

**IN**  
**CPA**  
**SOCIETY**

# re:Source





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## EDUCATION REQUIREMENTS

	INDIANA BOARD OF ACCOUNTANCY	AICPA	GAO YELLOW BOOK	INCPAS
<b>CPAS IN PUBLIC PRACTICE</b>	120 hrs/3 yrs minimum 20 hrs/yr	120 hrs/3 yrs	80 hrs/2 yrs minimum 20 hrs/yr	No CPE requirements
<b>CPAS IN INDUSTRY</b>	120 hrs/3 yrs minimum 20 hrs/yr	120 hrs/3 yrs	N/A	No CPE requirements
<b>A&amp;A REQUIREMENTS</b>	10% (or 12 hrs.) of the total required hours/3 yrs	N/A	N/A	N/A
<b>ETHICS</b>	4 hrs/3 yrs*	N/A	N/A	N/A
<b>SELF-STUDY RESTRICTIONS</b>	No more than 50% (60 hrs) can be attained through self-study	N/A	N/A	N/A
<b>REPORTING CYCLE</b>	1/1/2018 to 12/31/2020	Cycle begins the calendar year after joining the AICPA	Year end**	N/A

## NEED MORE INFORMATION?

**Indiana Board of Accountancy**  
Visit [in.gov/pla/accountancy.htm](http://in.gov/pla/accountancy.htm) or contact the Indiana Board of Accountancy at (317) 234-3022.

**Yellow Book**  
Visit [gao.gov/yellowbook](http://gao.gov/yellowbook) or contact the Office of Public Affairs at (202) 512-4800.

**AICPA**  
Visit [aicpa.org](http://aicpa.org) or call 1-888-777-7077.

See full statute on page 7.

\* Effective October 22, 2016, licensees may meet their Ethics requirement by successfully completing a competency-based course or through Ethics-related volunteer work.

\*\*Based on individual firm's entry into governmental accounting. Consult the Yellow Book Reporting Requirements for specific information.

**Qualifies for Yellow Book** = Qualifies for the 24 hour Yellow Book requirement. Determination as to the qualification of certain courses for the Yellow Book 24 hour requirement should be made on an auditor specific basis depending on that auditor's Yellow Book clients. Note that the determination of course qualification is a matter of an auditor's professional judgement in consultation with appropriate individuals in the audit firm. The 24 hours are a subset of the 80 hour requirement.

## HAVE YOU RECENTLY OBTAINED YOUR LICENSE?

**872 IAC 1-3-16 Prorated continuing education requirements for holders of certificates granted during a reporting period**

Authority: IC 25-2.1-2-15

Affected: IC 25-2.1-4-5

Sec. 16. The following table establishes the number of CPE hours that a licensee must obtain for the three (3) year reporting period in progress at the time of the issuance or reactivation of a certificate under section 8, 14, or 14.5 of this rule, and it also establishes the minimum hours required in the calendar year of the issuance or reactivation:

DATE OF ISSUANCE OF CERTIFICATE	REQUIRED HOURS FOR THREE YEAR REPORTING CYCLE	REQUIRED MINIMUM HOURS FOR THE YEAR OF ISSUANCE OR REACTIVATION
01/01–03/31 first year of the reporting period	120	20
04/01–06/30 first year of the reporting period	110	15
07/01–09/30 first year of the reporting period	100	10
10/01–12/31 first year of the reporting period	90	0
01/01–03/31 second year of the reporting period	80	20
04/01–06/30 second year of the reporting period	70	15
07/01–09/30 second year of the reporting period	60	10
10/01–12/31 second year of the reporting period	50	0
01/01–03/31 third year of the reporting period	40	N/A
04/01–06/30 third year of the reporting period	30	N/A
07/01–09/30 third year of the reporting period	20	N/A
10/01–12/31 third year of the reporting period	0	0

\* For purposes of this section, "N/A" means that there is no specifically stated requirement for the year of issuance or reactivation because the licensee would have to obtain the prorated CPE hours for the three (3) year reporting period.

# CPE SEMINARS ARE NOW PAPERLESS



Seminar manuals are now available electronically as PDFs, making them easily viewed on your personal electronic device or printed at your office. Manuals will no longer be distributed onsite.

## Benefits of paperless manuals

- **More current.** The PDF link we email you five business day prior to the event will have the most up-to-date information from speakers and vendors vs. content published several months ago.
- **Less clutter.** Paperless eliminates the need to store more manuals on your desk or in your office.
- **Quick reference.** Instead of flipping through pages to find a definition, act or rule, use the Control Find (Control + F) feature to immediately see and search the most relevant results.
- **Environmentally friendly.** Going paperless will save more paper and trees.
- **Creates savings.** By spending less on printing and shipping of manuals, we are able to keep registration fees down.

## What if I want the entire manual or select pages in print?

- Download the manual from the link we provide you and print prior to the seminar. Don't have a printer? You can have your manual printed and shipped to your home or office, courtesy of FedEx/Kinkos. For more details, including the discounted FedEx/Kinkos printing and shipping rates, see the event's materials web page.



## EVENT LOCATIONS

**Batesville**

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

**Bloomington**

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

**Carmel**

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

**Columbus**

Hotel Indigo  
400 Brown St.  
(812) 375-9100

**Evansville**

Holiday Inn Evansville Airport  
7101 U.S. Highway 41 North  
(812) 867-7999

**Fort Wayne**

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

**Indianapolis**

INCPAS Prof. Dev. & Conf. Ctr.  
8250 Woodfield Crossing Blvd.  
Suite 100  
(317) 726-5000  
1-800-272-2054

**INCPAS is relocating!**  
Check for announcements this  
summer for our new address.

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

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

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

**Jeffersonville**

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

**Kokomo**

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

**Lafayette**

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

**Merrillville**

Indiana Wesleyan University's  
Merrillville Education &  
Conference Center  
4815 Georgia St.  
(219) 769-5100

**Muncie**

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

**Richmond**

Hampton Inn & Suites  
455 Commerce Rd.  
(765) 966-5200

**South Bend**

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

**Indianapolis Hotels With Discounted Rates**

*To receive this discount, ask for the Indiana CPA Society rate.*

**Hyatt Place**

Keystone at the Crossing  
9104 Keystone Crossing  
Indianapolis, IN 46240  
(317) 843-0064

\$132/night (ask for INCPAS)

**Sheraton Indianapolis Hotel at Keystone Crossing**

8787 Keystone Crossing  
Indianapolis, IN 46240  
(800) 325-3535

\$169/night (ask for INCPAS)

**SpringHill Suite Carmel**

11855 N. Meridian St.  
Carmel, IN 46032

*Call or email Bret Wolfe for reservations for the Indiana CPA Society Good Neighbor Rate*

(317) 708-5342 or  
bret.wolfe@interstatehotels.com

\$109/night—Jan.—Mar.

\$119/night—Apr.—Sept.

\$109/night—Oct.—Dec.

## 2018 CONFERENCE CALENDAR

**CPAs in Business & Industry Conference**

June 20  
Ritz Charles, Carmel

**Not-for-Profit Conference**

July 26  
Marriott East, Indianapolis

**Small Firm: Big Business Conference**

August 17  
Ritz Charles, Carmel

**Accounting & Auditing Conference**

September 25  
Ritz Charles, Carmel

***New* Office 365 Tech Fest**

October 19  
Marriott East, Indianapolis

**Construction Conference**

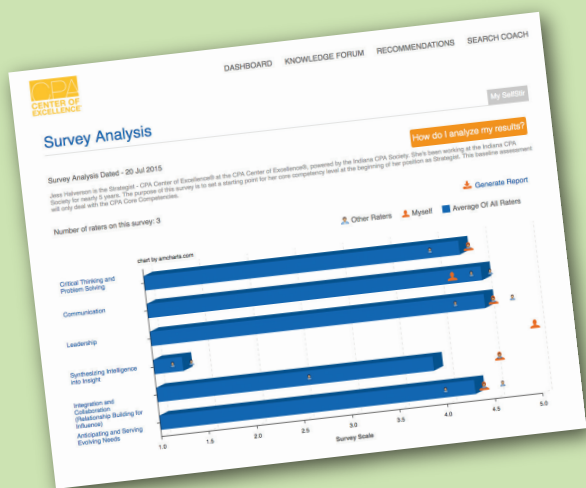
November 13  
Ritz Charles, Carmel

**Indiana Tax Conference**

November 29  
Ritz Charles, Carmel

Register online at  
[incpas.org/conferences](http://incpas.org/conferences)

# INSIGHT TOOLKIT AND RE:SOURCE



**Evaluate your business skills with the online Insight Toolkit from the CPA Center of Excellence®.**

We've paired the Insight Toolkit with the re:Source course catalog. Take the free online assessment to get personalized course recommendations for your most-needed soft skills. All course descriptions are listed here in this re:Source catalog.

[cpacoe.com/insight](http://cpacoe.com/insight)



## POLICIES & PROCEDURES

### IF YOU CANCEL OR SWITCH A COURSE

All cancellations and switches are subject to an administrative service fee. Cancellations must be received in writing or by telephone. You may substitute another individual in your place without penalty provided the registration fee paid applies to both registrants (i.e. both registrants qualify for the member fee). Please notify member services of the change to assure proper assignment of CPE credit.

### CANCELLATION AND SWITCH FEES

- \$15 service fee for cancellations or switches received 15 business days or more prior to the seminar or conference date.
- \$25 service fee for cancellations or switches received six–14 business days prior to the seminar or conference date.
- 50 percent of the registration fee will be refunded for cancellations or switches received five business days or less prior to any seminar.
- Nonrefundable registration fee for any INCPAS-sponsored conference cancellations or switches received five business days or less prior to any conference.
- Nonrefundable registration fee for cancellations or switches received on or after the seminar or conference date.

### IF INCPAS CANCELS A COURSE

A course will be cancelled if the minimum number of participants is not obtained approximately 10 days prior to the course. You may elect to receive a full refund or choose another course without penalty. INCPAS is not responsible for any personal expenses incurred if a course is cancelled.

### Inclement Weather Policy

Registrants will be notified at their office immediately upon cancellation of an event due to inclement weather. If we are unable to reach registrants or the decision to cancel has been made during non-business hours, registrants will be contacted at home. The Society uses our database to contact registrants, therefore it is imperative you notify the Society when your information has changed.

When an event has been cancelled due to inclement weather, registrants will have the option of attending the rescheduled event or registering for another event at the time of cancellation. If the registrant is unable to attend the rescheduled event and is unable to register for another event, a full refund will be issued.

If a registrant is unable to attend an event due to inclement weather they must notify the Society the day of the scheduled event. Cancellations will not be accepted before or after the event. If the event has not been cancelled, no refunds will be issued. Instead, registrants will be issued a credit voucher valid for one year from the date of issue. It is applicable to another event of equal value.

### MEMBER ID NUMBER

Your member ID number is located on the mailing label and course enrollment confirmations. Reference this number when registering for courses.

### MEMBER/NONMEMBER FEE

Registration for INCPAS events is open to the public. Members of INCPAS, CPA Society or other state CPA societies may register under the member price. To become a member, complete a membership application online at [incpas.org](http://incpas.org). Contact member services for additional information.

### LUNCH

Course fees do not include lunch unless indicated.

### COURSE TIMES

All course times are local time.

### COURSE AVAILABILITY

You may check course availability by calling member services; however, we cannot hold space in a course without full payment. On-site registration the day of the course is accepted only if space is available. Payment of the nonmember fee is required for all on-site registrations.

### CONFIRMATIONS

All registration confirmations will be emailed once payment has been processed. This will serve as your receipt. If you do not receive a confirmation three days prior to the course, contact member services. Make sure your email address is on file with the Society. If you have not received the attendance certificate email, be sure to check your SPAM filter, and approve "INCPAS Christina Pristasch" [[cpriestasch@incpas.org](mailto:cpriestasch@incpas.org)] as a sender.



### INCPAS live seminars are going paperless.

Manuals will **no longer be** distributed onsite but will be available for download five business days prior to the date of the event. We will send a reminder email from [info@incpas.org](mailto:info@incpas.org) once the materials link is active. If you would like a printed copy, you may download and print prior to the event or take advantage of discounted printing and shipping rates courtesy of FedEx/Kinkos. Go to [incpas.org/green](http://incpas.org/green) for more info.

## POLICIES &amp; PROCEDURES, CONTINUED



Members may purchase a FlexPass Package for a discount on INCPAS courses. FlexPass applies to all INCPAS live seminars, conferences, and CPA Center of Excellence® Interactive Online Courses offered through January 31,

2019. **FlexPass must be purchased by September 28, 2018. FlexPass purchasers may transfer his or her registration to another live seminar and conference without a penalty. FlexPass excludes any free CPE opportunities, self study and webinars.**

**CELL PHONES**

Cell phones must be silenced during INCPAS events.

**BUSINESS MEAL DEDUCTIONS**

Under IRS Code Section 162 (effective 1/1/94), 50 percent of the costs of business meals held in conjunction with association meetings are generally deductible.

## DISCLAIMERS

**DISCLAIMER**

The information and suggestions presented at the courses, seminars and institutes sponsored by the Indiana CPA Society are subject to constant change and, therefore, should serve only as a foundation for further investigation and study. Any forms presented at such courses, seminars or institutes are samples only and are not necessarily authoritative. All information, procedures and forms contained or used in such courses, seminars or institutes should be carefully reviewed and should serve only as a guide for use in specific situations.

The INCPAS and contributing authors and lectures hereby disclaim any and all responsibility, which may be asserted or claimed arising from or claimed to have arisen from reliance upon the information or utilization of the information or forms used in such courses, seminars or institutes. The opinions expressed by teachers or course leaders are not necessarily those of INCPAS.

Continuing education courses purchased from INCPAS may be deductible for federal income tax purposes as ordinary and necessary business expenses. Continuing education course purchases are not deductible as charitable contributions. Please consult your tax advisor for individual assistance in specific situations.

**CLE DISCLAIMER**

Indiana CPA Society continuing professional education courses have presumptive approval by the Indiana Commission for Continuing Legal Education (ICCLE). Attendance at each approved course will

be documented by INCPAS and forwarded within 30 days to ICCLE for their records. It is the sole discretion of ICCLE to determine what courses will be approved for CLE credit and how much credit can be earned for each approved course. **NEW** (bold and highlighted): Attendance reported more than 30 days after course completion will include a late processing fee of \$25.00, administered by ICCLE. Late attendance will not be recorded until payment is made.

**PHOTO DISCLAIMER**

It is the policy of the Indiana CPA Society, Inc. ("Society") that any Society member or other person who attends a Society event, function or meeting consents to the Society's use of that member or attendee's name, voice, likeness, or image in Society advertising, fundraising, promotional, or educational materials, in any medium whatsoever, without payment of additional consideration to the member or attendee. By participating in or attending Society events, each member or attendee understands and agrees that (i) the Society may record or document its events with photographs, audio and/or video recordings, and other media; (ii) the Society will own any such photographs, audio and/or video recordings or other media; and (iii) the Society may utilize such materials, including without limitation, posting any such photographs, audio or video recordings, or other media on the Society's website, for any purpose the Society deems appropriate. Any member or attendee objecting to the possible use of his or her name, voice, likeness, or image in this manner shall communicate in writing his or her objections to or limitations on such use to the Society.

## IMPORTANT INDIANA STATUTES, CHANGES

**872 IAC 1-3-3 Renewal of certificate**

Authority: IC 25-2.1-2-15

Affected: IC 25-2.1-4-5

Sec. 3. (a) Applicants for renewal of a certificate as a CPA, PA, or AP must complete a minimum of one hundred twenty (120) hours of instruction acceptable under this section and sections 4 and 5.1 of this rule. Subsections(c) and (d) and sections 3.1 through 3.4 of this rule will apply to determine the number of hours. (b) CPE is measured by course length with one (1) fifty (50) minute period equal to one (1) hour of CPE credit. One-half (1/2) hour CPE credit increments (equal to twenty-five (25) minutes) are permitted after the first hour of credit has been earned in a given course. When the total minutes of a course are greater than fifty (50) minutes, but not divisible by fifty (50), CPE credit hours granted will be rounded down to the nearest one-half (1/2) credit. For example, for courses with segments totaling one hundred forty (140) minutes, two and

one-half (2 1/2) hours CPE credit may be granted. (c) A minimum of ten percent (10%) of the required minimum hours in a reporting period shall be in accounting or auditing, or both. (d) An ethics requirement of four (4) hours of CPE credit shall be met during the reporting period through: (1) a minimum of four (4) hours in ethics; (2) completion of a competency-based ethics course; or (3) experience that augments the applicant's knowledge and skill in providing accounting services specifically through application of the code of professional conduct (as adopted in 872 IAC 1-2-1(b) (1)), which shall be in a noncompensated role with a professional or trade organization verified by the organization. (e) The time reporting period in which the applicant must have a minimum of one hundred twenty (120) hours is the three (3) years ending on December 31 prior to the expiration of certificates with a minimum of twenty (20) hours per year.



**IN**  
**CPA**  
**SOCIETY**

# Flex Pass

## SAVE FIRST. SHOP LATER.

**Forget discount codes,  
forget registering  
months—even  
weeks—in advance.**

**Buy now, schedule later.**

Choose from INCPAS conferences, live seminars or CPA Center of Excellence® Interactive Online Courses.

**Using your pass is EASY.**

Register via phone, web or our FlexPass app.

*FlexPass must be purchased by September 28, 2018. Hours must be used by January 31, 2019.*

FLEXPASS PACKAGES	PRICE	SAVINGS
16-HOURS	<b>\$575</b>	SAVINGS OF AT LEAST \$100*
24-HOURS	<b>\$850</b>	SAVINGS OF AT LEAST \$150*
40-HOURS	<b>\$1405</b>	SAVINGS OF AT LEAST \$290*

*\*Based on 8-hour course prices*

[incpas.org/flexpass](http://incpas.org/flexpass)

# INDIANA CPA SOCIETY CPE REGISTRATION

MEMBER ID NO.	FULL NAME	
NAME TO GREET BY	FIRM/COMPANY	
WORK PHONE NO.	FAX NO.	
EMAIL		
STREET ADDRESS (no P.O. Boxes)		
CITY	STATE	ZIP CODE



- I am not participating in the 2018 FlexPass Program.
- I am participating in the 2018 FlexPass Program; I have read the policies and agree to abide by them. I understand that if I fail to follow these policies, my participation in the program will be revoked. *For the policies, please refer to [incpas.org/flexpass](http://incpas.org/flexpass).*

Select your package(s):

- 16-hour FlexPass package **\$575**     24-hour FlexPass package **\$850**     40-hour FlexPass package **\$1405**

SIGNATURE \_\_\_\_\_

TOTAL \_\_\_\_\_

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

TOTAL \_\_\_\_\_

**DON'T PAY NONMEMBER PRICES! JOIN TODAY TO TAKE ADVANTAGE OF MEMBER PRICING AT [INCPAS.ORG/JOIN](http://incpas.org/join).**

## Method of Payment

- AMEX     Discover     MasterCard     Visa     Check

CREDIT CARD NO. \_\_\_\_\_

EXP. DATE \_\_\_\_\_

CVV# (last 3 digits on back of card) \_\_\_\_\_

NAME INDICATED ON CARD \_\_\_\_\_

SIGNATURE \_\_\_\_\_

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





# As a CPA and citizen, be the voice for effective and efficient change in how you do business in Indiana. Contribute today.

## Give because these issues matter:

- Serving business needs of your clients and employers
- Fair and simplified taxes
- CPA license and compliance issues
- Government transparency and accountability

*“We all likely understand the importance of voting, but there are other ways to ensure your voice is heard. One of the most impactful is to contribute to your PAC.”*

—Caleb Bullock, CPA, CGMA

Contribute \$25+ for the classic pin



Contribute \$100–\$499 for the silver pin



Contribute \$500+ for the gold pin



## A contribution to the Indiana CPA-PAC helps ensure we have the ear of legislators regarding issues affecting the profession.

As the only PAC in Indiana representing your interests as a CPA and professional, the Indiana CPA-PAC supports elected officials who support issues that affect your livelihood and day-to-day business interests. Your support for the PAC helps uphold the integrity and effectiveness of the profession. You can also contribute online at [incpas.org/pac](http://incpas.org/pac).

**Add to Your PAC:**  \$500  \$250  \$100  \$75  \$50  \$25  Other \_\_\_\_\_

NAME:		FIRM/CO.:	
ADDRESS:			
CITY:		STATE:	ZIP:
CREDIT CARD:	AmEx <input type="checkbox"/>	Discover <input type="checkbox"/>	Mastercard <input type="checkbox"/> Visa <input type="checkbox"/>
CREDIT CARD No.:			
NAME ON CARD:		EXP. DATE:	CVV#:
SIGNATURE:		TOTAL ON CARD:	<b>Thank you!</b>

Make checks payable to:  
**Indiana CPA-PAC**

Return to:  
**Indiana CPA-PAC**  
P.O. Box 40069  
Indianapolis, IN 46240

Contributions or gifts to the Indiana CPA Political Action Committee are not deductible as charitable contributions for federal tax purposes.



# Indiana CPA Society Membership Application 2018–19

First	MI	Last	
Name to greet by		Degrees and Professional Credentials	
Gender*	<input type="radio"/> Male <input type="radio"/> Female	AICPA Member No.	
Ethnic Background*	Month/Year of Birth*	Phone (Home)	
Home Address		Phone (Cell)	
City	County	State	Zip Code
Business Name		Title	
Address 1			
Address 2		Phone (Direct Line)	
City	County	State	Zip Code
Preferred Email Address		Preferred Phone: <input type="radio"/> Home <input type="radio"/> Cell <input type="radio"/> Office	
CPA License No./State/Date Issued		Send all INCPAS mail to <input type="radio"/> Home <input type="radio"/> Business	

Is the firm/company/organization you are employed by:  Government  Education  Public Accounting  Industry  
 If public accounting, please select:  Sole Practitioner  1–3 Partners  4–12 Partners  13 or more Partners

**In case of an emergency, whom should we contact on your behalf?** Name Phone

## Membership Classifications

### \_\_\_ First Time Applicants—PAY ONLY \$150

Check here and choose a member type below:

- |  |   |
|--|---|
| <input type="radio"/> Resident                             | <input type="radio"/> Business Partner                |
| <input type="radio"/> Non-Resident                         | <input type="radio"/> Firm Administrator              |
| <input type="radio"/> Government or Education              | <input type="radio"/> Non-CPA Accounting Professional |
| <input type="radio"/> Associate                            | <input type="radio"/> Paraprofessional                |
| <input type="radio"/> CPA Candidate                        | <input type="radio"/> Senior                          |
| <input type="radio"/> Affiliate ( <i>specialty below</i> ) |   |

#### \_\_\_ Resident — \$430

Holder of CPA license, lives or works in Indiana

#### \_\_\_ Non Resident — \$290

Holder of CPA license, does not live or work in Indiana

#### \_\_\_ Government — \$335

Holder of CPA license, works in a government position

#### \_\_\_ Education — \$330

Holder of CPA license, works in a education position

#### \_\_\_ Associate — \$335

Does not hold an active CPA license, but successfully completed CPA Exam

#### \_\_\_ CPA Candidate — \$185

Pursuing successful completion of the CPA Exam

#### \_\_\_ Affiliate — \$335

Working with the CPA profession and not eligible for other categories of membership

\_\_\_ Business Professional

\_\_\_ Firm Administrator

\_\_\_ Non-CPA Accounting Professional

\_\_\_ Paraprofessional

#### \_\_\_ Senior — \$185

Must be retired

**Students** — Call the Indiana CPA Society for a free student membership application or visit [incpas.org](http://incpas.org)

#### \_\_\_ Reinstatement Fee — \$25

A \$25 reinstatement fee applies to applicants who previously dropped or resigned membership or affiliation. Fee is in addition to full membership dues.

**Join Online: [incpas.org/join](http://incpas.org/join)**

\*optional



## I am joining the Society

(primary reason)

- To take advantage of member discounts.
- To network with colleagues.
- To gain access to discounted continuing education opportunities.
- To support the profession and help uphold the integrity of my credential.
- To stay current on new developments affecting my profession.

## Payment Information



**NOTICE: If this is the first time you are applying for membership in the Indiana CPA Society, pay only the \$150 fee for the first year.**

Method of Payment:

- Check
- American Express
- Discover
- MasterCard
- VISA
- Please send me an invoice

Card No. \_\_\_\_\_

Cardholder's Name \_\_\_\_\_

Cardholder's Signature \_\_\_\_\_

Expiration Date \_\_\_\_\_

CVV# \_\_\_\_\_

(last 3 digits on back of card)

*To the best of my knowledge the information contained herein is accurate. I agree to be governed by the bylaws of the Indiana CPA Society and the Code of Professional Conduct.*

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**Note:** *INCPAS dues are not deductible as charitable contributions, but may be deductible as ordinary and necessary business expenses. A portion of the dues, however, is not deductible as an ordinary and necessary business expense to the extent that the Indiana CPA Society engages in state and federal lobbying as defined by IRS regulations. Please contact the Society office to obtain the nondeductible portion of the dues.*

## Professional Interests

This category will be used to help identify your areas of interest so we may provide you with appropriate information related to these areas. Check as many as six areas of interest. These codes are used to determine targeted mailing lists for notices on issue specific information and events. Keep your codes updated to ensure that you receive appropriate mailings.

