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Connecticut Society of CPAs

FEATURED

Higgins Advisory AI Series

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The 2026 Higgins Advisory AI Series delivers focused, practical training designed specifically for CPAs and finance professionals who want to confidently integrate AI into daily workflows. Built specifically for accounting professionals, this series offers live, interactive instruction with real-world demonstrations - not theory. Register for the series and save more than 25%!

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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.

Governmental Accounting and Auditing Group Meeting (Virtual)

Tuesday, Sep. 15 9:00am - 10:00am Online 0.00 Credits

The Governmental Accounting and Auditing Committee meets to discuss developments, new regulations, and compliance issues in the field of governmental accounting and auditing. Group members include both public sector finance professionals and those who serve them in public accounting. Members also assist with planning the governmental accounting and auditing track at our MEGA Accounting and Auditing Conference held in June. A meeting agenda will be sent one week prior to the meeting date.This will be a virtual meeting via Zoom meetings. If you register for this meeting via our website, please see https://www.ctcpas.org/my-cpe/upcoming to launch the Zoom meeting.

Will Your Ethics Be Burned by Burnout?

Tuesday, Sep. 15 9:00am - 11:00am Online 2.00 Credits Member Price: $89

Individual Class Pass Company Coupon Book

Ethical behavior is not a destination it is a journey with twists, turns, and bumps in the road. We are faced with ethical dilemmas every day. Do I speed to make it to a meeting? Do I call in sick because I

need a break? When does "helping my child with their homework" become "doing it for them"? CPAs are ethical most of the time, but staying ethical is hard. It gets harder when we are under stress. 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 Gaining a Competitive Advantage: Critical Skills for CFOs and Controllers

Tuesday, Sep. 15 9:00am - 12:30pm Online 4.00 Credits Member Price: $159

Individual Class Pass Company Coupon Book

All organizations are looking for ways to gain an advantage over the competition. This practical and interactive session will present a toolkit of ideas to help CFOs, controllers, and finance professionals better position their organizations for the future. We know change is occurring at an exponential rate, and that has proven to be the case in all areas of finance, management, and leadership over the past year. The course deals with these new issues and will continue to be updated as necessary throughout the year. This year, we will take a special interest in the opportunities and threats of AI for the finance professional. Become the "financial hero" of your organization and make a positive impact on the bottom line.

Conducting a Remote Audit

Tuesday, Sep. 15 9:00am - 1:00pm Online 4.00 Credits Member Price: $139

Individual Class Pass Company Coupon Book

Auditing for today's world Remoting auditing is happening everywhere you turn. Understanding the considerations for a remote audit and the specific techniques for performing the engagement will help you integrate remote auditing into your practice. You will learn how to: Leverage the benefits of remote auditing Manage the team, client, and audit process remotely Identify engagement-wide procedures from client acceptance through report issuance when remote auditing Identify and obtain audit evidence for generally material accounts

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Avoiding the Most Misapplied Audit Concepts

Tuesday, Sep. 15 9:00am - 5:00pm Online 8.00 Credits Member Price: $239

Individual Class Pass Company Coupon Book

Recent new auditing standards are designed to improve overall audit quality. The course will address the most common misapplied audit concepts in planning and performing effective and efficient financial statement audits. 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 Preparing C Corporation Tax Returns for New Staff and Paraprofessionals

Tuesday, Sep. 15 9:00am - 5:00pm Online 8.00 Credits Member Price: $279

Individual Class Pass Company Coupon Book

This course is a great foundation to introduce new preparers to tax rules related to business returns. The course covers tax areas affecting all business entities, providing a solid basis for staff to handle business entity returns. Such business tax topics include the sale of assets used in a trade or business (Form 4797), depreciation (Form 4562), deductible and nondeductible items, and the basics of uniform capitalization. The objective of this course is to train new staff accountants, data processing employees, paraprofessionals, and bookkeepers to prepare complicated federal corporate income tax returns. It is a hands-on and practical course, with extra emphasis on changes to forms under new tax law.

