FAE

CPE SCHEDULE

JUNE 2021-MAY 2022

Learn. Develop. Network.

CHECK OUT FAE'S CPE OFFERINGS AND ADVANCE YOUR CAREER TODAY!

Conferences: nysscpa.org/conferences

Seminars: nysscpa.org/seminars

Group Discounts: corp-discounts@nysscpa.org

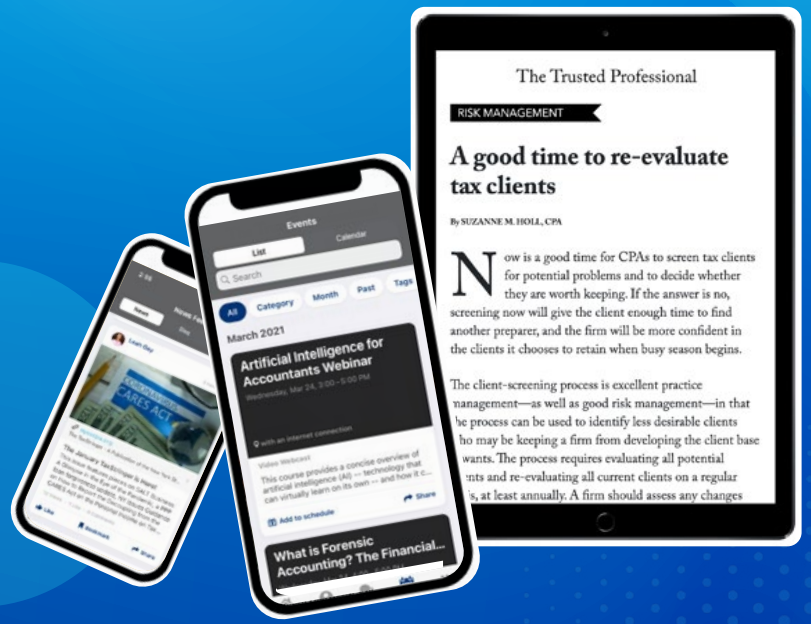
Customized Training Solutions: nysscpa.org/cts

Corporate Sponsorships: Call Laura Gaenzle at 717-430-2351

NOT A MEMBER? Join the NYSSCPA and save on CPE (nysscpa.org/membership).

SCAN QR CODE TO VIEW/DOWNLOAD THIS CPE SCHEDULE!

STAY UP-TO-DATE ON ALL FAE EVENTS AND MORE!



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or visit: **nysscpa.org/*my*NYSSCPA**

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YOUR TRUSTED PARTNER IN CONTINUING PROFESSIONAL EDUCATION

Advance Your Career Today

Established in 1972, the Foundation for Accounting Education (FAE) is a 501(c)(3) organization that administers an important strategic initiative of the New York State Society of CPAs (NYSSCPA)—to provide lifelong continuing education to certified public accountants in New York State. FAE offers a wide selection of courses in accounting, auditing, taxation, industry-specific topics, ethics and advisory services in multiple formats, including live and on-demand courses online, full- and half-day conferences and seminars, on-site learning, and 1- and 2-credit CPE sessions provided through the NYSSCPA's technical committees.

FAE is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy hold final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: nasbaregistry.org.

FAE is approved to issue NASBA credit for Group Live and Group Internet Based courses. FAE's sponsor number is 119366. FAE is also a registered CPE Sponsor in the State of New York with the following sponsor number: New York, 000372.

Use our menu buttons on the side of the pages

Learn. Develop. Network.

CPE REQUIREMENTS

Am I Required to Complete CPE?

If you are a licensed CPA or PA who performs accounting, tax, financial advisory or management advisory services in New York State, for private industry, government agencies, public accounting firms, not-for-profit organizations or academia, you are required to meet the continuing professional education (CPE) requirements.

When Am I Required to Complete CPE?

All licensed CPAs and PAs in the State of New York are to complete all required CPE hours annually, every full calendar year (January 1 – December 31).

How Many Hours of CPE Must I Complete?

You must complete 4 contact hours of acceptable professional ethics during every 3 calendar years and complete one of the following requirements:

- 24 contact hours concentrated in one of the recognized subject areas

  OR

- 40 contact hours in a combination of any of the recognized subject areas.

What Are the Approved Subject Areas for CPE?

- Accounting
- Advisory Services
- Attestation
- Auditing
- Ethics
- Taxation
- Specialized Knowledge and Applications Related to Specialized Industries

CE REQUIREMENTS FOR CERTIFIED FINANCIAL PLANNERS

Am I Required to Complete CE?

CERTIFIED FINANCIAL PLANNER™ (CFP) professionals are required to complete continuing education (CE) each reporting period.

When Am I Required to Complete CE?

The CE requirements are effective immediately upon initial certification, or 12 months after successful completion of the CFP® examination, if the experience and/or degree requirements have not been met.

How Many Hours of CE Must I Complete?

You must complete 30 hours of CE each reporting period, consisting of 2 hours of CFP Board-approved Ethics CE and 28 hours of CE covering 1 or more of the CFP Board's Principal Knowledge Topics.

What Are the Approved Principal Knowledge Topic Areas?

There are 8 Principal Knowledge Topics categories (72 topic areas in total) assessed on the exam, which candidates must master to become a CFP. These topic categories comprise the major topic areas of personal financial planning:

- Professional Conduct and Regulation
- General Principles of Financial Planning
- Education Planning
- Risk Management and Insurance Planning
- Investment Planning
- Tax Planning
- Retirement Savings and Income Planning
- Estate Planning

Up-to-date information on mandatory education requirements can be found at cfp.net.

CE REQUIREMENTS FOR IRS ENROLLED AGENTS

Am I Required to Complete CE?

All IRS Enrolled Agents are required to complete CE annually.

When Am I Required to Complete CE?

Enrolled agents must obtain 72 hours of continuing education every 3 years.

How Many Hours of CE Must I Complete?

Of the 72 hours of CE, a minimum of 16 hours must be earned per year, 2 of which must be in Ethics.

What Are the Approved Types of CE?

Any CE course noted as offering IRS CE credits.

Information on mandatory education requirements can be found at irs.gov.

NEXT GEN

NextGen Academy

NextGen University

NextGen Graduate

NextGen Professional

LIFELONG LEARNING
FOR EVERY AGE AND CAREER STAGE

COAP, the Career Opportunities in the Accounting Profession program, introduces students to the accounting profession and is sponsored by The Moynihan Scholarship Fund.

Visit nysscpa.org/coap

Save on CPA exam prep from reliable providers:

- Gleim
- Roger
- Surgent
- Yaeger

Visit nysscpa.org/benefits

Excellence in Accounting Scholarships are available and are sponsored by The Moynihan Scholarship Fund.

