.

Surgent's Section 529 Plans: A Comprehensive Guide

Wednesday, Sep. 16 2:00pm - 4:00pm Online 2.00 Credits Member Price: $99

Individual Class Pass Company Coupon Book

This course provides a thorough examination of qualified tuition programs (Section 529 plans), focusing on their tax treatment, planning applications, and recent legislative changes. Participants will learn how 529 plans operate, what qualifies as education expenses, and how contributions, distributions, and beneficiary changes are treated under federal law. The course explores practical planning strategies, including 529-to-Roth IRA rollovers, multigenerational "dynasty" 529 planning, grandparent-owned account considerations, and interplay with financial aid. It also addresses state-level variations, compliance issues, and common pitfalls. Using real-world scenarios, the course evaluates when 529 plans are advantageous, the limitations families may encounter, and alternative approaches to education and long-term savings. Participants will gain a clear understanding of tax benefits, penalties, strategic funding approaches, and planning opportunities for high-net-worth families as well as typical households.

How Recent Auditing Standards Improve Risk-Based Audits

Wednesday, Sep. 16 2:00pm - 6:00pm Online 4.00 Credits Member Price: $149

Individual Class Pass Company Coupon Book

Recent generally accepted auditing standards were written to improve the quality of risk-based financial statement audits, audit reporting, and required by-product communications. This course will discuss the important clarifications and enhancements intended to improve audit quality to ensure better compliance with requirements contained in the SASs. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

How to Audit Expenses and Payables

Wednesday, Sep. 16 2:30pm - 4:30pm Online 2.00 Credits Member Price: $89

Individual Class Pass Company Coupon Book

It is imperative that audit staff understand the fundamentals of expenses & payables. This course will cover the basics of auditing expenses, accrued liabilities, and other payables, including the related audit assertions, risks, & threats to the expenses & payables balances. During this course, we will also highlight the various substantive auditing procedures that staff should perform, and also walk through some real-world examples. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

K2's Implementing Internal Controls in QuickBooks Online Environments New For 2026!

Wednesday, Sep. 16 3:00pm - 7:00pm Online 4.00 Credits Member Price: $180

Individual Class Pass Company Coupon Book

The QuickBooks ecosystem of accounting tools remains the most widely-used set of accounting applications small businesses use. Yet, many of these organizations struggle because of inadequate internal controls. In this seminar, you will learn options for improving internal controls in small businesses running QuickBooks Pro, Premier, Enterprise, or Online. Participate in this program to understand how you can create a robust system of internal controls in a small business environment, including businesses using QuickBooks accounting solutions. In this session, you will also learn about the four common types of internal controls and how to assess the relative condition of the internal control structure of a small business. With this background in place, the focus then shifts to discovering the opportunities to enhance internal controls in QuickBooks-based environments using

features found in the application. In addition, you will learn about additional internal control procedures for situations where you cannot establish adequate controls in QuickBooks. While many believe that QuickBooks-based organizations will forever face weak internal control structures, participating in this session will teach you how QuickBooks-based businesses can benefit from strong internal controls.

Microsoft Teams for CPAs: Unlocking Its Full Potential

Wednesday, Sep. 16 3:30pm - 5:30pm Online 2.00 Credits Member Price: $89

Individual Class Pass Company Coupon Book

Microsoft Teams is designed to be the foundation of your Microsoft 365 ecosystem deployment. When deployed effectively, Teams can serve as a powerful platform for communication, collaboration, and knowledge sharing across your firm or business. Unfortunately, most organizations are substantially underutilizing the capabilities of Teams. This course provides a review and demonstration of the key features of Microsoft Teams that you can harness to optimize the return on your Microsoft 365 investment. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Fraud Busters: Controls to Prevent and Detect Fraud

Wednesday, Sep. 16 4:00pm - 6:00pm Online 2.00 Credits Member Price: $89

Individual Class Pass Company Coupon Book

This course investigates actual real-world fraud schemes and discusses what controls could have prevented the fraud from occurring, and what controls could detect and curtail the fraud scheme. The instructor speaks from experience, finding multiple frauds very early in her career leading to a career-long focus on fraud prevention and detection. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

AI-Powered Excel: Leveraging AI and ChatGPT for Supercharged Productivity

Thursday, Sep. 17 9:00am - 10:00am Online 1.00 Credits Member Price: $49

Individual Class Pass

Learn how to enhance your Excel workflows with AI in this course, "AI-Powered Excel: Leveraging AI and ChatGPT for Supercharged Productivity." Discover the various AI features built into Excel and how to use ChatGPT to create, understand and troubleshoot Excel functions and formulas. Imagine turning two-hour Excel tasks into two minutes of effort! This course will help you streamline your Excel work, research and documentation, saving you time and effort in your day-to-day tasks.