- Auto Dealers
- Agriculture
- Assurance Services
- Auditing (Internal)
- Auditing (Public)
- Budgeting/Planning
- Business Valuation
- Communications
- Construction
- Consulting Services
- Controllorship
- Corporate Analysis
- Cost Accounting
- Education
- Employee Benefits
- Employment Services
- Entertainment/Recreation
- Estate Planning
- Financial Institutions
- Financial Planning—Business
- Financial Planning—Personal
- Financial Reporting
- Forensic Accounting
- Governmental Accounting—Federal
- Governmental Accounting—State
- General Management
- Health Care
- Holding/Investment Company
- Human Resources
- Hospitality
- Insurance
- International Business
- Investment Analysis
- Litigation Services
- Legal Services
- Management of an Accounting Practice
- Management of Information Systems
- Manufacturing
- Marketing/Public Relations
- Museums/Zoos/Art Galleries
- Natural Resources
- Nonprofit Organizations
- Printing/Publishing
- Real Estate
- Restaurants
- Retail Trade
- Risk Management
- SEC Reporting
- Securities/Commodities
- Taxes—Federal
- Taxes—State & Local
- Technology
- Transportation
- Treasury Management
- Utilities
- Waste Management/Recycling
- Wholesale Trade

**Indiana CPA Society**  
**P.O. Box 40069**  
**Indianapolis, IN 46240**

**Phone (317) 726-5000/1-800-272-2054**  
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*The Society's 2018–19 fiscal year is July 1 through June 30.*



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<b>August</b>				
A&A Staff Level 3: In-Charge	8/6-7/18	Indianapolis	\$504/\$734	30
Professional Ethics Update	8/6/18	Evansville	\$107/\$246	49
A&A Update	8/6/18	Evansville	\$107/\$246	30
<b>New</b> Only Financial Officer 3.0: More Skills for Smaller Company Financial Managers	8/20/18	Indianapolis	\$339/\$493	55
<b>New</b> CFO Leadership Series: Managing Your Resources	8/21/18	Indianapolis	\$339/\$493	52
Professional Ethics Update	8/22/18	Muncie	\$107/\$246	49
A&A Update	8/22/18	Muncie	\$107/\$246	30
Not-for-Profit Financial Reporting: Mastering the Unique Requirements	8/23/18	Indianapolis	\$370/\$524	42
Professional Ethics Update	8/24/18	Lafayette	\$107/\$246	49
A&A Update	8/24/18	Lafayette	\$107/\$246	30
Real-World Fraud Found in Governments and Not-for-Profit	8/24/18	Indianapolis	\$370/\$524	43
Excel Tips, Tricks and Techniques for CPAs	8/27/18	Merrillville	\$349/\$504	37
Social Security: Understanding your Client's Future	8/27/18	Indianapolis	\$339/\$493	72
<b>New</b> Cyber Risk for the CPA: Implementing Your Action Plan	8/29/18	Indianapolis	\$190/\$267	76
<b>New</b> Cyber Risk for the CPA: Threats, Analysis and Management	8/29/18	Indianapolis	\$190/\$267	76
QuickBooks for CPAs	8/28/18	Merrillville	\$349/\$504	43
<b>New</b> When Bad Things Happen to Good Taxpayers	8/28/18	Indianapolis	\$339/\$493	74
Professional Ethics Update	8/29/18	Fort Wayne	\$107/\$246	49
A&A Update	8/29/18	Fort Wayne	\$107/\$246	30
Excel PivotTables for CPAs	8/29/18	Merrillville	\$349/\$504	37
Audits of 401(k) Plans	8/30/18	Indianapolis	\$370/\$524	34
Employment Law Update: Key Risks and Recent Trends	8/30/18	Indianapolis	\$370/\$524	54

TITLE	DATE	CITY	MEM./NON.	PAGE
Professional Ethics Update	8/31/18	Indianapolis	\$107/\$246	49
A&A Update	8/31/18	Indianapolis	\$107/\$246	30
<b>September</b>				
Critical Thinking Skills for Financial Professionals	9/17/18	South Bend	\$190/\$267	53
<i>New</i> Business Ethics: Cases from the Real World	9/17/18	South Bend	\$190/\$267	47
CFO Leadership Series: Essential Skills	9/17/18	Fort Wayne	\$339/\$493	35
<i>New</i> Advanced Audits of 401(k) Plans: Best Practices and Current Developments	9/18/18	Indianapolis	\$339/\$493	32
Annual CFO Spotlight: Corporate Finance Skills	9/18/18	South Bend	\$339/\$493	51
Applying the Uniform Guidance in Your Single Audits	9/18/18	Indianapolis	\$370/\$524	34
<i>New</i> The 8-Hour MBA for CPAs	9/19/18	Indianapolis	\$339/\$493	56
FASB's "Big 3:" Revenue Recognition, Leases and Financial Instruments	9/20/18	Indianapolis	\$339/\$493	38
Identity Theft: Preventing, Detecting and Investigating	9/20/18	Merrillville	\$370/\$524	40
<i>New</i> Nonprofit Industry Update and GAAP Refresher	9/20/18	Indianapolis	\$339/\$493	41
<i>New</i> Cybersecurity Advisory Engagements: What You Need to Know	9/21/18	Indianapolis	\$190/\$267	36
Annual Update for Controllers	9/21/18	Fort Wayne	\$370/\$524	51
<i>New</i> Cybersecurity Risk Management Program: What You Need to Know	9/21/18	Indianapolis	\$190/\$267	36
<i>New</i> FAQ: Nonprofit Accounting, Auditing, Compliance and Governance Issues	9/21/18	Indianapolis	\$339/\$493	38
Critical Thinking Skills for Financial Professionals	9/24/18	Indianapolis	\$190/\$267	53
Social Security and Medicare: Maximizing Retirement Benefits	9/24/18	Merrillville	\$190/\$267	72
Heartfelt Leadership: How Ethical Leaders Build Trusting Organizations	9/24/18	Indianapolis	\$190/\$267	48
Hottest Tax Planning Developments	9/24/18	Merrillville	\$190/\$267	68
Small Business Internal Controls, Security, and Fraud Prevention and Detection	9/24/18	South Bend	\$349/\$504	44
<i>New</i> Tax Reform's Impact on Corporations and Pass-Through Entities	9/25/18	Merrillville	\$190/\$267	73
<i>New</i> CFO Leadership Series: Budgets and Projections	9/25/18	Indianapolis	\$339/\$493	34
<i>New</i> Excel Data Magic, Including Advanced PivotTables and Power Pivot	9/25/18	South Bend	\$349/\$504	76
<i>New</i> Getting to the Heart of Tax Reform: Individual Income Tax Changes and Planning Strategies	9/25/18	Merrillville	\$190/\$267	68
Accounting and Reporting Update for Tax Practitioners	9/26/18	Indianapolis	\$339/\$493	31
Multistate Income Tax	9/26/18	Indianapolis	\$370/\$524	69
FASB's "Big 3:" Revenue Recognition, Leases and Financial Instruments	9/27/18	South Bend	\$339/\$493	68
<i>New</i> Tax Reform's Impact on Corporations and Pass-Through Entities	9/28/18	South Bend	\$190/\$267	73
<i>New</i> Getting to the Heart of Tax Reform: Individual Income Tax Changes and Planning Strategies	9/28/18	South Bend	\$190/\$267	68
<i>New</i> The 8-Hour MBA for CPAs	9/28/18	Fort Wayne	\$339/\$493	56

TITLE	DATE	CITY	MEM./ NON.	PAGE
<b>October</b>				
Advanced Topics in a Single Audit	10/4/18	Indianapolis	\$370/\$524	33
Advanced Auditing of HUD-Assisted Projects	10/5/18	Indianapolis	\$370/\$524	32
Accounting and Reporting for Not-for-Profit Organizations	10/16/18	Indianapolis	\$370/\$524	31
S Corporations: Intermediate Workshop	10/16/18	Indianapolis	\$339/\$493	71
Microsoft Excel: You Don't Know What You Don't Know	10/17/18	Indianapolis	\$339/\$493	78
<b>New</b> The Essential Course for Preparing Not-for-Profit Financial Statements Under ASU No. 2016-14	10/17/18	Indianapolis	\$339/\$493	45
<b>New</b> Tax Reform's Impact on Corporations and Pass-Through Entities	10/18/18	Evansville	\$190/\$267	73
Advanced Excel Topics for Spreadsheet Power Users	10/18/18	Indianapolis	\$339/\$493	75
Advanced Individual Income Tax Return Issues	10/18/18	Indianapolis	\$339/\$493	64
<b>New</b> Getting to the Heart of Tax Reform: Individual Income Tax Changes and Planning Strategies	10/18/18	Evansville	\$190/\$267	68
S Corporations: Advanced Workshop	10/18/18	Fort Wayne	\$339/\$493	71
<b>New</b> Tax Reform's Impact on Corporations and Pass-Through Entities	10/19/18	Indianapolis	\$190/\$267	73
Advanced Concepts in SSARS 21 and Nonattest Services: Are You Certain You Are in Compliance?	10/19/18	Indianapolis	\$339/\$493	32
<b>New</b> Getting to the Heart of Tax Reform: Individual Income Tax Changes and Planning Strategies	10/19/18	Indianapolis	\$190/\$267	68
<b>New</b> The 8-Hour MBA for CPAs	10/19/18	South Bend	\$339/\$493	56
Proven Controls to Steer You Clear of Fraud	10/22/18	Indianapolis	\$190/\$267	43
Social Security and Medicare: Maximizing Retirement Benefits	10/22/18	Fort Wayne	\$190/\$267	72
Advanced Business Law for CPAs	10/22/18	Indianapolis	\$370/\$524	51
Fraud Basics: Protecting the Company Till	10/22/18	Indianapolis	\$190/\$267	39
Hottest Tax Planning Developments	10/22/18	Fort Wayne	\$190/\$267	68
Lean Accounting and Management: Saving Money by Streamlining Operations	10/23/18	Indianapolis	\$190/\$267	55
<b>New</b> Tax Reform's Impact on Corporations and Pass-Through Entities	10/23/18	Fort Wayne	\$190/\$267	73
Analyzing a Company's Financial Statement	10/23/18	Indianapolis	\$190/\$267	33
<b>New</b> Getting to the Heart of Tax Reform: Individual Income Tax Changes and Planning Strategies	10/23/18	Fort Wayne	\$190/\$267	68
Real-World Fraud in Today's Small- to Medium- Sized Entities	10/23/18	Indianapolis	\$370/\$524	44
Reviewing Individual Tax Returns: What Are You Missing?	10/24/18	Indianapolis	\$190/\$267	70
Compilation and Review Practice Guide	10/24/18	Indianapolis	\$339/\$493	35
IRS Disputes: Identifying Options for Your Client	10/24/18	Indianapolis	\$190/\$267	68
<b>New</b> 2018 FASB and AICPA Update	10/25/18	Indianapolis	\$339/\$493	29
Accounting and Auditing Update for Small Businesses	10/25/18	Indianapolis	\$370/\$524	31
Annual Update for Controllers	10/29/18	Indianapolis	\$370/\$524	51
CFO Leadership Series: Driving and Managing Progress	10/29/18	Fort Wayne	\$339/\$493	35
Form 1041: Income Taxation of Estates and Trusts	10/29/18	Indianapolis	\$370/\$524	67
Analytics and Big Data for CPAs	10/30/18	Indianapolis	\$370/\$524	33

TITLE	DATE	CITY	MEM./ NON.	PAGE
Annual Update for CPAs and Auditors	10/30/18	Merrillville	\$214/\$493	33
<i>New</i> CFO Leadership Series: Honing Your Management Style	10/31/18	Indianapolis	\$339/\$493	47
<i>New</i> Federal Tax Update	10/31/18– 11/1/18	Indianapolis	\$504/\$734	67
Preventing, Detecting and Responding to Fraud: What Every CPA Should Know	10/31/18	South Bend	\$339/\$493	43
The Strategic CFO: Big Picture Skills	10/30/18	Indianapolis	\$339/\$493	46
<b>November</b>				
Risk, Cost and Cash Management for Controllers and Financial Managers	11/1/18	Evansville	\$190/\$267	56
Employment Law Update: Examining Critical Issues with FMLA, HIPPA, COBRA, ADA and More	11/1/18	Evansville	\$190/\$267	53
<i>New</i> Four-Hour Yellow Book Qualification Course	11/2/18	Indianapolis	\$190/\$267	39
<i>New</i> ASU No. 2016-14 in Just Four Hours	11/2/18	Indianapolis	\$190/\$267	34
Social Security, Medicare and Prescription Drug Retirement Benefits: What Every Baby Boomer Needs to Know Now	11/2/18	Indianapolis	\$339/\$493	72
Securing Your Data: Practical Tools for Protecting Information	11/5/18	Fort Wayne	\$200/\$277	79
Fraud Update: Detecting and Preventing the Top 10 Fraud Schemes	11/5/18	Indianapolis	\$370/\$524	39
Latest Developments in Nonprofit Accounting and Auditing	11/5/18	Indianapolis	\$339/\$493	41
Technology Update	11/5/18	Fort Wayne	\$200/\$277	79
Excel Financial Reporting and Analysis	11/6/18	Fort Wayne	\$349/\$504	37
Identity Theft: Preventing, Detecting and Investigating	11/6/18	Evansville	\$370/\$524	40
Internal Control Best Practices for Small- and Medium-Sized Entities	11/7/18	Indianapolis	\$370/\$524	40
Annual Tax-Planning Guide for S Corporations, Partnerships and LLCs	11/8/18	Indianapolis	\$339/\$493	65
Auditing Not-for-Profit Entities: Superior Skills for an Effective and Efficient Audit	11/8/18	Indianapolis	\$339/\$493	34
Accounting & Auditing for 2018: An Update and Refresher	11/9/18	Indianapolis	\$214/\$493	30
Annual Update and Practice Issues for Preparation, Compilation and Review Engagements	11/9/18	Fort Wayne	\$370/\$524	33
This Year's Best Income Tax, Estate Tax and Financial-Planning Ideas	11/9/18	Indianapolis	\$339/\$493	74
The Essential Course for Performing Single Audits Under the Uniform Guidance for Federal Awards	11/14/18	Indianapolis	\$339/\$493	45
Financial Statement Disclosures: A Guide for Small- and Medium-Sized Businesses	11/15/18	Fort Wayne	\$190/\$267	38
S Corporations: Compensation and Redemptions	11/15/18	Merrillville	\$190/\$267	71
A&A Hot Topics: Getting a Grasp on the Big Issues Facing the Industry	11/15/18	Indianapolis	\$339/\$493	29
<i>New</i> Accounting for Financial Instruments: Making Sense of the FASB's New Guidance on Impairment, Hedging, and Financial Assets and Liabilities	11/15/18	Fort Wayne	\$190/\$267	31
Limited Liability Companies: Losses, Liquidations, Terminations, Continuations and Sales	11/15/18	Merrillville	\$190/\$267	69
The Complete Guide to the Preparation of Form 1041	11/15/18	Indianapolis	\$339/\$493	74
Preparing Special Purpose Framework Financial Statements: Cash, Modified Cash and Tax Basis	11/16/18	Indianapolis	\$190/\$267	42



TITLE	DATE	CITY	MEM./ NON.	PAGE
Determining How Much Money You Need to Retire: Practical Planning Strategies	11/16/18	South Bend	\$339/\$493	66
Estate Planning for 2018 and Beyond	11/16/18	Indianapolis	\$339/\$493	66
Guide and Update to Compilations, Reviews and New Preparations	11/16/18	Indianapolis	\$190/\$267	39
Accounting & Auditing for 2018: An Update and Refresher	11/19/18	Columbus	\$214/\$493	30
<i>New</i> Tax Advisors Update	11/19/18	Indianapolis	\$339/\$493	72
The Most Common Financial Statement and Asset Fraud Schemes: How to Detect and Prevent Them	11/20/18	South Bend	\$190/\$267	46
Annual Update for CPAs and Auditors	11/20/18	Fort Wayne	\$214/\$493	33
Basis/Distributions for Pass-Through Entities: Simplifying the Complexities	11/20/18	Indianapolis	\$370/\$524	65
Preparation, Compilation, and Review Engagements: Update and Review	11/20/18	South Bend	\$190/\$267	42
Not-for-Profit Accounting and Auditing Update	11/20/18	Indianapolis	\$370/\$524	42
The Bottom Line on the New Lease Accounting Requirements	11/21/18	South Bend	\$190/\$267	45
Best Practices for Payroll Taxes and 1099 Issues	11/21/18	Indianapolis	\$370/\$524	65
Ethics and Professional Conduct: Updates and Practical Applications	11/21/18	South Bend	\$190/\$267	47
Studies on Single Audit and Yellow Book Deficiencies	11/21/18	Indianapolis	\$370/\$524	45
Estate and Life Planning Issues for the Middle-Income Client	11/26/18	Indianapolis	\$339/\$493	66
Nexus Update: Latest Developments in State Income, Franchise and Sales Taxes	11/26/18	Indianapolis	\$370/\$524	70
<i>New</i> CFO Leadership Series: Technical Competence	11/27/18	Indianapolis	\$339/\$493	35
Construction Contractors: Accounting, Auditing and Tax	11/27/18	Indianapolis	\$370/\$524	36
<i>New</i> Federal Tax Update	11/27–28/18	Evansville	\$504/\$734	67
Partnership and LLC Core Tax Issues from Formation through Liquidation	11/27/18	Fort Wayne	\$339/\$493	70
<i>New</i> Assisting the Survivors: CPA's Role in the Decedent's Estate	11/28/18	Indianapolis	\$339/\$493	65
Private Company Accounting: New Directions, New Challenges	11/28/18	Indianapolis	\$339/\$493	43
Real Estate Tax Boot Camp	11/28/18	Fort Wayne	\$339/\$493	70
<i>New</i> Only Financial Officer 3.0: More Skills for Smaller Company Financial Managers	11/29/18	South Bend	\$339/\$493	78
Technology for CPAs: Don't Get Left Behind	11/29/18	Indianapolis	\$349/\$504	79
Shorten Month-End: Closing Best Practices	11/30/18	Fort Wayne	\$190/\$267	44
The Bottom Line on the New Lease Accounting Requirements	11/30/18	Evansville	\$190/\$267	45
Accounting & Auditing for 2018: An Update and Refresher	11/30/18	South Bend	\$214/\$493	30
Advanced Excel	11/30/18	Indianapolis	\$349/\$504	32
Cases in Corporate Ethics: Discuss Real-Life Conflicts	11/30/18	Fort Wayne	\$190/\$267	47
Interpreting the New Revenue Recognition Standard: What All CPAs Need to Know	11/30/18	Evansville	\$190/\$267	41
<b>December</b>				
<i>New</i> Internal Control and Enterprise Risk Management in 2018	12/3/18	Indianapolis	\$190/\$267	41
<i>New</i> Church and Minister Taxation	12/3/18	Indianapolis	\$339/\$493	66

TITLE	DATE	CITY	MEM./ NON.	PAGE
Practical Internal Controls: A Case Study Approach	12/3/18	Indianapolis	\$190/\$267	42
<i>New</i> Estate Planning for the 99%: Portability and More	12/4/18	Indianapolis	\$190/\$267	66
<i>New</i> Adding Value for Clients via Retirement Programs	12/4/18	Indianapolis	\$190/\$267	64
Targeted 1040 Forms Update for the Occasional Tax Preparer	12/4/18	Indianapolis	\$339/\$493	72
Complete Guide to Payroll Taxes and 1099 Issues	12/5/18	Indianapolis	\$339/\$493	66
Fringe Benefits: 2018	12/5/18	Indianapolis	\$339/\$493	68
Proven Controls to Steer You Clear of Fraud	12/7/18	Merrillville	\$190/\$267	43
Fraud Basics: Protecting the Company Till	12/7/18	Merrillville	\$190/\$267	39
CFO Leadership Series: Managing Risk	12/10/18	Fort Wayne	\$339/\$493	35
<i>New</i> Federal Tax Update	12/10-11/18	South Bend	\$504/\$734	67
Multistate Tax Update	12/10/18	Indianapolis	\$339/\$493	69
Annual Update for CPAs and Auditors	12/11/18	Evansville	\$214/\$493	33
Buying and Selling a Business: Critical Tax and Structuring Issues	12/11/18	Indianapolis	\$339/\$493	65
<i>New</i> CFO Leadership Series: Reinventing the Finance Role	12/11/18	Indianapolis	\$339/\$493	52
<i>New</i> Federal Tax Update	12/12-13/18	Fort Wayne	\$504/\$734	67
Four Most Overlooked Business Risks: Preparing for the Future	12/12/18	Indianapolis	\$339/\$493	38
<i>New</i> Revenue from Contracts with Customers (ASU 2014-09 As Amended)	12/12/18	Indianapolis	\$339/\$493	44
Maximizing Your Social Security Benefits	12/13/18	Evansville	\$190/\$267	69
<i>New</i> Navigating Your Client Through the IRS Appeals Process	12/13/18	Indianapolis	\$190/\$267	69
A+ College Savings Planning: Maximizing Resources and Tax Benefits	12/13/18	Evansville	\$190/\$267	64
Key Partnership and S Corporation Tax Planning Strategies	12/13/18	Indianapolis	\$190/\$267	68
<i>New</i> Merger and Acquisition Planning and Best Practices	12/13/18	Indianapolis	\$339/\$493	69
Reviewing Individual Tax Returns: What Are You Missing?	12/14/18	South Bend	\$190/\$267	70
Determining How Much Money You Need to Retire: Practical Planning Strategies	12/14/18	Evansville	\$339/\$493	66
Fiduciary Income Tax Returns: Form 1041 Workshop with Filled-in Forms	12/14/18	Indianapolis	\$339/\$493	67
IRS Disputes: Identifying Options for Your Client	12/14/18	South Bend	\$190/\$267	68
Preventing, Detecting and Responding to Fraud: What Every CPA Should Know	12/14/18	Indianapolis	\$339/\$493	43
Top 10 Tax Topics This Year	12/17/18	Indianapolis	\$339/\$493	74
Yellow Book: Government Auditing Standards	12/17/18	Indianapolis	\$370/\$524	46
Controller's Update: Today's Latest Trends	12/18/18	Carmel	\$190/\$267	53
Ethics and Professional Conduct: Updates and Practical Applications	12/18/18	Carmel	\$190/\$267	47
Reviewing S Corporation Tax Returns: What Are You Missing?	12/18/18	Carmel	\$190/\$267	71
Accounting and Auditing Update	12/18/18	Carmel	\$190/\$267	30
Employment Law Update: Reducing Employer Liability	12/18/18	Carmel	\$190/\$267	54
Reviewing Partnership Tax Returns: What Are You Missing?	12/18/18	Carmel	\$190/\$267	71
Interpreting the New Revenue Recognition Standard: What All CPAs Need to Know	12/19/18	Carmel	\$190/\$267	41

TITLE	DATE	CITY	MEM./ NON.	PAGE
Tax Consequences and Reporting Issues of LLCs, LLPs, LPs and Other Partnerships	12/19/18	Carmel	\$190/\$267	73
The Bottom Line on the New Lease Accounting Requirements	12/19/18	Carmel	\$190/\$267	45
Annual Federal Tax Update	12/19/18	Carmel	\$190/\$267	64
Risk, Cost and Cash Management for Controllers and Financial Managers	12/19/18	Carmel	\$190/\$267	56
The Most Common Financial Statement and Asset Fraud Schemes: How to Detect and Prevent Them	12/19/18	Carmel	\$190/\$267	46
<b>January</b>				
Preparing Individual Tax Returns for New Staff and Para-Professionals	1/3/19	Indianapolis	\$339/\$493	70
Tax Forms Boot Camp: LLCs, Partnerships and S Corporations	1/4/19	Indianapolis	\$339/\$493	73
<i>New</i> Federal Tax Update	1/9-10/19	Carmel	\$504/\$734	67



**Qualifies for Yellow Book** = Qualifies for the 24 hour Yellow Book requirement. Determination as to the qualification of certain courses for the Yellow Book 24 hour requirement should be made on an auditor specific basis depending on that auditor's Yellow Book clients. Note that the determination of course qualification is a matter of an auditor's professional judgment in consultation with appropriate individuals in the audit firm. The 24 hours are a subset of the 80-hour requirement.

### *New* 2018 FASB and AICPA Update

**DATE:** 10/25/18 **TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Rebecca M. Lee, CPA, CGMA

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** Stay on top of the continuing changes in the profession. Whether these changes are in technical standards or professional standards, the course authors will evaluate and emphasize them with broad application and offer detailed practical guidance and illustrations.

**PREREQUISITE:** Basic audit and accounting course or experience

**AUDIENCE:** All firms, all staff, all CPAs needing a good year-round update on recently issued standards

**SOURCE:** Loscalzo Institute **LEVEL:** Update

**NOTE:** **Qualifies for Yellow Book**

### A&A Hot Topics: Getting a Grasp on the Big Issues Facing the Industry

**DATE:** 11/15/18 **TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Martin J. Birr, CPA, CIA, CMA

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** This course will provide you with a year-in-review look at some of the more important issues and challenges facing CPAs. We will identify and discuss specific areas within the profession that are likely to affect you and your clients, thereby keeping you "in the know" on these critical topics.

**PREREQUISITE:** Experience in accounting and auditing

**AUDIENCE:** Accounting and auditing practitioners at all levels desiring to remain "in the know" on current accounting and auditing hot topics and standard setters activities

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

### A&A Staff Level 1: Entry Level Staff

**DATE:** 7/16–17/18

**TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Rebecca M. Lee, CPA, CGMA

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 16 | **MEMBER:** \$504 | **NONMEMBER:** \$734

**OVERVIEW:** This course is a must for firms that need to transition newly hired staff from the academic environment to the practice world. It demonstrates to inexperienced staff a variety of work papers for typical assignments in the first year in the field. This program combines the one-day program "Documentation Techniques for Entry-Level Staff" with a discussion of compilation, review and audit issues.

**PREREQUISITE:** Participant should have participated on an audit engagement; be familiar with GAAP, be recent with FASBs and audit standards

**AUDIENCE:** Staff assistants with one to three years of experience

**SOURCE:** Loscalzo Institute

**LEVEL:** Basic

**NOTE:** **Bring a calculator**

### A&A Staff Level 2: Experienced Staff

**DATE:** 7/23–24/18

**TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Rebecca M. Lee, CPA, CGMA

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 16 | **MEMBER:** \$504 | **NONMEMBER:** \$734

**OVERVIEW:** As they gain more experience, staff are expected to take on more complex assignments with minimal supervision. This program combines two one-day courses: "Utilizing the Risk-Based Audit Standards and Disclosure: The Key to Financial Statements." It covers practical applications and understanding for auditing using the Risk-Based Audit Standards and provides basic disclosures required when preparing GAAP financial statements.

**PREREQUISITE:** Assistant-level experience and familiarity with the audit planning process

**AUDIENCE:** Staff with in-charge responsibility (three to four years of experience)

**SOURCE:** Loscalzo Institute

**LEVEL:** Intermediate

**NOTE:** **Qualifies for Yellow Book**

## A&A Staff Level 3: In-Charge

**DATE:** 8/6–7/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Rebecca M. Lee, CPA, CGMA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 16 | **MEMBER:** \$504 | **NONMEMBER:** \$734

**OVERVIEW:** Many times the firm expectations of an in-charge are not expressed. This course will identify basic expectations of this level while emphasizing the technical aspects of planning effective and cost-efficient audits. This program concentrates on the role expected of an in-charge for training, supervision and engagement management skills. This course includes the one-day program "Reviewing Documentation Effectively."