Apply online at nysscpa.org/eia

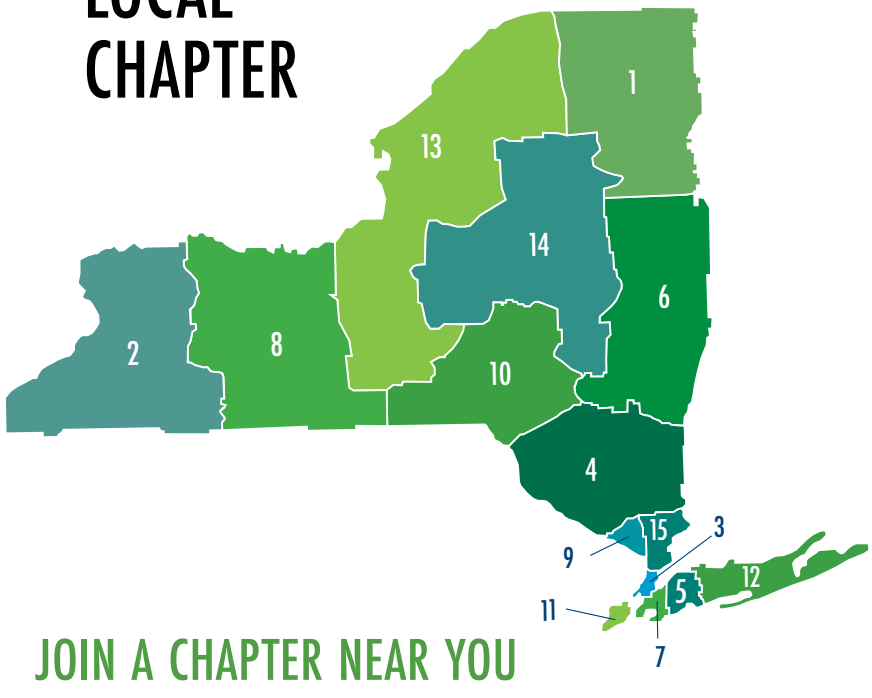
CPE options at cpe.nysscpa.org include:

- **FREE** unlimited on-demand CPE
- **FREE** committee CPE

Member discounts on:

- Seminars offered in-person or via webcast
- Conference developed by your committee peers

EARN CPE AT YOUR LOCAL CHAPTER



JOIN A CHAPTER NEAR YOU

Our 15 local chapters provide a home base for our members, as well as CPE and networking opportunities near your home or office. Chapter membership is complimentary.

1. Adirondack
2. Buffalo
3. Manhattan/Bronx
4. Mid Hudson
5. Nassau
6. Northeast
7. Queens/Brooklyn
8. Rochester
9. Rockland
10. Southern Tier
11. Staten Island
12. Suffolk
13. Syracuse
14. Utica
15. Westchester

CPE HOW YOU WANT IT, WHERE YOU WANT IT CHOOSE THE OPTION THAT WORKS FOR YOU!

Conferences | Seminars | Workshops

Hear from experts and regulators in the profession, and network with your peers.

In-Person

Live conferences, seminars and networking events held across the state.

Webcast

Real-time webcasts and webinars offering quality CPE via your computer or device.

Online Self Study

Quality CPE taken on your time; on-demand videos and self-assessment exams. This option is free for members.

Customized Training Solutions

Content tailored to meet your business or organization's needs—anywhere, anytime.

REGISTRATION MADE EASY

Online

Conferences: nysscpa.org/conferences
Seminars: nysscpa.org/seminars
Customized Training Solutions (CTS): nysscpa.org/cts
Group Discounts: corp-discounts@nysscpa.org

Phone

800-537-3635

Fax or Mail

Fill out the registration form on the next page or download it at nysscpa.org/registrationform and send by:

Fax

866-495-1354

Mail to:

Foundation for Accounting Education
P.O. Box 10490
Uniondale, NY 11555-0490

Register-by-Mail Instructions

Important! Please use one registration form per person. Please print clearly to avoid delays due to handwriting legibility problems.

To register: Cut the form on the next page along the dotted lines, complete it, and return by mail or fax. Be sure to include your Member ID and your full payment. Mail the form, including payment or credit card information, to:

Foundation for Accounting Education
P.O. Box 10490
Uniondale, NY
11555-0490

Or fax to: **866-495-1354**

You may also register online.
Visit the online FAE CPE Store at **nysscpa.org/fae**.

Or register by phone at **800-537-3635.**

REGISTRATION FORM

Today's Date (MM/DD/YYYY) _____

Are you a CPA? Yes ☐ No ☐

NYSSCPA Member? Yes ☐ No ☐

NYSSCPA Member ID No. _____

AICPA Member? Yes ☐ No ☐

AICPA Member ID No. _____

Name (Print)_____

Title (Print)_____

Address_____

City_____ State____ Zip_____

Phone (xxx-xxx-xxxx)_____

Fax_____

E-mail (required for delivery of e-materials)

_____

Total Amount Enclosed (please check) ☐

_____

Member: $_____

Member (Both NYSSCPA and AICPA):

$_____

Nonmember: $_____

If nonmember, please check here if you'd like to receive an NYSSCPA membership application. ☐

Please register me for the following courses:

Course Code: _____
Date: (MM/DD/YYYY) _____
Format: Webcast ☐ In-Person ☐

Course Code: _____
Date: (MM/DD/YYYY) _____
Format: Webcast ☐ In-Person ☐

Course Code: _____
Date: (MM/DD/YYYY) _____
Format: Webcast ☐ In-Person ☐

Course Code: _____
Date: (MM/DD/YYYY) _____
Format: Webcast ☐ In-Person ☐

Course Code: _____
Date: (MM/DD/YYYY) _____
Format: Webcast ☐ In-Person ☐

Course Code: _____
Date: (MM/DD/YYYY) _____
Format: Webcast ☐ In-Person ☐

Method of Payment

☐ Check payable to FAE ☐ American Express

☐ MasterCard ☐ Visa ☐ Discover

Credit Card No._____

Exp. Date _____ CVV No._____

Cardholder's Name _____

Cardholder's Signature _____

Build Talent. Earn CPE.

CUSTOMIZED TRAINING SOLUTIONS

CTS

Your Team. Your Office. FAE Expertise.

Content tailored to meet your organization's needs—anywhere, anytime!