Federal Taxation Interest Group Meeting

Thursday, Sep. 17 9:00am - 10:00am Online 0.00 Credits

This virtual meeting of the Federal Taxation Group will be an open format for any members to share issues or pain points they may be experiencing in the current tax season. The group welcomes those with an interest no matter your career stage or level of expertise. Pre-register for the meeting and you can then access the link in your online CTCPA account under My Upcoming Events the day of the meeting.

The Future of Audit: Technology, Talent and Transformation

Thursday, Sep. 17 9:00am - 10:00am Online 1.00 Credits $ Member Price: $55

Individual Class Pass

The audit profession stands at a critical inflection point, facing unprecedented challenges from technological disruption, evolving regulatory landscapes, and workforce transformation. This comprehensive course, based on the Pennsylvania Institute of CPAs' groundbreaking research report "The Future of the Audit: Building Relevance and Sustaining Quality," provides auditors with essential insights and actionable strategies to navigate these seismic shifts. Through expert perspectives from industry leaders including PCAOB board members, Big Four executives, and audit committee chairs, participants will explore how artificial intelligence, blockchain, and data analytics are fundamentally reshaping audit practices while creating new opportunities for value creation and risk assessment. Beyond technology adoption, this course addresses the pressing talent crisis facing the profession and offers practical solutions for building a future-ready workforce. Participants will learn how to leverage emerging technologies to enhance audit quality, understand the implications of regulatory modernization including the concept of "regulatory sandboxes," and develop strategies for attracting and retaining top talent in an increasingly competitive market. Whether you're a partner in a small

firm, a manager in a large organization, or an audit professional seeking to future-proof your career, this course provides the roadmap for maintaining relevance, ensuring quality, and thriving in the evolving audit landscape. You'll leave with concrete action steps for immediate implementation and a clear vision for transforming your audit practice to meet the demands of tomorrow's financial ecosystem. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Ethics: Court Orders, Confidentiality, and Compliance

Thursday, Sep. 17 9:00am - 11:00am Online 2.00 Credits Member Price: $89

Individual Class Pass Company Coupon Book

Tax professionals often find themselves navigating complex ethical terrain when responding to court-ordered summonses, especially in emotionally charged settings like divorce. This course explores the ethical obligations and legal boundaries that govern the disclosure of taxpayer information, with a focus on IRC 7216 and 6713, Circular 230, and the Gramm-Leach-Bliley Act (GLBA). Through scenario-based learning and practical analysis, participants will examine how ethical principles intersect with legal mandates and how to maintain professional integrity when faced with conflicting client interests, ambiguous court orders, or pressure to over-disclose. This course emphasizes informed consent, scope limitations, and the preparer's duty to protect confidentiality even when disclosure is legally permitted. This course provides the tools and frameworks needed to make sound decisions, avoid regulatory pitfalls, and uphold the highest standards of practice in sensitive legal contexts. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Leadershift Ethics: Things Must Change!

Thursday, Sep. 17 9:00am - 11:00am Online 2.00 Credits Member Price: $89

Individual Class Pass Company Coupon Book

With the rapid pace of change, change now happens daily in business and our personal lives. It can be difficult to navigate change when right and wrong get a bit fuzzy. New processes, new technology, new circumstances and new impacts to people must be measured and decisions made as the change evolves. Change always becomes something different than what was originally planned or imagined. In this session, learn how to measure your ethics through change. You will learn how to filter everything you do during change through a simple litmus test. Through the power of story, you

will learn from the lessons of other organizations and their ethical mistakes. Lastly, you will take away what is required to manage yourself so that when ethical decisions arise, you have the mental capacity to manage through it well. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Lessee and Lessor Accounting

Thursday, Sep. 17 9:00am - 11:00am Online 2.00 Credits Member Price: $89

Individual Class Pass Company Coupon Book

What you need to know about the lessee and lessor accounting models This course explains the lessee accounting model, including Lease and non-lease components Lease classification Amortization of the right-of-use asset Interest on the lease liability This course also explains the lessor accounting model, including Transfer of risk Profit recognition Collectibility Included in this course are detailed and illustrated examples with amortization tables and journal entries.

