

CHECKPOINT LEARNING®



DIVE DEEPER with the

CHECKPOINT LEARNING®
PREMIER PLUS CPE PACKAGE

Immerse yourself in the learning experience with the Checkpoint Learning Premier Plus CPE Package





DIVE DEEPER^{with}

CHECKPOINT LEARNING PREMIER PLUS CPE PACKAGE.

\$449 per year, per user.

Pricing applies to firms with under 50 seats; contact us for price quote if your firm has more than 50 users.

Optional Upgrade for Firm and Organization Accounts: University and Learning Plans – Just \$20 per user per year!

Note: Upgrades are available with the Premier Plus and Premier CPE Packages.

The Checkpoint Learning Premier Plus CPE Package provides more learning options than ever before for a single low annual price. This enhanced package was designed for tax, accounting and finance professionals who are looking for the flexibility and convenience of both online and on-location learning options throughout the year that will make meeting their mandatory CPE requirements easy. As with our popular Premier CPE Package, your subscription includes unlimited access to more than 450 online and downloadable self-study courses (over 2,500 hours of CPE content) along with the industry’s best online CPE tracking and monitoring system. Additionally, Premier Plus features access to our industry-specific Competency Model, 40 total hours annually of live event discounts and unlimited access to all webinars, including our popular full-day webinars.

Compare and see for yourself the clear advantage:

	Bloomberg Premier eLearning Library	SmartPros Advantage Subscription	CCH Learning Center Core Library	CHECKPOINT LEARNING Premier PLUS CPE Package
Online / Download CPE Courses	153 courses 238 CPE credits	400+ courses 900+ CPE credits	395 courses 1,090 CPE credits	450+ courses 2,500+ CPE credits
CPE Tracking	None	Very limited: spreadsheet-based	Basic: Tracks 50 regulators	Tracking and e-alerts for every state board (CPA), IRS EA, CFP, CTEC, 20+ others
Webinars	None	None (separate webinar subscription available for \$299 additional)	None	Unlimited webinars, including full-day webinars! (approx. 400 annual events)
Live Event Discount	None	None	None	40 hours annual discount: 40% off Gear Up, 25% off AuditWatch
Skills & Career Building Module	None	None	None	Checkpoint Learning Competency Model included
Annual cost	\$499	\$449	\$469	\$449*

Information above according to each competitor’s marketing literature and/or website as of 8/20/2014. Price shown reflects basic retail pricing (for both Checkpoint Learning and competitors); additional discounting or special offers may be available.

*Per-user pricing applies to firms with under 50 seats; contact us for price quote if your firm has more than 50 users.

PREMIER PLUS CPE PACKAGE INCLUDES:

TOPICS

Our courses, webinars and seminars cover the full range of updates and in-depth fields you need to meet your CPE requirements and professional goals.

- Accounting and Auditing
- Consulting Services
- Ethics
- Management
- Personal Development
- Specialized Knowledge and Applications
- Taxation
- Technology
- Yellow Book

What your peers are saying about Checkpoint Learning:

"Thank you for recommending the Checkpoint Learning Premier CPE Package. I have been using it frequently for the last two months. I am very pleased to discover the **courses are meaningful and useful**. The self study courses are very substantial, and the live webinar courses are very enjoyable and loaded with content. I appreciate not having to travel (in or out of town) or spend extra money and time."

— Ian H. Edwards

"The Thomson Reuters Checkpoint Learning product won me over because of its cost efficiency, the good variety of courses, the concise answers to estate and trust situations, and the fact that **Checkpoint Learning allows me to use my time more efficiently.**"

— John McPhee

"Being in public accounting, it is difficult to find the time to attend many live seminars, therefore I use self-study formats whenever possible. **Checkpoint Learning by far is the best.** I no longer have to track what courses I have taken and when I took them. It is all done for me through Checkpoint Learning. If I need to access my course completion certificates, all I need to do is sign onto my online account and there it is under the Activity History tab. Convenient and easy to use."

— Teresa Kerbe

CPE TRACKING

We make it easy to track your CPE as you go with online CPE tracking and compliance monitoring for every state board of accountancy requirement and more than 20 professional designations, including EA, RTRP, CTEC and CFP. You'll get:

- Automated CPE tracking and compliance monitoring
- CPE certificate storage
- Monthly email notification of CPE status
- Personalized learning dashboard

WEBINARS

With convenient online webinars, you can participate in training from anywhere. You get unlimited access to all webinars, including full-day webinars, with your Premier Plus CPE Package subscription. Checkpoint Learning Webinars offer a full schedule of weekly learning opportunities taught live by nationally recognized experts. Choose from 35 – 40 webinars each month, including approximately five full-day options.