Accounting
Advisory Services
Auditing
Regulatory Ethics
Specialized Knowledge
Tax, Technology and more

Training to Meet Your Business Needs

- ☑ **Minimize Downtime:** Eliminate the loss of valuable hours away from the office
- ☑ **Reduce Costs:** Cut unnecessary staff travel expenses with an on-site expert instructor
- ☑ **Full Customization:** Design the course content to meet the skill-set and knowledge level of your staff
- ☑ **Employee/Instructor Engagement:** Our instructors take a personal, interactive approach with your staff
- ☑ **Expertise:** Our accomplished instructors are all skilled practitioners, with years of real-life experience
- ☑ **Webcast to Multiple Offices:** Train your staff in multiple locations simultaneously
- ☑ **Convenient and Confidential:** Your staff will be able to speak openly about proprietary issues

Start Planning Today at nysscpa.org/cts

Contact Kelly Colvin at cts@nysscpa.org | 212.719.8376

FAE CONFERENCE SCHEDULE

ALL CONFERENCES OFFER 8 CPE CREDITS

September 23, 2021
HEALTHCARE CONFERENCE
Register: nysscpa.org/healthcare21
Course Code: 35545211 (webcast)

October 20, 2021
BUSINESS AND INDUSTRY CONFERENCE
Register: nysscpa.org/business21
Course Code: 25100211 (in-person)/ 35100211 (webcast)

October 28, 2021
ESTATE PLANNING CONFERENCE
Register: nysscpa.org/estate21
Course Code: 25697211 (in-person)/ 35697211 (webcast)

November 4, 2021
AUDITING STANDARDS CONFERENCE
Register: nysscpa.org/auditing21
Course Code: 25135211 (in-person)/ 35135211 (webcast)

November 11, 2021
TAX AND FINANCIAL PLANNING FOR INDIVIDUALS CONFERENCE
Register: nysscpa.org/taxplan21
Course Code: 25620211 (in-person)/ 35620211 (webcast)

November 18, 2021
ALTERNATIVE INVESTMENT FUND CONFERENCE
Register: nysscpa.org/aif21
Course Code: 25305211 (in-person)/ 35305211 (webcast)

December 1, 2021
REAL ESTATE & CONSTRUCTION CONFERENCE
Register: nysscpa.org/realestate21
Course Code: 25555211 (in-person)/ 35555211 (Real Estate Track webcast), 35555213 (Construction Track webcast)

December 2, 2021
TAX PLANNING FOR BUSINESS ENTITIES CONFERENCE
Register: nysscpa.org/closelyheld21
Course Code: 25602211 (in-person)/ 35602211 (webcast)

December 3, 2021
ADIRONDACK CHAPTER TAX CONFERENCE
Register: nysscpa.org/adirondack21
Course Code: 28612243 (in-person)

December 8, 2021
TRUST AND ESTATE CONFERENCE
Register: nysscpa.org/trusttax21
Course Code: 25608221 (in-person)/ 35608221 (webcast)

December 9, 2021
NEW YORK AND TRI-STATE TAXATION CONFERENCE
Register: nysscpa.org/nystax21
Course Code: 25612211 (in-person)/ 35612211 (webcast)

December 15, 2021
EXEMPT ORGANIZATIONS CONFERENCE
Register: nysscpa.org/exempt21
Course Code: 25507211 (in-person)/ 35507211 (webcast)

January 11, 2022
TAXATION OF FINANCIAL INSTRUMENTS CONFERENCE
Register: nysscpa.org/tfi22
Course Code: 25623211 (in-person)/ 35623211 (webcast)

January 13, 2022
44TH ANNUAL NONPROFIT CONFERENCE
Register: nysscpa.org/nonprofit22
Course Code: 25550211 (in-person)/ 35550213 (Industry Track webcast), 35550212 (A&A Track webcast), 35550211 (Govt. Track webcast)

January 27, 2022
INTERNATIONAL TAXATION CONFERENCE
Register: nysscpa.org/international22
Course Code: 25610211 (in-person)/ 35610211 (webcast)

FAE
SEMINAR SCHEDULE

Get expert knowledge in subject areas to hone your expertise

ACCOUNTING

Courses in this subject area focus on the development of professional knowledge and skills related to generally accepted accounting principles, comprehensive bases of accounting, and/or accounting processes and related financial reporting. Relevant subject matter includes authoritative pronouncements and accounting principles issued by the standards-setting bodies, as well as related subjects that are generally classified within the accounting discipline.

Individual programs in this subject area could cover newly promulgated financial reporting requirements/standards, accounting concepts and principles, preparation and compilation of financial statements, measurement, recognition and presentation of specific financial statement items, and internal controls for profit and nonprofit entities.

This description is provided by the New York State Education Department (NYSED).

JUNE

6/2/2021
The Bottom Line on the New Lease Accounting Requirements
Course Code: 35149211 (webcast)
CPE Credits: 4
Instructor: Renee Rampulla

6/2/2021
Interpreting the New Revenue Recognition Standard: What All CPAs Need to Know
Course Code: 35148211 (webcast)
CPE Credits: 4
Instructor: Renee Rampulla

6/7/2021
Going Concern Accounting and Reporting Considerations in the COVID-19 Environment
Course Code: 35164211 (webcast)
CPE Credits: 2
Instructor: Joann N. Cross

6/7/2021
Accounting for Financial Instruments: Applying the FASB's Three New Updates
Course Code: 35160211 (webcast)
CPE Credits: 4
Instructor: Joann N. Cross

6/14/2021
Introduction to Forensic Accounting
Course Code: 35165211 (webcast)
CPE Credits: 4
Instructor: William I. Eskin

6/16/2021
ASC 740: Accounting for Income Taxes
Course Code: 35161211 (webcast)
CPE Credits: 8
Instructor: Art M. Winstead, Jr.

6/21/2021
U.S. GAAP: Review for Business & Industry and Public Accounting
Course Code: 35142211 (webcast)
CPE Credits: 8
Instructor: Renee Rampulla

6/22/2021
Leases: Mastering the New FASB Requirements
Course Code: 35139211 (webcast)
CPE Credits: 8
Instructor: Renee Rampulla

AUGUST

8/9/2021
Forensic Accounting: Fraud Investigations
Course Code: 35150211 (webcast)
CPE Credits: 8
Instructor: Dennis S. Neier

8/10/2021
Annual Update: Top Governmental and Not-for-Profit Accounting and Auditing Issues Facing CPAs
Course Code: 35158211 (webcast)
CPE Credits: Accounting (4), Auditing (4)
Instructor: Jeff Lieman

8/18/2021
U.S. GAAP: Review for Business & Industry and Public Accounting
Course Code: 35142212 (webcast)
CPE Credits: 8
Instructor: Renee Rampulla

8/20/2021
Private Company Financial Statement Disclosures with Renee Rampulla
Course Code: 35133211 (webcast)
CPE Credits: 8
Instructor: Renee Rampulla

8/23/2021
Interpreting the New Revenue Recognition Standard: What All CPAs Need to Know
Course Code: 35138211 (webcast)
CPE Credits: 4
Instructor: Renee Rampulla

8/30/2021
Examining the New Lease Accounting Standard: More Than Meets the Eye
Course Code: 35162211 (webcast)
CPE Credits: 4
Instructor: Michael J. Morgan