Surgent's New and Expanded Tax Benefits Associated with Section 1202 – Qualified Small Business Stock

Thursday, Sep. 17 9:00am - 11:00am Online 2.00 Credits Member Price: $99

Individual Class Pass Company Coupon Book

This program reviews and analyzes the important changes made by the One Big Beautiful Bill Act (OBBBA) to qualified small business stock (QSBS) covered under Section 1202. Effective for stock issued after July 4, 2025, there are important changes that make Section 1202 much more appealing to clients willing to run the risks associated with doing business as a C corporation. These enhanced provisions could potentially lead to exclusion of capital gains if very strict compliance rules are followed. Section 1202 application is particularly attractive for start-ups and entrepreneurial endeavors. For taxpayers willing to confront the technical challenges of this provision, Section 1202 may produce impressive tax advantages.

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

Thursday, Sep. 17 9:00am - 12:30pm Online 4.00 Credits Member Price: $159

Individual Class Pass Company Coupon Book

The employer-employee relationship strains both sides in uncertain times, and businesses need CPAs, controllers, and other advisors to provide understanding of the complex legal, tax, and health care issues associated with all aspects of employment. This course provides in-depth coverage of this critical area.

Financial Statement Presentation, Disclosure, and Analysis

Thursday, Sep. 17 9:00am - 5:00pm Online 8.00 Credits Member Price: $239

Individual Class Pass Company Coupon Book

This comprehensive session is a must-attend event for accountants who prepare financial statements and want to explore best practices for discerning the stories told by financial statements. We discuss salient requirements for presenting financial information while considering the critical role of disclosure for lending relevance to financial statements. We also explore techniques that will allow participants to perform meaningful financial statement analysis and effectively communicate conclusions to decision-makers and other stakeholders. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Surgent's Compilations, Reviews, and Preparations: Engagement Performance and Annual Update

Thursday, Sep. 17 9:00am - 5:00pm Online 8.00 Credits Member Price: $299

Individual Class Pass Company Coupon Book

Specifically designed for preparation, compilation, and review practitioners, this course will provide you with a comprehensive review and hands-on application for performing financial statement preparation, compilation, and review engagements. You will learn the ins and outs of applying SSARS No. 21, Clarification and Recodification, as well as the additional guidance related to SSARS engagements through the issuance of SSARS Nos. 22-26 by the ARSC. In addition to SSARS 26, the entire suite of quality management standards is discussed. However, knowing the standards is not enough. You need to be able to effectively apply them. To support this, the course will review

recent peer review feedback on SSARS engagements, providing insights on how to successfully apply this guidance. Not only will this course bring you up to date on SSARS requirements and guidance, but more importantly, it will provide you with practical examples and illustrations to help you effectively and efficiently perform these types of engagements. This course is intended to be your go-to reference for training your staff and managing your SSARS No. 21-26 services in compliance with professional, ethical, and technical requirements.

Surgent's The Complete Guide to Payroll Taxes and 1099 Issues

Thursday, Sep. 17 9:00am - 5:00pm Online 8.00 Credits Member Price: $279

Individual Class Pass Company Coupon Book

Employment taxes are often overlooked as an area where more planning may be effective. Payroll taxes have become an increasing burden for the average business, and IRS penalties for noncompliance have risen dramatically in recent years. The Service has announced that uncovering noncompliance by employers ranks high on its audit list. This course presents a comprehensive overview of federal payroll taxes, Form 1099, and related compliance issues.

The Best Individual Income Tax Update Course by Surgent

Thursday, Sep. 17 9:00am - 5:00pm Online 8.00 Credits Member Price: $299

Individual Class Pass Company Coupon Book

This highly informative course comprehensively covers all the latest tax law developments. The focus is on individual taxation and discussion of the planning opportunities practitioners need to understand to help clients respond effectively. You will come away from the course with the up-to-date knowledge to educate your individual tax clients and implement tax-saving ideas that will serve their ever-evolving needs. This course is continually updated to reflect enacted legislation. Please Note: Due to content overlap, it is recommended that this course NOT be taken together with BFTU.