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

**SOURCE:** Loscalzo Institute **LEVEL:** Intermediate

**NOTE:** Qualifies for Yellow Book

## A&A Update

**DATE:** 6/8/18 **TIME:** 8:30 a.m.–noon  
**INSTRUCTOR:** James Schaefer, CPA-Inactive, CFE, CIA, CISA, DBA  
**LOCATION:** Sheraton Louisville Riverside Hotel, Jeffersonville

**DATE:** 6/11/18 **TIME:** 8:30 a.m.–noon  
**INSTRUCTOR:** James Schaefer, CPA-Inactive, CFE, CIA, CISA, DBA  
**LOCATION:** Indiana Wesleyan University's Merrillville Education and Conference Center, Merrillville

**DATE:** 6/15/18 **TIME:** 8:30 a.m.–noon  
**INSTRUCTOR:** James Schaefer, CPA-Inactive, CFE, CIA, CISA, DBA  
**LOCATION:** Hillcrest Country Club, Batesville

**DATE:** 6/18/18 **TIME:** 8:30 a.m.–noon  
**INSTRUCTOR:** James Schaefer, CPA-Inactive, CFE, CIA, CISA, DBA  
**LOCATION:** Century Center, South Bend

**DATE:** 6/22/18 **TIME:** 8:30 a.m.–noon  
**INSTRUCTOR:** James Schaefer, CPA-Inactive, CFE, CIA, CISA, DBA  
**LOCATION:** Bloomington Convention Center, Bloomington

**DATE:** 6/25/18 **TIME:** 8:30 a.m.–noon  
**INSTRUCTOR:** James Schaefer, CPA-Inactive, CFE, CIA, CISA, DBA  
**LOCATION:** Kokomo Country Club, Kokomo

**DATE:** 6/29/18 **TIME:** 8:30 a.m.–noon  
**INSTRUCTOR:** James Schaefer, CPA-Inactive, CFE, CIA, CISA, DBA  
**LOCATION:** Hampton Inn & Suites Richmond, Richmond

**DATE:** 8/6/18 **TIME:** 8:30 a.m.–noon  
**INSTRUCTOR:** James Schaefer, CPA-Inactive, CFE, CIA, CISA, DBA  
**LOCATION:** Holiday Inn Evansville Airport, Evansville

**DATE:** 8/22/18 **TIME:** 8:30 a.m.–noon  
**INSTRUCTOR:** James Schmutte, CPA, DBA  
**LOCATION:** Horizon Convention Center, Muncie

**DATE:** 8/24/18 **TIME:** 8:30 a.m.–noon  
**INSTRUCTOR:** James Schmutte, CPA, DBA  
**LOCATION:** Holiday Inn Lafayette-City Centre, Lafayette

**DATE:** 8/29/18 **TIME:** 8:30 a.m.–noon  
**INSTRUCTOR:** James Schmutte, CPA, DBA  
**LOCATION:** Grand Wayne Center, Fort Wayne

**DATE:** 8/31/18 **TIME:** 8:30 a.m.–noon  
**INSTRUCTOR:** James Schmutte, CPA, DBA  
**LOCATION:** Marriott North, Indianapolis

**CPE:** 4 | **MEMBER:** \$107 | **NONMEMBER:** \$246

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

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

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

## Accounting & Auditing for 2018: An Update and Refresher

**DATE:** 11/9/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** James Schaefer, CPA-Inactive, CFE, CIA, CISA, DBA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**DATE:** 11/19/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** James Schaefer, CPA-Inactive, CFE, CIA, CISA, DBA  
**LOCATION:** Hotel Indigo Columbus, Columbus

**DATE:** 11/30/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** James Schaefer, CPA-Inactive, CFE, CIA, CISA, DBA  
**LOCATION:** Century Center, South Bend

**CPE:** 8 | **MEMBER:** \$214 | **NONMEMBER:** \$493

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

**PREREQUISITE:** Experience in accounting and auditing

**AUDIENCE:** All CPAs

**SOURCE:** James Schaefer, CPA-Inactive, CFE, CIA, CISA, DBA

**LEVEL:** Update

## Accounting and Auditing Update

**DATE:** 12/18/18 **TIME:** 8:30 a.m.–noon  
**INSTRUCTOR:** Daryl G. Krause, CPA  
**LOCATION:** Ritz Charles, Carmel

**CPE:** 4 | **MEMBER:** \$190 | **NONMEMBER:** \$267

**OVERVIEW:** Keep abreast of the fast-paced changes in accounting and auditing. This comprehensive course covers relevant pronouncements, exposure drafts, and other guidance recently



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

**PREREQUISITE:** Experience in accounting and auditing

**AUDIENCE:** CPAs in public practice and industry who want to remain up-to-date on accounting and auditing pronouncements

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

## Accounting and Auditing Update for Small Businesses

**DATE:** 10/25/18 **TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Martin J. Birr, CPA, CIA, CMA

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$370 | **NONMEMBER:** \$524

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

**PREREQUISITE:** Previous auditing and accounting experience

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

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

## Accounting and Reporting for Not-for-Profit Organizations

**DATE:** 10/16/18 **TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Martin J. Birr, CPA, CIA, CMA

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$370 | **NONMEMBER:** \$524

**OVERVIEW:** This course provides you with the tools necessary to enhance your not-for-profit accounting skills and create value-added services to clients. We take you beyond the theory through a case-study-intense, highly interactive, classroom environment where you will examine, evaluate, and perform case studies enhancing your working knowledge of fundamental not-for-profit accounting and reporting.

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

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

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

**NOTE:** Qualifies for Yellow Book

## Accounting and Reporting Update for Tax Practitioners

**DATE:** 9/26/18

**TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Daryl G. Krause, CPA

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** Designed for all tax practitioners, including those who prepare tax basis financial statements for their clients, this course will replenish your accounting and reporting tank with an update of recent standard setting activities at the PCC, FASB, ASB and ARSC, including the new revenue recognition, lease and financial instruments accounting standards. The course will also review recent FASB updates that impact income tax accounting for stock-based compensation and the presentation of deferred taxes on the balance sheet. We will also review the authoritative standards and guidance for performing and reporting on engagements found in SSARS No. 21, Clarification and Recodification. The course will focus on any changes to common book-tax temporary differences which will result from applying this new guidance and will utilize plenty of hands-on examples and illustrations to increase your overall understanding and application of the material.

**PREREQUISITE:** Experience in accounting and reporting

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

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

## *New* Accounting for Financial Instruments: Making Sense of the FASB's New Guidance on Impairment, Hedging, and Financial Assets and Liabilities

**DATE:** 11/15/18

**TIME:** 8:30 a.m.–noon

**INSTRUCTOR:** William I. Eskin, CPA

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

**CPE:** 4 | **MEMBER:** \$190 | **NONMEMBER:** \$267

**OVERVIEW:** With the recent completion of its financial instruments project, the FASB has made some significant changes to how an entity accounts for many of its financial instruments. In ASUs dealing with the recognition and measurement of financial assets and liabilities (ASU No. 2016-01), impairment (ASU No. 2016-13) and hedging, this new guidance will challenge all entities, not just those in the financial services industry. This means you. In this course, we'll review the new guidance in each of these areas and how it varies from existing guidance on accounting for changes in the fair value of equity securities, timing and measurement of the impairment of financial instruments, and hedge accounting. Specifically, we'll review the details of the new Current Estimate of Credit Losses (CECL) model, which entities must follow when determining the credit losses on their financial instruments. Applying the CECL model will result in the earlier recognition of credit losses, as an entity will recognize such losses based on its current estimates, not its actual incurred losses. Next, we'll discuss what's changed in hedge accounting and how these changes may make hedging transactions more appealing to

smaller entities. Lastly, we'll explore the changes in where entities record the changes in fair value for equity securities.

**PREREQUISITE:** Experience in financial accounting and reporting

**AUDIENCE:** Practicing CPAs and their staff, both in public accounting and business and industry—controllers, accountants, and other financial accounting personnel involved in financial statement preparation and review

**SOURCE:** Surgent

**LEVEL:** Intermediate

## Advanced Auditing of HUD-Assisted Projects

**DATE:** 10/5/18

**TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Michele Kemp, CPA

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8

**MEMBER:** \$370

**NONMEMBER:** \$524

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

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

**AUDIENCE:** CPA firm audit managers (and above) involved with the performance of audits of HUD-assisted projects Government auditors and HUD-assistance grantees

**SOURCE:** AICPA

**LEVEL:** Advanced

**NOTE:** Qualifies for Yellow Book

## *New* Advanced Audits of 401(k) Plans: Best Practices and Current Developments

**DATE:** 9/18/18

**TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Daryl G. Krause, CPA

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8

**MEMBER:** \$339

**NONMEMBER:** \$493

**OVERVIEW:** As we saw from the recent United States Department of Labor review of employee benefit plan audits, auditors need to raise their game in order to provide the quality audits that plan stakeholders demand. The AICPA has reacted by issuing a proposed SAS that will significantly impact how audits of these plans will be performed. Get up to speed on these significant issues and changes occurring in the world of 401(k) plan audits. We will discuss both the existing and new rules and regulations unique to employee benefit plans, as well as provide practical guidance on their application. Efficient audit techniques that can be utilized in various audit engagements will also be identified. This is the course to take to help you improve the quality of your 401 (k) benefit plan audits.

**PREREQUISITE:** Understanding of auditing defined contribution plans

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

**SOURCE:** Surgent

**LEVEL:** Advanced

## Advanced Concepts in SSARS 21 and Nonattest Services: Are You Certain You Are in Compliance?

**DATE:** 10/19/18

**TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Daryl G. Krause, CPA

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8

**MEMBER:** \$339

**NONMEMBER:** \$493

**OVERVIEW:** Practitioners that provide non-audit services must strike the right balance between complying with relevant professional and regulatory standards, providing value-added client service, and mitigating litigation and other practice management risks. This course contains many case studies to reinforce best practices for managing the accounting, reporting and performance issues associated with the attest services of compilations and reviews where reports are issued, as well as the SSARS 21 preparation of financial statements service and other nonattest engagements.

**PREREQUISITE:** Experience with performing non-audit services

**AUDIENCE:** Anyone who performs or supervises non-audit engagements

**SOURCE:** Surgent

**LEVEL:** Advanced

## Advanced Excel

**DATE:** 11/30/18

**TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Steven M. Phelan, CPA.CITP

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8

**MEMBER:** \$349

**NONMEMBER:** \$504

**OVERVIEW:** In this laptop-friendly program, you will learn critical advanced Excel skills in six key areas: 1) collaborating with other users and securing workbooks, 2) using tables to analyze and report data, 3) integrating and manipulating data from external sources, 4) creating and auditing complex formulas, 5) advanced data analysis tools, and 6) visualization techniques to analyze and communicate information. You do not want to miss this opportunity to become more efficient and proficient in Microsoft Office Excel, the accounting and financial professional's tool of choice. This course covers advanced Excel topics found in Excel 2007 through Excel 2016.

**PREREQUISITE:** Experienced Excel user

**AUDIENCE:** Business professionals who work with Excel 2007 or newer and want to extend their knowledge with advanced features and functions

**SOURCE:** K2 Enterprises

**LEVEL:** Advanced

**NOTE:** Qualifies for Accounting and Auditing, 4 hours; Group-live demo and discussion using color computer projection—laptop friendly, with access to demonstration files; Program focuses on Excel for Windows, but many of the features can be found in Excel for Mac

## Advanced Topics in a Single Audit

**DATE:** 10/4/18 **TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Michele Kemp, CPA

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$370 | **NONMEMBER:** \$524

**OVERVIEW:** Be prepared for the weighty responsibilities of planning, directing and reporting on a single audit engagement conducted under the Uniform Guidance. This course gives you insights into key issues not covered in other courses, with an emphasis on advanced topics that require particular attention. Case studies are provided to help put the guidance into practice.

**PREREQUISITE:** Intermediate competency in single audits

**AUDIENCE:** Auditors responsible for planning, directing and reporting on single audits

**SOURCE:** AICPA **LEVEL:** Advanced

**NOTE:** Qualifies for Yellow Book

## Analytics and Big Data for CPAs

**DATE:** 10/30/18 **TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** James T. Lindell, CPA, CGMA, CSP, MBA

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$370 | **NONMEMBER:** \$524

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

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

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

## Analyzing a Company's Financial Statement

**DATE:** 10/23/18 **TIME:** 8:30 a.m.–noon

**INSTRUCTOR:** Curtis J. Quickel, CPA

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 4 | **MEMBER:** \$190 | **NONMEMBER:** \$267

**OVERVIEW:** More and more, clients are turning to you for advice on financial performance. Are you ready? This course presents the financial statements as a set of dynamic instruments that can be used for accurate, relevant and timely financial decisions. Focus on the economic and financial conditions that caused the statements to change and discover how businesses can manage liquidity, debt and profitability. Plus, explore effect ratios, causal ratios, pro forma analysis, sustainable growth and much more.

**AUDIENCE:** CPAs responsible for financial statement analysis

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

## Annual Update and Practice Issues for Preparation, Compilation and Review Engagements

**DATE:** 11/9/18 **TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Daryl G. Krause, CPA

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

**CPE:** 8 | **MEMBER:** \$370 | **NONMEMBER:** \$524

**OVERVIEW:** A go-to reference for training staff and managing your preparation, compilation and review engagements, this course will enable you to be in compliance with all of the professional standards surrounding engagements performed in accordance with Statements on Standards for Accounting and Review Services (SSARs). A practice-oriented review of the latest developments, cases and lively discussion among the experienced participants make this class informative and practical.

**PREREQUISITE:** Experience with engagements performed in accordance with SSARs

**AUDIENCE:** CPA firm seniors (and above) managing engagements performed in accordance with SSARs

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

## Annual Update for CPAs and Auditors

**DATE:** 10/30/18 **TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Martin J. Birr, CPA, CIA, CMA, MBA

**LOCATION:** Indiana Wesleyan University's Merrillville Education and Conference Center, Merrillville

**DATE:** 11/20/18 **TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Martin J. Birr, CPA, CIA, CMA, MBA

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

**DATE:** 12/11/18 **TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Martin J. Birr, CPA, CIA, CMA, MBA

**LOCATION:** Holiday Inn Evansville Airport, Evansville

**CPE:** 8 | **MEMBER:** \$214 | **NONMEMBER:** \$493

**OVERVIEW:** Keep abreast of the fast-paced changes in accounting and auditing. This comprehensive course covers relevant pronouncements, exposure drafts and other guidance recently issued in the accounting, auditing, review and compilation arenas. Let us sort through the complexities and help you identify and apply recently issued FASB, PCAOB and ASB standards and guidance. With the rate of change in today's regulatory environment, you must stay current on the topics impacting the profession - don't get left behind!

**PREREQUISITE:** Experience in accounting and auditing

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

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

## Applying the Uniform Guidance in Your Single Audits

**DATE:** 9/18/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Martin J. Birr, CPA, CIA, CMA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$370 | **NONMEMBER:** \$524

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

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

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

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

**NOTE:** Qualifies for Yellow Book

## New ASU No. 2016-14 in Just Four Hours

**DATE:** 11/2/18 **TIME:** 8:30 a.m.–noon  
**INSTRUCTOR:** James Schmutte, CPA, DBA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 4 | **MEMBER:** \$190 | **NONMEMBER:** \$267

**OVERVIEW:** ASU No. 2016-14, *Presentation of Financial Statements of Not-for-Profit Entities*, will usher in the most significant changes to not-for-profit financial reporting in over 20 years when it becomes effective for December 31, 2018, year-ends. To properly implement the new financial reporting model, professionals will need to have a strong, working knowledge of the new requirements. Now is the time to obtain that knowledge! This course will explain the new requirements, illustrate how the requirements will manifest themselves in the financial statements, and explain key options that not-for-profits have in implementing the requirements. The course will also examine other key issues on the horizon related to revenue recognition and leases. The course materials utilize a highly illustrative and innovative format to provide an enhanced working knowledge of not-for-profit financial reporting.

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

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

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

**NOTE:** Qualifies for Yellow Book

## Auditing Not-for-Profit Entities: Superior Skills for an Effective and Efficient Audit

**DATE:** 11/8/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Martin J. Birr, CPA, CIA, CMA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** It's been said that you cannot fit a square peg into a round hole. The same principle holds true for audits of not-for-profit entities. You simply cannot apply a standard commercial audit approach to the audit of a not-for-profit entity and expect a good fit. Skilled auditors will instead adjust and hone the audit to fit the not-for-profit entity. This course is designed to help you do just that and equip you with the superior skills needed to excel in auditing not-for-profit entities. Updated for ASU No. 2016-14 (i.e., the new not-for-profit reporting model), the course materials utilize a highly illustrative and innovative format. Over 25 focused exercises are included to provide an enhanced working knowledge of auditing not-for-profit entities.

**PREREQUISITE:** Basic auditing knowledge

**AUDIENCE:** Auditors of not-for-profit entities

**SOURCE:** Surgent

**LEVEL:** Intermediate

**NOTE:** Qualifies for Yellow Book

## Audits of 401(k) Plans

**DATE:** 8/30/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Daryl G. Krause, CPA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$370 | **NONMEMBER:** \$524

**OVERVIEW:** Since 401(k) plans make a popular option for employee benefit plans, auditors of employee benefit plans must have the proper skills to audit these plans effectively. You will work through how to audit a 401(k) plan and prepare financial statements that satisfy ERISA and SEC requirements. Tap into ways to plan and conduct 401(k) audits more efficiently and effectively, and understand the difference

**AUDIENCE:** Auditors of employee benefit plans, CPAs in business and industry, responsible for company benefits

**SOURCE:** AICPA

**LEVEL:** Basic

## New CFO Leadership Series: Budgets and Projections

**DATE:** 9/25/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** John F. Levy, CPA, MBA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** This is day two of five for the popular series designed specifically for CFOs and those who aspire to be CFOs. In this eight-hour session, the day will be divided into four different topics, consisting of two hours for each topic. The course will provide extensive case study analysis and many opportunities for group discussion on essential skills. See page 58 for more information.

**PREREQUISITE:** Management experience helpful

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

**SOURCE:** Executive Education

**LEVEL:** Intermediate

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



## CFO Leadership Series: Driving and Managing Progress

**DATE:** 10/29/18 **TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Don Mingos, MBA

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

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** This is day two of three in Fort Wayne for the popular series designed specifically for CFOs and those who aspire to be CFOs. In this eight-hour session, the day will be divided into four different topics, consisting of two hours for each topic. The course will provide extensive case study analysis and many opportunities for group discussion on essential skills. See page 58 for more information.

**PREREQUISITE:** Management experience helpful

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

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

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

## CFO Leadership Series: Essential Skills

**DATE:** 9/17/18 **TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** John L. Daly, CPA, CMA, CPIM, MBA

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

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** This is day one of three in Fort Wayne for the popular series designed specifically for CFOs and those who aspire to be CFOs. In this eight-hour session, the day will be divided into four different topics, consisting of two hours for each topic. The course will provide extensive case study analysis and many opportunities for group discussion on essential skills. See page 58 for more information.

**PREREQUISITE:** Management experience helpful

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

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

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

## CFO Leadership Series: Managing Risk

**DATE:** 12/10/18 **TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Richard A. Karwic, MBA

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

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** This is day three of three in Fort Wayne of a popular series designed specifically for CFOs and those who aspire to be CFOs. In this eight-hour session, the day will be divided into four different topics, consisting of two hours for each topic.

The course will provide extensive case study analysis and many opportunities for group discussion on essential skills. See page 58 for more information.

**PREREQUISITE:** Management experience helpful

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

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

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

## New CFO Leadership Series: Technical Competence

**DATE:** 11/27/18

**TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Paul R. Harrison, CPA, CFP, MBA

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** This is day four of five of a popular series designed specifically for CFOs and those who aspire to be CFOs. In this eight-hour session, the day will be divided into four different topics, consisting of two hours for each topic. The course will provide extensive case study analysis and many opportunities for group discussion on these skills. See page 58 for more information.

**PREREQUISITE:** Management experience helpful

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

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

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

## Compilation and Review Practice Guide

**DATE:** 10/24/18

**TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Rebecca M. Lee, CPA, CGMA

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

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

**PREREQUISITE:** Basic familiarity with SSARS standards

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

**SOURCE:** Loscalzo Institute **LEVEL:** Intermediate



## Construction Contractors: Accounting, Auditing and Tax

**DATE:** 11/27/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Martin J. Birr, CPA, CIA, CMA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$370 | **NONMEMBER:** \$524

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

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

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

## New Cybersecurity Advisory Engagements: What You Need to Know

**DATE:** 9/21/18 **TIME:** 1–4:30 p.m.  
**INSTRUCTOR:** Joann Noe Cross, CPA, CGFM, CGMA, CMA, Ph.D.  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 4 | **MEMBER:** \$190 | **NONMEMBER:** \$267

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

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

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

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

## New Cybersecurity Risk Management Program: What You Need to Know

**DATE:** 9/21/18 **TIME:** 8:30 a.m.–noon  
**INSTRUCTOR:** Joann Noe Cross, CPA, CGMA, CGFM, CMA, Ph.D.  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 4 | **MEMBER:** \$190 | **NONMEMBER:** \$267

**OVERVIEW:** Cyber threats come in all shapes, sizes, complexity and are ever-evolving. Attacks are causing great financial loss and serious damage to companies. There is not a simple one-size-fits all way to respond. Each organization must work to effectively mitigate the risk of data breaches. It is essential for each organization to establish a baseline for identify critical components that must be incorporated into any cybersecurity risk management approach. Professionals working in firms or entities will learn how to keep abreast of the latest cybersecurity trends, manage risks, and ensure the right level of governance to safeguard their organization.

**AUDIENCE:** Professionals working for firms or organizations who want to obtain a basic understanding of a cybersecurity risk management program

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

## Documenting Your EBP Audit: What You Need to Know

**DATE:** 6/15/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Daryl G. Krause, CPA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$370 | **NONMEMBER:** \$524

**OVERVIEW:** During this course, you will be challenged in new ways to think holistically about your level of audit documentation. Employee benefit plans are a unique entity, and the performance of audit procedures will involve testing items that are not typically tested in audits of other types of entities. Even experienced auditors may find it difficult to ascertain exactly what documentation is sufficient. This course has been developed to provide participants with real examples and real solutions. Throughout this course, we will tackle the most common areas in EBP audits where detailed documentation is critical to supporting the audit conclusions. This course is designed to accomplish the following objectives: 1) Understand the professional standards which relate to audit documentation and be able to apply them in various audit situations you will encounter while performing EBP audits. 2) Work through a comprehensive approach to audit documentation, using hands on group exercises and discussions, in several common audit areas. 3) Provide participants with the knowledge to develop a plan at their firm that will provide a consistent approach to EBP audit documentation.

**AUDIENCE:** Auditors providing employee benefit audit and accounting services

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

## Employee Benefit Plan: Accounting & Auditing Update

**DATE:** 6/21/18 **TIME:** 1–4:30 p.m.  
**INSTRUCTOR:** Daryl G. Krause, CPA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**DATE:** 6/29/18 **TIME:** 1–4:30 p.m.  
**INSTRUCTOR:** Daryl G. Krause, CPA  
**LOCATION:** Century Center, South Bend

**CPE:** 4 | **MEMBER:** \$190 | **NONMEMBER:** \$267

**OVERVIEW:** A program focused on the significant changes in accounting and auditing guidance that will be or can be (if early adopted) applicable to the performance of employee benefit plan financial statement audits for plan years ended December 31, 2017. FASB ASU 2015-07: Fair Value Measurement, Topic 820: Disclosures for Investments in Certain Entities That Calculate Net Asset Value per Share (or Its Equivalent). FASB ASU 2017-06: Employee Benefit Plan Master Trust Reporting. Auditing topics will include the impact of SAS No. 132, The Auditor's Consideration of an Entity's Ability to Continue as a Going Concern, on the audit process, a preview of the Proposed Statement on Auditing Standards – Forming an Opinion and Reporting on Financial Statements of Employee Benefit Plans Subject to ERISA status and potential implications, and other current audit developments and/or areas of emphasis.

**AUDIENCE:** CPAs in public practice who perform employee benefit plan financial statement audits

**SOURCE:** Daryl G. Krause, CPA **LEVEL:** Intermediate

## Excel Financial Reporting and Analysis

**DATE:** 11/6/18 **TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Brian F. Tankersley, CPA.CITP

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

**CPE:** 8 | **MEMBER:** \$349 | **NONMEMBER:** \$504

**OVERVIEW:** Microsoft Office Excel is a powerful tool for analyzing financial data and preparing financial reports and if you are ready to harness the power of Excel for financial reporting and analysis, then this program is for you. In this course, you will learn how to put Excel to use to deliver accounting and financial solutions in critical areas such as formatting reports and financial statements using advanced techniques, assembling and printing reports and schedules, and using templates to automate reporting processes. You will also learn options for consolidating financial data from multiple sources, how to create Excel visualizations to improve reader's comprehension of financial information, and advanced data analysis techniques such as PivotTables connected in real-time to your accounting database. Like most powerful tools, Excel contains features and functions useful for reporting and analysis that are not immediately obvious to many users. In this course, you will uncover many of these hidden features to help you prepare computationally accurate and aesthetically pleasing reports in far less time than you might imagine possible. You do not want to miss this opportunity to learn how to take advantage of Excel to overcome many of the reporting and analysis obstacles currently facing you.

**PREREQUISITE:** Fundamental knowledge of Microsoft Office Excel 2007 or newer

**AUDIENCE:** Accounting and financial professionals desiring more knowledge in using Excel for financial statement preparation and analysis

**SOURCE:** K2 Enterprises **LEVEL:** Advanced

**NOTE:** Group-live demo and discussion using color computer projection—laptop friendly, with access to demonstration files. Program focuses on Excel for Windows, but many of the features can be found in Excel for Mac

## Excel PivotTables for CPAs

**DATE:** 8/29/18

**TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Brian F. Tankersley, CPA.CITP

**LOCATION:** Indiana Wesleyan University's Merrillville Education and Conference Center, Merrillville

**CPE:** 8 | **MEMBER:** \$349 | **NONMEMBER:** \$504

**OVERVIEW:** PivotTables are widely considered the most powerful feature in Excel, yet most accounting and financial professionals do not use them in their day-to-day activities. In this program, you will learn how to build PivotTables, how to group data inside PivotTables—including grouping options for fiscal periods—and how to create user-defined calculations in your PivotTables. You will also learn advanced PivotTable techniques, including how to build PivotTables that consolidate data from multiple data ranges and PivotTables dynamically connected to external databases and financial accounting systems. Additionally, you will learn how to take advantage of other Excel features associated with PivotTables, including Slicers, Power Query and Power Pivot. At the end of the day, you will be a master of Excel PivotTables!

**PREREQUISITE:** Fundamental understanding of Microsoft Office Excel 2007 or newer

**AUDIENCE:** Accounting and financial professionals who want to use the power of Excel PivotTables to analyze and summarize data

**SOURCE:** K2 Enterprises **LEVEL:** Advanced

**NOTE:** Qualifies for Accounting and Auditing, 4 hours; Group-live demo and discussion using color computer projection

## Excel Tips, Tricks and Techniques for CPAs

**DATE:** 8/27/18

**TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Brian F. Tankersley, CPA.CITP

**LOCATION:** Indiana Wesleyan University's Merrillville Education and Conference Center, Merrillville

**CPE:** 8 | **MEMBER:** \$349 | **NONMEMBER:** \$504

**OVERVIEW:** Excel is the CPA's tool of choice for analyzing and reporting financial data, yet many use time-consuming and error-prone processes to complete everyday tasks. Regardless of your level of experience, if you use Excel, you need this course to learn more efficient and effective ways to work with Excel. In this course, you will learn tips, tricks and techniques to improve your general level of productivity, reduce the amount of time you spend on mundane tasks, such as formatting, and customize Excel for greater accuracy and efficiency. You will also learn valuable formula-building skills, best practices for linking Excel data from other worksheets and workbooks, and how to streamline report generation and printing processes.

**PREREQUISITE:** Fundamental knowledge of Microsoft Office Excel 2007 or newer

**AUDIENCE:** Accounting and financial professionals who want to learn how to use Excel more efficiently and effectively

**SOURCE:** K2 Enterprises **LEVEL:** Intermediate

**NOTE:** Qualifies for Accounting and Auditing, 4 hours; Group-live demo and discussion using color computer projection—laptop friendly, with access to demonstration files; Program focuses on Excel for Windows, but many of the features can be found in Excel for Mac

## New FAQ: Nonprofit Accounting, Auditing, Compliance and Governance Issues

**DATE:** 9/21/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Marci S. Thomas, CPA, MHA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** The literature specific to nonprofit organizations continues to evolve and become more complex. Using the popular and fast-moving "Frequently Asked Questions" format, this course was compiled from questions asked of the author in their capacity as a technical reviewer and advisor to firms and nonprofit organizations. This course also provides an update on emerging governance issues.

**PREREQUISITE:** Basic familiarity with nonprofit accounting

**AUDIENCE:** Practitioners working with nonprofits in public practice and CPAs working in nonprofit organizations who need to keep on top of current accounting and disclosure requirements

**SOURCE:** Loscalzo Institute **LEVEL:** Intermediate

**NOTE:** [Qualifies for Yellow Book](#)

## FASB's "Big 3:" Revenue Recognition, Leases and Financial Instruments

**DATE:** 9/20/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Martin J. Birr, CPA, CIA, CMA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**DATE:** 9/27/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Martin J. Birr, CPA, CIA, CMA  
**LOCATION:** Century Center, South Bend

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** Sometimes we can avoid addressing the elephant in the room for a while. However, when there are three elephants in the room, it's time to address the issues. Designed for practitioners and their staff, whether in public accounting or business and industry, this course provides a comprehensive review and update of the FASB's Big 3 accounting and reporting areas—Revenue Recognition, Leases and Financial Instruments. We will focus on recently issued Accounting Standards Updates, covering these critical areas of your practice or organization. We will analyze the Big 3, which have a major effect on all industries, using examples and illustrations to provide a hands-on approach that will help you better assess and implement the new standards and guidance applicable to your clients or organization.