SEPTEMBER

9/1/2021
The Most Critical Challenges in Governmental Accounting Today
Course Code: 35172211 (webcast)
CPE Credits: 4
Instructor: Jeff Lieman

9/1/2021
The Most Critical Challenges in Not-for-Profit Accounting Today
Course Code: 35173211 (webcast)
CPE Credits: 4
Instructor: Jeff Lieman

9/21/2021
FAE's Nonprofit Workshop with Allen Fetterman
Course Code: 35101211 (webcast)
CPE Credits: Accounting (5), Auditing (2), Taxation (1)
Instructor: Allen L. Fetterman

9/27/2021
Preparing Not-for-Profit Financial Statements Under ASU No. 2016-14
Course Code: 35169211 (webcast)
CPE Credits: 8
Instructor: Diane E. Edelstein

OCTOBER

10/4/2021
Not-for-Profit Financial Reporting: Mastering the Unique Requirements
Course Code: 35152211 (webcast)
CPE Credits: 8
Instructor: Jeff Lieman

10/5/2021
Governmental Accounting and Auditing Update
Course Code: 35159211 (webcast)
CPE Credits: Accounting (4), Auditing (4)
Instructor: Jeff Lieman

10/7/2021
Examining the New Lease Accounting Standard: More Than Meets the Eye
Course Code: 35162212 (webcast)
CPE Credits: 4
Instructor: Jeff Lieman

10/7/2021
Mastering the Basics of Inventory Accounting
Course Code: 35166211 (webcast)
CPE Credits: 4 Accounting
Instructor: Jeff Lieman

10/8/2021
Construction Contractors: Critical Accounting, Auditing, and Tax Issues
Course Code: 35185211 (webcast)
CPE Credits: Accounting (4), Auditing (2), Taxation (2)
Instructor: Jeff Lieman

10/19/2021
FAE's Nonprofit Workshop with Allen Fetterman
Course Code: 35101212 (webcast)
CPE Credits: Accounting (5), Auditing (2), Taxation (1)
Instructor: Allen L. Fetterman

10/21/2021
U.S. GAAP: Review for Business & Industry and Public Accounting
Course Code: 35142213 (webcast)
CPE Credits: 8
Instructor: Renee Rampulla

10/25/2021
Private Company Financial Statement Disclosures with Renee Rampulla
Course Code: 35133212 (webcast)
CPE Credits: 8
Instructor: Renee Rampulla

10/26/2021
Leases: Mastering the New FASB Requirements
Course Code: 35139212 (webcast)
CPE Credits: 8
Instructor: Renee Rampulla

NOVEMBER

11/1/2021
Latest Developments in Government and Nonprofit Accounting and Auditing
Course Code: 35187211 (webcast)
CPE Credits: Accounting (4), Auditing (4)
Instructor: Michael J. Morgan

11/10/2021
Forensic Accounting: Fraud Investigations
Course Code: 35150212 (webcast)
CPE Credits: 8
Instructor: Robert P. Bedwell

11/12/2021
FAE's Nonprofit Workshop with Allen Fetterman
Course Code: 35101213 (webcast)
CPE Credits: Accounting (5), Auditing (2), Taxation (1)
Instructor: Allen L. Fetterman

11/15/2021
U.S. GAAP: Review for Business & Industry and Public Accounting
Course Code: 35142214 (webcast)
CPE Credits: 8
Instructor: Renee Rampulla

11/17/2021
Private Company Financial Statement Disclosures with Renee Rampulla
Course Code: 35133213 (webcast)
CPE Credits: 8
Instructor: Renee Rampulla

11/29/2021
Revenue Recognition: Mastering the New FASB Requirements
Course Code: 35141211 (webcast)
CPE Credits: 8
Instructor: Renee Rampulla

DECEMBER

12/2/2021
U.S. GAAP: Review for Business & Industry and Public Accounting
Course Code: 35142215 (webcast)
CPE Credits: 8
Instructor: Renee Rampulla

12/8/2021
FAE's Nonprofit Workshop with Allen Fetterman
Course Code: 35101214 (webcast)
CPE Credits: Accounting (5), Auditing (2), Taxation (1)
Instructor: Allen L. Fetterman

12/14/2021
Get Ready for Busy Season: Accounting & Auditing Boot Camp with Renee Rampulla
Course Code: 35136211 (webcast)
CPE Credits: Accounting (4), Auditing (4)
Instructor: Renee Rampulla

12/15/2021
U.S. GAAP: Review for Business & Industry and Public Accounting
Course Code: 35142216 (webcast)
CPE Credits: 8
Instructor: Renee Rampulla

12/17/2021
Private Company Financial Statement Disclosures with Renee Rampulla
Course Code: 35133214 (webcast)
CPE Credits: 8
Instructor: Renee Rampulla

12/20/2021
Leases: Mastering the New FASB Requirements
Course Code: 35139213 (webcast)
CPE Credits: 8
Instructor: Renee Rampulla

12/21/2021
Construction Contractors: Accounting Considerations
Course Code: 35146211 (webcast)
CPE Credits: 4
Instructor: Renee Rampulla

12/27/2021
Get Ready for Busy Season: Accounting & Auditing Boot Camp with Renee Rampulla Replay
Course Code: 35136212 (webcast)
CPE Credits: Accounting (4), Auditing (4)
Instructor: Renee Rampulla

12/29/2021
Private Company Financial Statement Disclosures with Renee Rampulla Replay
Course Code: 35133215 (webcast)
CPE Credits: 8
Instructor: Renee Rampulla

MAY

5/11/2022
FAE's Nonprofit Workshop with Allen Fetterman
Course Code: 21101215 (in-person)/35101215 (webcast)
CPE Credits: Accounting (5), Auditing (2), Taxation (1)
Instructor: Allen L. Fetterman

5/12/2022
Critical Issues That CPAs in Industry Will Need to Face This Year
Course Code: 33208211 (in-person)/35208211 (webcast)
CPE Credits: Accounting (2), Taxation (2)
Instructor: Carl F. Shultz

5/18/2022
FAE's Nonprofit Workshop with Allen Fetterman (Albany)
Course Code: 21101246 (in-person)
CPE Credits: Accounting (5), Auditing (2), Taxation (1)
Instructor: Allen L. Fetterman

5/23/2022
Latest Developments in Government and Nonprofit Accounting and Auditing
Course Code: 33187212 (in-person)/35187212 (webcast)
CPE Credits: Accounting (4), Auditing (4)
Instructor: Jeff Lieman

5/24/2022
Financial Reporting Update for Tax Practitioners
Course Code: 33186211 (in-person)/35186211 (webcast)
CPE Credits: Accounting (4), Auditing (4)
Instructor: Jeff Lieman

Hear From Our Certified Public Accountants

Robert J. Sheppard, CPA
"I'm able to utilize and hone soft skills while continuously learning new topics and rules within the industry."