Securing Your Data with a Password Management App - Updated

Thursday, Sep. 17 9:30am - 11:30am Online 2.00 Credits Member Price: $89

Individual Class Pass Company Coupon Book

Cybersecurity protection is one of the most important responsibilities of every CPA professional to protect the confidentiality of sensitive client information. While there are many aspects of cybersecurity that need to be addressed, the biggest vulnerability to protect against is unauthorized access to your application login credentials. Once your login credentials are breached, the cybercriminal essentially has the keys to your data kingdom. John Higgins, a national leader in the CPA technology, will demonstrate the ease with which you can protect all of your login credentials with maximum security with minimal expense. You will leave this course prepared to deploy this state of the art security tool in your organization. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Forensic Accounting: Court Approved Methods of Proof

Thursday, Sep. 17 9:30am - 1:30pm Online 4.00 Credits Member Price: $149

Individual Class Pass Company Coupon Book

How does a forensic accountant calculate financial losses? Federal courts have approved various ways to calculate losses ranging from net worth method of proof to the expenditures method. Each method of proof depends on the available facts to the forensic accountant. This presentation will focus on the various court approved methods of proof, when to use them, and how to calculate the total loss. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Fraud and Embezzlement: Case Studies from the Trenches

Thursday, Sep. 17 10:00am - 12:00pm Online 2.00 Credits Member Price: $89

Individual Class Pass Company Coupon Book

Governmental entities are the second largest victims of embezzlement. This seminar examines recent events involving theft of public money and circumstances that allowed the fraud to occur. Case studies we examine include the 2012 $54 million embezzlement from the City of Dixon by Rita Crundwell. The events that impacted the small Illinois town of 16,000 residents was the largest governmental fraud case to date, and spanned an astonishing 20 years. This remarkable story inspired an award-winning documentary, "All the Queen's Horses." We will also examine factors that led to scandals involving the Baptist Foundation of Arizona, World Com, Collin Street Bakery and the

Ohio American Cancer Society, among others. This course is ideal for CPAs, government finance personnel, all Internal Auditors, lawyers, governance professionals, accountants and human resource personnel. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Surgent's Guide to Understanding the At-Risk Basis Rules and Forms 6198 and 7203

Thursday, Sep. 17 10:00am - 12:00pm Online 2.00 Credits Member Price: $99

Individual Class Pass Company Coupon Book

Many tax clients with losses from their S corporations, partnerships, and multiple-member LLCs treated as partnerships will want to use these losses to offset their other income from other sources. This program explains when, why, and how the at-risk rules apply to allow or to prevent the owner of a pass-through entity from taking a loss from a pass-through entity and using it to offset other income. This program is extremely helpful for anyone with pass-through entity clients.

Financial and Tax Accounting for S Corporations and Partnerships

Thursday, Sep. 17 10:00am - 6:00pm Online 8.00 Credits Member Price: $239

Individual Class Pass Company Coupon Book

This program compares and contrasts the financial and tax accounting differences of partnerships, LLCs, and S corporations, as well as discuss the tax accounting for these entities. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Surgent's Fiduciary Income Tax Returns – Form 1041 Workshop with Filled-in Forms

Thursday, Sep. 17 10:00am - 6:00pm Online 8.00 Credits Member Price: $279

Individual Class Pass Company Coupon Book

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

Written Information Security Plans

Thursday, Sep. 17 11:00am - 12:00pm Online 1.00 Credits Member Price: $55

Individual Class Pass

Thsi course provides a comprehensive overview of Written Information Security Plans (WISP), focusing on their purpose, requirements, and implentation. All PTIN holders must certify they have a WISP prior to renewal, along with certifying the training of employees, staff and contractors as necessary. Participants will explore the history and legal foundation of WISP under the Gramm-Leach-Bliley Act, and how compliances is enforsed through IRS Circular 230, AICPA Statments of Standards, The American Bar Associations and the Federal Trade Commission (FTC). This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Mastering the Excel Lookup Functions

Thursday, Sep. 17 11:00am - 1:00pm Online 2.00 Credits Member Price: $89

Individual Class Pass Company Coupon Book

In today's data-driven world, Microsoft Excel has become an essential tool for professionals in any organization. To harness the full potential of Excel, it is crucial to understand and master its lookup functions. This course is designed to equip participants with the knowledge and skills needed to effectively utilize Excel's lookup functions and enhance their data analysis capabilities. Throughout this comprehensive course, participants will dive deep into the world of lookup functions and gain experience through practical exercises and real-world scenarios. Whether you're a seasoned Excel user looking to fine-tune your skills or a beginner eager to unlock Excel's full potential, this course is tailored to meet your learning needs. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Performing Preparation, Compilation and Review Engagements

Thursday, Sep. 17 11:00am - 1:00pm Online 2.00 Credits Member Price: $89

Individual Class Pass Company Coupon Book

Compliance with standards Do you perform preparation, compilation, or review engagements? Staying in compliance with all professional standards surrounding engagements performed in accordance with Statements on Standards for Accounting and Review Services (SSARSs) is essential to your engagements. You'll gain insight into how to perform these engagements in accordance with the relevant guidance. Building a foundation for successful engagements You'll cover several key topics to help you complete preparation, compilation, or review engagements successfully and compliantly. Topics covered include: Frameworks, objectives, and general principles Standards and guidance Documentation