**PREREQUISITE:** Experience in financial accounting and reporting

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

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

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

**DATE:** 11/15/18 **TIME:** 1–4:30 p.m.  
**INSTRUCTOR:** William I. Eskin, CPA  
**LOCATION:** Grand Wayne Center, Fort Wayne

**CPE:** 4 | **MEMBER:** \$190 | **NONMEMBER:** \$267

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

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

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

## Four Most Overlooked Business Risks: Preparing for the Future

**DATE:** 12/12/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Richard A. Karwic, MBA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** We tend to focus on fighting today's fires without spending adequate time on bigger, more important risks inherent in today's inter-connected, competitive world. This seminar drills down into four commonly overlooked business risks, looking at how to anticipate, manage, mitigate or exploit them. We will discuss the professional obligations of the board and executive management to assess risks and the responsibility of internal and external auditors to evaluate the adequacy of these assessments.

**PREREQUISITE:** Some risk management training or experience

**AUDIENCE:** Upper-level corporate financial managers, internal auditors and public practice CPAs concerned about risk in their own business or who advise clients on risk management issues

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

**NOTE:** [This seminar includes group discussion of at least five cases and exercises](#)

## New Four-Hour Yellow Book Qualification Course

**DATE:** 11/2/18 **TIME:** 1–4:30 p.m.

**INSTRUCTOR:** James Schmutte, CPA, DBA

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 4 | **MEMBER:** \$190 | **NONMEMBER:** \$267

**OVERVIEW:** As part of the 24-hour Yellow Book CPE requirement the new Yellow Book also requires four hours of CPE on the Yellow Book itself. This course not only fulfills that requirement, it also prepares you to excel in implementing the new Yellow Book. Learn precisely what the new Yellow Book does and does not require auditors to do. The course materials utilize a highly illustrative and innovative format. Over 15 focused exercises are included to provide an enhanced knowledge of the new Yellow Book.

**PREREQUISITE:** Basic audit knowledge

**AUDIENCE:** Auditors performing Yellow Book engagements

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

**NOTE:** The purpose of this course is to fulfill the new GAGAS (i.e., Yellow Book) Qualification CPE requirement. Qualifies for Yellow Book

## Fraud Basics: Protecting the Company Till

**DATE:** 10/22/18 **TIME:** 8:30 a.m.–noon

**INSTRUCTOR:** James Schaefer, CPA-Inactive, CFE, CIA, CISA, DBA

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**DATE:** 12/7/18 **TIME:** 8:30 a.m.–noon

**INSTRUCTOR:** James Schaefer, CPA-Inactive, CFE, CIA, CISA, DBA

**LOCATION:** Indiana Wesleyan University's Merrillville Education and Conference Center, Merrillville

**CPE:** 4 | **MEMBER:** \$190 | **NONMEMBER:** \$267

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

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

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

## Fraud Update: Detecting and Preventing the Top 10 Fraud Schemes

**DATE:** 11/5/18 **TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Daryl G. Krause, CPA

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$370 | **NONMEMBER:** \$524

**OVERVIEW:** Many costly fraudulent schemes have occurred repeatedly throughout the past several decades. Why do these material and frequently recurring frauds succeed? One reason is that business owners, management, auditors and employees fail to recognize the red flags that have been associated with

these financial statement and misappropriation of asset frauds. Another major reason is that the reporting and transaction processing systems do not have adequate controls to either prevent and/or detect these schemes. This course will provide descriptions of how these major frauds are perpetrated (including real-world examples) and the types of cost-effective controls that can be implemented by both small and large businesses and nonprofit entities to identify and prevent these deceptive acts.

**PREREQUISITE:** Experience in accounting and reporting

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

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

## Frauds Affecting Employee Benefit Plans

**DATE:** 6/21/18 **TIME:** 8:30 a.m.–noon

**INSTRUCTOR:** Daryl G. Krause, CPA

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**DATE:** 6/29/18 **TIME:** 8:30 a.m.–noon

**INSTRUCTOR:** Daryl G. Krause, CPA

**LOCATION:** Century Center, South Bend

**CPE:** 4 | **MEMBER:** \$190 | **NONMEMBER:** \$267

**OVERVIEW:** The U.S. Department of Labor (DOL) Employee Benefits Security Administration (EBSA) monitors and makes publicly available in the form of ERISA Enforcement communications information regarding enforcement actions they have undertaken with respect to employee benefit plans. This program will demonstrate how to access and explore this information. Participants—who may be plan sponsors or plan auditors—will consider how this source can assist them in identifying the kind of fraudulent activity that may occur in the employee benefit plans they are involved with, then enable them to factor this into their risk assessment and internal control processes.

**AUDIENCE:** Accounting, financial and human resource professionals responsible for coordinating the external audits and safeguarding the assets of their organization's employee benefit plans; CPAs in public practice who perform employee benefit plan financial statements

**SOURCE:** Daryl G. Krause, CPA **LEVEL:** Intermediate

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

**DATE:** 11/16/18 **TIME:** 8:30 a.m.–noon

**INSTRUCTOR:** William I. Eskin, CPA

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 4 | **MEMBER:** \$190 | **NONMEMBER:** \$267

**OVERVIEW:** Specifically designed for compilation, preparation, and review practitioners and their staff, this course will provide you with an overview, update and hands-on application for performing compilation, preparation and review engagements. You will learn the ins and outs of SSARS No. 21, *Clarification and Recodification*. The course will also cover the changes that have occurred with the issuance of SSARS Nos. 22 and 23 with regard to compilation of proforma financial information engagements,



engagements on prospective financial information, as well as in other areas relevant to SSARS No. 21 engagements, including lessons learned from early peer reviews of SSARS No. 21 engagements. This course will bring you up-to-date on SSARS requirements and guidance as well as provide examples and illustrations to help you effectively perform compilation, preparation and review engagements.

**PREREQUISITE:** Experience in performing and managing compilation, preparation, and review engagements

**AUDIENCE:** Accounting practitioners and their staff performing and managing compilation, preparation and review engagement services

**SOURCE:** Surgent

**LEVEL:** Update

## Identity Theft: Preventing, Detecting and Investigating

**DATE:** 9/20/18

**TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Joann Noe Cross, CPA, CGFM, CGMA, CMA, Ph.D.

**LOCATION:** Indiana Wesleyan University's Merrillville Education and Conference Center, Merrillville

**DATE:** 11/6/18

**TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Jeffrey Lieman, CPA

**LOCATION:** Holiday Inn Evansville Airport, Evansville

**CPE:** 8

| **MEMBER:** \$370

| **NONMEMBER:** \$524

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

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

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

**SOURCE:** AICPA

**LEVEL:** Intermediate

## *New* Implementing Internal Controls in QuickBooks Environments

**DATE:** 6/19/18

**TIME:** 8:30 a.m.–noon

**INSTRUCTOR:** Brian Tankersley, CPA.CITP

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 4

| **MEMBER:** \$200

| **NONMEMBER:** \$277

**OVERVIEW:** The QuickBooks ecosystem of accounting tools remains the most widely-used set of accounting applications in use by small businesses, yet many of these organizations struggle because of inadequate internal controls. In this seminar,

you will learn options for how you can improve internal controls in small businesses running QuickBooks Pro, Premier, Enterprise or Online. Through participating in this program, you will learn the importance of maintaining a strong system of internal controls in a small business environment, including businesses using QuickBooks accounting solutions. 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 by using features found in the application. In addition, you will learn about supplemental internal control procedures for situations where effective controls cannot be established through QuickBooks. In sum, while many believe that QuickBooks-based organizations are destined for weak internal control structures, by participating in this program you will learn how QuickBooks-based businesses can benefit from a strong system of internal controls.

**PREREQUISITE:** Fundamental knowledge of internal controls and QuickBooks solutions

**AUDIENCE:** CPAs and other business professionals who want to improve internal controls in QuickBooks and QuickBooks Online environments

**SOURCE:** K2 Enterprises

**LEVEL:** Intermediate

**NOTE:** Group-live demo and discussion using color computer projection

## Internal Control Best Practices for Small- and Medium-Sized Entities

**DATE:** 11/7/18

**TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Jeffrey Lieman, CPA

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8

| **MEMBER:** \$370

| **NONMEMBER:** \$524

**OVERVIEW:** This course provides practical guidance for those involved with internal control responsibilities (auditing, monitoring, implementing, etc.) in adapting the 2013 COSO Internal Control-Integrated Framework (the COSO framework) to small- and medium-sized entities. Internal control concepts are applicable to every entity, regardless of size. However, there is no "one size fits all" set of rules that can be applied to all entities. Often times the internal control "best practices" that have evolved over time are based upon large entity environments and these "best practices" are not necessarily relevant to small- and medium-sized entities. This course will show you some best practices for designing, implementing, monitoring, evaluating, and auditing cost-effective internal controls for small- and medium-sized entities.

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

**AUDIENCE:** Accountants, auditors, managers, and others who are responsible for implementing, monitoring, evaluating, auditing and designing cost-effective internal controls for small and medium-sized entities

**SOURCE:** AICPA

**LEVEL:** Basic



## New Internal Control and Enterprise Risk Management in 2018

**DATE:** 5/22/18 **TIME:** 1–4:30 p.m.  
**INSTRUCTOR:** James Schaefer, CPA-Inactive, CFE, CIA, CISA, DBA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**DATE:** 12/3/18 **TIME:** 1–4:30 p.m.  
**INSTRUCTOR:** James Schaefer, CPA-Inactive, CFE, CIA, CISA, DBA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 4 | **MEMBER:** \$190 | **NONMEMBER:** \$267

**OVERVIEW:** This course utilizes COSO's updated document *Enterprise Risk Management—Integrating with Strategy and Performance* to demonstrate how organizations can identify, assess and respond to risk while increasing stakeholder value. Numerous examples and case studies are used to:

- Emphasize the relationship between risk and value.
- Understand the role of culture.
- Elevate the use of strategy.
- Link enterprise risk management to decision-making.

The goal is to move from traditional risk reduction strategies to using enterprise risk management throughout the value chain.

**AUDIENCE:** While previous experience with internal control is desirable, those new to internal control should benefit from this course

**SOURCE:** James Schaefer, CPA-Inactive, CFE, CIA, CISA, DBA

**LEVEL:** Intermediate

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

**DATE:** 11/30/18 **TIME:** 8:30 a.m.–noon  
**INSTRUCTOR:** Daryl G. Krause, CPA  
**LOCATION:** Holiday Inn Evansville Airport, Evansville

**DATE:** 12/19/18 **TIME:** 1–4:30 p.m.  
**INSTRUCTOR:** Daryl G. Krause, CPA  
**LOCATION:** Ritz Charles, Carmel

**CPE:** 4 | **MEMBER:** \$190 | **NONMEMBER:** \$267

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

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

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

**SOURCE:** AICPA

**LEVEL:** Intermediate

## Latest Developments in Nonprofit Accounting and Auditing

**DATE:** 11/5/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** James Schmutte, CPA, DBA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

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

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

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

**SOURCE:** Surgent

**LEVEL:** Update

**NOTE:** Qualifies for Yellow Book

## New Nonprofit Industry Update and GAAP Refresher

**DATE:** 9/20/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Marci S. Thomas, CPA, MHA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** This program provides a 2018 update of the issues at the forefront of industry to assist the auditor in assessing risk. It also includes updates to FASB guidance through March 2018 with a specific section on the new not-for-profit financial statements, complete with disclosure examples. We will also discuss the FASB's decisions to date related to the accounting for grants, as well as a discussion of the AICPA's task force recommendations related to revenue recognition. The U.S. GAAP refresher portion of the program includes coverage of some significantly enhanced sections in the nonprofit audit guide and nonprofit Technical Practice Aids (AICPA). This course also provides an update on issues relative to the Single Audit. We will also discuss SAS No. 132 on the auditor's consideration of the entity's ability to remain a going concern.

**PREREQUISITE:** Basic familiarity with not-for-profit accounting and auditing

**AUDIENCE:** Practitioners working with nonprofit organizations in public practice and nonprofit CPAs who need to keep on top of current accounting and disclosure requirements

**SOURCE:** Loscalzo Institute

**LEVEL:** Intermediate

**NOTE:** Qualifies for Yellow Book

## Not-for-Profit Accounting and Auditing Update

**DATE:** 11/20/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** James Buckley, CPA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$370 | **NONMEMBER:** \$524

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

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

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

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

**NOTE:** Qualifies for Yellow Book

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

**DATE:** 8/23/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Jeanette Bax-Kurtz, CPA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$370 | **NONMEMBER:** \$524

**OVERVIEW:** Are you aware of how not-for-profit financial statements will change because of FASB's Financial Statement Standard? Avoid the potholes of confusion and provide a financial picture that end users can truly understand. Through a combination of practical guidance and case studies, this course provides insight into what makes not-for-profits different. As well, you will receive guidance on FASB's new financial statement standard, which will have a major impact on the financial reporting for not for profits, allowing you to clear the hurdles in an efficient and effective manner.

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

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

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

**NOTE:** Qualifies for Yellow Book

## Practical Internal Controls: A Case Study Approach

**DATE:** 5/22/18 **TIME:** 8:30 a.m.–noon  
**INSTRUCTOR:** James Schaefer, CPA-Inactive, CFE, CIA, CISA, DBA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**DATE:** 12/3/18 **TIME:** 8:30 a.m.–noon  
**INSTRUCTOR:** James Schaefer, CPA-Inactive, CFE, CIA, CISA, DBA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 4 | **MEMBER:** \$190 | **NONMEMBER:** \$267

**OVERVIEW:** This updated and revised course uses real-life case

studies to identify risks and then implement internal controls to manage (or at least mitigate) these risks. Participants will practice designing cost-effective internal controls. Case studies include applications in small business, health care and not-for-profit sectors.

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

**SOURCE:** James Schaefer, CPA-Inactive, CFE, CIA, CISA, DBA  
**LEVEL:** Basic

## Preparation, Compilation and Review Engagements: Update and Review

**DATE:** 11/20/18 **TIME:** 8:30 a.m.–noon  
**INSTRUCTOR:** William I. Eskin, CPA  
**LOCATION:** Century Center, South Bend

**CPE:** 4 | **MEMBER:** \$190 | **NONMEMBER:** \$267

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

**PREREQUISITE:** Experience with engagements performed in accordance with SSARS

**AUDIENCE:** CPA firm seniors (and above) managing engagements performed in accordance with SSARS

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

## Preparing Special Purpose Framework Financial Statements: Cash, Modified Cash and Tax Basis

**DATE:** 11/16/18 **TIME:** 1–4:30 p.m.  
**INSTRUCTOR:** William I. Eskin, CPA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 4 | **MEMBER:** \$190 | **NONMEMBER:** \$267

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

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

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

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

**DATE:** 10/31/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** James Schaefer, CPA-Inactive, CFE, CIA, CISA, DBA  
**LOCATION:** Century Center, South Bend

**DATE:** 12/14/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** James Schaefer, CPA-Inactive, CFE, CIA, CISA, DBA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** This course provides CPAs with detailed guidance on how to prevent, detect and respond to fraud. Starting with an overview of current fraud statistics, the course then covers the fraud triangle, the fraud diamond and legal elements of fraud. Numerous case studies will provide tools to identify key risk areas and cost-effective controls to mitigate the risk of fraud. Cybersecurity, money laundering and insurance fraud will also be addressed.

**AUDIENCE:** CPA in all practice areas

**SOURCE:** James Schaefer, CPA-Inactive, CFE, CIA, CISA, DBA

**LEVEL:** Basic

## Private Company Accounting: New Directions, New Challenges

**DATE:** 11/28/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Paul R. Harrison, CPA, CFP, MBA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** The convergence process is beginning to wind down. Both FASB and the IASB have issued new revenue recognition standards and lease standards. Financial instrument changes will soon follow. These changes will impact both public and private companies. IFRS convergence and private company accounting changes impact activities well beyond financial reporting. Awareness of IFRS adoption efforts by the SEC is one thing; understanding how FASB's convergence project and private company reporting can affect your company is a very different issue.

**AUDIENCE:** CFOs, controllers and managers involved with financial reporting

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

**NOTE:** This seminar includes six group exercises

## Proven Controls to Steer You Clear of Fraud

**DATE:** 10/22/18 **TIME:** 1–4:30 p.m.  
**INSTRUCTOR:** James Schaefer, CPA-Inactive, CFE, CIA, CISA, DBA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**DATE:** 12/7/18 **TIME:** 1–4:30 p.m.  
**INSTRUCTOR:** James Schaefer, CPA-Inactive, CFE, CIA, CISA, DBA  
**LOCATION:** Indiana Wesleyan University's Merrillville Education and Conference Center, Merrillville

**CPE:** 4 | **MEMBER:** \$190 | **NONMEMBER:** \$267

**OVERVIEW:** Organizations that fall victim to fraud (and that is every organization in the world) have many controls in place to combat fraud. We will discuss means and methods to stop fraud and the controls that victim organizations employ to seek improvements for our organizations.

**AUDIENCE:** CPAs in public practice and business and industry who wish to educate clients or colleagues on how to better prevent fraud from occurring at the source—would-be fraudsters—as well as to seek means to improve anti-fraud controls

**SOURCE:** Surgent

**LEVEL:** Basic

## QuickBooks for CPAs

**DATE:** 8/28/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Brian Tankersley, CPA.CITP  
**LOCATION:** Indiana Wesleyan University's Merrillville Education and Conference Center, Merrillville

**CPE:** 8 | **MEMBER:** \$349 | **NONMEMBER:** \$504

**OVERVIEW:** QuickBooks is an extremely powerful product with features and capabilities of which many users are either not aware or do not know how to utilize effectively. This course helps you get more out of QuickBooks and QuickBooks Online and to resolve the issues with which even experienced QuickBooks users often struggle, such as locking down prior periods. This program starts out fast with a chapter covering the top issues CPAs face with QuickBooks. The day continues with practical guidance and solutions designed to help CPAs get the most out of QuickBooks for themselves and/or their clients. You will learn about issues such as setting up a new company, configuring and customizing QuickBooks preferences, and enabling system security and password protection features. In addition, you will learn how to lock down transactions in prior periods, the audit trail, customizing reports, exporting reports to Excel, and extending QuickBooks' usefulness with tools such as the Fixed Asset Manager and Loan Manager.

**PREREQUISITE:** Fundamental understanding of basic QuickBooks operations

**AUDIENCE:** Accounting and financial professionals who use or support clients who use QuickBooks

**SOURCE:** K2 Enterprises

**LEVEL:** Intermediate

**NOTE:** Qualifies for Accounting and Auditing, 4 hours; Group-live demo and discussion using color computer projection

## Real-World Fraud Found in Governments and Not-for-Profit

**DATE:** 8/24/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Jeanette Bax-Kurtz, CPA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$370 | **NONMEMBER:** \$524

**OVERVIEW:** What do you think of when you hear the word "fraud?" Are you concerned for your clients or your organization? Through a comprehensive learning approach using examples, explanations of audit standards and informative case studies, you will learn about real-world government and NFP fraud, including cyber fraud, and your responsibilities when dealing

with fraud. Since recognizing fraudulent or deceptive practice isn't always easy, this course will highlight frauds headlining today's news and sharpen your forensic skills with techniques to help you identify behavior tendencies which may lead to fraudulent activity.

**PREREQUISITE:** Knowledge of government and not-for-profit sectors

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

**SOURCE:** AICPA

**LEVEL:** Intermediate

**NOTE:** Qualifies for Yellow Book

## Real-World Fraud in Today's Small- to Medium-Sized Entities

**DATE:** 10/23/18

**TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Martin J. Birr, CPA, CIA, CMA

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8

**MEMBER:** \$370

**NONMEMBER:** \$524

**OVERVIEW:** This course uses hands-on case studies based on real-world frauds to help participants carry out their financial statement fraud responsibilities. Auditors and corporate accounting and finance professionals in small- to medium-sized entities will find this course relevant. It includes an overview of the auditor's responsibilities related to financial statement fraud. In addition, the course includes information relevant to management's responsibility for fraud and internal controls. Cases address revenue recognition, various financial statement manipulations and purchasing fraud.

**AUDIENCE:** CPA firm attest staff, including paraprofessionals, who are new to performing preparation, compilation or review engagements, or CPAs requiring a refresher on preparation, compilation or review engagements

**SOURCE:** AICPA

**LEVEL:** Basic

## New Revenue from Contracts with Customers (ASU 2014-09 As Amended)

**DATE:** 12/12/18

**TIME:** 8:30 a.m.–4:30 p.m.

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

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8

**MEMBER:** \$339

**NONMEMBER:** \$493

**OVERVIEW:** ASU 2014-09, as amended (Topic 606) will impact most U.S. GAAP financial statements either due to measurement and recognition changes from legacy U.S. GAAP and/or additional disclosure requirements compared to prior guidance. This new eight-hour program will review the key provisions of the ASU, identify and apply the new five-step revenue recognition model with detailed examples/case studies for each step, describe the new disclosure requirements, and discuss transition and business implications of the new guidance. This program will be presented from the perspective of the practitioner preparing and disclosing the financial information necessary to comply with the new ASU.

**PREREQUISITE:** Basic knowledge of U.S. GAAP

**AUDIENCE:** CPAs and other accounting professionals in industry and public practice

**SOURCE:** Loscalzo Institute

**LEVEL:** Intermediate

## Shorten Month-End: Closing Best Practices

**DATE:** 11/30/18

**TIME:** 1–4:30 p.m.

**INSTRUCTOR:** John L. Daly, CPA, CMA, CPIM, MBA

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

**CPE:** 4

**MEMBER:** \$190

**NONMEMBER:** \$267

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

**AUDIENCE:** Corporate financial managers

**SOURCE:** Executive Education

**LEVEL:** Intermediate

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

## Small Business Internal Controls, Security, and Fraud Prevention and Detection

**DATE:** 9/24/18

**TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Steven M. Phelan, CPA, CITP

**LOCATION:** Century Center, South Bend

**CPE:** 8

**MEMBER:** \$349

**NONMEMBER:** \$504

**OVERVIEW:** Internal controls are more important than ever, and their importance increases seemingly on a daily basis. However, internal controls present a challenge for many smaller organizations. In this program, you will learn how to evaluate, develop and implement an effective internal control structure in a small business environment. You will identify how to assess risk in smaller organizations and how to implement preventive, detective, deterrent and compensating controls to mitigate these risks, even in the absence of proper segregation of duties. You will learn technology-focused techniques for preventing and detecting fraud as well as securing information systems and sensitive data. You will benefit from the case studies used in class in which theoretical concepts are implemented and demonstrated in leading small business accounting software programs, such as QuickBooks and QuickBooks Online, Sage 50/ Peachtree, Microsoft Dynamics GP and Sage 100. Participate in this program to learn the necessary insights and tools to design, implement, and monitor effective internal controls, security and anti-fraud measures in small organizations.

**PREREQUISITE:** Basic understanding of internal controls and accounting and administrative processes in smaller organizations

**AUDIENCE:** Business professionals responsible for internal control and fraud prevention and detection

**SOURCE:** K2 Enterprises

**LEVEL:** Intermediate

**NOTE:** Group-live demo and discussion using color computer projection



## Studies on Single Audit and Yellow Book Deficiencies

**DATE:** 11/21/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** James Buckley, CPA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$370 | **NONMEMBER:** \$524

**OVERVIEW:** This course focuses on areas that may need special attention in a single audit. Increase your knowledge regarding these areas found in single audits and Yellow Book engagements using simulated case studies and practice exercises with lessons for today's issues. These case studies and practice exercises are based on the Yellow Book and the Uniform Guidance and will assist you in avoiding common mistakes and recognizing deficiencies before it's too late.

**PREREQUISITE:** Experience in Yellow Book and OMB environment

**AUDIENCE:** Auditors performing single audits and internal financial staff of governmental and not-for-profit entities

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

**NOTE:** Qualifies for Yellow Book

## The Bottom Line on the New Lease Accounting Requirements

**DATE:** 11/21/18 **TIME:** 1–4:30 p.m.  
**INSTRUCTOR:** William I. Eskin, CPA  
**LOCATION:** Century Center, South Bend

**DATE:** 11/30/18 **TIME:** 1–4:30 p.m.  
**INSTRUCTOR:** Daryl G. Krause, CPA  
**LOCATION:** Holiday Inn Evansville Airport, Evansville

**DATE:** 12/19/18 **TIME:** 1–4:30 p.m.  
**INSTRUCTOR:** Bruce Shepard, CPA  
**LOCATION:** Ritz Charles, Carmel

**CPE:** 4 | **MEMBER:** \$190 | **NONMEMBER:** \$267

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

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

**AUDIENCE:** CPAs in public practice and business and industry

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

## The Essential Course for Performing Single Audits Under the Uniform Guidance for Federal Awards

**DATE:** 11/14/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** James Schmutte, CPA, DBA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** Applying one set of auditing standards is tough. Applying three sets of auditing standards is really tough. However, this is precisely what the auditor does in applying GAAS, the Yellow Book, and the OMB requirements to a single audit. This is an essential course for auditors performing single audits as it will equip you with the hands-on skills needed to perform audits under the Uniform Guidance for Federal Awards. The course materials utilize an illustrative and innovative format.

**PREREQUISITE:** Basic single audit knowledge

**AUDIENCE:** Auditors performing single audits

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

**NOTE:** Qualifies for Yellow Book

## *New* The Essential Course for Preparing Not-for-Profit Financial Statements Under ASU No. 2016-14

**DATE:** 10/17/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** James Schmutte, CPA, DBA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** ASU No. 2016-14, *Presentation of Financial Statements of Not-for-Profit Entities*, will usher in the most significant changes to not-for-profit financial reporting in over 20 years when it becomes effective for December 31, 2018, year-ends. To properly implement the new financial reporting model, professionals will need to have a strong, working knowledge of the new requirements. This course will explain the new requirements, illustrate how the requirements will manifest themselves in the financial statements, and explain key options that not-for-profits have in implementing the requirements. The course will also update you on today's core not-for-profit accounting requirements while examining other key issues on the horizon related to revenue recognition and leases. Course materials utilize an illustrative and innovative format, including over 25 focused exercises to provide an enhanced working knowledge of not-for-profit accounting and reporting.

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

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

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

**NOTE:** Qualifies for Yellow Book



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

**DATE:** 11/20/18 **TIME:** 1–4:30 p.m.  
**INSTRUCTOR:** William I. Eskin, CPA  
**LOCATION:** Century Center, South Bend

**DATE:** 12/19/18 **TIME:** 8:30 a.m.–noon  
**INSTRUCTOR:** Daryl G. Krause, CPA  
**LOCATION:** Ritz Charles, Carmel

**CPE:** 4 | **MEMBER:** \$190 | **NONMEMBER:** \$267

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

**PREREQUISITE:** Experience in accounting and reporting

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

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

## The Strategic CFO: Big Picture Skills

**DATE:** 10/30/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Don Minges, MBA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

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

**AUDIENCE:** Those who are, or aspire to be, chief financial officers; focus discussions on medium-sized organizations

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

**NOTE:** This seminar includes group discussion of five cases

## Yellow Book: Government Auditing Standards

**DATE:** 12/17/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** James Schmutte, CPA, DBA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$370 | **NONMEMBER:** \$524

**OVERVIEW:** Do you perform engagements in accordance with Generally Accepted Government Auditing Standards (GAGAS or GAS or the "Yellow Book")? This course provides an excellent

baseline of information for CPAs as it relates to understanding Government Auditing Standards, including the foundation of government auditing and the related concepts and standards. It is essential that all auditors planning and conducting engagements in accordance with Government Auditing Standards understand and be able to discern these concepts and standards in executing their responsibilities.