Khalia Jones, CPA
"Being a part of the Society has provided me a ... forum to ask questions and then receive real-time feedback."

Steven Baierlein, CPA
"I have been able to forge many bonds, exchange ideas with industry leaders, and immerse myself in the latest industry developments that are important to me."

ADVISORY SERVICES

This subject area encompasses the various advisory services provided by accountants to clients. Traditionally, these services involve analyzing, evaluating, designing and, in some situations, implementing the systems that affect the planning, organizing and controlling of any phase of activity in a business or nonprofit enterprise. Less traditional advisory services include technology consulting, personal financial planning and small business consulting.

Relevant programs within this category could cover planning and control systems for business or not-for-profit organizations. These systems could target specific business processes such as manufacturing, marketing, human resources, research and development, and information management.

This description is provided by the New York State Education Department (NYSED).

JUNE

6/1/2021
Planning and Strategy Formulation for Your Organization's Financial Success
Course Code: 35215211 (webcast)
CPE Credits: 4
Instructor: Arthur G. Pulis

6/1/2021
Gaining a Competitive Advantage: Critical Skills for CFOs and Controllers
Course Code: 35212211 (webcast)
CPE Credits: 4
Instructor: Arthur G. Pulis

6/2/2021
Innovative Forecasting and Budgeting: Moving Beyond the Traditional Techniques
Course Code: 35213213 (webcast)
CPE Credits: 4
Instructor: Arthur G. Pulis

6/2/2021
Controller/CFO Update: Hot Topics Facing Today's Financial Professional
Course Code: 35207213 (webcast)
CPE Credits: 4
Instructor: Arthur G. Pulis

6/10/2021
Enterprise Risk Management Concepts and Strategy for Small and Medium-Sized Companies
Course Code: 35211211 (webcast)
CPE Credits: 4
Instructor: Jason W. Carney

6/14/2021
Navigating the Gray: An Advanced Guide to Auditor Independence Compliance
Course Code: 35214211 (webcast)
CPE Credits: Advisory Services (2), Auditing (2)
Instructor: William I. Eskin

6/28/2021
Innovative Forecasting and Budgeting: Moving Beyond the Traditional Techniques
Course Code: 35213211 (webcast)
CPE Credits: 4
Instructor: Jason W. Carney

6/28/2021
Controller/CFO Update: Hot Topics Facing Today's Financial Professional
Course Code: 35207211 (webcast)
CPE Credits: 4
Instructor: Jason W. Carney

6/29/2021
Employer's Handbook: Legal, Tax, and Health Care Issues
Course Code: 35210211 (webcast)
CPE Credits: Advisory Services (4), Taxation (4)
Instructor: Jason W. Carney

AUGUST

8/16/2021
Business Law Essentials for Practitioners and Controllers
Course Code: 35205211 (webcast)
CPE Credits: 8
Instructor: Charles A. Borek

8/17/2021
Employer's Handbook: Legal, Tax, and Health Care Issues
Course Code: 35210212 (webcast)
CPE Credits: Advisory Services (4), Taxation (4)
Instructor: Charles A. Borek

SEPTEMBER

9/30/2021
Business Law Essentials for Practitioners and Controllers
Course Code: 35205212 (webcast)
CPE Credits: 8
Instructor: Charles A. Borek

OCTOBER

10/1/2021
Employer's Handbook: Legal, Tax, and Health Care Issues
Course Code: 35210213 (webcast)
CPE Credits: Advisory Services (4), Taxation (4)
Instructor: Charles A. Borek

NOVEMBER

11/8/2021
Annual Update for Controllers
Course Code: 35201211 (webcast)
CPE Credits: 8
Instructor: James Lindell

11/30/2021
CFO/Controller's Roadmap to Success: Integrated Planning, Forecasting, and Budgeting
Course Code: 35206211 (webcast)
CPE Credits: 8
Instructor: Carl F. Shultz

DECEMBER

12/1/2021
Current Developments and Best Practices for Today's CFOs and Controllers
Course Code: 35209211 (webcast)
CPE Credits: 8
Instructor: Carl F. Shultz

MAY

5/9/2022
Business Law Essentials for Practitioners and Controllers
Course Code: 33205213 (in-person)/ 35205213 (webcast)
CPE Credits: 8
Instructor: Charles A. Borek

5/10/2022
Employer's Handbook: Legal, Tax, and Health Care Issues
Course Code: 33210214 (in-person)/ 35210214 (webcast)
CPE Credits: Advisory Services (4), Taxation (4)
Instructor: Charles A. Borek

5/12/2022
Gaining a Competitive Advantage: Critical Skills for CFOs and Controllers
Course Code: 33212212 (in-person)/ 35212212 (webcast)
CPE Credits: 4
Instructor: Carl F. Shultz

5/13/2022
Innovative Forecasting and Budgeting: Moving Beyond the Traditional Techniques
Course Code: 33213212 (in-person)/ 35213212 (webcast)
CPE Credits: 4
Instructor: Carl F. Shultz

5/13/2022
Controller/CFO Update: Hot Topics Facing Today's Financial Professional
Course Code: 33207212 (in-person)/ 35207212 (webcast)
CPE Credits: 4
Instructor: Carl F. Shultz

Stay abreast on best practices and the latest regulatory updates

AUDITING

This subject area includes the body of knowledge that deals with the basic service of the public accounting profession—examining and reporting on financial statements. It also includes the examination or review of internal and administrative controls, operations and/or government programs. Courses on professional conduct and ethics are appropriately categorized in the auditing category.

Individual programs classified in this area could cover audit theory and philosophy, generally accepted auditing standards, evaluation of internal controls, substantive audit procedures, audit sampling, reporting on financial statements, review services, computer and government audits, and Securities and Exchange Commission audit activities and requirements.

This description is provided by the New York State Education Department (NYSED).