Using ChatGPT with Excel

Tuesday, Sep. 15 9:30am - 11:30am Online 2.00 Credits Member Price: $89

Individual Class Pass Company Coupon Book

In this innovative course, participants will learn to combine the power of artificial intelligence with the functionality of Microsoft Excel. You will learn how to leverage ChatGPT, OpenAI's powerful language model, to improve your Excel skills and decrease the time it takes to build spreadsheets. The course will include a quick introduction to ChatGPT but the majority of the time will be spent using ChatGPT to create an Excel spreadsheet. 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 Excel Lookups: Moving Beyond VLOOKUP Limitations

Tuesday, Sep. 15 10:00am - 12:00pm Online 2.00 Credits Member Price: $99

Individual Class Pass Company Coupon Book

How do you pull a value from a cell into another cell? Do you use a direct cell reference, like =G10? If so, you are probably missing out on some efficiency gains that could be achieved by using a variety of Excel's lookup functions. Veteran Excel users, who are aware of the VLOOKUP function, are also painfully aware of its limitations--especially that it cannot go left. We will explore how to bypass VLOOKUP's limitations by nesting functions and by moving beyond VLOOKUP altogether.

Surgent's Liquidation of Flow-Through Entities for LLCs and Partnerships

Tuesday, Sep. 15 10:00am - 12:00pm Online 2.00 Credits Member Price: $99

Individual Class Pass Company Coupon Book

Part of the technical competence of most experienced accounting and finance professionals is the ability to advise owners of S corporations and partnerships or multiple-member LLCs treated as partnerships regarding the tax rules that apply when these entities liquidate. Entity liquidations do not occur every day; but they do occur, and often at very critical times in the business life of the entity and its owners. All accounting and finance professionals should be able to advise their clients about the tax issues associated with client businesses that go out of existence and liquidate. This program explains the tax consequences associated with liquidating S corporations, partnerships, and multiple-member limited liability companies treated as partnerships.

Surgent's Taxation of the Mobile Workforce

Tuesday, Sep. 15 10:00am - 12:00pm Online 2.00 Credits Member Price: $99

Individual Class Pass Company Coupon Book

Today's workforce looks a lot different than it used to. With more people working from home and across state lines, employers must examine withholding and unemployment laws in a new light. In this course, we will examine tried and true rules in this area and examine statutes that are still developing. Using real-life examples and discussion, we will examine state laws on reciprocity and residency requirements. We will also look at what to do when state laws are silent or conflict on a

particular issue so you can keep your clients in compliance and be well-prepared for the questions that will come your way in these ever-changing times.

The DIY Automation Revolution: Building Finance Solutions Without Code

Tuesday, Sep. 15 10:00am - 12:00pm Online 2.00 Credits Member Price: $89

Individual Class Pass Company Coupon Book

The modern accounting firm is often held hostage by "software silos"—critical financial data trapped in disconnected applications that refuse to speak to one another. For years, the only solution was manual data entry or expensive custom development. This course introduces the "DIY Automation" movement, showing financial professionals how to use Integration Platform as a Service (iPaaS) tools like n8n, Zapier, and Power Automate to bridge these gaps. We move beyond basic triggers to explore how "localized innovation" allows practitioners to build bespoke connections between their favorite apps without writing a single line of code. Participants will gain a strategic framework for identifying automation opportunities, from client follow-ups to complex status reporting. We will explore the mechanics of the "wide ecosystem" of integration tools and demystify the role of Agentic AI, explaining how Retrieval-Augmented Generation (RAG) and the Model Context Protocol (MCP) are changing the way data is moved and interpreted. By the end of this session, you will be able to perform a clear cost-benefit analysis of your automation options and understand how to build resilient, error-aware workflows that keep your practice moving.