**AUDIENCE:** Government auditors and CPAs in public accounting planning or conducting engagements in accordance with Generally Accepted Government Auditing Standards (GAGAS) ("Yellow Book")

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

**NOTE:** Qualifies for Yellow Book



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

**DATE:** 9/17/18                      **TIME:** 8:30 a.m.–noon  
**INSTRUCTOR:** Don Minges, MBA  
**LOCATION:** Century Center, South Bend

**CPE:** 4                      | **MEMBER:** \$190                      | **NONMEMBER:** \$267

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

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

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

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

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

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

**DATE:** 11/30/18                      **TIME:** 8:30 a.m.–noon  
**INSTRUCTOR:** John L. Daly, CPA, CMA, CPIM, MBA  
**LOCATION:** Grand Wayne Center, Fort Wayne

**CPE:** 4                      | **MEMBER:** \$190                      | **NONMEMBER:** \$267

**OVERVIEW:** Anyone who has ever attended a lecture format ethics seminar knows there is a better way. Cases in Corporate Ethics provides an opportunity for lively group discussion of ethical dilemmas. This seminar examines eight cases drawn from real-life business conflicts involving corporate financial managers.

**AUDIENCE:** Corporate financial managers

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

**NOTE:** This seminar includes group discussion of eight real life cases

## ***New* CFO Leadership Series: Honing Your Management Style**

**DATE:** 10/31/18                      **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Don Minges, MBA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8                      | **MEMBER:** \$339                      | **NONMEMBER:** \$493

**OVERVIEW:** This is day three of five for the popular series designed specifically for CFOs and those who aspire to be CFOs. In this eight-hour session, the day will be divided into four different topics, consisting of two hours for each topic. The course will provide extensive case study analysis and many opportunities for group discussion on essential skills. See page 58 for more information.

**PREREQUISITE:** Management experience helpful

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

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

**NOTE:** Qualifies for Ethics, 4 hours; Bring a calculator; This seminar includes extensive case study analysis and many opportunities for group discussion

## **Ethics and Professional Conduct: Updates and Practical Applications**

**DATE:** 11/21/18                      **TIME:** 8:30 a.m.–noon  
**INSTRUCTOR:** William I. Eskin, CPA  
**LOCATION:** Century Center, South Bend

**DATE:** 12/18/18                      **TIME:** 1–4:30 p.m.  
**INSTRUCTOR:** Daryl G. Krause, CPA  
**LOCATION:** Ritz Charles, Carmel

**CPE:** 4                      | **MEMBER:** \$190                      | **NONMEMBER:** \$267

**OVERVIEW:** This CPE course provides a timely update and refresher on the AICPA Code of Professional Conduct, including the conceptual framework and independence provisions for nonattest services, personal independence and other critical matters. It reviews the basic tenets of ethical and professional conduct (including the principles upon which the code rests), explains why the code is necessary, and how it is organized. AICPA members must follow the AICPA code, and many courts and regulatory bodies view the AICPA code as the de facto standard for the CPA profession, therefore it is imperative to stay current on the rules and apply them properly. Through

interactive case studies, exercises and illustrative graphics, you will learn the most up-to-date rules.

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

**SOURCE:** AICPA

**LEVEL:** Basic

### **New Ethics: 50 Shades of Gray**

**DATE:** 5/23/18

**TIME:** 1–4:30 p.m.

**INSTRUCTOR:** Peter A. Margaritis, CPA, CGMA

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 4

**MEMBER:** \$190

**NONMEMBER:** \$267

**OVERVIEW:** Ethics should be a black and white issue. However, if you ask most CPAs, they would say ethics is a very gray area. Why is this? It seems like at least once a month there is an article written in the Wall Street Journal about someone committing fraud to big corporations failing in their corporate governance responsibilities. We will discuss real-world cases such as Wells Fargo, Theranos and the most current case of ethics violations in the news. Also, we will debate this topic—ethical considerations and webinars, webcasts and self-study. At times during this session, we will put a humorous twist in our discussion of ethics.

**AUDIENCE:** CPAs and accountants in public practice, business and industry, and higher education

**SOURCE:** Business Learning Institute

**LEVEL:** Basic

### **Ethics: A Line in the Sand for CPAs**

**DATE:** 6/27/18

**TIME:** 1–4:30 p.m.

**INSTRUCTOR:** James T. Lindell, CPA, CGMA, CSP, MBA

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 4

**MEMBER:** \$190

**NONMEMBER:** \$267

**OVERVIEW:** Ethical behavior continues to be a problem in society and even in the CPA ranks. "Ethics: A Line in the Sand for CPAs" looks at the behavioral issues that influence how CPAs act. CPAs will benefit from this course by learning why CPAs make ethical blunders, understanding the signs coworkers display that indicate ethical lapses, and learning how corporate policy and procedure creates or dispels ethical work environments.

**AUDIENCE:** Anyone interested in improving the overall daily effectiveness of the accounting function; the tools and techniques are applicable for all levels of individuals

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

### **New Ethics Online Interactive Course**

**DATE:** Open

**ENROLLMENT TIME:** 90 days to complete the course

**CPE:** Fulfills IN Ethics Requirement | **MEMBER:** \$190 | **NONMEMBER:** \$267

**OVERVIEW:** Experience a new way to fulfill your ethics requirement. This online interactive course provides an overview of ethics for CPAs, touching on both behavioral and regulatory issues. Throughout this course, you will explore stories, scenarios

and case studies from the real world, then reference your own experience, previous education and the AICPA Code of Professional Conduct to determine how to answer the discussion questions to advance to the next level.

**AUDIENCE:** Any CPA licensed in Indiana who is interested in a new way to fulfill their ethics requirement

**SOURCE:** CPA Center of Excellence®, Inc.

**LEVEL:** Intermediate

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

**DATE:** 9/24/18

**TIME:** 8:30 a.m.–noon

**INSTRUCTOR:** John F. Levy, CPA, MBA

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 4

**MEMBER:** \$190

**NONMEMBER:** \$267

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

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

**SOURCE:** Executive Education

**LEVEL:** Intermediate

**NOTE:** The course material includes group discussion and case studies

### **Professional Ethics Update**

**DATE:** 6/8/18

**TIME:** 1–4:30 p.m.

**INSTRUCTOR:** James Schaefer, CPA-Inactive, CFE, CIA, CISA, DBA

**LOCATION:** Sheraton Louisville Riverside Hotel, Jeffersonville

**DATE:** 6/11/18

**TIME:** 1–4:30 p.m.

**INSTRUCTOR:** James Schaefer, CPA-Inactive, CFE, CIA, CISA, DBA

**LOCATION:** Indiana Wesleyan University's Merrillville Education and Conference Center, Merrillville

**DATE:** 6/15/18

**TIME:** 1–4:30 p.m.

**INSTRUCTOR:** James Schaefer, CPA-Inactive, CFE, CIA, CISA, DBA

**LOCATION:** Hillcrest Country Club, Batesville

**DATE:** 6/18/18

**TIME:** 1–4:30 p.m.

**INSTRUCTOR:** James Schaefer, CPA-Inactive, CFE, CIA, CISA, DBA

**LOCATION:** Century Center, South Bend

**DATE:** 6/22/18

**TIME:** 1–4:30 p.m.

**INSTRUCTOR:** James Schaefer, CPA-Inactive, CFE, CIA, CISA, DBA

**LOCATION:** Bloomington Convention Center, Bloomington

**DATE:** 6/25/18

**TIME:** 1–4:30 p.m.

**INSTRUCTOR:** James Schaefer, CPA-Inactive, CFE, CIA, CISA, DBA

**LOCATION:** Kokomo Country Club, Kokomo

**DATE:** 6/29/18

**TIME:** 1–4:30 p.m.

**INSTRUCTOR:** James Schaefer, CPA-Inactive, CFE, CIA, CISA, DBA

**LOCATION:** Hampton Inn & Suites Richmond, Richmond

**DATE:** 8/6/18 **TIME:** 1–4:30 p.m.  
**INSTRUCTOR:** James Schaefer, CPA-Inactive, CFE, CIA, CISA, DBA  
**LOCATION:** Holiday Inn Evansville Airport, Evansville

**DATE:** 8/22/18 **TIME:** 1–4:30 p.m.  
**INSTRUCTOR:** James Schmutte, CPA, DBA  
**LOCATION:** Horizon Convention Center, Muncie

**DATE:** 8/24/18 **TIME:** 1–4:30 p.m.  
**INSTRUCTOR:** James Schmutte, CPA, DBA  
**LOCATION:** Holiday Inn Lafayette-City Centre, Lafayette

**DATE:** 8/29/18 **TIME:** 1–4:30 p.m.  
**INSTRUCTOR:** James Schmutte, CPA, DBA  
**LOCATION:** Grand Wayne Center, Fort Wayne

**DATE:** 8/31/18 **TIME:** 1–4:30 p.m.  
**INSTRUCTOR:** James Schmutte, CPA, DBA  
**LOCATION:** Marriott North, Indianapolis

**CPE:** 4 | **MEMBER:** \$107 | **NONMEMBER:** \$246

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

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

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



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**11 years** of ethical violations

**3.5 million** fake  
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# MANAGEMENT

## Advanced Business Law for CPAs

**DATE:** 10/22/2018 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Curtis J. Quickel, CPA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$370 | **NONMEMBER:** \$524

**OVERVIEW:** Get a solid understanding of complex legal issues that come up every day and learn how to respond to them. Issue identification is often what separates top financial officers and managers from others. This course covers legal issues in employment, contracts, intellectual property, corporate law, securities, business taxes, environmental regulation and public company matters. Limit your clients' individual liability and insurance, head off tax issues, and take advantage of alternate forms of dispute resolution.

**PREREQUISITE:** Experience in, and knowledge of, legal issues encountered by businesses

**AUDIENCE:** CPAs in public practice and business and industry who want to increase their knowledge of legal issues encountered by businesses

**SOURCE:** AICPA **LEVEL:** Advanced

## Advanced Controller and CFO Skills

**DATE:** 6/26/2018 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** James T. Lindell, CPA, CGMA, CSP, MBA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$370 | **NONMEMBER:** \$524

**OVERVIEW:** This course examines best practices of leading-edge controllers and CFOs. Demonstrate your advanced skills that add value and contribute to the success of the organization. You will learn specific skills every CFO or controller needs to be successful, and you will find that you suddenly have more power and influence than you ever thought possible. Show the company's leadership how vital you are to their profitability!

**PREREQUISITE:** Previous financial management experience

**AUDIENCE:** Controllers and CFOs with at least four years of leadership experience and the desire to expand in their role

**SOURCE:** AICPA **LEVEL:** Advanced

## Annual CFO Spotlight: Corporate Finance Skills

**DATE:** 9/18/2018 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Don Minges, MBA  
**LOCATION:** Century Center, South Bend

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** In this eight-hour session, the day will be divided into four different topics, consisting of two hours for each topic. The course will provide extensive case study analysis and many opportunities for group discussion on essential skills. : 1. Financial Analysis: EVA and the Altman-Z Score. 2. Strategic Cash Management: Capital Structure and Long-Term Cash Need. 3. Better Performance Plans: The Microeconomics of Motivating Your Team. 4. Crowd Funding: What Every CFO Should Know.

**PREREQUISITE:** Management experience helpful

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

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

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

## Annual Update for Controllers

**DATE:** 9/21/2018 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Thomas N. Howard, CPA  
**LOCATION:** Grand Wayne Center, Fort Wayne

**DATE:** 10/29/2018 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** James T. Lindell, CPA, CGMA, CSP, MBA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$370 | **NONMEMBER:** \$524

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

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

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

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

## CFO Leadership Series: Driving and Managing Progress

**DATE:** 10/29/2018 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Don Minges, MBA  
**LOCATION:** Grand Wayne Center, Fort Wayne

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** This is day two of three in Fort Wayne for the popular series designed specifically for CFOs and those who aspire to be CFOs. In this eight-hour session, the day will be divided into four different topics, consisting of two hours for each topic. The course will provide extensive case study analysis and many opportunities for group discussion on essential skills. See page 58 for more information.

**PREREQUISITE:** Management experience helpful

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

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

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

## New CFO Leadership Series: Honing Your Management Style

**DATE:** 10/31/2018 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Don Minges, MBA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** This is day three of five for the popular series designed specifically for CFOs and those who aspire to be CFOs. In this eight-hour session, the day will be divided into four different topics, consisting of two hours for each topic. The course will provide extensive case study analysis and many opportunities for group discussion on essential skills. See page 58 for more information.

**PREREQUISITE:** Management experience helpful

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

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

**NOTE:** Qualifies for Ethics, 4 hours; Bring a calculator; This seminar includes extensive case study analysis and many opportunities for group discussion

## New CFO Leadership Series: Managing Your Resources

**DATE:** 8/21/2018 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** John L. Daly, CPA, CMA, CPIM, MBA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** This is day one of five for the popular series designed

specifically for CFOs and those who aspire to be CFOs. In this eight-hour session, the day will be divided into four different topics, consisting of two hours for each topic. The course will provide extensive case study analysis and many opportunities for group discussion on essential skills. See page 58 for more information.

**PREREQUISITE:** Management experience helpful

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

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

**NOTE:** Qualifies for Technology, 4 hours; Bring a calculator; This seminar includes extensive case study analysis and many opportunities for group discussion

## New CFO Leadership Series: Reinventing the Finance Role

**DATE:** 12/11/2018 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Richard A. Karwic, MBA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** This is day five of five for the popular series designed specifically for CFOs and those who aspire to be CFOs. In this eight-hour session, the day will be divided into four different topics, consisting of two hours for each topic. The course will provide extensive case study analysis and many opportunities for group discussion on essential skills. See page 58 for more information.

**PREREQUISITE:** Management experience helpful

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

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

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

## New CFO Leadership Series: Technical Competence

**DATE:** 11/27/2018 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Paul R. Harrison, CPA, CFP, MBA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** This is day four of five for the popular series designed specifically for CFOs and those who aspire to be CFOs. In this eight-hour session, the day will be divided into four different topics, consisting of two hours for each topic. The course will provide extensive case study analysis and many opportunities for group discussion on essential skills. See page 58 for more information.

**PREREQUISITE:** Management experience helpful

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

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

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

## Communication Skills Online Interactive Course

**DATE:** Open      **ENROLLMENT TIME:** 90 days to complete the course

**CPE:** 8 hr waiver | **MEMBER:** \$129 | **NONMEMBER:** \$129

**OVERVIEW:** Learn how verbal, nonverbal and written communication are critical to your success. Be aware of common communication pitfalls, understand the critical role of empathy in crafting your messages and keep several frameworks in your back pocket for when the need for different communication styles arise.

**AUDIENCE:** CPAs who want to improve their vital business success skills with a flexible, online solution that fits your schedule

**SOURCE:** CPA Center of Excellence®, Inc.      **LEVEL:** Intermediate

## Controller's Update: Today's Latest Trends

**DATE:** 12/18/2018      **TIME:** 1–4:30 p.m.

**INSTRUCTOR:** Bruce Shepard, CPA  
**LOCATION:** Ritz Charles, Carmel

**CPE:** 4 | **MEMBER:** \$190 | **NONMEMBER:** \$267

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

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

**AUDIENCE:** CFOs, controllers and other financial managers

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

## Critical Thinking Online Interactive Course

**DATE:** Open      **ENROLLMENT TIME:** 90 days to complete the course

**CPE:** 8 hr waiver | **MEMBER:** \$129 | **NONMEMBER:** \$129

**OVERVIEW:** Learn what critical thinking is, why it matters to you, your career and organization, and—most importantly—what strategies you can use to improve this indispensable skill. In this course you will gain access to practical tools that will improve results and impact in your workplace, participate in exercises that will prompt reflection upon your current abilities and opportunities to further your professional development.

**AUDIENCE:** CPAs who want to improve their vital business success skills with a flexible, online registration that fits your schedule

**SOURCE:** CPA Center of Excellence®, Inc.      **LEVEL:** Intermediate

## Critical Thinking Skills for Financial Professionals

**DATE:** 9/17/2018      **TIME:** 1–4:30 p.m.

**INSTRUCTOR:** Don Minges, MBA  
**LOCATION:** Century Center, South Bend

**DATE:** 9/24/2018      **TIME:** 1–4:30 p.m.

**INSTRUCTOR:** John F. Levy, CPA, MBA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 4 | **MEMBER:** \$190 | **NONMEMBER:** \$267

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

**AUDIENCE:** Corporate financial managers

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

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

## Decision Making Online Interactive Course

**DATE:** Open      **ENROLLMENT TIME:** 90 days to complete the course

**CPE:** 8 hr waiver | **MEMBER:** \$129 | **NONMEMBER:** \$129

**OVERVIEW:** Learn how to make decisions more strategically (instead of by immediate necessity or default), get the frameworks you can adapt to your constantly changing business environment, and be aware of bias in decision making—both in yourself and others.

**AUDIENCE:** CPAs who want to improve their vital business success skills with a flexible solution that fits your schedule

**SOURCE:** CPA Center of Excellence®, Inc.      **LEVEL:** Intermediate

## Employment Law Update: Examining Critical Issues with FMLA, HIPPA, COBRA, ADA and More

**DATE:** 11/1/2018      **TIME:** 8:30 a.m.–noon

**INSTRUCTOR:** George D. Scheeler  
**LOCATION:** Holiday Inn Evansville Airport, Evansville

**CPE:** 4 | **MEMBER:** \$190 | **NONMEMBER:** \$267

**OVERVIEW:** Employment law issues affect virtually every business, governmental entity, and not-for-profit organizations. This update examines employer liability for discrimination of all types, including disability discrimination and violations of the Americans with Disabilities Act, wage and hour laws, the Family Medical Leave Act; Health Insurance Portability and Accountability Act and expensive lessons learned for simple Consolidated Omnibus Budget Reconciliation Act violations. Also discussed are non-complete covenants and pitfalls for employers approached by

employees of competitors, and how non-disclosure and non-solicitation agreements can provide many of the protections of non-competes. This course also includes a 50-state survey of non-compete agreements which addresses the various state's position on enforceability, restrictions and scope, standards, consideration and judicial revisions of non-competes.

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

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

**SOURCE:** AICPA

**LEVEL:** Advanced

## Employment Law Update: Key Risks and Recent Trends

**DATE:** 8/30/2018

**TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** William F. Murphy, CPA, ABV, CFF, CGMA, CVA, PFS

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8

**MEMBER:** \$370

**NONMEMBER:** \$524

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

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

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

**SOURCE:** AICPA

**LEVEL:** Advanced

## Employment Law Update: Reducing Employer Liability

**DATE:** 12/18/2018

**TIME:** 8:30 a.m.–noon

**INSTRUCTOR:** Bruce Shepard, CPA

**LOCATION:** Ritz Charles, Carmel

**CPE:** 4

**MEMBER:** \$190

**NONMEMBER:** \$267

**OVERVIEW:** Employment law issues affect virtually every business, governmental entity and not-for-profit organization. This update examines trends in employment-related claims and settlements including: members of protected classes and the implications of that membership; analysis of state trends in employment litigation; e-employment and cyber issues such as employee and employer social media rights; device and internet use and monitoring; employer liability issues for employee internet

use; telecommuting and "off-the-clock" work issues; wrongful termination; bullying and its implications; harassment; and retaliation. This course also introduces you to the Employment Claim Risk Assessment Tool, which provides you a framework to analyze your organization's or your client's exposures to employment-related claims.

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

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

**SOURCE:** AICPA

**LEVEL:** Advanced

## Entrepreneurship Online Interactive Course

**DATE:** Open

**ENROLLMENT TIME:** 90 days to complete the course

**CPE:** 8 hr waiver

**MEMBER:** \$129

**NONMEMBER:** \$129

**OVERVIEW:** Fifty percent of businesses in the U.S. cease to trade within five years of opening, and with fewer firms being created this means opportunity for you as an entrepreneur, whether that's starting your own business or enhancing your role within a current one. Learn the considerations, techniques and frameworks for success before you start!

**AUDIENCE:** CPAs who want to improve their vital business success skills with a flexible solution that fits your schedule

**SOURCE:** CPA Center of Excellence®, Inc. **LEVEL:** Intermediate

## *New* How to Develop Your Team's Performance and Build the Kind of Environment Where Your Employees Love to Work

**DATE:** 5/24/2018

**TIME:** 8:30 a.m.–noon

**INSTRUCTOR:** Tom Borg

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 4

**MEMBER:** \$190

**NONMEMBER:** \$267

**OVERVIEW:** This program is designed to help you create the kind of a company where your employees maximize their potential and help you build a successful organization.

**AUDIENCE:** Financial professionals, leadership, management, accountants and CPAs

**SOURCE:** Tom Borg Consulting, LLC.

**LEVEL:** Basic

## *New* How to Have the Time of Your Life: Strategies to Shift Your Mindset to Create a More Positive, Productive and Less Stressful Life

**DATE:** 5/24/2018

**TIME:** 1–4:30 p.m.

**INSTRUCTOR:** Tom Borg

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 4

**MEMBER:** \$190

**NONMEMBER:** \$267



**OVERVIEW:** This program is designed to help you maximize your personal and professional potential and improve the quality of your life.

**AUDIENCE:** Financial professionals, leadership, management, accountants and CPAs

**SOURCE:** Tom Borg Consulting, LLC. **LEVEL:** Basic

## Leadership Online Interactive Course

**DATE:** Open **ENROLLMENT TIME:** 90 days to complete the course

**CPE:** 8 hr waiver | **MEMBER:** \$129 | **NONMEMBER:** \$129

**OVERVIEW:** Learn the difference between leadership and management, appreciate the symbiotic relationship of leaders and followers, and know how to immediately “read the room” (or business environment) so you can identify the most appropriate type of leadership for each situation.

**AUDIENCE:** CPAs who want to improve their vital business success skills with flexible, online solution that fits your schedule

**SOURCE:** CPA Center of Excellence®, Inc. **LEVEL:** Intermediate

## Lean Accounting and Management: Saving Money by Streamlining Operations

**DATE:** 10/23/2018 **TIME:** 1–4:30 p.m.

**INSTRUCTOR:** Curtis J. Quickel, CPA

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 4 | **MEMBER:** \$190 | **NONMEMBER:** \$267

**OVERVIEW:** Companies using Lean Accounting have better information for decision making, simple and timely reports that are clearly understood by everyone in the company and they focus their business around the value created from their customers. Learn to minimize waste and create wealth in your organization through a lean accounting and management approach that improves profitability by streamlining operations. Provide customer value through target-costing and eliminate waste through value-stream management. Improve flow through capacity management. Achieve perfection through continuous process improvement.

**PREREQUISITE:** Management responsibility in finance, operations, or planning

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

**SOURCE:** AICPA **LEVEL:** Advanced

## *New* Lions and Tigers and Numbers, Oh My! Finance for the Non-Financial Manager

**DATE:** 5/22/2018 **TIME:** 8:30 a.m.–4:30 pm

**INSTRUCTOR:** Peter A. Margaritis, CPA, CGMA

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** Numbers don't have to be a nightmare, and you don't

need to be a CPA to understand them! Master the basics of the language behind the primary financial reports. Use case studies to learn how to read each of the financial statements—the balance sheet, income statement and the statement of cash flows. Then learn to read between the numbers to analyze performance. Spot both short- and long-term trends that can be used to improve business performance.

**AUDIENCE:** CPAs, controllers and other financial managers in business and industry regardless of experience

**SOURCE:** Business Learning Institute **LEVEL:** Basic

## Networking & Collaboration Online Interactive Course

**DATE:** Open **ENROLLMENT TIME:** 90 days to complete the course

**CPE:** 8 hr waiver | **MEMBER:** \$129 | **NONMEMBER:** \$129

**OVERVIEW:** Learn the characteristics of a master networker and the implications of networking on working with clients, how to analyze your network to see if it is as effective as you think it is, and leave with practical tools that will improve results and impact your workplace.

**AUDIENCE:** CPAs who want to improve their vital business success skills with a flexible, online solution that fits your schedule

**SOURCE:** CPA Center of Excellence®, Inc. **LEVEL:** Intermediate

## *New* Only Financial Officer 3.0: More Skills for Smaller Company Financial Managers

**DATE:** 8/20/2018 **TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** John L. Daly, CPA, CMA, CPIM, MBA

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**DATE:** 11/29/2018 **TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** John L. Daly, CPA, CMA, CPIM, MBA

**LOCATION:** Century Center, South Bend

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** The title "Chief Financial Officer" is not an accurate description for what many financial managers do because the word "chief" implies the company has more than one degreed CPA. This seminar is for the financial manager who must do it all. This class gives financial managers in small- to medium-sized companies the high-level skills needed to act as a member of top management.

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

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

**NOTE:** Bring a calculator; Includes group discussion of five cases



## Risk, Cost and Cash Management for Controllers and Financial Managers

**DATE:** 11/1/2018 **TIME:** 1–4:30 p.m.  
**INSTRUCTOR:** George D. Scheeler  
**LOCATION:** Holiday Inn Evansville Airport, Evansville

**DATE:** 12/19/2018 **TIME:** 8:30 a.m.–noon  
**INSTRUCTOR:** Bruce Shepard, CPA  
**LOCATION:** Ritz Charles, Carmel

**CPE:** 4 | **MEMBER:** \$190 | **NONMEMBER:** \$267

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

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

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

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

## Successful Time Management: Getting the Most Out of Your Day

**DATE:** 6/27/2018 **TIME:** 8:30 a.m.–noon  
**INSTRUCTOR:** James T. Lindell, CPA, CGMA, CSP, MBA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 4 | **MEMBER:** \$190 | **NONMEMBER:** \$267

**OVERVIEW:** This course will help you increase your productivity without increasing the total time you work. The course will help you understand where time is lost and teach methods to maximize the time available.

**AUDIENCE:** Those who have to balance the demands of reduced time and increased productivity, including CPAs, accountants, controllers, treasurers and CFOs

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

## *New* The 8-Hour MBA for CPAs

**DATE:** 9/19/2018 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** James Schaefer, CPA-Inactive, CFE, CIA, CISA, DBA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**DATE:** 9/28/2018 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** James Schaefer, CPA-Inactive, CFE, CIA, CISA, DBA  
**LOCATION:** Grand Wayne Center, Fort Wayne

**DATE:** 10/19/2018 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** James Schaefer, CPA-Inactive, CFE, CIA, CISA, DBA  
**LOCATION:** Century Center, South Bend

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

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

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

**SOURCE:** James Schaefer, CPA-Inactive, CFE, CIA, CISA, DBA

**LEVEL:** Intermediate

## *New* The Latest in Leadership: What's New at the Harvard Business Review

**DATE:** 5/23/2018 **TIME:** 8:30 a.m.–noon  
**INSTRUCTOR:** Peter A. Margaritis, CPA, CGMA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 4 | **MEMBER:** \$190 | **NONMEMBER:** \$267

**OVERVIEW:** The world is changing every hour and so is your organization. When did you last update your leadership skillset? The *Harvard Business Review* publishes innovative research and concepts promoting the latest in leadership. Review recent articles and research published in the last six months to keep your leadership skills fresh, functional and effective.

**AUDIENCE:** Anyone with supervisory experience

**SOURCE:** Business Learning Institute **LEVEL:** Intermediate

## The Strategic CFO: Big Picture Skills

**DATE:** 10/30/2018 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Don Minges, MBA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

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

**AUDIENCE:** Those who are, or aspire to be, chief financial officers; focus discussions on medium-sized organizations

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

**NOTE:** Qualifies for Accounting and Auditing, 4 hours; This seminar includes group discussion of five cases

## Transforming Your Role as Controller to Business Partner

**DATE:** 5/23/2018

**TIME:** 8:30 a.m.–4:30 pm

**INSTRUCTOR:** John Minnich, CPA, CGMA

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8

| **MEMBER:** \$370

| **NONMEMBER:** \$524

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

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

**AUDIENCE:** CFOs, controllers and management CPAs who want to improve the value add and impact of their skill set in order to drive the financial performance of an organization

**SOURCE:** AICPA

**LEVEL:** Intermediate



# CFO LEADERSHIP SERIES

Get the tools you need: This popular and highly-rated series is designed specifically for CFOs and aspiring CFOs. You don't have to register for all of the courses; attend one or some based on your CPE needs.