JUNE

6/7/2021
Service Organization Control Reports — A User Auditor View
Course Code: 35171211 (webcast)
CPE Credits: 2
Instructor: Joann N. Cross

6/7/2021
Advanced Course on Risk Assessment in Relation to AUC-315 and AUC-330: What Needs to Be Considered for 2021
Course Code: 35107211 (webcast)
CPE Credits: 4
Instructor: Melissa Critcher

6/7/2021
Introductory Seminar to the Risk Assessment Standards
Course Code: 35108211 (webcast)
CPE Credits: 4
Instructor: Melissa Critcher

6/8/2021
Introduction to Employee Benefit Plans
Course Code: 35109211 (webcast)
CPE Credits: 8
Instructor: Melissa Critcher

6/9/2021
Employee Benefit Plan Update and Hot Topics for Experienced Auditors
Course Code: 35110211 (webcast)
CPE Credits: 8
Instructor: Melissa Critcher

6/14/2021
Navigating the Gray: An Advanced Guide to Auditor Independence Compliance
Course Code: 35214211 (webcast)
CPE Credits: Advisory Services (2), Auditing (2)
Instructor: William I. Eskin

6/15/2021
Fraud Basics: Protecting the Company Till
Course Code: 35163211 (webcast)
CPE Credits: 4
Instructor: William I. Eskin

6/15/2021
Proven Controls to Steer You Clear of Fraud
Course Code: 35170211 (webcast)
CPE Credits: 4
Instructor: William I. Eskin

JULY

7/26/2021
What Fraud Schemes Exist in Your Organization
Course Code: 35143211 (webcast)
CPE Credits: 8
Instructor: Renee Rampulla

7/27/2021
Real-World Frauds Found in Not-for-Profits
Course Code: 35140211 (webcast)
CPE Credits: 4
Instructor: Renee Rampulla

7/27/2021
You Have a SOC 1® Report — Now What?
Course Code: 35144211 (webcast)
CPE Credits: 4
Instructor: Renee Rampulla

AUGUST

8/4/2021
Becoming an AICPA Peer Review Team or Review Captain: Case Study Application
Course Code: 35155211 (webcast)
CPE Credits: 8
Instructor: Raymond M. Nowicki

8/10/2021
Annual Update: Top Governmental and Not-for-Profit Accounting and Auditing Issues Facing CPAs
Course Code: 35158211 (webcast)
CPE Credits: Accounting (4), Auditing (4)
Instructor: Jeff Lieman

8/11/2021
What Fraud Schemes Exist in Your Organization
Course Code: 35143213 (webcast)
CPE Credits: 8
Instructor: Leah Donti

8/19/2021
Auditing Update with Renee Rampulla
Course Code: 35131211 (webcast)
CPE Credits: 4
Instructor: Renee Rampulla

8/19/2021
SSARS Update with Renee Rampulla
Course Code: 35132211 (webcast)
CPE Credits: 4
Instructor: Renee Rampulla

8/23/2021
Conducting a Remote Audit
Course Code: 35145211 (webcast)
CPE Credits: 4
Instructor: Renee Rampulla

8/24/2021
Introduction to Employee Benefit Plans
Course Code: 35109212 (webcast)
CPE Credits: 8
Instructor: Melissa Critcher

8/26/2021
Employee Benefit Plan Update and Hot Topics for Experienced Auditors
Course Code: 35110212 (webcast)
CPE Credits: 8
Instructor: Melissa Critcher

8/27/2021
Internal Controls, Risk Assessment, Audit Documentation and Best Practices
Course Code: 35116211 (webcast)
CPE Credits: 8
Instructor: Melissa Critcher

8/30/2021
Performing an Effective Audit Risk Assessment in the COVID-19 Environment
Course Code: 35167211 (webcast)
CPE Credits: 4
Instructor: Michael J. Morgan

8/31/2021
Performing Single Audits Under the Uniform Guidance for Federal Awards
Course Code: 35168211 (webcast)
CPE Credits: 8
Instructor: Jeff Lieman

SEPTEMBER

9/21/2021
FAE's Nonprofit Workshop with Allen Fetterman
Course Code: 35101211 (webcast)
CPE Credits: Accounting (5), Auditing (2), Taxation (1)
Instructor: Allen L. Fetterman

9/23/2021
What Fraud Schemes Exist in Your Organization
Course Code: 35143212 (webcast)
CPE Credits: 8
Instructor: Renee Rampulla

9/28/2021
Performing Single Audits Under the Uniform Guidance for Federal Awards
Course Code: 35168212 (webcast)
CPE Credits: 8
Instructor: Diane E. Edelstein

OCTOBER

10/1/2021
What Fraud Schemes Exist in Your Organization
Course Code: 35143214 (webcast)
CPE Credits: 8
Instructor: Daryl Krause

10/5/2021
Governmental Accounting and Auditing Update
Course Code: 35159211 (webcast)
CPE Credits: Accounting (4), Auditing (4)
Instructor: Jeff Lieman

10/8/2021
Construction Contractors: Critical Accounting, Auditing, and Tax Issues
Course Code: 35185211 (webcast)
CPE Credits: Accounting (4), Auditing (2), Taxation (2)
Instructor: Jeff Lieman

10/18/2021
Advanced Auditing of HUD-Assisted Projects
Course Code: 35153211 (webcast)
CPE Credits: 8
Instructor: Jeanette Bax-Kurtz

10/19/2021
FAE's Nonprofit Workshop with Allen Fetterman
Course Code: 35101212 (webcast)
CPE Credits: Accounting (5), Auditing (2), Taxation (1)
Instructor: Allen L. Fetterman

10/22/2021
Auditing Update with Renee Rampulla
Course Code: 35131212 (webcast)
CPE Credits: 4
Instructor: Renee Rampulla

10/22/2021
SSARS Update with Renee Rampulla
Course Code: 35132212 (webcast)
CPE Credits: 4
Instructor: Renee Rampulla

NOVEMBER

11/1/2021
Latest Developments in Government and Nonprofit Accounting and Auditing
Course Code: 35187211 (webcast)
CPE Credits: Accounting (4), Auditing (4)
Instructor: Michael J. Morgan

11/5/2021
Annual Update and Practice Issues for Preparation, Compilation, and Review Engagements
Course Code: 35134211 (webcast)
CPE Credits: 8
Instructor: Renee Rampulla

11/9/2021
Advanced Course on Risk Assessment in Relation to AUC-315 and AUC-330: What Needs to Be Considered for 2021
Course Code: 35107212 (webcast)
CPE Credits: 4
Instructor: Melissa Critcher

11/9/2021
Introductory Seminar to the Risk Assessment Standards
Course Code: 35108212 (webcast)
CPE Credits: 4
Instructor: Melissa Critcher

11/12/2021
FAE's Nonprofit Workshop with Allen Fetterman
Course Code: 35101213 (webcast)
CPE Credits: Accounting (5), Auditing (2), Taxation (1)
Instructor: Allen L. Fetterman

11/16/2021
Auditing Update with Renee Rampulla
Course Code: 35131213 (webcast)
CPE Credits: 4
Instructor: Renee Rampulla

11/16/2021
SSARS Update with Renee Rampulla
Course Code: 35132213 (webcast)
CPE Credits: 4
Instructor: Renee Rampulla

DECEMBER

12/3/2021
Auditing Update with Renee Rampulla
Course Code: 35131214 (webcast)
CPE Credits: 4
Instructor: Renee Rampulla

12/3/2021
SSARS Update with Renee Rampulla
Course Code: 35132214 (webcast)
CPE Credits: 4
Instructor: Renee Rampulla

12/8/2021
FAE's Nonprofit Workshop with Allen Fetterman
Course Code: 35101214 (webcast)
CPE Credits: Accounting (5), Auditing (2), Taxation (1)
Instructor: Allen L. Fetterman