DISCOUNTS ON SEMINARS AND CONFERENCES

You'll have the opportunity to save on instructor-led solutions for up to 40 hours per annual subscription in total. See details on pages 5 and 6 about discounts for Gear Up and AuditWatch seminars and conferences.

ONLINE AND DOWNLOAD SELF-STUDY COURSES

Your subscription offers immediate access to our complete library of all online-accessible self-study courses from MicroMash, PASS Online and PPC — so you can learn any time it's convenient for you. You'll have more than 450 titles /2,500+ CPE credits at your fingertips.

Online Courses:

Interactive online courses feature a user interface with easy, intuitive navigation. Many courses include video and other media-rich features, including a complete library of online state and specialty ethics courses.

PPC Self-Study Courses:

Downloadable self-study CPE courses are based on PPC Guides with CPE earned through the Online Grading Center.

COMPETENCY MODEL

The Checkpoint Learning Competency Model provides the foundation for setting learning goals and plans, discussing performance management issues and planning career strategies. Designed specifically for the accounting and finance industry, it incorporates a database of competencies for four career levels — staff, senior, manager and director — across five areas of technical specialty and 13 non-technical categories. Features include a self-assessment tool that allows managers to review and add comments, report writing capabilities and customizing capabilities to add firm-specific competencies and categories, as well as map proprietary courses and just-in-time activities.

CHECKPOINT LEARNING COMPETENCY MODEL

A COMPREHENSIVE MODEL FOR ASSESSING, IMPROVING AND CONNECTING YOUR CPE TO TAX AND ACCOUNTING SPECIALTIES, SKILLS AND CAREER LEVELS!

A competency model is a descriptive tool that displays the skills needed to perform a specific role in a job, organization or profession. It prepares people for success by understanding what proficiencies are needed to not just complete the job but excel!

The Checkpoint Learning Competency Model provides a database of competencies for four career levels — staff, senior, manager and director — across five areas of technical specialty and 13 non-technical categories. It includes a self-assessment that allows managers to review and add comments, report writing capabilities and customizing capabilities that makes it possible to add competencies and categories as well as map proprietary courses and just-in-time activities. The Checkpoint Learning Competency Model provides the foundation for setting learning goals and plans, discussing performance management issues and planning career strategies.

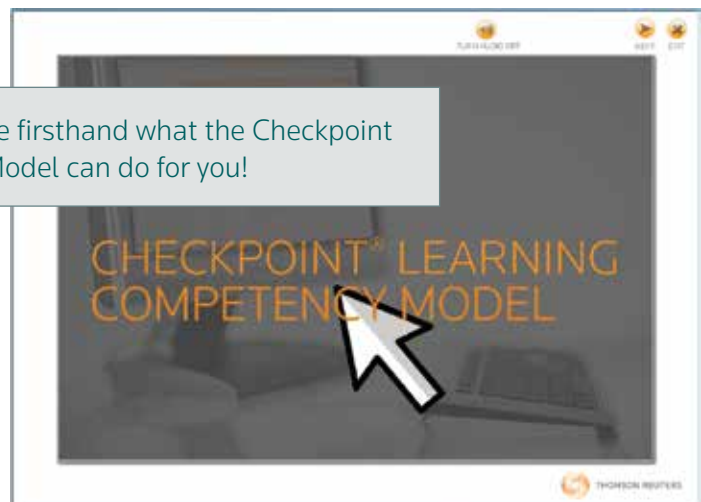
TECHNICAL SPECIALTIES:

- Corporate accounting
- External audit
- Financial management
- Internal audit
- Tax

NON-TECHNICAL CATEGORIES:

- Business analysis and interpretation
- Client service
- Communication
- Ethics
- Industry and global perspective
- Leadership
- Legal and regulatory
- Management
- Problem solving and decision making
- Professional development
- Research
- Risk analysis
- Technology

Watch the demo and see firsthand what the Checkpoint Learning Competency Model can do for you!



Designed specifically for tax and accounting professionals, the Checkpoint Learning Competency Model helps conscientious learners make wise decisions with their CPE time and budget. And firms with employees or contractors across national borders can ensure that skill sets and knowledge are consistent across offices and countries.

ADDITIONAL FEATURES:

- The Competency Model presents knowledge, skills and abilities that professionals must master to be proficient on the job.
- Learners can view or print competencies in their own specialty area or other areas or categories.
- Suggestions and examples are available for users who need assistance writing competencies.
- The easy-to-use self-assessment allows learners to quickly measure their own strengths and areas in need of further development.
- Competencies are linked to Thomson Reuters courses.