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Introduction to Ethics and Professional Skepticism

Thursday, Sep. 17 11:30am - 1:30pm Online 2.00 Credits Member Price: $89

Individual Class Pass Company Coupon Book

Ethics and professional skepticism are a cornerstone of public accounting. This course will review the Code of Ethics for Professional Accountants that practitioners must adhere to. This course will outline the pressures, opportunities, and rationalizations that lead to instances of fraud. In addition, this class will walk through some interactive examples to illustrate various scenarios of noncompliance during engagements. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Internal Control - Testing for Operating Effectiveness

Thursday, Sep. 17 12:30pm - 2:30pm Online 2.00 Credits Member Price: $89

Individual Class Pass Company Coupon Book

Properly designed and effectively operating internal control over financial reporting is critical for preventing, or detecting and correcting, material misstatement. This course describes how to satisfy the audit requirements related to taking a control reliance strategy by testing the operating effectiveness of internal controls, while promoting an effective and efficient financial statement audit.

This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Eight Awesome PivotTable Features

Thursday, Sep. 17 12:30pm - 4:30pm Online 4.00 Credits Member Price: $180

Individual Class Pass Company Coupon Book

Are you looking to take your PivotTables to the next level? Many experts consider PivotTables to be Excel's most powerful feature. Yet, most who create and work with them barely scratch the surface of all that PivotTables can do. In this session, you'll learn eight powerful features you may have missed. From user-defined calculations to consolidating reports and adding KPIs, we'll show you how to get the most out of your PivotTables. These are just some examples of the great things you can do with PivotTables, and in this session, you will learn these and other techniques to make your PivotTables even more powerful.

Applying AI in A&A: Creating Effective Prompts

Thursday, Sep. 17 1:00pm - 2:00pm Online 1.00 Credits Member Price: $49

Individual Class Pass

When you ask someone in accounting and finance how often they use generative AI, it's no longer a "sometimes" -- it's usually daily. Effective use of the AI tools may vary, though. This webcast can help improve both efficiency and effectiveness for accounting and assurance professionals by unlocking the key to well-structured AI prompts. Examples of effectively written prompts will illustrate how to craft prompts that improve AI outputs and create even more efficiency in your work.

Supervision/Management Competencies: An Ethical Approach

Thursday, Sep. 17 1:00pm - 3:00pm Online 2.00 Credits Member Price: $89

Individual Class Pass Company Coupon Book

Job titles for individuals can vary in different organizations even though the work is the same. This webinar is designed for the individual whose role is to oversee the work of others. This webinar

includes an overview of Aristotle's virtue ethics and its application to the responsibility and privilege of developing employees to be their best and for the success of the organization. We will also address issues such as going from "buddy to boss", how to manage if you are newly assigned to an existing employee that was previously supervised by someone else, and critical skill sets necessary for supervisory/managerial positions. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Surgent's Introduction to Charitable Gifting for Individual Taxpayers

Thursday, Sep. 17 1:00pm - 3:00pm Online 2.00 Credits Member Price: $119

Individual Class Pass Company Coupon Book

This course is designed to provide a comprehensive understanding of charitable gifting strategies and their implications for individual taxpayers. Participants will explore the fundamentals of charitable giving, including the tax benefits, legal considerations, and planning opportunities available under current tax law. The course will cover the types of organizations that qualify for charitable contributions, the income and estate tax treatment of gifts, and the various methods of structuring charitable donations to maximize tax efficiency. Attendees will learn about specific charitable gifting techniques such as donor-advised funds, charitable remainder trusts, and qualified charitable distributions from retirement accounts. The course will also examine tax deduction limits, substantiation requirements, and the impact of state tax credits on charitable giving. By the end of the course, participants will be equipped with the knowledge and tools to guide clients in implementing effective charitable giving strategies that align with their financial and philanthropic goals.

Surgent's Guide and Update to Compilations, Reviews, and Preparations

Thursday, Sep. 17 1:00pm - 4:30pm Online 4.00 Credits Member Price: $159

Individual Class Pass Company Coupon Book

Specifically designed for preparation, compilation, and review practitioners, this course provides a comprehensive review and hands-on application for performing financial statement preparation, compilation, and review engagements. You will learn the ins and outs of applying SSARS No. 21, Clarification and Recodification, as well as additional guidance related to SSARS engagements through the issuance of SSARS Nos. 22-27 by the AICPA's Accounting and Review Services Committee (ARSC). The course also reviews recent peer review feedback on SSARS engagements, providing insights on how to successfully apply this guidance. Not only will this course bring you up to

date on SSARSs requirements and guidance, but more importantly, it will provide you with practical examples and illustrations to help you effectively and efficiently perform compilation, preparation, and review engagements.