An Exhaustive Look At Fraud and Ways To Control It

Tuesday, Sep. 15 10:00am - 6:00pm Online 8.00 Credits Member Price: $239

Individual Class Pass Company Coupon Book

Fraud activities can be executed from within an organization, by parties outside an entity, or by both. Importantly, as the business world becomes more technological, the way fraud is carried out is changing. There must be an increased focus on understanding where new fraud vulnerabilities exist. In this session, we delve into the reasons that both internal and external intentional defalcations take place. The material discusses the new ways fraud is being actuated and looks at the factors driving those that undertake fraud. We spend time examining measures that can be implemented in order to stop fraud via the deployment of added security across the enterprise. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Exploring Internal Controls That Could Have Prevented Frauds

Tuesday, Sep. 15 10:30am - 12:30pm Online 2.00 Credits Member Price: $89

Individual Class Pass Company Coupon Book

This course examines actual fraud circumstances through the lens of potential prevention. We will examine how selected frauds were accomplished and consider what internal controls may have prevented fraudsters' ability to accomplish their nefarious acts. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Advanced ChatGPT for Accountants

Tuesday, Sep. 15 11:00am - 1:00pm Online 2.00 Credits Member Price: $89

Individual Class Pass Company Coupon Book

This course concisely explains the latest "see, hear, speak" multi-modal updates to ChatGPT and how they can be used in an accounting context. New features include vision processing, voice conversation, image generation, real-time Internet access, advanced data analysis, plugins and more. Discover how this technology can be used in mind-blowing ways to analyze financial data, optimize processes, and solve problems in the accounting domain. Through the lens of ChatGPT, practitioners can explore innovative solutions, automate routine tasks, and generate deeper insights and value to their clients and organizations in previously unimaginable workflows. You'll walk away with scores of advanced ChatGPT strategies and tips that can be immediately applied and deliver instant results to elevate the efficiency and effectiveness of your accounting projects and tasks. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Complete Guide to Analyze Data with Excel PivotTables

Tuesday, Sep. 15 11:00am - 3:00pm Online 4.00 Credits Member Price: $149

Individual Class Pass Company Coupon Book

Unlock the full potential of Microsoft Excel PivotTables with this comprehensive course. This training is designed to equip participants with the skills to effectively analyze and summarize data, transforming raw numbers into actionable insights. Whether you're a seasoned professional or new to

data analysis, this course provides an in-depth understanding of PivotTables and their capabilities, helping you uncover patterns, compare data, and make informed decisions. The program includes a step-by-step approach to creating and customizing PivotTables, focusing on how to use them to analyze data efficiently. Participants will learn how to group and filter data, identify trends, and apply advanced features to solve real-world business challenges. Beyond technical knowledge, this course introduces data visualization through PivotCharts, teaching participants how to present their analysis effectively to stakeholders. By the end of the course, you'll not only master PivotTable fundamentals but also gain advanced techniques to streamline data analysis and support strategic decision-making in any context. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Introduction to Risk Assessment

Tuesday, Sep. 15 11:30am - 1:30pm Online 2.00 Credits Member Price: $89

Individual Class Pass Company Coupon Book

Effective risk assessment is foundational to designing an appropriate audit response. This course introduces the audit risk model and provides an overview of the risk assessment procedures performed during engagements. Participants will review the components of the audit risk model and examine common risk assessment procedures, including inquiries, analytical procedures, and observation and inspection techniques. Emphasis is placed on understanding how risk assessment drives engagement planning and supports the development of appropriate audit responses. Designed for auditors seeking a structured introduction or refresher, this course builds foundational knowledge necessary for effective engagement planning and execution. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Retaining Top Talent: Strategies for CPA Firms

Tuesday, Sep. 15 12:00pm - 1:00pm Online 1.00 Credits Member Price: $55

Individual Class Pass

In today's challenging talent market, accounting firms face unprecedented pressure to retain their best performers. This course provides actionable, research-backed strategies to help firms keep their top talent from leaving. Based on comprehensive surveys of both current accounting professionals and those who have recently left the profession, participants will learn the real reasons employees