BENEFITS:

- Professionals can track competencies throughout their careers.
- Learners are directed to specific Thomson Reuters courses, firms' proprietary courses or learning events to gain knowledge and insights.
- Users have a new and consistent way of assessing tax, accounting and audit professionals across their office or practice area.
- The Competency Model provides a common language for partners and their extended management team to use in talking about the firm's capabilities and the quality of their work.
- The Competency Model improves the firm's quality control processes by linking areas requiring quality improvement to specific competencies.

APPLY YOUR PREMIER PLUS DISCOUNT TO GEAR UP EVENTS

Your subscription offers significant discounts on our popular Gear Up and AuditWatch events for up to 40 hours of training per annual subscription (in total).

You'll receive a 40% discount on Gear Up seminars and conferences. (Applies to Thomson Reuters-sponsored* events.) Available across the nation, Gear Up seminars provide insightful application of tax and accounting information, led by practitioners who understand your daily practice.

GEAR UP CONFERENCES

Gear Up conferences are held in locations such as Las Vegas, Orlando and Chicago, so you can combine a week of CPE with a recreational getaway.

ROYAL FLUSH IN LAS VEGAS

December 1 – 6, 2014 | 48 CPE CREDITS | \$939
LAS VEGAS, NV | LAS VEGAS FLAMINGO HOTEL

MAGIC WEEK IN ORLANDO

December 16 – 20, 2014 | 40 CPE CREDITS | \$829
ORLANDO, FL | DISNEY'S YACHT CLUB RESORT

JACKPOT IN LAS VEGAS

May 25 – 30, 2015 | 48 CPE CREDITS | \$929
LAS VEGAS, NV | LAS VEGAS MIRAGE

CITRUS WEEK IN ORLANDO

June 22 – 25, 2015 | 32 CPE CREDITS | \$629
ORLANDO, FL | WALT DISNEY WORLD SWAN RESORT

WINDY CITY WEEK IN CHICAGO

July 20 – 25, 2015 | 44 CPE CREDITS | \$879
CHICAGO, IL | HOTEL TBD

See our website for CPE information and the most current schedules and pricing for Gear Up events.

See reference map on page 7 to find qualifying events by state.

*States with Thomson Reuters-sponsored Gear Up seminars currently include AZ, CA, CO, FL, GA, IL, IN, IA, MA, MD, MO, NV, NM, NY, ND, OK and OR. Many professional associations sponsor and host Gear Up seminars; these events do not qualify for the Premier Plus CPE discount.

Note: the Premier Plus CPE Package discount does not combine with Gear Up or AuditWatch Early Bird or other discount offers.

GEAR UP SEMINARS

Below are the live events scheduled for winter 2014-2015. Call 800.231.1860 or visit cl.thomsonreuters.com to find out about additional dates and locations for 2015.

ACCOUNTING

16 CPE Credits | 2 Days | Accounting | Basic
Held in CA, FL, NV from Nov. 2014 to Jan. 2015

FRAUD DETECTION

8 CPE Credits | 1 Day | Auditing | Basic
Held in CA, Dec. 2014

PRACTICE DEVELOPMENT AND MANAGEMENT

8 CPE Credits | 1 Day | Business Management and Organization | Basic
Held in FL, IL, NV, Dec. 2014

TECHNOLOGY 3.0: THE NEXT STEP IN MAKING YOUR PRACTICE TECHNOLOGICALLY SAVVY

8 CPE Credits | 1 Day | Computer Science | Basic
4 CPE Credits | Half Day | Computer Science | Basic
Held in CA, FL, NV, Dec. 2014

ETHICS FOR FLORIDA CPAs

4 CPE Credits | Half-Day | Regulatory Ethics | Basic
Held in FL, Dec. 2014

ETHICS FOR THE TAX PROFESSIONAL

2 CPE Credits | Regulatory Ethics | Basic
Held in AZ, CA, FL, NV from Oct. 2014 to Jan. 2015

1040 INDIVIDUAL TAX

16 CPE Credits | 2 Days | Taxation | Basic
Held in 18 states, from Oct. 2014 to Jan. 2015

BUSINESS ENTITIES

16 CPE Credits | 2 Days | Taxation | Basic
8 CPE Credits | 1 Day | Taxation | Basic
Held in 8 states, from Sept. to Dec. 2014

ESTATES AND TRUSTS

16 CPE Credits | 2 Days | Taxation | Basic
8 CPE Credits | 1 Day | Taxation | Basic
Held in CA, MD, OR, NV from Sept. to Dec. 2014