Preparation, Compilation, and Review Engagements: Update and Review

Thursday, Sep. 17 1:00pm - 5:00pm Online 4.00 Credits Member Price: $139

Individual Class Pass Company Coupon Book

If you supervise preparation, compilation, and review engagements, this course is designed to assist you in adhering to professional standards. It will inform you of the latest developments and pertinent issues relevant to these engagements as you gain insights into: The U.S. business economy Peer review practices FASB updates Various other aspects that influence preparation, compilation, and review engagements

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Exercise Your Ethics: Techniques to Improve Ethical Response

Thursday, Sep. 17 1:30pm - 3:30pm Online 2.00 Credits Member Price: $89

Individual Class Pass Company Coupon Book

Many courses highlight ethical failures - this course goes beyond that. This course identifies the many barriers to ethical behavior, focuses on habits and techniques that improve ethics and offer ways to practice so that the ethical "muscle" is ready for any dilemma. This course incorporates ideas from leading ethical authors and includes data from the ACFE Report to the Nations. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Surgent's Weekly Expert Hour

Thursday, Sep. 17 2:00pm - 3:00pm Online 1.00 Credits Member Price: $79

Individual Class Pass

As financial and tax professionals well know, information overload is a constant struggle we face because things change quickly, and the sheer number of changes being made on a daily basis is

enormous. Of great importance to small and medium tax and advisory firms is differentiating between changes that are relevant to our practice and our clients and changes that are new but totally irrelevant. Distinguishing between the two is difficult and time-consuming. Mike Tucker and a team of experts are pleased to present a weekly series designed to eliminate the clutter and get you what you need to stay up-to-date and perform for your clients. Mike and his co-presenters will dispense news on current events impacting taxes, finance, and industry. The subject matter will differ each week and intermittently include topics such as Social Security and Medicare. The panelists will discuss personal and corporate tax matters as well as other late-breaking news related to practitioners' personal finances and those of their clients. Every financial professional will benefit from this series. This is a cost-effective way for accountants to fulfill their compulsory continuing education because this weekly series will include almost 40 one-hour presentations. Sign up today — your clients and your bottom line will thank you.

Navigating IRS Collections: The Collection Process

Thursday, Sep. 17 2:00pm - 4:00pm Online 2.00 Credits Member Price: $89

This course is designed for tax professionals seeking to understand and navigate the IRS collection process effectively. Participants will gain indepth knowledge of the various collection methods employed by the IRS, including liens, levies and wage garnishments. Additionall, participants will leand strategies to avoid or halt collection actions and the implications of the statute of limitations on tax collection. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

ChatGPT and Advanced Accounting Research

Thursday, Sep. 17 2:30pm - 4:30pm Online 2.00 Credits Member Price: $89

This course provides a concise overview of how artificial intelligence, particularly ChatGPT and other AI tools, is transforming accounting research methodologies and practices. Students will explore the shift from traditional search engine-based research to AI-driven insights, learning how to leverage various AI platforms for enhanced financial analysis, regulatory compliance, and strategic decision-making. The course emphasizes practical applications of AI in accounting contexts while addressing critical considerations such as data verification, ethical usage, and professional judgment. This event

may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

AICPA Town Hall Series (9/17/2026)

Thursday, Sep. 17 3:00pm - 4:00pm Online 1.00 Credits

The AICPA Town Hall Series delivers: Timely & Critical Information Interpretation & Analysis Firm and Business Strategies Practitioner Capabilities **Free for AICPA members Not an AICPA or CIMA member? Become one today.

Advanced Excel for Staff - Build Reports and Analyze Data

Thursday, Sep. 17 3:00pm - 5:00pm Online 2.00 Credits Member Price: $89

Individual Class Pass Company Coupon Book

Advanced Excel for Staff - Build Reports and Analyze Data is a comprehensive, 2-hour course tailored for professionals looking to enhance their Microsoft Excel skills in creating reports and performing data analysis. This course bridges the gap between basic Excel functionality and the advanced techniques required for effective data-driven reports. Participants will learn to efficiently gather, organize, and structure data, apply calculations to derive key metrics, and create professional-grade reports that are both visually appealing and actionable. The course emphasizes practical application, providing participants with guidance on Excel's advanced tools and functions. By mastering workflows and best practices, learners will gain the confidence to tackle complex data challenges and streamline reporting processes. Additionally, participants will explore methods to validate and share their work, ensuring that reports are accurate, insightful, and easily communicated across teams. Whether you are tasked with preparing financial summaries, tracking performance metrics, or generating operational insights, this course will equip you with the tools to maximize Excel's potential, saving time and improving the quality of your outputs. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Quality Management: My System is Set Up -- Now What?