stay or go-and what firms can do about it. The course goes beyond simple solutions like "pay more, expect less" to explore comprehensive retention strategies including whole-person compensation, work-life balance improvements, career development pathways, and necessary business model transformations. Participants will discover why 73% of surveyed professionals want to stay with their current firm, yet many still leave-and how to bridge that gap. Key topics include understanding the true cost of turnover versus retention, implementing flexible work arrangements that actually work, creating meaningful career paths for non-partner track professionals, and transforming firm operations to support both profitability and employee satisfaction. Special attention is given to retaining diverse talent and adapting to the expectations of younger professionals who will comprise 27% of the workforce by 2025. Whether you're a firm leader, HR professional, or manager responsible for team retention, this course provides the insights and tools needed to build a sustainable talent strategy in an evolving profession. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Human Leadership in an AI-World

Tuesday, Sep. 15 12:00pm - 1:30pm Online 1.50 Credits Member Price: $69

Individual Class Pass

"AI won't take your job. But, AI will take parts of your job. And if you don't learn to do the particularly human things that AI will never do, then, you may in fact be without a job." -Kassi Rushing "Human Leadership in an AI World" workshop is designed to equip current and aspiring leaders with understanding of the essential skills and insights needed to thrive in an increasingly technology-driven workplace. This interactive and forward-thinking session challenges participants to harness the power of Generative AI and other new technologies while emphasizing the irreplaceable value of human leadership.

The CPA's 2026 Guide to Cryptocurrency and Blockchain

Tuesday, Sep. 15 12:30pm - 2:30pm Online 2.00 Credits Member Price: $89

Individual Class Pass Company Coupon Book

We have passed the 15 year anniversary of the start of the cryptocurrency market with the release of Bitcoin in 2010. It is estimated today that 1 in 5 people in the U.S. trade in cryptocurrency. With the recent changes in the legislative landscape, this number is poised for substantial growth. In addition, there will be natural evolution towards "smart contracts" powered by AI and the integration of

cryptocurrency as the payment mechanism. For these reasons, it is important for every CPA to have a baseline understanding of the cryptocurrency marketplace and the technology it is built on. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Data and Statistical Analytics Using Microsoft Excel

Tuesday, Sep. 15 12:30pm - 3:30pm Online 3.00 Credits Member Price: $119

Individual Class Pass

The role of the financial professional has shifted from reporting on the past to predicting the future, yet many practitioners still rely on manual, static workflows that fail to capture the full story within their data. This course bridges the gap between traditional accounting and modern data science by utilizing Excel's most powerful analytical engines to turn raw numbers into defensible business intelligence. We will move beyond simple averages, exploring how to use the Analysis ToolPak for deep statistical dives and leveraging Dynamic Arrays to build fluid, auto-updating models that respond to changing business conditions in real time. Participants will explore a modern analytics workflow that balances classic statistical rigor with cutting-edge efficiency. We will examine how to implement regression analysis for more accurate budgeting, utilize advanced forecasting functions to anticipate market shifts, and even leverage AI-assisted insights to find hidden patterns in sprawling datasets. By the end of this session, you will be able to distinguish between mere "data entry" and "data discovery," providing your firm or organization with the high-level analysis required to navigate an increasingly complex economic landscape.

Corporate Transparency Act Developments

Tuesday, Sep. 15 1:00pm - 3:00pm Online 2.00 Credits Member Price: $89

Individual Class Pass Company Coupon Book

U.S. Department of Treasury's Financial Crimes Enforcement Network (FinCEN) imposed a new reporting requirement that went into effect on January 1, 2024. Millions of businesses may have to file a Beneficial Ownership Information (BOI) Report. In a surprise turn of events, the Federal District Court from the Northern District of Alabama ruled on March 1, 2024 in National Small Business United v. Yellen ("NSB") that the CTA is unconstitutional. This course will discuss the CTA's provisions and the court's decision in NSB. Also covered will be future implications for business entities and steps to consider given the recent ruling. We will also discuss recent proposed

rulemaking by FinCen with respect to nonfinanced purchases of residential real estate and gratuitous transfers so that businesses can prepare for any additional reporting burdens that might arise. 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 Controllership Skills Update: Current Survival Skills