## INDIANAPOLIS

INCPAS Prof. Dev. & Conf. Ctr.

DAY 1

### Managing Your Resources

**August 21**

Learn why your company must be a learning organization and make continuous learning affordable; how to gather and interpret non-financial data; how to get the most from your information systems; and how to attract and keep the best people.

DAY 2

### Budgets and Projections

**September 25** – Includes 8 hrs A&A

Learn the current best practices in forecasting to help prepare better budgets and projections; how to become a great predictor; and how financial professionals and their organizations can prepare for an uncertain future.

DAY 3

### Honing Your Management Style

**October 31** – Includes 4 hrs Ethics

Learn why quiet leaders are so successful; how to create a cohesive team; how to recognize and deal with others who are unethical; and how to use a 15-step action plan to gain commitment from your team members, build trust, hold each person accountable and create results for your organization.

DAY 4

### Technical Competence

**November 27** – Includes 6 hrs A&A

Learn about COSO Updates; the new standards for revenue and lease accounting that will go into effect; how to identify the right performance metrics for your organization, organize them in to a balanced scorecard and use them to improve organizational performance; and how to raise capital.

DAY 5

### Reinventing the Finance Role

**December 11**

Learn how to reinvent the finance role; why some financial managers succeed while others fail; find common ground with the different generations who make up the current workforce; and what makes the Trappist Monks successful.

## FORT WAYNE

Grand Wayne Center

DAY 1

### Essential Skills

**September 17** – Includes 8 hrs A&A

Learn essential skills such as eliminating wasteful tasks; how to use performance metrics to reduce forecasting work; taking a closer look at principled negotiation; and how to save time and get results by writing more effectively.

DAY 2

### Driving and Managing Progress

**October 29** – Includes 2 hrs A&A

Learn how to drive corporate performance to create a competitive advantage; how good companies become great; what every financial manager must know about risk analysis and management; and how to deal with individual resistance to change and cultural inertia that prevent an organization from reaching its goals.

DAY 3

### Managing Risk

**December 10** – Includes 8 hrs A&A

Learn topics on risk, such as the importance of preparing for unpredictability; the six mega trends that may create hazards and opportunities for your business; how to maintain integrity of management's disclosures; and how to protect against fraud.

## ADDITIONAL DETAILS

### TIME

8:30 a.m.–4:30 p.m.

### CPE

8 hrs per course

### COST

Members: \$339 per course

Nonmembers: \$493 per course

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# NOT-FOR-PROFIT & GOVERNMENT

**Qualifies for Yellow Book** = Qualifies for the 24 hour Yellow Book requirement. Determination as to the qualification of certain courses for the Yellow Book 24 hour requirement should be made on an auditor specific basis depending on that auditor's Yellow Book clients. Note that the determination of course qualification is a matter of an auditor's professional judgment in consultation with appropriate individuals in the audit firm. The 24 hours are a subset of the 80-hour requirement.

## *New* 2018 FASB and AICPA Update

**DATE:** 10/25/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Rebecca M. Lee, CPA, CGMA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** This popular course is a must to keep you on top of the continuing changes in the profession. Whether these changes are in technical standards or professional standards, the course authors will evaluate and emphasize those changes with broad application and offer detailed practical guidance and illustrations.

**PREREQUISITE:** Basic audit and accounting course or experience

**AUDIENCE:** All firms, all staff, all CPAs needing a good year-round update on recently issued standards

**SOURCE:** Loscalzo Institute **LEVEL:** Update

**NOTE:** **Qualifies for Yellow Book**

## A&A Staff Level 2: Experienced Staff

**DATE:** 7/23–24/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Rebecca M. Lee, CPA, CGMA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 16 | **MEMBER:** \$504 | **NONMEMBER:** \$734

**OVERVIEW:** As they gain more experience, staff are expected to take on more complex assignments with minimal supervision. This program combines two one-day courses: "Utilizing the Risk-Based Audit Standards and Disclosure: The Key to Financial Statements." It covers practical applications and understanding for auditing using the Risk-Based Audit Standards and provides basic disclosures required when preparing GAAP financial statements.

**PREREQUISITE:** Assistant-level experience and familiarity with the audit planning process

**AUDIENCE:** Staff with in-charge responsibility (three to four years of experience)

**SOURCE:** Loscalzo Institute

**LEVEL:** Intermediate

**NOTE:** **Qualifies for Yellow Book**

## A&A Staff Level 3: In-Charge

**DATE:** 8/6–7/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Rebecca M. Lee, CPA, CGMA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 16 | **MEMBER:** \$504 | **NONMEMBER:** \$734

**OVERVIEW:** Many times the firm expectations of an in-charge are not expressed. This course will identify basic expectations of this level while emphasizing the technical aspects of planning effective and cost-efficient audits. This program concentrates on the role expected of an in-charge for training, supervision and engagement management skills. This course includes the one-day program "Reviewing Documentation Effectively."

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

**SOURCE:** Loscalzo Institute

**LEVEL:** Intermediate

**NOTE:** **Qualifies for Yellow Book**

## Accounting and Reporting for Not-for-Profit Organizations

**DATE:** 10/16/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Martin J. Birr, CPA, CIA, CMA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$370 | **NONMEMBER:** \$524

**OVERVIEW:** This course provides you with the tools necessary to enhance your not-for-profit accounting skills and create value-added services to clients. We take you beyond the theory through a case-study-intense, highly interactive, classroom environment where you will examine, evaluate, and perform case studies enhancing your working knowledge of fundamental not-for-profit accounting and reporting.

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

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

**SOURCE:** AICPA

**LEVEL:** Intermediate

**NOTE:** **Qualifies for Yellow Book**



## Advanced Auditing of HUD-Assisted Projects

**DATE:** 10/5/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Michele Kemp, CPA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$370 | **NONMEMBER:** \$524

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

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

**AUDIENCE:** CPA firm audit managers (and above) involved with the performance of audits of HUD-assisted projects Government auditors and HUD-assistance grantees

**SOURCE:** AICPA **LEVEL:** Advanced

**NOTE:** [Qualifies for Yellow Book](#)

## Advanced Topics in a Single Audit

**DATE:** 10/4/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Michele Kemp, CPA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$370 | **NONMEMBER:** \$524

**OVERVIEW:** Be prepared for the weighty responsibilities of planning, directing and reporting on a single audit engagement conducted under the Uniform Guidance. This course gives you insights into key issues not covered in other courses, with an emphasis on advanced topics that require particular attention. Case studies are provided to help put the guidance into practice.

**PREREQUISITE:** Intermediate competency in single audits

**AUDIENCE:** Auditors responsible for planning, directing and reporting on single audits

**SOURCE:** AICPA **LEVEL:** Advanced

**NOTE:** [Qualifies for Yellow Book](#)

## Applying the Uniform Guidance in Your Single Audits

**DATE:** 9/18/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Martin J. Birr, CPA, CIA, CMA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$370 | **NONMEMBER:** \$524

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

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

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

**SOURCE:** AICPA

**LEVEL:** Intermediate

**NOTE:** [Qualifies for Yellow Book](#)

## New ASU No. 2016-14 in Just Four Hours

**DATE:** 11/2/18 **TIME:** 8:30 a.m.–noon  
**INSTRUCTOR:** James Schmutte, CPA, DBA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 4 | **MEMBER:** \$190 | **NONMEMBER:** \$267

**OVERVIEW:** ASU No. 2016-14, *Presentation of Financial Statements of Not-for-Profit Entities*, will usher in the most significant changes to not-for-profit financial reporting in over 20 years when it becomes effective for December 31, 2018, year-ends. To properly implement the new financial reporting model, professionals will need to have a strong, working knowledge of the new requirements. This course will explain the new requirements, illustrate how the requirements will manifest themselves in the financial statements, and explain key options that not-for-profits have in implementing the requirements. The course will also examine other key issues on the horizon related to revenue recognition and leases. The course materials utilize a highly illustrative and innovative format to provide an enhanced working knowledge of not-for-profit financial reporting.

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

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

**SOURCE:** Surgent

**LEVEL:** Intermediate

**NOTE:** [Qualifies for Yellow Book](#)

## Auditing Not-for-Profit Entities: Superior Skills for an Effective and Efficient Audit

**DATE:** 11/8/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Martin J. Birr, CPA, CIA, CMA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** It's been said that you cannot fit a square peg into a round hole. The same principle holds true for audits of not-for-profit entities. You simply cannot apply a standard commercial audit approach to the audit of a not-for-profit entity and expect a good fit. Skilled auditors will instead adjust and hone the audit to fit the not-for-profit entity. This course is designed to help you do just that and equip you with the superior skills needed to excel in auditing not-for-profit entities. Updated for ASU No. 2016-14 (i.e., the new not-for-profit reporting model), the course materials utilize a highly illustrative and innovative format. Over 25 focused exercises are included to provide an enhanced working knowledge of auditing not-for-profit entities.

**PREREQUISITE:** Basic auditing knowledge

**AUDIENCE:** Auditors of not-for-profit entities

**SOURCE:** Surgent

**LEVEL:** Intermediate

**NOTE:** [Qualifies for Yellow Book](#)



## New FAQ: Nonprofit Accounting, Auditing, Compliance and Governance Issues

**DATE:** 9/21/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Marci S. Thomas, CPA, MHA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** The literature specific to nonprofit organizations continues to evolve and become more complex. Using the popular and fast-moving "Frequently Asked Questions" format, this course was compiled from questions asked of the author in their capacity as a technical reviewer and advisor to firms and nonprofit organizations. This course also provides an update on emerging governance issues.

**PREREQUISITE:** Basic familiarity with nonprofit accounting

**AUDIENCE:** Practitioners working with nonprofits in public practice and CPAs working in nonprofit organizations who need to keep on top of current accounting and disclosure requirements

**SOURCE:** Loscalzo Institute **LEVEL:** Intermediate

**NOTE:** Qualifies for Yellow Book

## New Four-Hour Yellow Book Qualification Course

**DATE:** 11/2/18 **TIME:** 1–4:30 p.m.  
**INSTRUCTOR:** James Schmutte, CPA, DBA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 4 | **MEMBER:** \$190 | **NONMEMBER:** \$267

**OVERVIEW:** As part of the 24-hour Yellow Book CPE requirement the new Yellow Book also requires four hours of CPE on the Yellow Book itself. This course not only fulfills that requirement, it also prepares you to excel in implementing the new Yellow Book. Learn precisely what the new Yellow Book does and does not require auditors to do. The course materials utilize a highly illustrative and innovative format. Over 15 focused exercises are included to provide an enhanced knowledge of the new Yellow Book.

**PREREQUISITE:** Basic audit knowledge

**AUDIENCE:** Auditors performing Yellow Book engagements

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

**NOTE:** The purpose of this course is to fulfill the new GAGAS (i.e., Yellow Book) Qualification CPE requirement. Qualifies for Yellow Book

## Latest Developments in Nonprofit Accounting and Auditing

**DATE:** 11/5/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** James Schmutte, CPA, DBA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** This year is indeed another year of significant change in the world of nonprofit accounting and auditing. Time is valuable, and it's hard to stay current in today's rapidly changing

environment. Let us save you time and effort in staying current through this informative update course. The course materials utilize a highly illustrative and innovative format. Over 30 focused exercises are included to provide an enhanced working knowledge of the latest developments in nonprofit accounting and auditing.

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

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

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

**NOTE:** Qualifies for Yellow Book

## New Nonprofit Industry Update and GAAP Refresher

**DATE:** 9/20/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Marci S. Thomas, CPA, MHA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** This program provides a 2018 update of the issues at the forefront of industry to assist the auditor in assessing risk. It also includes updates to FASB guidance through March 2018 with a specific section on the new not-for-profit financial statements, complete with disclosure examples. We will also discuss the FASB's decisions to date related to the accounting for grants, as well as a discussion of the AICPA's task force recommendations related to revenue recognition. The U.S. GAAP refresher portion of the program includes coverage of some significantly enhanced sections in the nonprofit audit guide and nonprofit Technical Practice Aids (AICPA). This course also provides an update on issues relative to the Single Audit. We will also discuss SAS No. 132 on the auditor's consideration of the entity's ability to remain a going concern.

**PREREQUISITE:** Basic familiarity with not-for-profit accounting and auditing

**AUDIENCE:** Practitioners working with nonprofit organizations in public practice and nonprofit CPAs who need to keep on top of current accounting and disclosure requirements

**SOURCE:** Loscalzo Institute **LEVEL:** Intermediate

**NOTE:** Qualifies for Yellow Book

## Not-for-Profit Accounting and Auditing Update

**DATE:** 11/20/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** James Buckley, CPA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$370 | **NONMEMBER:** \$524

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

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

**AUDIENCE:** Accounting and finance personnel responsible for

accounting and financial reporting for not-for-profits and auditors of those entities

**SOURCE:** AICPA

**LEVEL:** Update

**NOTE:** [Qualifies for Yellow Book](#)

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

**DATE:** 8/23/18

**TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Jeanette Bax-Kurtz, CPA

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8

| **MEMBER:** \$370

| **NONMEMBER:** \$524

**OVERVIEW:** Are you aware of how not-for-profit financial statements will change because of FASB's Financial Statement Standard? Do you know what makes not-for-profit accounting and financial reporting different? Avoid the potholes of confusion and provide a financial picture that end users can truly understand. Through a combination of practical guidance and case studies, this course provides insight into what makes not-for-profits different. As well, you will receive guidance on FASB's new financial statement standard, which will have a major impact on the financial reporting for not for profits, allowing you to clear the hurdles in an efficient and effective manner.

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

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

**SOURCE:** AICPA

**LEVEL:** Intermediate

**NOTE:** [Qualifies for Yellow Book](#)

## Real-World Fraud Found in Governments and Not-for-Profit

**DATE:** 8/24/18

**TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Jeanette Bax-Kurtz, CPA

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8

| **MEMBER:** \$370

| **NONMEMBER:** \$524

**OVERVIEW:** What do you think of when you hear the word "fraud?" Are you concerned for your clients or your organization? Through a comprehensive learning approach using examples, explanations of audit standards and informative case studies, you will learn about real-world government and NFP fraud, including cyber fraud, and your responsibilities when dealing with fraud. Since recognizing fraudulent or deceptive practice is not always easy, this course will highlight frauds headlining today's news and sharpen your forensic skills with techniques to help you identify behavior tendencies which may lead to fraudulent activity.

**PREREQUISITE:** Knowledge of government and not-for-profit sectors

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

**SOURCE:** AICPA

**LEVEL:** Intermediate

**NOTE:** [Qualifies for Yellow Book](#)

## Studies on Single Audit and Yellow Book Deficiencies

**DATE:** 11/21/18

**TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** James Buckley, CPA

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8

| **MEMBER:** \$370

| **NONMEMBER:** \$524

**OVERVIEW:** This course focuses on areas that may need special attention in a single audit. Increase your knowledge regarding these areas found in single audits and Yellow Book engagements using simulated case studies and practice exercises with lessons for today's issues. These case studies and practice exercises are based on the Yellow Book and the Uniform Guidance and will assist you in avoiding common mistakes and recognizing deficiencies before it's too late.

**PREREQUISITE:** Experience in Yellow Book and OMB environment

**AUDIENCE:** Auditors performing single audits and internal financial staff of governmental and not-for-profit entities

**SOURCE:** AICPA

**LEVEL:** Intermediate

**NOTE:** [Qualifies for Yellow Book](#)

## The Essential Course for Performing Single Audits Under the Uniform Guidance for Federal Awards

**DATE:** 11/14/18

**TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** James Schmutte, CPA, DBA

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8

| **MEMBER:** \$339

| **NONMEMBER:** \$493

**OVERVIEW:** Applying one set of auditing standards is tough. Applying three sets of auditing standards is really tough. However, this is precisely what the auditor does in applying GAAS, the Yellow Book, and the OMB requirements to a single audit. This is an essential course for auditors performing single audits as it will equip you with the hands-on skills needed to perform audits under the Uniform Guidance for Federal Awards. The course materials utilize a highly illustrative and innovative format. Over 40 focused exercises are included to provide an enhanced working knowledge of the single audit requirements.

**PREREQUISITE:** Basic single audit knowledge

**AUDIENCE:** Auditors performing single audits

**SOURCE:** Surgent

**LEVEL:** Intermediate

**NOTE:** [Qualifies for Yellow Book](#)

## *New* The Essential Course for Preparing Not-for-Profit Financial Statements Under ASU No. 2016-14

**DATE:** 10/17/18

**TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** James Schmutte, CPA, DBA

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8

| **MEMBER:** \$339

| **NONMEMBER:** \$493

**OVERVIEW:** ASU No. 2016-14, *Presentation of Financial Statements of Not-for-Profit Entities*, will usher in the most significant changes to not-for-profit financial reporting in over 20 years when it becomes effective for December 31, 2018, year-ends. To properly implement the new financial reporting model, professionals will need to have a strong, working knowledge of the new requirements. Now is the time to obtain that knowledge! This course will explain the new requirements, illustrate how the requirements will manifest themselves in the financial statements, and explain key options that not-for-profits have in implementing the requirements. The course will also update on you on today's core not-for-profit accounting requirements while also examining other key issues on the horizon related to revenue recognition and leases. The course materials utilize a highly illustrative and innovative format, including over 25 focused exercises to provide an enhanced working knowledge of not-for-profit accounting and reporting.

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

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

**SOURCE:** Surgent

**LEVEL:** Intermediate

**NOTE:** Qualifies for Yellow Book

## Yellow Book: Government Auditing Standards

**DATE:** 12/17/18

**TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** James Schmutte, CPA, DBA

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8

| **MEMBER:** \$370

| **NONMEMBER:** \$524

**OVERVIEW:** Do you perform engagements in accordance with Generally Accepted Government Auditing Standards (GAGAS or GAS or the "Yellow Book")? This course provides an excellent baseline of information for CPAs as it relates to understanding Government Auditing Standards, including the foundation of government auditing and the related concepts and standards. It is essential that all auditors planning and conducting engagements in accordance with Government Auditing Standards understand and be able to discern these concepts and standards in executing their responsibilities.

**AUDIENCE:** Government auditors and CPAs in public accounting planning or conducting engagements in accordance with Generally Accepted Government Auditing Standards (GAGAS) ("Yellow Book")

**SOURCE:** AICPA

**LEVEL:** Basic

**NOTE:** Qualifies for Yellow Book



# TAXATION

## A+ College Savings Planning: Maximizing Resources and Tax Benefits

**DATE:** 12/13/18 **TIME:** 8:30 a.m.–noon  
**INSTRUCTOR:** William F. Taylor, CPA  
**LOCATION:** Holiday Inn Evansville Airport, Evansville

**CPE:** 4 | **MEMBER:** \$190 | **NONMEMBER:** \$267

**OVERVIEW:** For many families, planning for college education savings begins right after counting fingers and toes in the delivery room. For others it may creep up (and require some catch up) during the middle or high school years. Regardless of when the planning process starts and what the available assets are, CPAs can deliver value to their clients (and their own families) through effective application of all the available savings and funding vehicles as well as tax-minimizing strategies. In this session, we will survey the tools available and show you how to make the most of them.

**AUDIENCE:** All CPAs who assist clients, family members or their own families with tax and financial planning related to college costs

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

**NOTE:** Qualifies for CFP

## New Adding Value for Clients via Retirement Programs

**DATE:** 12/4/18 **TIME:** 8:30 a.m.–noon  
**INSTRUCTOR:** Edward K. Zollars, CPA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 4 | **MEMBER:** \$190 | **NONMEMBER:** \$267

**OVERVIEW:** Closely held business clients look to their CPA to provide timely tax planning advice. Qualified plans offer one of the most significant tax deferral opportunities, especially when designed specifically to fit a business owner's own tax and financial goals. This program will discuss options available to design a plan that provides maximum value to the business owner while keeping other plan costs under control. CPAs looking to show clients why their services are of more value than the "average" tax professional will want to attend this session.

**PREREQUISITE:** Experience working with closely held business owners

**AUDIENCE:** CPAs in public practice who provide tax and/or financial planning services to closely held business clients

**SOURCE:** Loscalzo Institute **LEVEL:** Intermediate

## Advanced Individual Income Tax Return Issues

**DATE:** 10/18/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** John Lawrence, CPA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** Most CPAs have been preparing individual income tax returns for years, and while many of the returns are easy, there are always a number of issues that come up in busy season of which experienced practitioners wish they had more knowledge. This course is designed to explore the tough tax issues for experienced practitioners and help them provide better planning strategies and results for their higher income clients.

**PREREQUISITE:** Extensive experience in preparation of individual income tax returns

**AUDIENCE:** Experienced CPAs who want and need an in-depth knowledge of the most difficult individual income tax return issues

**SOURCE:** Surgent **LEVEL:** Advanced

## Annual Federal Tax Update

**DATE:** 12/19/18 **TIME:** 8:30 a.m.–noon  
**INSTRUCTOR:** Steven B. Wagner, CPA  
**LOCATION:** Ritz Charles, Carmel

**CPE:** 4 | **MEMBER:** \$190 | **NONMEMBER:** \$267

**OVERVIEW:** Save time and keep current on the latest tax developments! This comprehensive course covers all legislative, judicial and IRS developments of the past year with a focus on implementation and compliance. Discover how to effectively and confidently complete tax-planning and compliance engagements. Cover current developments affecting individuals (including those regarding income, deductions and losses, tax calculations, individual credits, filing matters), business entities (including those regarding S Corporations and their shareholders, C Corporations, partnerships), retirement plans and more.

**PREREQUISITE:** Two years of tax experience

**AUDIENCE:** Public accounting senior associates, managers and partners; tax professionals in company finance or tax departments

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



## Annual Tax-Planning Guide for S Corporations, Partnerships and LLCs

**DATE:** 11/8/18 **TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Edward A. Harter, CPA

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

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

**PREREQUISITE:** A basic course in partnership theory and S corporation theory

**AUDIENCE:** CPAs in public accounting and business and industry who want to learn planning strategies relevant to S corporations, partnerships and LLCs

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

## *New* Assisting the Survivors: CPA's Role in the Decedent's Estate

**DATE:** 11/28/18 **TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Richard L. Bartholomew, CPA, J.D.

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** CPAs are comfortable dealing with one of the two certain things in life, but are not necessarily ready to deal with other certainty aside from taxes. When a client dies, the CPA is most often placed in the position of assisting the survivors in handling all of the various issues of the decedent's estate. This course looks at the various roles and issues a CPA will need to understand in assisting the survivors following a death.

**AUDIENCE:** CPAs in public practice and those assisting with decedents' estates; may also be suitable for public practice

**SOURCE:** Loscalzo Institute **LEVEL:** Intermediate

## Basis/Distributions for Pass-Through Entities: Simplifying the Complexities

**DATE:** 11/20/18 **TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Robert R. Thelen, CPA

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$370 | **NONMEMBER:** \$524

**OVERVIEW:** The IRS is scrutinizing, more closely than ever, the basis owners have and the transactions for which the computation of basis is required. This course addresses the rules used to determine basis for partnerships and S Corporations and puts the computation of basis in contexts that often come under scrutiny—loss limitations, distributions and sales of an interest, among others. Learn the crucial rules for computing the adjusted basis and the tax treatment of distributions from pass-through entities, such as partnerships and S Corporations. Focus on

the computation of the basis and the at-risk amount for these entities. Become familiar with correct allocation of liabilities among partners, the types and amounts of income that can result from distributions and sales of interests, and the basis of assets distributed from pass-through entities.

**PREREQUISITE:** Experience in business taxation

**AUDIENCE:** CPA firm managers, partners and other tax practitioners who advise clients concerning issues related to the computation of pass-through entity basis, loss limitations, sales of interests and distributions

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

## Best Practices for Payroll Taxes and 1099 Issues

**DATE:** 11/21/18 **TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Robert R. Thelen, CPA

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$370 | **NONMEMBER:** \$524

**OVERVIEW:** This course is designed to provide you with practical pointers for managing the payroll tax and reporting function. Learn how to avoid the frequent penalties in payroll tax reporting and stay up-to-date with the latest information. It also shows how to handle reporting and withholding requirements for employee fringe benefits. Master the often-confusing rules for Form 1099-MISC and other information reports including when and how much to report. Make sure you or your clients are in compliance and not subject to IRS penalties!

**PREREQUISITE:** Working knowledge of payroll tax issues or payroll type functions

**AUDIENCE:** CPAs in business and industry and public accounting responsible for the payroll tax function or those CPAs advising clients on payroll tax issues

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

## Buying and Selling a Business: Critical Tax and Structuring Issues

**DATE:** 12/11/18 **TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Jeffrey Snyder, CPA

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

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

**PREREQUISITE:** A basic course in partnerships/LLCs; experience with C corporations

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

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



## New Church and Minister Taxation

**DATE:** 12/3/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Edward K. Zollars, CPA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** Even though churches are tax exempt and generally pay no income tax, churches are not outside the reach of the IRS. Churches are responsible for correctly reporting payroll, understanding the rules for charitable contributions, recognizing unrelated business income and filing the appropriate returns. The tax rules for ministers are complex and often controversial. In order for ministers to file accurate and complete tax returns, an understanding of these rules is necessary.

**AUDIENCE:** CPAs in public practice or serving as church treasurers or financial administrators

**SOURCE:** Loscalzo Institute **LEVEL:** Basic

## Complete Guide to Payroll Taxes and 1099 Issues

**DATE:** 12/5/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Sali L. Sheafor, CPA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** 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. They have also been subject to employer incentives. 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.

**AUDIENCE:** CPAs in public accounting and business and industry with responsibility for payroll tax compliance

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

## Determining How Much Money You Need to Retire: Practical Planning Strategies

**DATE:** 11/16/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Joshua R. Jenson, CPA  
**LOCATION:** Century Center, South Bend

**DATE:** 12/14/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** William F. Taylor, CPA  
**LOCATION:** Holiday Inn Evansville Airport, Evansville

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** This course gives CPAs knowledge to help their clients implement tax-effective investment and portfolio strategies for successful wealth accumulation and real after-tax retirement income maintenance.

**PREREQUISITE:** Basic knowledge in retirement planning

**AUDIENCE:** CPAs who wish to serve the needs of the public for whom effective retirement planning is critical as they reach their peak earning years and/or are approaching retirement

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

**NOTE:** Qualifies for CFP

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

**DATE:** 11/26/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Edward A. Harter, CPA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** Clients think estate planning only applies to the very rich. In truth, there are many issues of critical concern for which the middle-income client needs to plan. This course is a must-attend for all CPAs who work with middle-income clients and are looking for ways to provide additional quality services. Updated for developments relative to potential estate tax repeal and the implications for planning.

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

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

**NOTE:** Qualifies for CFP

## Estate Planning for 2018 and Beyond

**DATE:** 11/16/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Anthony J. Rocca, J.D.  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** Over the past few years, Congress has made sweeping changes to the Internal Revenue Code regarding Estate, Gift and Generation-Skipping taxation. In addition, the United States Supreme Court has issued multiple opinions on the issue of same sex marriages. Understanding the impact of the new legislation and the Supreme Court rulings, together with recent case law developments is important to all practitioners in property advising their clients.

**PREREQUISITE:** Basic knowledge of Federal Estate and Gift Taxation

**AUDIENCE:** CPAs, EAs, attorneys, financial planners, insurance agents and bankers

**SOURCE:** Werner-Rocca Seminars, Ltd. **LEVEL:** Intermediate

## New Estate Planning for the 99%: Portability and More

**DATE:** 12/4/18 **TIME:** 1–4:30 p.m.  
**INSTRUCTOR:** Edward K. Zollars, CPA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 4 | **MEMBER:** \$190 | **NONMEMBER:** \$267

**OVERVIEW:** With a lifetime exemption of over \$5,000,000, much of the traditional estate planning CPAs did for clients no longer

makes sense as these clients do not face a federal estate tax liability or it can be easily avoided. But that does not mean there are not tax issues, or that a failure to plan will not cost the family money. This session will look at advising those "poor" estates. We will discuss the use of portability planning in lieu of bypass trusts, how to plan to maximize basis for heirs rather than minimize inclusion in an estate, and not getting blind-sided by state level estate and inheritance taxes.