12/8/2021
Introduction to Employee Benefit Plans
Course Code: 35109213 (webcast)
CPE Credits: 8
Instructor: Melissa Critcher

12/9/2021
Employee Benefit Plan Update and Hot Topics for Experienced Auditors
Course Code: 35110213 (webcast)
CPE Credits: 8
Instructor: Melissa Critcher

12/10/2021
Internal Controls, Risk Assessment, Audit Documentation and Best Practices
Course Code: 35116212 (webcast)
CPE Credits: 8
Instructor: Melissa Critcher

12/13/2021
Conducting a Remote Audit
Course Code: 35145212 (webcast)
CPE Credits: 4
Instructor: Renee Rampulla

12/13/2021
You Have a SOC 1® Report — Now What?
Course Code: 35144212 (webcast)
CPE Credits: 4
Instructor: Renee Rampulla

12/14/2021
Get Ready for Busy Season: Accounting & Auditing Boot Camp with Renee Rampulla
Course Code: 35136211 (webcast)
CPE Credits: Accounting (4), Auditing (4)
Instructor: Renee Rampulla

12/16/2021
Auditing Update with Renee Rampulla
Course Code: 35131215 (webcast)
CPE Credits: 4
Instructor: Renee Rampulla

12/16/2021
SSARS Update with Renee Rampulla
Course Code: 35132215 (webcast)
CPE Credits: 4
Instructor: Renee Rampulla

12/21/2021
Construction Contractors: Auditing Considerations
Course Code: 35147211 (webcast)
CPE Credits: 4
Instructor: Renee Rampulla

12/27/2021
Get Ready for Busy Season: Accounting & Auditing Boot Camp with Renee Rampulla Replay
Course Code: 35136212 (webcast)
CPE Credits: Accounting (4), Auditing (4)
Instructor: Renee Rampulla

12/28/2021
Auditing Update with Renee Rampulla Replay
Course Code: 35131216 (webcast)
CPE Credits: 4
Instructor: Renee Rampulla

12/28/2021
SSARS Update with Renee Rampulla Replay
Course Code: 35132216 (webcast)
CPE Credits: 4
Instructor: Renee Rampulla

MAY

5/11/2022
FAE's Nonprofit Workshop with Allen Fetterman
Course Code: 21101215 (in-person)/ 35101215 (webcast)
CPE Credits: Accounting (5), Auditing (2), Taxation (1)
Instructor: Allen L. Fetterman

5/18/2022
FAE's Nonprofit Workshop with Allen Fetterman (Albany)
Course Code: 21101246 (in-person)
CPE Credits: Accounting (5), Auditing (2), Taxation (1)
Instructor: Allen L. Fetterman

5/23/2022
Latest Developments in Government and Nonprofit Accounting and Auditing
Course Code: 33187212 (in-person)/ 35187212 (webcast)
CPE Credits: Accounting (4), Auditing (4)
Instructor: Jeff Lieman

5/24/2022
Financial Reporting Update for Tax Practitioners
Course Code: 33186211 (in-person)/ 35186211 (webcast)
CPE Credits: Accounting (4), Auditing (4)
Instructor: Jeff Lieman

5/24/2022
Introduction to Employee Benefit Plans
Course Code: 21109214 (in-person)/ 35109214 (webcast)
CPE Credits: 8
Instructor: Melissa Critcher

5/25/2022
Employee Benefit Plan Update and Hot Topics for Experienced Auditors
Course Code: 21110214 (in-person)/ 35110214 (webcast)
CPE Credits: 8
Instructor: Melissa Critcher

5/26/2022
Internal Controls, Risk Assessment, Audit Documentation and Best Practices
Course Code: 21116213 (in-person)/ 35116213 (webcast)
CPE Credits: 8
Instructor: Melissa Critcher

Gain the expertise required to deliver professional, competent and ethical financial planning services to clients

CFP CE

Courses in this subject area focus on professional conduct and regulation, general principles of financial planning, education planning, risk management and insurance planning, investment planning, tax planning, retirement savings and income planning, estate planning and financial plan development.

This description is provided by the Certified Financial Planner Board of Standards.

JUNE

6/17/2021
The Best Federal Tax Update Course by Surgent
Course Code: 35646211 (webcast)
CFP Credits: 8
CPE Credits: 8 (Taxation)
IRS CE Credits: 8
Instructor: Edward A. Harter

6/18/2021
Estate and Life Planning Issues for the Middle-Income Client
Course Code: 35628211 (webcast)
CFP Credits: 8
CPE Credits: 8 (Taxation)
IRS CE Credits: 8
Instructor: Edward A. Harter

6/24/2021
This Year's Best Income Tax, Estate Tax, and Financial-Planning Ideas
Course Code: 35659211 (webcast)
CFP Credits: 8
CPE Credits: 8 (Taxation)
Instructor: John N. Sherrick

6/25/2021
The Complete Trust Workshop
Course Code: 35658211 (webcast)
CFP Credits: 8
CPE Credits: 8 (Taxation)
Instructor: Martin J. Satinsky

JULY

7/28/2021
The Best Individual Income Tax Update Course by Surgent
Course Code: 35647211 (webcast)
CFP Credits: 8
CPE Credits: 8 (Taxation)
IRS CE Credits: 8
Instructor: John M. Kilroy

AUGUST

8/12/2021
Social Security and Medicare: Planning for You and Your Clients
Course Code: 35640211 (webcast)
CFP Credits: 8
CPE Credits: 8 (Taxation)
Instructor: John L. Evanich, Jr.

SEPTEMBER

9/29/2021
Estate and Life Planning Issues for the Middle-Income Client
Course Code: 35628212 (webcast)
CFP Credits: 8
CPE Credits: 8 (Taxation)
IRS CE Credits: 8
Instructor: Susan Smith

9/30/2021
This Year's Best Income Tax, Estate Tax, and Financial-Planning Ideas
Course Code: 35659212 (webcast)
CFP Credits: 8
CPE Credits: 8 (Taxation)
Instructor: Susan Smith

OCTOBER

10/6/2021
The Best Individual Income Tax Update Course by Surgent
Course Code: 35647212 (webcast}
CFP Credits: 8
CPE Credits: 8 (Taxation)
IRS CE Credits: 8
Instructor: Edward A. Harter

10/25/2021
The Best Individual Income Tax Update Course by Surgent
Course Code: 35647213 (webcast)
CFP Credits: 8
CPE Credits: 8 (Taxation)
IRS CE Credits: 8
Instructor: Sali L. Sheafor

NOVEMBER

11/4/2021
Social Security and Medicare: Planning for You and Your Clients
Course Code: 35640212 (webcast)
CFP Credits: 8
CPE Credits: 8 (Taxation)
Instructor: Michael A. Frost