Tuesday, Sep. 15 1:00pm - 3:00pm Online 2.00 Credits Member Price: $99

Individual Class Pass Company Coupon Book

The role of financial professionals has and continues to change in organizations. The stereotype of collecting and reporting data has been replaced by a broader vision, which focuses on improving an organization's results today and preparing it for the future. This brief program offers specific actions that can be implemented by financial personnel to expand their role through improving their organization. The actions and techniques provided build upon and improve activities that exist in many organizations (measuring, budgeting, hiring, risk management, etc.), as well as providing insights into capital allocation, cash management, valuation techniques, variables that influence capacity levels, M&A activity and actions to increase efficiency and innovation. Updated to include the impact of regulations, additional examples of M&A, alliances and strategic spin-offs/splits, methods to improve efficiency from existing activities, the impact of COVID-19, as well as current organizational changes employed to manage and accelerate growth.

Surgent's Excel Tables and Conditional Summing

Tuesday, Sep. 15 1:00pm - 3:00pm Online 2.00 Credits Member Price: $99

Individual Class Pass Company Coupon Book

In this webinar we will explore the powerful concept of splitting data from reports and dig into the mechanics that enable this technique. The key feature discussed is the Tables feature, and the key function discussed is the multiple-condition summing function. We will illustrate these items in a variety of ways, including building crosstab style reports and mapping tables.

Surgent's Governing Agentic AI: Cybersecurity, Data, and Risk

Tuesday, Sep. 15 1:00pm - 3:00pm Online 2.00 Credits Member Price: $119

Individual Class Pass Company Coupon Book

As accounting firms and financial institutions deploy agentic AI, they face significant governance challenges. This course focuses on cybersecurity, data governance, and risk management practices essential for the safe and effective use of autonomous systems. Participants will examine frameworks such as NIST AI RMF and the CSA's red-teaming guidelines, as well as case studies on AI-powered cyber incidents. The course equips professionals to assess agentic system vulnerabilities, implement controls, and integrate risk insights into enterprise compliance strategies. This course equips CPAs to fulfill their oversight responsibilities in safeguarding financial data and ensuring the reliability of autonomous systems within the enterprise's control environment.

Surgent's Top Business Tax Planning Strategies

Tuesday, Sep. 15 1:00pm - 3:00pm Online 2.00 Credits Member Price: $99

Individual Class Pass Company Coupon Book

Business strategies for 2026 are based on important tax changes made in the One Big Beautiful Bill Act (OBBBA). There are a number of important business tax changes that can be used to develop tax planning strategies that have great advantages for businesses and their owners. This program covers many important business tax changes and the implications for tax planning founded on them.

Deep Dive Into Common Auditing Deficiencies

Tuesday, Sep. 15 1:00pm - 5:00pm Online 4.00 Credits Member Price: $149

Individual Class Pass Company Coupon Book

This course will review common deficiencies identified by the AICPA and state boards of accountancy. It features discussion on a variety of topics, including analytical procedures, sampling, group audits and risk assessment. We will review the areas of concern and how you can overcome them by employing best practices. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

The Bottom Line on the New Lease Accounting Requirements

Tuesday, Sep. 15 1:00pm - 5:00pm Online 4.00 Credits Member Price: $139

Individual Class Pass Company Coupon Book

FASB ASC 842, *Leases* explained Understanding lease fundamentals is essential to applying FASB lease requirements appropriately. As such, you'll delve into key concepts that define what a lease is, as well as basic lease accounting topics, such as: Contracts containing leases Lease classification Amortization of the right-of-use asset Impairment considerations Lease presentation and disclosure requirements Comprehensive examples and case studies will guide you through approaches to help you adopt accounting guidance for FASB ASU 2023-01. You'll also review the presentation and disclosure requirements, and other topics, including: Lease versus non-lease components Sales-type lease Direct financing lease Operating lease Lease terminations

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SEC Case Studies: Ethical Dilemmas in Finance and Accounting