FEDERAL TAX UPDATE

8 CPE Credits | 1 Day | Taxation | Basic
Held in CO, FL, IL, OK, OR from Nov. 2014 to Jan. 2015

HEALTHCARE REFORM

8 CPE Credits | 1 Day | Taxation | Basic
Held in AZ, CA, CO, FL, GA, IL, MD, MO, NV, from Sept. to Jul 2014

1040 TAX UPDATE

4 CPE Credits | Half Day | Taxation | Update
Held in CA from Oct. 2014 to Jan. 2015

CALIFORNIA PROFESSIONAL ETHICS

4 CPE Credits | Half Day | Regulatory Ethics | Basic
Held in CA from Aug 2014 to Jan. 2015

CALIFORNIA TAX UPDATE

5 CPE Credits | Half Day | Taxation | Update
Held in CA, NV from Oct. 2014 to Jan. 2015

APPLY YOUR PREMIER PLUS DISCOUNT TO **AUDITWATCH EVENTS**

Your subscription offers significant discounts on our popular AuditWatch and Gear Up events for up to 40 hours per annual subscription (in total).

You'll receive a 25% discount on AuditWatch public seminars including our core staff training programs: AuditWatch University, TaxWatch University and Yellow Book University.

AUDITWATCH UNIVERSITY

Held in GA, MA, IL, OH, NY, MD, DC, TN, CO, MN, TX, NV, UT, CA OR from May 2013 to January 2014

LEVEL 1: Basic Staff Training | 32 CPE Credits | Auditing, Accounting, Communication | Basic | Experience: 0 – 4 Months

LEVEL 2: Experienced Staff Training | 24 CPE Credits | Auditing, Accounting, Communication | Intermediate | Experience: 5 – 21 Months

LEVEL 3: Beginning In-Charge Training | 24 CPE Credits | Auditing, Communication | Intermediate | Experience: 21 – 36 Months

LEVEL 4: Experienced In-Charge Training | 24 CPE Credits | Auditing, Personal Development, Accounting | Intermediate | Experience: 3 – 4 Years

LEVEL 4.5: Taking the Next Step | 16 CPE Credits | Auditing, Personal Development, Accounting | Intermediate | Experience: 4 – 5 Years

LEVEL 5: Taking the Lead | 24 CPE Credits | Personal Development, Communication, Accounting, Auditing | Advanced | Experience: 5 – 6 Years

LEVEL 6: Developing the Executive Within | 16 CPE Credits | Personal Development, Accounting, Auditing | Advanced | Experience: Over 6 Years

TAXWATCH UNIVERSITY

Held in GA, MA, IL, OH, NJ, MD, DC, TX, CA from June 2013 to Jan 2014

LEVEL 1: 3 Days | 24 CPE Credits | Taxation | Basic | Experience: 0 – 1 Year

LEVEL 2: 3 Days | 24 CPE Credits | Taxation | Intermediate | Experience: 1 – 2 Years

LEVEL 3: 3 Days | 24 CPE Credits | Taxation | Intermediate | Experience: 2 – 3 Years

LEVEL 4: 3 Days | 24 CPE Credits | Taxation | Advanced | Experience: 3 – 4 Years

YELLOW BOOK UNIVERSITY

Held in MA, IL, OH, DC, TX, CA from May 2013 to October 2013

DAY 1: Yellow Book Issues | 8 CPE Credits | Auditing (Governmental) | Basic

DAY 2: Performing Efficient and Effective Single Audits | 8 CPE Credits | Taxation | Basic

DAY 3: Governmental and Nonprofit Update | 8 CPE Credits | Accounting, Accounting (Governmental), Auditing, Auditing (Governmental) | Basic

DAY 4: Yellow Book Issues — Advanced | 8 CPE Credits | Accounting, Accounting (Governmental), Auditing, Auditing (Governmental) | Advanced