**PREREQUISITE:** Experience advising clients on tax and financial matters

**AUDIENCE:** CPAs who advise clients with net worths between \$1,000,000 and \$5,000,000 or married couples with a combined net worth of under \$10,000,000

**SOURCE:** Loscalzo Institute

**LEVEL:** Intermediate

## New Federal Tax Update

**DATE:** 10/31/18–11/1/18 **TIME:** 8 a.m.–4 p.m.

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

**LOCATION:** Indianapolis Marriott North, Indianapolis

**DATE:** 11/27–28/18 **TIME:** 8 a.m.–4 p.m.

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

**LOCATION:** Holiday Inn Evansville Airport, Evansville

**DATE:** 12/10–11/18 **TIME:** 8 a.m.–4 p.m.

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

**LOCATION:** Century Center, South Bend

**DATE:** 12/12–13/18 **TIME:** 8 a.m.–4 p.m.

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

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

**DATE:** 1/9–10/19 **TIME:** 8 a.m.–4 p.m.

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

**LOCATION:** Ritz Charles, Carmel

**CPE:** 16 | **MEMBER:** \$504 | **NONMEMBER:** \$734

**OVERVIEW:** With the increasing complexity and ever-changing nature of tax laws and issues, today's CPA needs a two-day update course focusing on individual income tax issues. This comprehensive class will not only review the current Federal individual income tax laws but will also update tax return preparers of new tax forms, changes to existing tax forms, as well as tax planning opportunities and pitfalls.

**AUDIENCE:** Tax CPAs in public or private practice in need of power-packed two-day Federal individual income tax update course; this is a great course to gear up for tax season

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

**NOTE:** Qualifies for CFP

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

**DATE:** 12/14/18 **TIME:** 8:30 a.m.–4:30 p.m.

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

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** This course is designed for participants to understand 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.

**PREREQUISITE:** Experience with the preparation of income tax returns

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

**SOURCE:** Surgent

**LEVEL:** Intermediate

**NOTE:** Qualifies for CFP

## Form 1041: Income Taxation of Estates and Trusts

**DATE:** 10/29/18

**TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** William F. Murphy, CPA, ABV, CFF, CGMA, CVA, PFS

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$370 | **NONMEMBER:** \$524

**OVERVIEW:** Protect your clients' assets and shield their estates from increased taxation brought about by the changing tax code. Understand the tax obligations of trusts and estates and how these obligations affect beneficiaries. This course provides exercises and examples that reflect the calculation and allocation of taxable income and its presentation on the appropriate forms. You will also learn how to prepare Federal Form 1041 and the accompanying schedules.

**AUDIENCE:** CPAs and financial planners with basic knowledge of federal income tax concepts

**SOURCE:** AICPA

**LEVEL:** Basic

## Form 990: Mastering Its Unique Characteristics

**DATE:** 6/25/18

**TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Robert R. Lyons, CPA

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$370 | **NONMEMBER:** \$524

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

**AUDIENCE:** CPAs, attorneys and nonprofit managers

**SOURCE:** AICPA

**LEVEL:** Basic

## Fringe Benefits: 2018

**DATE:** 12/5/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Edward K. Zollars, CPA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** Fringe benefits are a significant part of every company's overhead, and a concern for every employer. Help clients or employers comply with Congress' revisions to the health care laws, make effective use of fringe benefits, and reduce income and payroll tax burdens in the process. During this one-day program, participants will learn how to most effectively use major fringe benefit options to contain costs and increase employee job satisfaction.

**AUDIENCE:** Practitioners and industry CPAs who are interested in the tax rules that govern fringe benefits; may also be suitable for public practice

**SOURCE:** Loscalzo Institute **LEVEL:** Intermediate

## *New* Getting to the Heart of Tax Reform: Individual Income Tax Changes and Planning Strategies

**DATE:** 9/25/18 **TIME:** 8:30 a.m.–noon  
**INSTRUCTOR:** Peter J. Towle, CPA, LLM  
**LOCATION:** Indiana Wesleyan University's Merrillville Education and Conference Center, Merrillville

**DATE:** 9/28/18 **TIME:** 8:30 a.m.–noon  
**INSTRUCTOR:** William F. Taylor, CPA  
**LOCATION:** Century Center, South Bend

**DATE:** 10/18/18 **TIME:** 8:30 a.m.–noon  
**INSTRUCTOR:** David Peters, CPA  
**LOCATION:** Holiday Inn Evansville Airport, Evansville

**DATE:** 10/19/18 **TIME:** 8:30 a.m.–noon  
**INSTRUCTOR:** David Peters, CPA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**DATE:** 10/23/18 **TIME:** 8:30 a.m.–noon  
**INSTRUCTOR:** Andrew Blum, CPA, J.D., LLM  
**LOCATION:** Grand Wayne Center, Fort Wayne

**CPE:** 4 | **MEMBER:** \$190 | **NONMEMBER:** \$267

**OVERVIEW:** The monumental passing of the Tax Cuts and Jobs Act results in historic tax reform impacting nearly every American. This course provides a comprehensive overview of the changes impacting individuals and families as well as critical financial planning considerations and strategies

**AUDIENCE:** CPAs, tax professionals, financial planners and other qualified professionals with basic knowledge

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

## Hottest Tax Planning Developments

**DATE:** 9/24/18 **TIME:** 8:30 a.m.–noon  
**INSTRUCTOR:** Peter J. Towle, CPA, LLM

**LOCATION:** Indiana Wesleyan University's Merrillville Education and Conference Center, Merrillville

**DATE:** 10/22/18 **TIME:** 8:30 a.m.–noon  
**INSTRUCTOR:** Andrew Blum, CPA, J.D., LLM  
**LOCATION:** Grand Wayne Center, Fort Wayne

**CPE:** 4 | **MEMBER:** \$190 | **NONMEMBER:** \$267

**OVERVIEW:** Are you up-to-date on the latest tax planning developments for 2018? This course explores the hottest tax planning topics that will impact you and your clients. Discover how these topics may impact tax planning strategies and be in a position to help minimize your client's tax bill.

**PREREQUISITE:** Basic understanding of individual and business taxation

**AUDIENCE:** All practitioners

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

## IRS Disputes: Identifying Options for Your Client

**DATE:** 10/24/18 **TIME:** 8:30 a.m.–noon  
**INSTRUCTOR:** John Lawrence, CPA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**DATE:** 12/14/18 **TIME:** 8:30 a.m.–noon  
**INSTRUCTOR:** John Lawrence, CPA  
**LOCATION:** Century Center, South Bend

**CPE:** 4 | **MEMBER:** \$190 | **NONMEMBER:** \$267

**OVERVIEW:** Get the confidence and understanding you need to stand up to the Internal Revenue Service. Learn about what may trigger an audit, how to negotiate with the IRS, settle on appeal and qualify for an IRS collection program. Represent your client with confidence and evaluate your client's best options for dealing with the IRS.

**AUDIENCE:** CPAs, enrolled agents and attorneys

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

## Key Partnership and S Corporation Tax Planning Strategies

**DATE:** 12/13/18 **TIME:** 8:30 a.m.–noon  
**INSTRUCTOR:** John L. Evanich Jr., CPA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 4 | **MEMBER:** \$190 | **NONMEMBER:** \$267

**OVERVIEW:** Most of our clients are pass-through entities for which many of the general business strategies are subject to additional limitations. To provide the tax planning strategies for closely held business clients that will bring more revenue, this course focuses on the special concerns and techniques the practitioner needs to thrive in this market.

**PREREQUISITE:** Experience with business clients

**AUDIENCE:** All tax practitioner in public accounting and business and industry who are responsible for tax planning for their clients and/or companies

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

## Limited Liability Companies: Losses, Liquidations, Terminations, Continuations and Sales

**DATE:** 11/15/18 **TIME:** 8:30 a.m.–noon  
**INSTRUCTOR:** Joshua R. Jenson, CPA  
**LOCATION:** Indiana Wesleyan University's Merrillville Education and Conference Center, Merrillville

**CPE:** 4 | **MEMBER:** \$190 | **NONMEMBER:** \$267

**OVERVIEW:** The purpose of this course is to provide an in-depth discussion of selected advanced-level issues affecting LLCs and LLPs.

**PREREQUISITE:** A beginning course in LLCs/partnerships; experience with LLC/partnership clients

**AUDIENCE:** CPAs with clients using the LLC or LLP structure who need to understand advanced issues, problems and planning strategies

**SOURCE:** Surgent **LEVEL:** Advanced

## Maximizing Your Social Security Benefits

**DATE:** 12/13/18 **TIME:** 1–4:30 p.m.  
**INSTRUCTOR:** William F. Taylor, CPA  
**LOCATION:** Holiday Inn Evansville Airport, Evansville

**CPE:** 4 | **MEMBER:** \$190 | **NONMEMBER:** \$267

**OVERVIEW:** The leading edge of the Baby Boomer generation has already reached retirement age. Financial and tax planners can expect increased demand for strategies that dovetail Social Security with other retirement- and estate-planning objectives. This course provides tax and financial planning professionals with both the background information on the Social Security system and the strategies clients will need in dealing with Social Security, and the myriad of all the other related retirement planning issues.

**AUDIENCE:** Practitioners who have Baby Boomer clients with significant wages or earned income

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

## *New* Merger and Acquisition Planning and Best Practices

**DATE:** 12/13/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Mark Mishler, CPA, CMA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** This program is designed to help individuals from first time buyers to veteran entrepreneurs navigate the acquisition process. It discusses practical ideas on finding potential targets, letters of intent (LOIs), the due diligence process, building the business case financial model, obtaining proper financing, negotiating the deal documents, and integration of the acquired entity. The course will cover how to build a plan, execute the acquisition process, and lead a team to be a successful acquirer

of other business entities to grow revenue and enhance net income.

**PREREQUISITE:** Basic knowledge of business acquisition accounting

**AUDIENCE:** CFOs, VPs of finance and CPA advisors to assist business owners in the acquisition process of buying or selling a business

**SOURCE:** Loscalzo Institute **LEVEL:** Advanced

## Multistate Income Tax

**DATE:** 9/26/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** William F. Murphy, CPA, ABV, CFF, CGMA, CVA, PFS  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$370 | **NONMEMBER:** \$524

**OVERVIEW:** You can conquer the theoretical conundrums and compliance issues caused by the question of whether or not a business has nexus in a particular jurisdiction. Be the one to guide your client skillfully through the maze of multistate corporate tax codes. Rapidly develop a working knowledge of both multistate tax compliance and related planning opportunities. With the rate of change, you can't afford to be out-of-date with your knowledge of this critical tax area.

**PREREQUISITE:** Experience in corporate taxation

**AUDIENCE:** Experienced tax professionals and CPAs; private industry accounting and finance managers

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

## Multistate Tax Update

**DATE:** 12/10/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Jeffrey Snyder, CPA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** You can't afford to ignore recent changes in state and local tax. Even tax-savvy businesses often neglect to consider the consequences of state and local taxes. Multistate taxation is more complex and demanding than ever before. In addition to having their own unique tax laws, states have been more focused on enforcement. This fast-paced class covers developing topics in state taxation, ranging from individuals to passthrough entities to corporate taxpayers. It will focus on issues of small- and middle-market companies and offer guidance for minimizing tax liability and negotiating the treacherous waters of compliance.

**PREREQUISITE:** Experience in corporate taxation

**AUDIENCE:** CPAs who want an update on current multistate tax issues to minimize clients' potential state and local tax liability

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

## *New* Navigating Your Client Through the IRS Appeals Process

**DATE:** 12/13/18 **TIME:** 1–4:30 p.m.  
**INSTRUCTOR:** John L. Evanich Jr., CPA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis



CPE: 4 | MEMBER: \$190 | NONMEMBER: \$267

**OVERVIEW:** Despite the fact that a client's matter may be taken directly to court, utilizing IRS Appeals usually results in saving your client both time and money. Join us as we discuss the misunderstood process through IRS Appeals.

**PREREQUISITE:** Experience in preparing individual and business tax returns

**AUDIENCE:** CPAs who wish to represent clients with a tax matter in disagreement

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

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

**DATE:** 11/26/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** William F. Murphy, CPA, ABV, CFF, CGMA, CVA, PFS  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

CPE: 8 | MEMBER: \$370 | NONMEMBER: \$524

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

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

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

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

## Partnership and LLC Core Tax Issues from Formation through Liquidation

**DATE:** 11/27/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** John M. Kilroy, CPA, CFP  
**LOCATION:** Grand Wayne Center, Fort Wayne

CPE: 8 | MEMBER: \$339 | NONMEMBER: \$493

**OVERVIEW:** As they gain more experience, staff are expected to take on more complex assignments with minimal supervision. This course is designed to be a stepping stone for staff interested in pursuing more advanced partnership and LLC issues than mere preparation, via deeper life-cycle study into critical areas of formation, special allocations of income and deductions, basis calculations and implications of recourse and nonrecourse debt, basis step-up under §754 on transfer of an ownership interest, distributions, self-employment tax issues, and termination/liquidation of the LLC.

**PREREQUISITE:** Experience in business taxation

**AUDIENCE:** Experienced CPAs desiring a comprehensive case approach to understand reasonably complex limited liability company issues and problems; CPAs who want a comprehensive, intermediate-level limited liability company practice manual

**SOURCE:** Surgent

**LEVEL:** Intermediate

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

**DATE:** 1/3/19 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Robert R. Thelen, CPA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

CPE: 8 | MEMBER: \$339 | NONMEMBER: \$493

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

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

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

## Real Estate Tax Boot Camp

**DATE:** 11/28/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** John M. Kilroy, CPA, CFP  
**LOCATION:** Grand Wayne Center, Fort Wayne

CPE: 8 | MEMBER: \$339 | NONMEMBER: \$493

**OVERVIEW:** This course is a "deep dive" into all things real estate tax related for the mid-level practitioner moving into this complex area. You will deepen your understanding of the complex considerations and strategies that individuals must navigate in acquiring, holding, managing, constructing and disposing of real estate. You will leave the course able to navigate critical issues associated with the relevant returns and plan strategically for your company or clients.

**PREREQUISITE:** Some experience preparing tax returns involving real estate holdings and transactions

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

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

## Reviewing Individual Tax Returns: What Are You Missing?

**DATE:** 10/24/18 **TIME:** 1–4:30 p.m.  
**INSTRUCTOR:** John Lawrence, CPA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**DATE:** 12/14/18 **TIME:** 1–4:30 p.m.  
**INSTRUCTOR:** John Lawrence, CPA  
**LOCATION:** Century Center, South Bend

CPE: 4 | MEMBER: \$190 | NONMEMBER: \$267

**OVERVIEW:** Join us as we discuss the common errors practitioners make on individual tax returns that are often missed by review staff. The intent is to sharpen skills for reviewers by examining

case studies and discussing issues where additional information from the client may be warranted and areas of tax law where proper treatment requires additional analysis and information. Multiple issues will be discussed including passthrough K-1s, home office issues, hobby losses, rental property, hiring spouses, depreciation, §179 issues, amortization and more! This course follows a highly illustrative case study format to increase participant comprehension and retention.

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

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

**SOURCE:** AICPA

**LEVEL:** Intermediate

## Reviewing Partnership Tax Returns: What Are You Missing?

**DATE:** 12/18/18

**TIME:** 8:30 a.m.–noon

**INSTRUCTOR:** Steven B. Wagner, CPA

**LOCATION:** Ritz Charles, Carmel

**CPE:** 4

| **MEMBER:** \$190

| **NONMEMBER:** \$267

**OVERVIEW:** Join us as we discuss the common errors practitioners make on partnership tax returns that are often missed by review staff. The intent is to sharpen skills for reviewers by examining case studies and discussing issues where additional information from the client may be warranted and areas of tax law where proper treatment requires additional analysis and information. Multiple issues will be discussed including income, deductions, K-1 reporting and more! This course follows a highly illustrative case study format to increase participant comprehension and retention.

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

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

**SOURCE:** AICPA

**LEVEL:** Intermediate

## Reviewing S Corporation Tax Returns: What Are You Missing?

**DATE:** 12/18/18

**TIME:** 1–4:30 p.m.

**INSTRUCTOR:** Steven B. Wagner, CPA

**LOCATION:** Ritz Charles, Carmel

**CPE:** 4

| **MEMBER:** \$190

| **NONMEMBER:** \$267

**OVERVIEW:** Join us as we discuss the common errors practitioners make on S corporation tax returns that are often missed by review staff. The intent is to sharpen skills for reviewers by examining case studies and discussing issues where additional information from the client may be warranted and areas of tax law where proper treatment requires additional analysis and information. Multiple issues will be discussed including income, deductions, K-1 reporting and more! This course follows a highly illustrative case study format to increase participant comprehension and retention.

**PREREQUISITE:** Basic knowledge of S corporation income taxation

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

**SOURCE:** AICPA

**LEVEL:** Intermediate

## S Corporations: Advanced Workshop

**DATE:** 10/18/18

**TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Robert W. Jamison, CPA, Ph.D.

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

**CPE:** 8

| **MEMBER:** \$339

| **NONMEMBER:** \$493

**OVERVIEW:** This one-day course provides all significant legislative, administrative and judicial developments up to the date of presentation. It includes corporate level taxes, terminations and sales of the business.

**PREREQUISITE:** Familiarity with individual income and S corporation tax rules

**AUDIENCE:** CPAs whose practices include S corporations and their shareholders

**SOURCE:** Tax Scopes, LLC

**LEVEL:** Advanced

## S Corporations: Compensation and Redemptions

**DATE:** 11/15/18

**TIME:** 1–4:30 p.m.

**INSTRUCTOR:** Joshua R. Jensen, CPA

**LOCATION:** Indiana Wesleyan University's Merrillville Education and Conference Center, Merrillville

**CPE:** 4

| **MEMBER:** \$190

| **NONMEMBER:** \$267

**OVERVIEW:** This course goes beyond the basics and addresses important practical issues that an experienced practitioner must know. Even if you have attended other S corporation courses, you will learn something new in this course.

**PREREQUISITE:** A basic course in S corporations; some experience in advising S corporations and their shareholders

**AUDIENCE:** All practitioners and controllers who have attended a basic S corporation course and want to understand more complex issues and their practical implications

**SOURCE:** Surgent

**LEVEL:** Advanced

## S Corporations: Intermediate Workshop

**DATE:** 10/16/18

**TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Robert W. Jamison, CPA, Ph.D.

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8

| **MEMBER:** \$339

| **NONMEMBER:** \$493

**OVERVIEW:** This one-day course provides all significant legislative, administrative and judicial developments up to the date of presentation. It includes S corporation eligibility and election requirements, basis and other loss limits, taxable and net investment income, distributions compensation and entity structuring. It also includes state-specific rules regarding entities and taxes.

**PREREQUISITE:** Familiarity with individual income tax rules and business entities in general.

**AUDIENCE:** CPAs whose practices include S corporations and their

shareholders

**SOURCE:** Tax Scopes, LLC**LEVEL:** Intermediate

## Social Security and Medicare: Maximizing Retirement Benefits

**DATE:** 9/24/18**TIME:** 1–4:30 p.m.**INSTRUCTOR:** Peter J. Towle, CPA, LLM**LOCATION:** Indiana Wesleyan University's Merrillville Education and Conference Center, Merrillville**DATE:** 10/22/18**TIME:** 1-4:30 p.m.**INSTRUCTOR:** Andrew Blum, CPA, J.D., LLM**LOCATION:** Grand Wayne Center, Fort Wayne**CPE:** 4**MEMBER:** \$190**NONMEMBER:** \$267

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

**PREREQUISITE:** Basic knowledge of Social Security and Medicare**AUDIENCE:** CPAs, professional accountants and financial advisors**SOURCE:** AICPA**LEVEL:** Intermediate

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

**DATE:** 11/2/18**TIME:** 8:30 a.m.–4:30 p.m.**INSTRUCTOR:** Dennis J. Hickle, CPA, CTFA**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis**CPE:** 8**MEMBER:** \$339**NONMEMBER:** \$493

**OVERVIEW:** Social Security seems poised for changes in benefits and eligibility age. The leading edge of the Baby Boomer generation has already reached retirement age. Financial and tax planners can expect increased demand for strategies that dovetail Social Security with other retirement- and estate-planning objectives. This course provides tax and financial planning professionals with both the background information on the Social Security system and the strategies clients will need in dealing with Social Security, and the myriad of all the other related retirement planning issues.

**AUDIENCE:** Practitioners who have Baby Boomer clients with significant wages or earned income**SOURCE:** Surgent**LEVEL:** Basic**NOTE:** Qualifies for CFP

## Social Security: Understanding Your Client's Future

**DATE:** 8/27/18**TIME:** 8:30 a.m.–4:30 p.m.**INSTRUCTOR:** Ron Roberson, CPA**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis**CPE:** 8**MEMBER:** \$339**NONMEMBER:** \$493

**OVERVIEW:** The Social Security Administration estimates that 10,000 Baby Boomers will turn age 65 each day for the next 14 years. Financial professionals are frequently relied on to answer challenging questions about a very complicated Social Security system. Traps for the unaware drastically reduce lifetime benefits and strategies for the informed significantly increase those lifetime Social Security benefits. This course explains how to avoid the benefit reducing traps and how to take advantage of the benefit maximizing strategies that every potential Social Security recipient must know. We all know the questions: How are benefits calculated? Does maximizing Social Security earnings in my last three working years have a large impact on the amount of benefit payments? Age 62, 66, 70, or some other age—when should benefits be started? What recent Social Security law changes have impacted planning opportunities? What benefits are available for a spouse and how are they calculated? What is the best age for a spouse to start collecting benefits? When are disability benefits available and how are they calculated? And, of course, will benefits even be available when I reach retirement age? These and many more questions will be addressed in the fast paced and energetic presentation.

**AUDIENCE:** Practitioners who have Baby Boomer clients**SOURCE:** Roberson Seminars**LEVEL:** Intermediate

## Targeted 1040 Forms Update for the Occasional Tax Preparer

**DATE:** 12/4/18**TIME:** 8:30 a.m.–4:30 p.m.**INSTRUCTOR:** Sali L. Sheafor, CPA**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis**CPE:** 8**MEMBER:** \$339**NONMEMBER:** \$493

**OVERVIEW:** Many individuals casually prepare a few income tax returns for family members, friends or acquaintances. Many such preparers are professionals in industry and not in full-time tax preparation. The manual is designed to provide a preparation update to the casual preparer and has been updated for impacts of newly enacted legislation. The manual involves not only new tax rules for the current year, but also understanding how the new and old rules apply to current tax forms. The up-to-date review of important tax form changes will be invaluable to attendees who prepare tax returns for individuals.

**PREREQUISITE:** Basic familiarity with tax rules relating to individual taxation**AUDIENCE:** Industry or non-tax professionals preparing individual income tax returns for the current tax year**SOURCE:** Surgent**LEVEL:** Intermediate

## *New* Tax Advisors Update

**DATE:** 11/19/18**TIME:** 8:30 a.m.–4:30 p.m.**INSTRUCTOR:** Mary Marino, CPA**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis**CPE:** 8**MEMBER:** \$339**NONMEMBER:** \$493

**OVERVIEW:** This strategy-packed eight-hour tax seminar is created by practitioners for practitioners and will teach you about key federal tax developments, including the latest information on pending federal tax legislation. You will also review IRS pronouncements, treasury regulations and court cases, along with gaining practical planning tips and illustrations based on a practitioner's actual examples. Finally, you will learn about important estate and gift, tax-exempt, payroll tax and other federal developments.

**PREREQUISITE:** Experience in federal tax planning and preparation

**AUDIENCE:** Tax professionals, whether in public practice or industry, who need to be aware of new federal tax legislation, IRS guidance and recent court decisions

**SOURCE:** CliftonLarsonAllen **LEVEL:** Update

## Tax Consequences and Reporting Issues of LLCs, LLPs, LPs and Other Partnerships

**DATE:** 12/19/18 **TIME:** 1–4:30 p.m.

**INSTRUCTOR:** Steven B. Wagner, CPA

**LOCATION:** Ritz Charles, Carmel

**CPE:** 4 | **MEMBER:** \$190 | **NONMEMBER:** \$267

**OVERVIEW:** Is LLC and partnership taxation something new to you? Perhaps you have worked in this area for years but need a quick review of the fundamental concepts. Build a foundation of knowledge or freshen up your skills. This course addresses the tax consequences of the most common transactions engaged in by LLCs and partnerships. Develop a level of comfort with the basic conceptual framework underlying partnership and LLC taxation, with an emphasis on explaining the tax consequences associated with issues that are most frequently confronted by tax practitioners.

**AUDIENCE:** Public accounting staff, seniors and tax professionals in company finance or tax departments

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

## New Tax Cuts and Jobs Act

**DATE:** 6/14/18 **TIME:** 8:30 a.m.–4:30 p.m.

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

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** On December 22, 2017 President Trump signed into law the Tax Cuts and Jobs Act. The major overhaul of our tax system will lower income tax rates for individual and corporate taxpayers and introduce a new 20% deduction for qualified business income for sole proprietors and pass-through entities (starting in 2018). The cornerstone of this course is the comprehensive discussion of the newly enacted income tax provisions affecting individuals and businesses.

**AUDIENCE:** Professionals in public or private practice in need of an in-depth training of the income tax provisions of the newly enacted Tax Cuts & Jobs Act.

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

## Tax Forms Boot Camp: LLCs, Partnerships and S Corporations

**DATE:** 1/4/19

**TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Robert R. Thelen, CPA

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** The course provides a comprehensive understanding of the preparation of both S corporation and partnership/LLC tax returns, along with the underlying laws, regulations, etc. The course and instruction delivery is geared toward the basic understanding and progresses to complex issues. The boot camp allows staff to discover the connections and alterations of these widely held entity structures, while also providing a valued reference for the participant's future use. The course utilizes an identical sample trial balance for form preparation, with filled-in completed Forms 1120S and 1065 provided in the case solutions.

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

**SOURCE:** Surgent

**LEVEL:** Basic

**NOTE:** Qualifies for CFP

## New Tax Reform's Impact on Corporations and Pass-Through Entities

**DATE:** 9/25/18

**TIME:** 1–4:30 p.m.

**INSTRUCTOR:** Peter J. Towle, CPA, LLM

**LOCATION:** Indiana Wesleyan University's Merrillville Education and Conference Center, Merrillville

**DATE:** 9/28/18

**TIME:** 1–4:30 p.m.

**INSTRUCTOR:** William F. Taylor, CPA

**LOCATION:** Century Center, South Bend

**DATE:** 10/18/18

**TIME:** 1–4:30 p.m.

**INSTRUCTOR:** David Peters, CPA

**LOCATION:** Holiday Inn Evansville Airport, Evansville

**DATE:** 10/19/18

**TIME:** 1–4:30 p.m.

**INSTRUCTOR:** David Peters, CPA

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**DATE:** 10/23/18

**TIME:** 1–4:30 p.m.

**INSTRUCTOR:** Andrew Blum, CPA, J.D., LLM

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

**CPE:** 4 | **MEMBER:** \$190 | **NONMEMBER:** \$267

**OVERVIEW:** The monumental passing of the Tax Cuts and Jobs Act results in historic tax reform impacting nearly every American. This CPE course provides a comprehensive overview of the changes impacting corporations and pass-through entities along with reviewing tax planning considerations for investors, owners and executives.