Tuesday, Sep. 15 1:30pm - 3:30pm Online 2.00 Credits Member Price: $89

Individual Class Pass Company Coupon Book

Overview: Ethical challenges in finance and accounting can be complex and far-reaching, impacting not only individual careers but also entire organizations and the public trust. This webinar will provide a practical exploration of the ethical considerations professionals face in today's financial landscape. Through real-world case studies, participants will examine common ethical issues, learn to navigate conflicts between financial performance and ethical integrity, and gain tools for making sound decisions under pressure. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

From Numbers to Narratives: Mastering Data Analysis for CPAs

Tuesday, Sep. 15 2:00pm - 4:00pm Online 2.00 Credits Member Price: $89

Individual Class Pass Company Coupon Book

The accounting profession is rapidly shifting from a compliance-centered focus to one that demands insight, foresight, and strategic advisory skills. "From Numbers to Narratives: Mastering Data Analysis for CPAs" explores the "why" behind this transformation and highlights the critical role data analysis plays in helping CPAs remain relevant and competitive. This course provides a high-level

overview of the skills and mindset required to move beyond historical reporting and into forward-looking analysis and storytelling. Participants will gain an understanding of how Microsoft 365 applications - such as Excel, Power Query, Power BI, OneDrive, and Teams - can be leveraged to transform raw financial data into meaningful insights. With an emphasis on the advisory role of CPAs, this course empowers professionals at every stage of their career to embrace analytics as a core competency. 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 Bankruptcy Basics: Understanding the Reorganization and Liquidation Process in These Uncertain Economic Times

Tuesday, Sep. 15 2:00pm - 4:00pm Online 2.00 Credits Member Price: $99

Individual Class Pass Company Coupon Book

Consumers and businesses file for bankruptcy to seek protection from creditors and to reorganize or liquidate debts. Bankruptcy filings rise and fall with the economy. Surveys show that loss of income is the leading cause of consumer bankruptcies, followed by medical expenses and foreclosure. Corporate bankruptcies, on the other hand, are often the result of several factors, including excessive debt, decreased demand, increased costs, lawsuits or poor accounting practices. It is no secret bankruptcy filings will see a tremendous uptick in the wake of the Covid-19 pandemic. As an accountant, CFP, attorney or other professional, you need to be able to discuss the process and different available courses of action with your clients. Both landlords and tenants will be influenced tremendously. Individuals will look to your advice for a discharge and new start. Businesses will do the same and will also need to advise loyal employees. Creditors will receive proofs of claim and look to you for your expertise. Take this course and make sure you can speak fluently to both creditors and debtors. As trusted advisors, then, professionals should have a basic understanding of the bankruptcy process. This course provides a thorough review of the consumer and corporate bankruptcy practice. Participants in this course will gain an understanding of how consumer and corporate bankruptcy proceedings begin and end, as well as learn about key issues that affect debtor and creditor rights during bankruptcy. This course provides information from the perspective of both debtor and creditor. Although bankruptcy concerns the debts of the debtor, the Bankruptcy Code provides substantial protections to creditors. Creditor rights, however, vary widely depending on the status afforded the creditor under the Bankruptcy Code. Do yourself, your clients and your profit margin a favor and sign up for this invaluable program.

Surgent's Hiring New Workers and Payroll Taxes

Tuesday, Sep. 15 2:00pm - 4:00pm Online 2.00 Credits Member Price: $99

Individual Class Pass Company Coupon Book

When a new employee is hired, there are a lot of things the employer needs to take care of. Aside from getting employment contracts signed, training lined up, and the new hire breakfast planned, employers are tasked with making sure all of the payroll forms are filled out. For many small business owners, this can be a source of anxiety. They often wonder if they have everything they need. They also hear horror stories about potential IRS penalties for not having all of the boxes checked. In this course, we will explore the payroll compliance side of hiring new employees. From the alphabet soup of forms that need to be filled out to the initial payroll tax forms, we have you covered if you are a new practitioner or new business owner. We will even discuss the surprisingly difficult-to-navigate world of unemployment insurance.