Thursday, Sep. 17 3:00pm - 5:00pm Online 2.00 Credits Member Price: $89

Individual Class Pass Company Coupon Book

With the design and implementation of your firm's system of quality management complete, the firm now focuses on operating, maintaining, and continuously improving that system. This webcast explores the ongoing post-implementation requirements of SQMS No. 1, including: Understanding engagement performance responsibilities Performing and documenting monitoring activities Identifying and evaluating findings and deficiencies Implementing, evaluating, and tracking remediation Conducting the required annual evaluation of the system and periodic performance evaluations of those assigned ultimate and operational responsibility for the system Learn how to keep your firm's system responsive, current, and effective in maintaining and promoting quality.

Surgent's Going Out on Your Own: Entity Types and Accounting Methods

Thursday, Sep. 17 3:00pm - 5:00pm Online 2.00 Credits Member Price: $99

Individual Class Pass Company Coupon Book

Starting a business is tough! There are lots of decisions to be made and things to think about. You may feel like you have a great idea. You have done your marketing research, developed a prototype, and even looked at locations for your new office. Then it dawns on you.... What type of entity do I need to be? Is there really an advantage to choosing one entity type over the other? In this class, we will dig into the differences between entity types - from taxes to liability. We will also look at the advantages and disadvantages of different methods of accounting. Whether you are a small business owner looking to start something new or a practitioner looking to expand your client advisory services, this course is the one for you!

Tax Depreciation: Review and Update

Thursday, Sep. 17 4:00pm - 6:00pm Online 2.00 Credits Member Price: $89

Individual Class Pass Company Coupon Book

A discussion of recent law changes that impact capitalization, depreciation, and disposition of assets. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

The AI Revolution in 2026: What CPAs Should Know

Thursday, Sep. 17 4:00pm - 6:00pm Online 2.00 Credits Member Price: $89

Individual Class Pass Company Coupon Book

AI is reshaping accounting, tax, and finance. This update surveys the state of AI technology in 2026: core concepts, software tools, risks/controls, and practical CPA use cases. You will leave with an expanded AI vocabulary, a current view of the AI landscape, and actionable talking points for staff, clients, and service providers. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Tax Implications of Retirement Plan Distributions

Thursday, Sep. 17 5:00pm - 6:00pm Online 1.00 Credits Member Price: $55

Individual Class Pass

This session will address the complex rules of retirement distributions, review key provisions of the SECURE Act 2.0, and provide practical strategies of maximizing tax benefits for your client. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Ethics: How to Give and Receive Criticism the Right Way

Friday, Sep. 18 9:00am - 11:00am Online 2.00 Credits Member Price: $89

Individual Class Pass Company Coupon Book

How well do you accept criticism? How might it enrich your business - and you - if you did a better job of it? This distinctive webinar will show you why it is in your best interest to accept criticism with gratitude. It's even better to welcome criticism. It's also a good idea to learn how to give criticism the right way. A related topic is the art of giving and receiving apologies, and we'll do a deep dive into this area as well. You'll leave with clear guidelines for how to criticize others, accept criticism from them, give meaningful apologies, and accept apologies with grace and ethical intelligence. The result will be a stronger CPA practice and a better you. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Public Procurement Basics: Protecting the People's Money

Friday, Sep. 18 9:00am - 11:00am Online 2.00 Credits Member Price: $89

Individual Class Pass Company Coupon Book

Procurement is a critical component of successful government operations. While there are challenges in public procurement, there are a number of guidelines and requirements that will help lead you to success. This course will offer guidance on how governments can meet complicated procurement needs and develop best practices that protect public and Federal funds. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

COSO's Internal Control Framework Essentials

Friday, Sep. 18 9:00am - 12:30pm Online 3.50 Credits Member Price: $125

Individual Class Pass

COSO framework overview Gain an overview of COSO's internal control framework comprising five components and their related principles. Learn how to evaluate the control environment, risk assessment, control activities, information and communication, and monitoring activities at your or your client's entity. Through real-life examples, enhance your understanding of how to apply the framework as it relates to financial reporting whether you are an auditor or entity management.