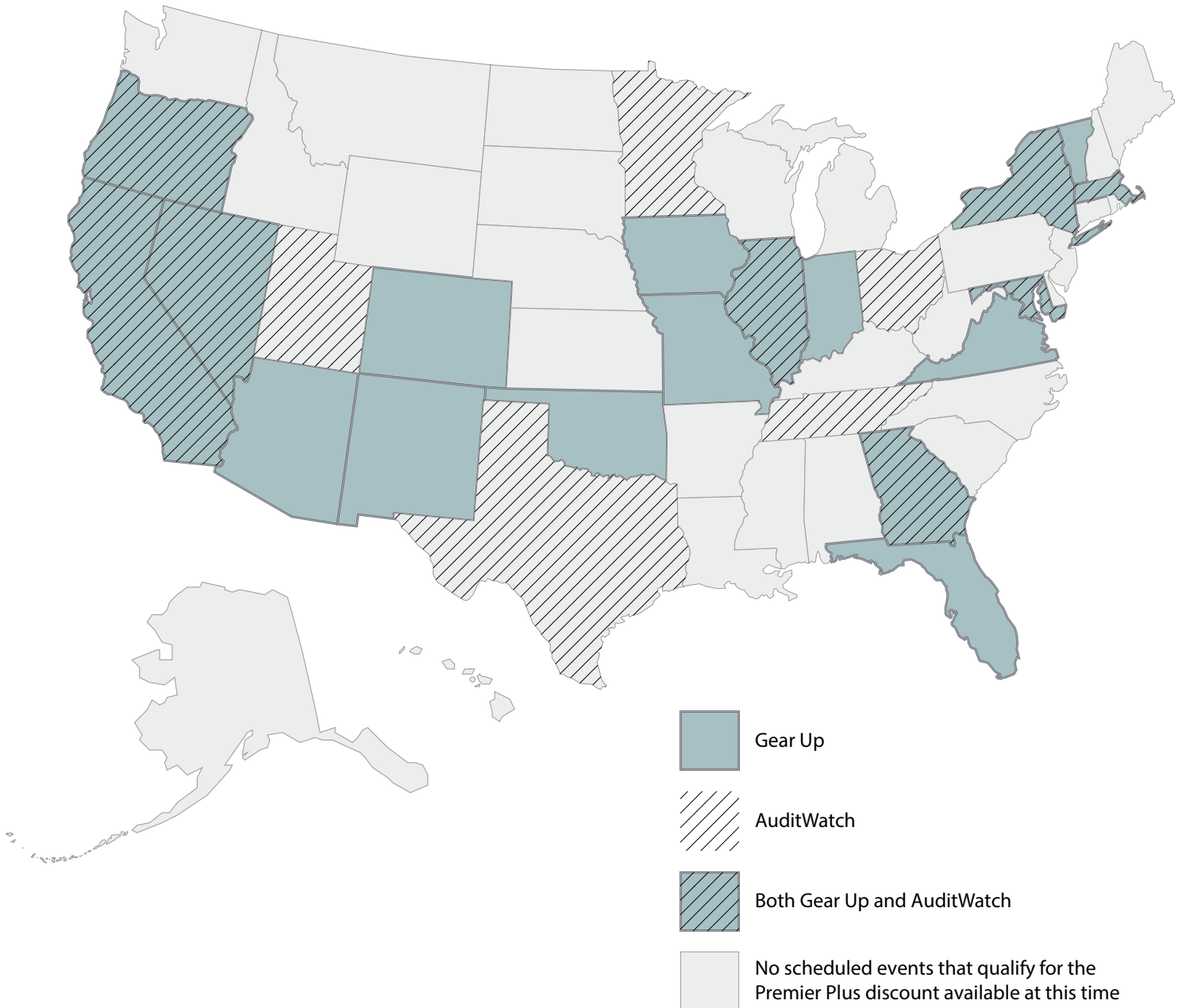
Note: the Premier Plus CPE Package discount does not combine with Gear Up or AuditWatch Early Bird or other discount offers.

See our website for CPE information and most current schedules and pricing for AuditWatch events.

See reference map on page 7 to find qualifying events by state.

CHECKPOINT LEARNING PREMIER PLUS CPE PACKAGE

DISCOUNT EVENTS BY LOCATION



CHECKPOINT LEARNING® PREMIER PLUS CPE PACKAGE



INTEGRATED ONLINE LEARNING MANAGEMENT AND CPE TRACKING FROM CHECKPOINT LEARNING

Only we provide the current, relevant course content you need in a multitude of formats that are both convenient and affordable. We offer more than 450 courses on accounting, auditing, tax, management, Yellow Book, staff training and more. These high-quality courses are available in a wide spectrum of media: seminars, conferences, on-site training, online learning, webinars and self-study in print or electronic formats.

CHECKPOINT LEARNING
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“I really like my Checkpoint Learning subscription! Checkpoint Learning lets me know conveniently in one place how close I am to meeting my CPE requirements for multiple licenses. There is a great variety of course topics, delivery methods and hours offered per course. Video and audio clips, diagrams and questions reinforce learning. **The annual subscription price is very affordable and the quality of the courses is very high.**”

— James O. (Joe) Bailey, CPA, EA



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