Surgent's Tax and Advisory with Agentic AI

Tuesday, Sep. 15 2:00pm - 4:00pm Online 2.00 Credits Member Price: $119

Individual Class Pass Company Coupon Book

This course examines how agentic AI is revolutionizing tax compliance, planning, and advisory services. Participants will explore real-world deployments by leading firms such as EY, which has developed agents that handle millions of global tax transactions. The course also delves into cross-border compliance issues, transfer pricing automation, and emerging advisory models powered by agent-led simulations. Risks related to bias, unauthorized practice, and data privacy will be addressed, with guidance on aligning autonomous operations with professional and regulatory standards. CPAs must understand these advancements to ensure tax compliance, manage client expectations, and mitigate professional liability risks when providing agent-assisted advisory services.

Analyzing IFRS Financial Statements

Tuesday, Sep. 15 2:00pm - 6:00pm Online 4.00 Credits Member Price: $149

Individual Class Pass Company Coupon Book

Evaluating performance for professionals used to GAAP. A strong foundation in financial statement analysis is essential for understanding a company's performance and financial health across reporting standards. This seminar is designed for professionals, particularly those trained in U.S. GAAP, who want to enhance their understanding of IFRS-based financial reporting using a real-world Canadian public company as a case study. We will walk through the company's IFRS-based balance sheet, income statement, and statement of cash flows, highlighting both presentation and interpretation differences compared to U.S. GAAP. Participants will learn key analytical tools such as common-size analysis, trend analysis, and financial ratios covering liquidity, profitability, and leverage for an IFRS reporting company. Throughout the session, comparisons to GAAP will help clarify terminology, classification differences, and measurement principles-including treatment of leases, revenue, financial instruments, and impairment. The seminar also moves beyond basic ratios to explore advanced analytical techniques, such as ROE decomposition, operating vs. non-operating performance measures, and managerial ratios that reveal cost behavior, efficiency, and cash flow dynamics. Participants will see how IFRS disclosure requirements can offer additional insight into performance, risk, and sustainability. This practical and comparative seminar is ideal for accounting, finance, and business professionals who want to sharpen analytical skills, interpret IFRS-based financial statements, and better understand how to bridge IFRS and GAAP for global comparison and decision-making. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

ChatGPT for Accountants: 50+ Use Cases

Tuesday, Sep. 15 2:30pm - 4:30pm Online 2.00 Credits Member Price: $89

Individual Class Pass Company Coupon Book

This course will explore the use of ChatGPT and artificial intelligence chatbot technologies in the accounting profession. Participants will learn how to utilize ChatGPT to automate tasks, improve efficiency and accuracy, and provide real-time support to clients. 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 Current Issues in Accounting and Auditing: An Annual Update

Tuesday, Sep. 15 2:30pm - 6:00pm Online 4.00 Credits Member Price: $159

Individual Class Pass Company Coupon Book

Designed for accounting, auditing, and attestation practitioners at all levels in public accounting and business and industry, this course provides a detailed review of the multitude of FASB and AICPA standards and reports issued over the past few years, including a discussion of the FASB's Stage 3 PIR report on ASC 606. It also provides an overview of recent PCAOB inspection report findings and SEC rulemaking activity. Through hands-on examples and illustrations, this course will help you apply the guidance in practice. We further discuss other important A&A practice matters to be aware of, including an update on the quality management standards and soon-to-be-effective requirements for engagement quality reviews.

What If Your Client Didn't Take Reasonable Compensation

Tuesday, Sep. 15 3:00pm - 4:00pm Online 1.00 Credits Member Price: $55

Individual Class Pass

Are you a new advisor handling S Corp clients, or perhaps a seasoned professional facing this common scenario: "My S Corp client didn't take reasonable compensation last year. Now what?" Knowing that reasonable compensation isn't just a tax obligation, but a strategic financial decision, you need to be armed with expert knowledge to help your client navigate this situation. Join us to discuss IRS regulations, understand preventive measures, and address challenges within the year. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