How Fraud Can Affect Smaller Organizations

Friday, Sep. 18 9:00am - 1:00pm Online 4.00 Credits Member Price: $149

Individual Class Pass Company Coupon Book

Many small to medium sized companies do not properly address the risk that arises related to fraud because these organizations do not have the resources needed to mitigate this risk or because owners or those in top level management underestimate the scope of the issue. All organizations, regardless of size, must be aware of the risks associated with intentional fraudulent acts and know that a significant and effective fraud scheme could even create going concern issues for some entities. In this session, we delve into the reasons that fraud takes place. The material discusses the types of defalcations that are often executed against smaller entities and then explores measures

that organizations can implement to help stop fraud activities and add security. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

LLCs and S Corporations: A Comparative Analysis

Friday, Sep. 18 9:00am - 5:00pm Online 8.00 Credits Member Price: $239

Individual Class Pass Company Coupon Book

This course focuses on the most common aspects and tax implications of Limited Liability Companies and S Corporations. It will further compare forms of entities, along with corporate formalities compliance issues of each entity type. Electing Subchapter S status as well as reviewing the mechanics of electing Subchapter S status will be discussed. Highlights of entity specific tax forms will be discussed, as well as accountable plans, taxable fringe benefits, officer reasonable compensation, estate planning, business continuation planning and audit strategies. Schedules K-1, K-2, K-3, and effectively connected income will be reviewed in this course as well. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Surgent's Form 1065 Boot Camp: Step-by-Step Preparation with Completed Forms

Friday, Sep. 18 9:00am - 5:00pm Online 8.00 Credits Member Price: $279

Individual Class Pass Company Coupon Book

The objective of this course is to train new, rusty, or returning-to-practice staff with a hands-on, pencil-pushing gold standard for preparing Form 1065. Common to advanced issues of partnerships are explored in the current course that can double as a quick and practical reference guide for tax treatment and tax preparation guidelines. Within each chapter, we illustrate various parts and areas of interest when preparing a 1065, including examples and corresponding tax forms. We bring it all together in the final two chapters with a comprehensive example that integrates and links all previous chapters. The course and instruction delivery are geared toward a basic understanding and progress to more complex issues via Surgent's "Step-by-Step" preparation guide.

Surgent's Industry Accountant Key Performance Metrics

Friday, Sep. 18 9:00am - 5:00pm Online 8.00 Credits Member Price: $279

Individual Class Pass Company Coupon Book

This course will explore some of the most essential tools for measuring financial and operational success, as well as improving results. Appendices will be provided to give students hands-on applicable materials that can be utilized after completion of the course.

AI and Accounting in Manufacturing

Friday, Sep. 18 9:30am - 11:30am Online 2.00 Credits Member Price: $89

Individual Class Pass Company Coupon Book

This course provides a concise overview of how artificial intelligence (AI) is reshaping financial oversight in the global manufacturing sector. With factories evolving into digital ecosystems powered by intelligent automation, predictive analytics, and edge computing, the role of accounting and finance professionals is rapidly transforming. Participants will explore how AI technologies intersect with core financial functions-cost accounting, audit, tax compliance, and financial planning-while enabling real-time reporting, fraud detection, and predictive decision-making. Drawing on current global trends and real-world case studies, the course offers actionable insights into integrating AI into financial operations, elevating the strategic role of accounting in manufacturing enterprises. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

CFO Solutions to IRS Problems

Friday, Sep. 18 9:30am - 1:30pm Online 4.00 Credits Member Price: $149

Individual Class Pass Company Coupon Book

Many CPAs are becoming full-time or fractional CFOs for small businesses. In that position, they are the resident expert in finances, cash flow planning, and budgeting. But what about dealing with the IRS? The IRS has broad powers to administer the assessment and collection of taxes. From removing penalties to criminal prosecutions, this presentation focuses on how CFOs can prevent problems with the IRS and how to develop winning strategies if the IRS knocks on the door. This event may be a rebroadcast of a live event and the instructor will be available to answer your

questions during the event.

Surgent's Elder Fraud

Friday, Sep. 18 10:00am - 12:00pm Online 2.00 Credits Member Price: $119

Individual Class Pass Company Coupon Book

When we leave our jobs, we also leave the protection our employer provides us with regards to internet and Wi-Fi security. Hired people may be able to help with the newest applications, but they may not understand the security risks posed. This session will cover some basic information about cybersecurity weaknesses and some of the scams that target older, retired people. Many times, the perpetrator is someone close and someone who we think we can trust. In this course, you will learn some basic tools to protect against those who wish to perpetrate fraud.