**AUDIENCE:** Tax and business professionals

**SOURCE:** AICPA

**LEVEL:** Basic



## The Complete Guide to the Preparation of Form 1041

**DATE:** 11/15/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Anthony J. Rocca, J.D.  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** Tax compliance issues for fiduciary entities are sometimes confusing to practitioners since many lack experience in this area. This course provides the practitioner with a practical understanding of the issues involved in preparing the U.S. Income Tax Return for Estates and Trusts (Form 1041).

**AUDIENCE:** CPAs, EAs and attorneys

**SOURCE:** Werner-Rocca Seminars, Ltd. **LEVEL:** Basic

## This Year's Best Income Tax, Estate Tax and Financial-Planning Ideas

**DATE:** 11/9/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Edward A. Harter, CPA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** With different tax rates for individuals and trusts, tax planning takes on more importance. Plus with Social Security going bust and interest rates at an all-time low, new ideas for financial planning for retirement must be considered. The purpose of this course is to explore practical tax-planning ideas that practitioners can use to assist clients with their needs. This course is crucial for CPAs who are looking for good ideas that can save clients money! Continually updated for legislative developments.

**PREREQUISITE:** Basic course in individual income tax, Social Security, and estate planning

**AUDIENCE:** All practitioners, especially those who want to provide the best up-to-the-minute tax advice

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

**NOTE:** Qualifies for CFP

## Top 10 Tax Topics This Year

**DATE:** 12/17/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** John Lawrence, CPA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** Join us for our annual expedition through the harbors and swamps on the tax landscape this season. We will uncover the top issues with wide applicability and importance this year and explore the practical implications, potential pitfalls and planning opportunities.

**PREREQUISITE:** One or more years of experience in planning for individual and business clients

**AUDIENCE:** All CPAs who want an in-depth discussion of the current tax issues that affect all clients

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

## *New* When Bad Things Happen to Good Taxpayers

**DATE:** 8/28/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Ron Roberson, CPA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** This course covers tax compliance, planning and positioning techniques for clients going through a divorce, bankruptcy, disaster and/or cancellation of debt issues. We present the rules and examples to complete the appropriate forms, advise the client what mistakes to avoid and actions to take when going through the relevant situation, and provide dozens of planning ideas to minimize short- AND long-term tax effects.

**AUDIENCE:** All practitioners

**SOURCE:** Roberson Seminars **LEVEL:** Basic



## Advanced Excel

**DATE:** 11/30/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Steven M. Phelan, CPA.CITP  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$349 | **NONMEMBER:** \$504

**OVERVIEW:** In this laptop-friendly program, you will learn critical advanced Excel skills in six key areas: 1) collaborating with other users and securing workbooks, 2) using tables to analyze and report data, 3) integrating and manipulating data from external sources, 4) creating and auditing complex formulas, 5) advanced data analysis tools, and 6) visualization techniques to analyze and communicate information. You do not want to miss this opportunity to become more efficient and proficient in Microsoft Office Excel, the accounting and financial professional's tool of choice. This course covers advanced Excel topics found in Excel 2007 through Excel 2016.

**PREREQUISITE:** Experienced Excel user

**AUDIENCE:** Business professionals who work with Excel 2007 or newer and want to extend their knowledge with advanced features and functions

**SOURCE:** K2 Enterprises **LEVEL:** Advanced

**NOTE:** Qualifies for Accounting and Auditing, 4 hours; Group-live demo and discussion using color computer projection – laptop friendly, with access to demonstration files; Program focuses on Excel for Windows, but many of the features can be found in Excel for Mac

## Advanced Excel Topics for Spreadsheet Power Users

**DATE:** 10/18/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Karl W. Egnatoff, CPA.CITP  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** CPAs and other business professionals that work in Excel extensively become very strong with many aspects of the ubiquitous spreadsheet application. They, however, often do not have knowledge of the numerous advanced features available in Excel. In this session we highlight many of the powerful tools found in Excel and provide details as to how they are beneficial and how they are used. Topics include data connectivity, advanced functions available for formula creation, Excel Tables and PivotTables, and charting tools. Many proficient Excel users only utilize a limited percentage of the available functionality

when they work with spreadsheets, which is like tying one's hands behind one's back. This session will help make participants "two-handed" Excel users!

**PREREQUISITE:** An understanding of Excel conventions

**AUDIENCE:** Accounting and other business professionals who work extensively with Excel and want to become knowledgeable about the many powerful features it possesses

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

**NOTE:** Please bring a laptop; This session is taught using a Hands-On methodology; The speaker will provide practice files that tie to the examples in the course materials so participants can undertake all the steps in unison with the instructor for a greatly improved learning experience; All practice and demonstration files are available for download 30 days after the session is taught

## Advanced QuickBooks Tips and Techniques

**DATE:** 6/19/18 **TIME:** 1–4:30 p.m.  
**INSTRUCTOR:** Brian Tankersley, CPA.CITP  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 4 | **MEMBER:** \$200 | **NONMEMBER:** \$277

**OVERVIEW:** QuickBooks remains one of the leading accounting solutions for small and growing businesses, and Intuit has added numerous advanced features to the application over the past few releases. In this seminar, you will learn how to take advantage of many of QuickBooks' new and advanced features to solve important issues. You will learn advanced inventory management techniques, including the ability to change the default costing methodology in QuickBooks, and implementing lot and serial number tracking. You will also learn how to build complete sets of financial statements in Excel that link in real-time to underlying QuickBooks data files, and how to create multi-company financial statements. Additionally, you will learn how to put the Client Data Review feature to work to streamline the process of identifying and correcting errors and closing accounting periods in QuickBooks. Take advantage of this opportunity to learn about QuickBooks' "deep" features so you maximize your effectiveness with the application.

**PREREQUISITE:** Fundamental knowledge of QuickBooks

**AUDIENCE:** Accounting and financial professionals who want to learn about advanced features and techniques associated with QuickBooks

**SOURCE:** K2 Enterprises **LEVEL:** Advanced

**NOTE:** Group-live demo and discussion using color computer projection

## **New CFO Leadership Series: Managing Your Resources**

**DATE:** 8/21/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** John L. Daly, CPA, CMA, CPIM, MBA  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** This is day one of five for the popular series designed specifically for CFOs and those who aspire to be CFOs. In this eight-hour session, the day will be divided into four different topics, consisting of two hours for each topic. The course will provide extensive case study analysis and many opportunities for group discussion on essential skills. See page 58 for more information.

**PREREQUISITE:** Management experience helpful

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

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

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

## **New Cybersecurity Advisory Engagements: What You Need to Know**

**DATE:** 9/21/18 **TIME:** 1–4:30 p.m.  
**INSTRUCTOR:** Joann Noe Cross, CPA, CGFM, CGMA, CMA, Ph.D.  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 4 | **MEMBER:** \$190 | **NONMEMBER:** \$267

**OVERVIEW:** Cyber threats come in all shapes, sizes, complexity and are ever-evolving. Attacks are causing great financial loss and serious damage to companies. It is essential for organizations to establish a baseline for identify critical components that must be incorporated into any cybersecurity risk management approach. This course will better prepare firms that conduct readiness assessments for their clients through consulting or advisory services. Participants will learn how to keep abreast of the latest cybersecurity trends, manage risks and ensure that clients have a sound risk management program to safeguard their organization.

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

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

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

## **New Cyber Risk for the CPA: Implementing Your Action Plan**

**DATE:** 8/29/18 **TIME:** 1–4:30 p.m.  
**INSTRUCTOR:** Rick Rusch, CPA, CGMA, CITP  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 4 | **MEMBER:** \$190 | **NONMEMBER:** \$267

**OVERVIEW:** There's no silver bullet to solve the threats associated with cybersecurity. Management of cybersecurity risks doesn't

stop with a plan. Taking action and implementing a well devised, but imperfect risk management plan is the cornerstone to cyber security. Process improvement from your baseline is a critical aspect of risk management

**AUDIENCE:** Financial professionals wishing to understand cyber risk management for themselves, their company or their clients

**SOURCE:** Secure ERP, Inc.

**LEVEL:** Basic

## **New Cyber Risk for the CPA: Threats, Analysis and Management**

**DATE:** 8/29/18 **TIME:** 8:30 a.m.–noon  
**INSTRUCTOR:** Rick Rusch, CPA, CGMA, CITP  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 4 | **MEMBER:** \$190 | **NONMEMBER:** \$267

**OVERVIEW:** Cyber threats are inescapable in today's technology rich environment. Cybersecurity skills are becoming a must have and financial professionals are often tasked with assisting in understanding and analyzing the financial risks associated with this ever expanding cyber threat landscape. Learn about the cybercriminals' intent, approach and damage caused.

**AUDIENCE:** Financial professionals wishing to understand cyber risk management for themselves, their company or their clients

**SOURCE:** Secure ERP, Inc.

**LEVEL:** Basic

## **New Cybersecurity Risk Management Program: What You Need to Know**

**DATE:** 9/21/18 **TIME:** 8:30 a.m.–noon  
**INSTRUCTOR:** Joann Noe Cross, CPA, CGFM, CGMA, CMA, Ph.D.  
**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 4 | **MEMBER:** \$190 | **NONMEMBER:** \$267

**OVERVIEW:** Cyber threats come in all shapes, sizes, complexity and are ever-evolving. Attacks are causing great financial loss and serious damage to companies. There is not a simple one-size-fits all way to respond. Each organization must work to effectively mitigate the risk of data breaches. It is essential for each organization to establish a baseline for identify critical components that must be incorporated into any cybersecurity risk management approach. Professionals working in firms or entities will learn how to keep abreast of the latest cybersecurity trends, manage risks, and ensure the right level of governance to safeguard their organization.

**AUDIENCE:** Professionals working for firms or organizations who want to obtain a basic understanding of a cybersecurity risk management program

**SOURCE:** AICPA

**LEVEL:** Basic

## **New Excel Data Magic, Including Advanced PivotTables and Power Pivot**

**DATE:** 9/25/18 **TIME:** 8:30 a.m.–4:30 p.m.  
**INSTRUCTOR:** Steven M. Phelan, CPA, CITP  
**LOCATION:** Century Center, South Bend

**CPE:** 8 | **MEMBER:** \$349 | **NONMEMBER:** \$504

**OVERVIEW:** Leave those manual reporting processes behind and move into the new world of automatically linking data into Excel for analyzing, reporting and preparing visualizations. Using tools such as Power Query and Power Pivot, you can leverage your existing knowledge of PivotTables to do even more when it comes to summarizing, analyzing and reporting potentially very large volumes of data. In this program, you will learn how to use automated data queries to link data from external databases into Excel and then transform this data into Data Models. From there, you will learn how to use Power Pivot and CUBE formulas to streamline the process of summarizing and reporting this data. You will also learn how to take advantage of advanced features such as Data Analysis Expressions, Key Performance Indicators, Hierarchies and Dimensions to streamline your reporting processes. Further, you will learn how to create compelling visualizations of this summarized data to help your readers understand the true meaning behind the numbers. If you currently use PivotTables on a regular basis and want to take advantage of the powerful advanced reporting features available in Excel, then sign up today for this program.

**PREREQUISITE:** Full understanding of intermediate to advanced PivotTables

**AUDIENCE:** Business professionals using the Windows-based premium editions of Excel 2013 and Excel 2016 who are seeking to extend their knowledge of Excel as a reporting tool

**SOURCE:** K2 Enterprises **LEVEL:** Advanced

**NOTE:** Many of the concepts taught in this course depend upon access to Power Pivot, Power Query, and Power View, available only in the Windows-based premium editions of Excel 2013 and Excel 2016; Group-live demo and discussion using color computer projection, laptop friendly, with access to demonstration files

## Excel Financial Reporting and Analysis

**DATE:** 11/6/18 **TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Brian F. Tankersley, CPA.CITP

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

**CPE:** 8 | **MEMBER:** \$349 | **NONMEMBER:** \$504

**OVERVIEW:** Microsoft Office Excel is a powerful tool for analyzing financial data and preparing financial reports and if you are ready to harness the power of Excel for financial reporting and analysis, then this program is for you. In this course, you will learn how to put Excel to use to deliver accounting and financial solutions in critical areas such as formatting reports and financial statements using advanced techniques, assembling and printing reports and schedules, and using templates to automate reporting processes. You will also learn options for consolidating financial data from multiple sources, how to create Excel visualizations to improve reader's comprehension of financial information, and advanced data analysis techniques such as PivotTables connected in real-time to your accounting database. Like most powerful tools, Excel contains features and functions useful for reporting and analysis that are not immediately obvious to many users. In this course, you will uncover many of these hidden features to help you prepare computationally accurate and aesthetically pleasing reports in far less time than you might imagine possible. You do not want to miss this opportunity to learn how to take advantage of Excel to overcome many of the reporting and analysis obstacles currently facing you.

**PREREQUISITE:** Fundamental knowledge of Microsoft Office Excel 2007 or newer

**AUDIENCE:** Accounting and financial professionals desiring more knowledge in using Excel for financial statement preparation and analysis

**SOURCE:** K2 Enterprises

**LEVEL:** Advanced

**NOTE:** Qualifies for Accounting and Auditing, 8 hours; Group-live demo and discussion using color computer projection—laptop friendly, with access to demonstration files. Program focuses on Excel for Windows, but many of the features can be found in Excel for Mac

## Excel PivotTables for CPAs

**DATE:** 8/29/18

**TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Brian F. Tankersley, CPA.CITP

**LOCATION:** Indiana Wesleyan University's Merrillville Education and Conference Center, Merrillville

**CPE:** 8 | **MEMBER:** \$349 | **NONMEMBER:** \$504

**OVERVIEW:** PivotTables are widely considered the most powerful feature in Excel, yet most accounting and financial professionals do not use them in their day-to-day activities. If you are ready to learn how to take advantage of PivotTables or how to extend your existing knowledge of PivotTables, then you should make time to participate in this course. In this program, you will learn how to build PivotTables, how to group data inside PivotTables—including grouping options for fiscal periods—and how to create user-defined calculations in your PivotTables. You will also learn advanced PivotTable techniques, including how to build PivotTables that consolidate data from multiple data ranges and PivotTables dynamically connected to external databases and financial accounting systems. Additionally, you will learn how to take advantage of other Excel features associated with PivotTables, including Slicers, Power Query and Power Pivot. At the end of the day, you will be a master of Excel PivotTables!

**PREREQUISITE:** Fundamental understanding of Microsoft Office Excel 2007 or newer

**AUDIENCE:** Accounting and financial professionals who want to use the power of Excel PivotTables to analyze and summarize data

**SOURCE:** K2 Enterprises

**LEVEL:** Advanced

**NOTE:** Qualifies for Accounting and Auditing, 4 hours; Group-live demo and discussion using color computer projection

## Excel Tips, Tricks and Techniques for CPAs

**DATE:** 8/27/18

**TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Brian F. Tankersley, CPA.CITP

**LOCATION:** Indiana Wesleyan University's Merrillville Education and Conference Center, Merrillville

**CPE:** 8 | **MEMBER:** \$349 | **NONMEMBER:** \$504

**OVERVIEW:** Excel is the CPA's tool of choice for analyzing and reporting financial data, yet many use time-consuming and error-prone processes to complete everyday tasks. Regardless of your level of experience, if you use Excel, you need this course to learn more efficient and effective ways to work with Excel. In this course, you will learn tips, tricks and techniques to



improve your general level of productivity, reduce the amount of time you spend on mundane tasks, such as formatting, and customize Excel for greater accuracy and efficiency. You will also learn valuable formula-building skills, best practices for linking Excel data from other worksheets and workbooks, and how to streamline report generation and printing processes.

**PREREQUISITE:** Fundamental knowledge of Microsoft Office Excel 2007 or newer

**AUDIENCE:** Accounting and financial professionals who want to learn how to use Excel more efficiently and effectively

**SOURCE:** K2 Enterprises **LEVEL:** Intermediate

**NOTE:** Qualifies for Accounting and Auditing, 4 hours; Group-live demo and discussion using color computer projection—laptop friendly, with access to demonstration files; Program focuses on Excel for Windows, but many of the features can be found in Excel for Mac

## Microsoft Excel: You Don't Know What You Don't Know

**DATE:** 10/17/18 **TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Karl W. Egnatoff, CPA.CITP

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** Many Excel users have received little or no formal training to help them use the ubiquitous productivity application. This session can help users that wish to improve their Excel skills to increase their productivity. The material starts by covering basic topics such time saving tips and keyboard shortcuts and then moves to more advanced areas like conditional formatting and complex formula building. Users that find themselves looking at the spreadsheets that others design and wishing they could do as much with Excel will benefit greatly by taking this course.

**AUDIENCE:** Accounting and other business professionals who have an understanding of Excel but want to become more proficient as they design and edit workbooks of all types

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

**NOTE:** Please bring a laptop; This session is taught using a Hands-On methodology; The speaker will provide practice files that tie to the examples in the course materials so participants can undertake all the steps in unison with the instructor for a greatly improved learning experience; All practice and demonstration files are available for download 30 days after the session is taught

## New Only Financial Officer 3.0: More Skills for Smaller Company Financial Managers

**DATE:** 8/20/18 **TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** John L. Daly, CPA, CMA, CPIM, MBA

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**DATE:** 11/29/18 **TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** John L. Daly, CPA, CMA, CPIM, MBA

**LOCATION:** Century Center, South Bend

**CPE:** 8 | **MEMBER:** \$339 | **NONMEMBER:** \$493

**OVERVIEW:** The title "Chief Financial Officer" is not an accurate

description for what many financial managers do because the word "chief" implies the company has more than one degreed CPA. This seminar covers four major topics of importance to the financial manager who must do it all. This class was created to give financial managers in small- to medium-sized companies the high-level skills needed to act as a member of top management.

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

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

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

## New Paperless Office

**DATE:** 6/18/18

**TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Brian F. Tankersley, CPA.CITP

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$349 | **NONMEMBER:** \$504

**OVERVIEW:** Would you like to find important documents in 10 seconds or less? Would you like to ensure that all your digital information is safe and secure? Would you like to improve efficiency in workflow? Of course, you would, and with a little planning and guidance, you will be on your way to realizing these and other benefits associated with a paperless office. No one expects a completely "paperless" office but reducing the amount of paper we shuffle can lead to tremendous rewards and in this course, you will learn best practices and proven processes for effective document management. By participating in this program, you will learn how you can implement simple, inexpensive document management systems at an individual, work group or small business level. You will also learn how you can implement more sophisticated and comprehensive document management systems—complete with automated workflow processing—that would be appropriate for larger offices and organizations.

**PREREQUISITE:** Fundamental knowledge of computer operations

**AUDIENCE:** Accountants and other business professionals who are seeking to improve document management processes in their organizations

**SOURCE:** K2 Enterprises **LEVEL:** Intermediate

**NOTE:** Group-live demo and discussion using color computer projection

## QuickBooks for CPAs

**DATE:** 8/28/18

**TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Brian F. Tankersley, CPA.CITP

**LOCATION:** Indiana Wesleyan University's Merrillville Education and Conference Center, Merrillville

**CPE:** 8 | **MEMBER:** \$349 | **NONMEMBER:** \$504

**OVERVIEW:** QuickBooks is an extremely powerful product with features and capabilities of which many users are either not aware or do not know how to utilize effectively. This course helps you get more out of QuickBooks and QuickBooks Online and to resolve the issues with which even experienced QuickBooks users often struggle, such as locking down prior periods. This program starts out fast with a chapter covering the top issues

CPAs face with QuickBooks. The day continues with practical guidance and solutions designed to help CPAs get the most out of QuickBooks for themselves and/or their clients. You will learn about issues such as setting up a new company, configuring and customizing QuickBooks preferences, and enabling system security and password protection features. In addition, you will learn how to lock down transactions in prior periods, the audit trail, customizing reports, exporting reports to Excel, and extending QuickBooks' usefulness with tools such as the Fixed Asset Manager and Loan Manager.

**PREREQUISITE:** Fundamental understanding of basic QuickBooks operations

**AUDIENCE:** Accounting and financial professionals who use or support clients who use QuickBooks

**SOURCE:** K2 Enterprises **LEVEL:** Intermediate

**NOTE:** Qualifies for Accounting and Auditing, 4 hours; Group-live demo and discussion using color computer projection

## Securing Your Data: Practical Tools for Protecting Information

**DATE:** 11/5/18 **TIME:** 1–4:30 p.m.

**INSTRUCTOR:** Brian F. Tankersley, CPA.CITP

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

**CPE:** 4 | **MEMBER:** \$200 | **NONMEMBER:** \$277

**OVERVIEW:** Security is not optional and yesterday's security techniques are not working to minimize today's security threats. Therefore, now is the time for you to tune up what you know about protecting sensitive data. In this program, you will learn about the latest tools and techniques for securing your data, including encryption, virus protection, secure communications, electronic signatures, secure authentication and more. You will also learn how to implement a very practical, five-step approach to securing your PC and the types of questions you should be asking of your staff to ensure server-based information remains protected. Security failures, such as a breach of client or customer data, are costly—they can even drive your company out of business. What are the security tools you need, and how do you use them to secure your sensitive data and systems? Can you afford to take the risk of attempting to manage today's threats by using yesterday's techniques? Participate in this program to learn how you can implement viable and practical solutions to mitigating today's security threats.

**PREREQUISITE:** Basic understanding of computer operations

**AUDIENCE:** Business professionals seeking to secure sensitive data

**SOURCE:** K2 Enterprises **LEVEL:** Intermediate

**NOTE:** Group-live demo and discussion using color computer projection

## Technology for CPAs: Don't Get Left Behind

**DATE:** 11/29/18 **TIME:** 8:30 a.m.–4:30 p.m.

**INSTRUCTOR:** Steven M. Phelan, CPA.CITP

**LOCATION:** INCPAS Prof. Dev. & Conf. Ctr., Indianapolis

**CPE:** 8 | **MEMBER:** \$349 | **NONMEMBER:** \$504

**OVERVIEW:** How good are you with the technology you use daily?

What new technology tools are available that could save you time and make you more effective? Technology continues to accelerate rapidly, and the need to keep pace is important. If you are not an information technology (IT) expert but need a technology update to maintain and improve your skills so that you can serve your companies and/or clients more efficiently and effectively, then this course is for you! In this fast-paced, update-style course, you will survey today's IT environment and learn about computer hardware, software (including Office 2016), operating systems (including Windows 10) and what they mean for you and peripheral devices. You will also learn about significant trends in information technology and how to take advantage of the opportunities presented by these trends. Examples include the latest Excel features, working with PDF files, and security and privacy issues. Additionally, you will learn how to improve the overall performance of your IT investment, thereby increasing your return on investment. Throughout this program, you will learn from real-time demonstrations of practical applications of the latest tools which can provide you with knowledge you need to harness the power of technology, both now and in the future. Don't miss this—register now to get the skills needed to enhance the value of your IT investment.

**AUDIENCE:** Accounting and financial professionals seeking to improve their knowledge of technology and the return on their investment in technology

**SOURCE:** K2 Enterprises **LEVEL:** Basic

**NOTE:** Group-live demo and discussion using color computer projection

## Technology Update

**DATE:** 11/5/18 **TIME:** 8:30 a.m.–noon

**INSTRUCTOR:** Brian F. Tankersley, CPA.CITP

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

**CPE:** 4 | **MEMBER:** \$200 | **NONMEMBER:** \$277

**OVERVIEW:** Are you ready to learn about the latest trends in technology? Do you sometimes feel lost in the technology jungle? Would you like clear guidance regarding Windows, Office, the Cloud, security, and other technology related issues? If you answered "yes" to any of these questions, then make plans now to invest four hours in this fast-paced and highly informative seminar that is sure to ramp up your return on technology investment. The technology tools available to businesses have never been better, but many are not taking full advantage of these tools. This course helps professionals, at all levels, understand the major trends in hardware, software, and services and how to utilize these tools to meet organizational objectives both efficiently and effectively. More than just a seminar on the latest computers, you will learn about the full spectrum of practical technology available to you and your team and how to implement these tools for maximum impact.

**PREREQUISITE:** Fundamental understanding of basic technology concepts

**AUDIENCE:** Business professionals who are interested in how technology affects them and seek an update of relevant technology trends, tools and techniques

**SOURCE:** K2 Enterprises **LEVEL:** Intermediate

**NOTE:** Group-live demo and discussion using color computer projection

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**\*INCPAS is relocating!**

Check for announcements this  
summer for our new address.

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(effective July 1, 2018)

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(effective July 1, 2017–June 30, 2018)

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Assess the political, legislative and regulatory environment affecting INCPAS and its members, identify advocacy issues and propose relevant policy and position statements.

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Serves at the guiding coalition of Society and public members to increasing ethnic diversity within the Society and the CPA profession in Indiana.



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(effective July 1, 2017–June 30, 2018)

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It is the mission of the Ethics Committee to promote the ethical practice of the CPA profession through education and enforcement activities.

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Monitor issues and trends in the profession that could create opportunity for innovation for members or INCPAS.

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It is the mission of the Peer Review Committee to effectively administer the AICPA Peer Review and PCPS programs in the state of Indiana.

## TAX RESOURCE ADVISORY COUNCIL

*(effective July 1, 2017–June 30, 2018)*

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**IRS Tax Practitioner Priority Service Hotline** .....1-866-860-4259  
*Hours of Operation: 7 a.m.–7 p.m. local time*

## IRS Phone Numbers

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Criminal Investigation Division..... (317) 685-7727

Small Business/Self Employed Operating Division  
 Collections Division.....(317) 685-7762

Liaison and Disclosure, Governmental Liaison .....(312) 292-3520

Stakeholder Liaison Field – Stakeholder Liaison ..... (317) 685-7573

Examination Division .....(317) 581-5701

Specialty Programs Employment .....(317) 685-7725

Tax Exempt/Government Entities Organization .....(317) 685-7648

Local Taxpayer Advocate .....(317) 685-7799

Tax Payer Advocate Office .....(317) 685-7840

Treasury Inspector General for Tax Administration.....(317) 685-7961

## IRS Phone Numbers Outside of Indianapolis

Bloomington.....(812) 337-7600

Columbus.....(812) 379-7400

Evansville.....(812) 474-4800

Fort Wayne.....(260) 458-5000

Lafayette .....(765) 449-3880

Merrillville .....(219) 736-4378

Muncie.....(765) 216-0570

South Bend .....(574) 401-6656

Terre Haute.....(812) 233-6060

## Indiana Department of Revenue

Indiana Government Center North  
 100 N. Senate Ave., Room N105  
 Indianapolis, IN 46204-2281  
[in.gov/dor](http://in.gov/dor)

## IN DOR Corporate Line

(317) 232-0129

## IN DOR Tax Practitioners Hotline

(317) 233-4017 or 1-800-462-6320 (enter 4367 when prompted)

## IN DOR Collections Hotline/Stop Warrants

(317) 233-4017 or 1-800-462-6320 (enter 4367 when prompted, then select Option 3 for collections when prompted)

## Indiana Board of Accountancy

Handles inquiries regarding regulation, licensing, renewals, CPE credit, examinations and certificates for CPAs, CPA corporations, CPA partnerships and professional corporations.

## Indiana Professional Licensing Agency (IPLA)

Attn: Board of Accountancy  
 402 W. Washington St., Room W072  
 Indianapolis, IN 46204  
 (317) 234-8800  
[in.gov/pla/accountancy.htm](http://in.gov/pla/accountancy.htm)  
[pla14@pla.in.gov](mailto:pla14@pla.in.gov)

## IPLA Director

Rae Harmon  
 (317) 234-8800

## IPLA Compliance Officer

Rachelle Canon-Mason  
 (317) 234-3025  
[rcannonmason@pla.in.gov](mailto:rcannonmason@pla.in.gov)  
*You may contact her anonymously.*

## IN Department of Workforce Development Tax Line

1-800-437-9136 (Not Benefits Line)

## AICPA Member Service Center

1-888-777-7077  
[service@aicpa.org](mailto:service@aicpa.org)