The Ethic of Teamwork

Tuesday, Sep. 15 3:30pm - 5:30pm Online 2.00 Credits Member Price: $89

Individual Class Pass Company Coupon Book

"No one cares how much you know until they know how much you care." To be a part of a team, a team that truly cares for its people, is to be granted an opportunity for growth and inclusion and a sense of belonging. It doesn't get better than that! This ethics-based webinar examines the essence of what constitutes teams that are high functioning and highly collaborative. One essential component is the balance between content (getting the job done!) and process (how we get things done...how we treat each other). This webinar will offer concrete practical suggestions for teams both for content and process effectiveness. It will also offer opportunities for self-reflection and actions to take to enhance team performance. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Building Bulletproof Spreadsheets: When Accuracy Is Everything

Tuesday, Sep. 15 4:00pm - 6:00pm Online 2.00 Credits Member Price: $89

Individual Class Pass Company Coupon Book

This course equips accounting and finance professionals with practical methods to strengthen spreadsheet accuracy in environments where reliability directly affects reporting, analysis, and decision support. The content emphasizes modern Microsoft 365 capabilities, including dynamic arrays, data types, structured references, version history, and collaborative features that reduce formula risk and manual intervention. Participants see how sound workbook design, thoughtful data organization, and targeted validation rules reduce the likelihood of downstream errors and create spreadsheets that stand up to real-world pressures. The session also highlights common failure points found in finance teams—such as fragile formulas, inconsistent structures, and user-driven overrides—and demonstrates how to avoid them through protective controls, guided templates, and streamlined calculation flows. By combining updated Excel tools with practical design principles, participants leave with techniques that improve accuracy, enhance efficiency, and support higher-confidence financial outputs across their organizations.

Ethics, Tax Practice and Understanding Circular 230

Tuesday, Sep. 15 4:00pm - 6:00pm Online 2.00 Credits Member Price: $89

Individual Class Pass Company Coupon Book

This course provides a comprehensive overview of the ethical standards and principles governing tax practice, as outlined in IRS Circular 230. Participants will explore the importance of ethics in the tax preparation industry, review IRS rules, and examine common ethical violations and their associated penalties. The course emphasizes procedures that promote compliance with ethical guidelines, equipping tax practitioners to navigate complex ethical dilemmas confidently. Real-world scenarios will be used to demonstrate the application of ethical principles in tax preparation and representation. This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

CTCPA Town Hall Meeting: A Business Update from the Secretary of State and the IRS

Wednesday, Sep. 16 9:00am - 10:00am Online 1.00 Credits

Secretary of State Stephanie Thomas made history when she was sworn in as Connecticut's 75th Secretary of the State in 2023 as the first Black person elected to the office. She leads one of Connecticut's oldest constitutional offices - established in 1639 - and one of its most wide-ranging, overseeing elections, the state's business registry, and official public records. In this Town Hall Meeting, Secretary of State Thomas covers three timely topics of interest to business leaders: Business Fraud: Current fraud trends affecting businesses and practical steps to protect your organization. Human Trafficking Awareness: Recent legal developments and what business owners need to know about potential liability when working with vendors or suppliers involved in trafficking. Civic Engagement: How businesses can benefit from civic engagement and promote nonpartisan civic participation among employees, customers, and the community. We'll also be joined by IRS Stakeholder Liaison Yolanda Durant to talk about the Written Internet Security Plan (WISP) requirement. What are the most common cybersecurity vulnerabilities the IRS is currently seeing among tax and accounting professionals and what are three actions you need to take now? You must register to attend and receive CPE credit.

Forgotten Managerial Accounting Tools for CPAs

Wednesday, Sep. 16 9:00am - 11:00am Online 2.00 Credits Member Price: $89

Individual Class Pass Company Coupon Book

This session revisits managerial accounting techniques that you may not have considered for many years, even though they could be invaluable for CPAs in both business and public accounting. You will appreciate a fresh perspective of concepts you may not have considered since your college days. We will illustrate concepts with practical examples that you can immediately bring back to the office! 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

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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

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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

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

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.