11/5/2021
Securing a Comfortable Retirement in the Age of Spending
Course Code 35639211 (webcast)
CFP Credits: 8
CPE Credits: 8 (Taxation)
Instructor: Michael A. Frost

11/22/2021
The Best Individual Income Tax Update Course by Surgent
Course Code 35647214 (webcast)
CFP Credits: 8
CPE Credits: 8 (Taxation)
IRS CE Credits: 8
Instructor: Michael E. Reilly

DECEMBER

12/13/2021
The Best Individual Income Tax Update Course by Surgent
Course Code: 35647215 (webcast)
CFP Credits: 8
CPE Credits: 8 (Taxation)
IRS CE Credits: 8
Instructor: Dennis P. Riley

12/16/2021
This Year's Best Income Tax, Estate Tax, and Financial-Planning Ideas
Course Code: 35659213 (webcast)
CFP Credits: 8
CPE Credits: 8 (Taxation)
Instructor: Edward A. Harter

12/21/2021
The Best Individual Income Tax Update Course by Surgent
Course Code: 35647216 (webcast)
CFP Credits: 8
CPE Credits: 8 (Taxation)
IRS CE Credits: 8
Instructor: Michael E. Reilly

ETHICS

This field of study includes coursework that will increase accountants' knowledge of ethical standards for the profession. Coursework will focus on New York State Education Law, Rules of the Board of Regents and Regulations of the Commissioner of Education. The foundation course will cover topics including introduction to ethics concepts, the psychology of moral development, judgement and values, the sociology of professions, virtue and the role of rules of ethics, public expectations of CPAs' responsibilities, and ethical dilemmas. The role of the Board of Regents and the State Education Department, highlighting New York State law, rules and regulations, including a comparison and contrast to AICPA and New York State Society of CPAs ethics rules and enforcement of rules on ethics, will also be covered.

Ethics coursework in the specific fields of accounting, auditing and taxation will be acceptable and should include updates on New York State and AICPA ethics rules, ethical guidance in the specialty practice, information on recent litigation related to ethical concerns or issues in the area of specialization, and discussion of case studies in the field relating to ethical issues.

This description is provided by the New York State Education Department (NYSED).

AUGUST

8/25/2021
FAE's Ethics Update for Public Practice
Course Code: 35301211 (webcast)
CPE Credits: 4
Instructor: Debbie A. Cutler

8/25/2021
FAE's Ethics Update for Members in Business
Course Code: 35302211 (webcast)
CPE Credits: 4
Instructor: Debbie A. Cutler

SEPTEMBER

9/24/2021
FAE's Ethics Update for Members in Business
Course Code: 35302212 (webcast)
CPE Credits: 4
Instructor: Debbie A. Cutler

9/24/2021
FAE's Ethics Update for Public Practice
Course Code: 35301212 (webcast)
CPE Credits: 4
Instructor: Debbie A. Cutler

OCTOBER

10/29/2021
FAE's Ethics Update for Public Practice
Course Code: 35301213 (webcast)
CPE Credits: 4
Instructor: Debbie A. Cutler

10/29/2021
FAE's Ethics Update for Members in Business
Course Code: 35302213 (webcast)
CPE Credits: 4
Instructor: Debbie A. Cutler

NOVEMBER

11/19/2021
FAE's Ethics Update for Members in Business
Course Code: 35302214 (webcast)
CPE Credits: 4
Instructor: Debbie A. Cutler

11/19/2021
FAE's Ethics Update for Public Practice
Course Code: 35301214 (webcast)
CPE Credits: 4
Instructor: Debbie A. Cutler

DECEMBER

12/7/2021
FAE's Ethics Update for Public Practice
Course Code: 35301215 (webcast)
CPE Credits: 4
Instructor: Debbie A. Cutler

12/7/2021
FAE's Ethics Update for Members in Business
Course Code: 35302215 (webcast)
CPE Credits: 4
Instructor: Debbie A. Cutler

12/20/2021
FAE's Ethics Update for Public Practice
Course Code: 35301216 (webcast)
CPE Credits: 4
Instructor: Debbie A. Cutler

12/20/2021
FAE's Ethics Update for Members in Business
Course Code: 35302216 (webcast)
CPE Credits: 4
Instructor: Debbie A. Cutler

IRS CE

As specialists in the field of taxation, enrolled agents need to acquire a vast knowledge of income tax, gift tax, inheritance tax, retirement, payroll, non-profit taxation, among others.

To help enrolled agents brush up on all these areas and to stay updated with any changes in the field, IRS EA ethics courses cover a wide range of topics. From the fundamental concepts of ethics and ethical duties of tax preparers to Circular 230 of the Department of the Treasury, unethical tax actions, as well as, their consequences, and many more topics.

This description is provided by irs.gov

JUNE

6/17/2021
The Best Federal Tax Update Course by Surgent
Course Code: 35646211 (webcast)
IRS CE Credits: 8
CPE Credits: 8 (Taxation)
CFP Credits: 8
Instructor: Edward A. Harter

6/18/2021
Estate and Life Planning Issues for the Middle-Income Client
Course Code: 35628211 (webcast)
IRS CE Credits: 8
CPE Credits: 8 (Taxation)
CFP Credits: 8
Instructor: Edward A. Harter

6/23/2021
How to Settle a Client's Estate
Course Code: 35633211 (webcast)
IRS CE Credits: 8
CPE Credits: 8 Taxation
Instructor: John N. Sherrick

JULY

7/28/2021
The Best Individual Income Tax Update Course by Surgent
Course Code: 35647211 (webcast)
IRS CE Credits: 8
CPE Credits: 8 (Taxation)
CFP Credits: 8
Instructor: John M. Kilroy

7/29/2021
The Best S Corporation, Limited Liability, and Partnership Update Course by Surgent
Course Code: 35656211 (webcast)
IRS CE Credits: 8
CPE Credits: 8 (Taxation)
Instructor: John M. Kilroy

AUGUST

8/2/2021
Limited Liability Companies: Losses, Liquidations, Terminations, Continuations, and Sales
Course Code: 35635211 (webcast)
IRS CE Credits: 4
CPE Credits: 4 (Taxation)
Instructor: Michael A. Frost

8/3/2021
Four Tiers of Loss Limitations: A Guide to the New Rules for Pass-Through Entities
Course Code: 35630211 (webcast)
IRS CE Credits: 4
CPE Credits: 4 (Taxation)
Instructor: Michael A. Frost

8/3/2021
S Corporation Taxation: Advanced Issues
Course Code: 35638211 (webcast)
IRS CE Credits: 4
CPE Credits: 4 (Taxation)
Instructor: Michael A. Frost

8/5/2021
Surgent's Essential Depreciation and Expensing Update
Course Code: 35644211 (webcast)
IRS CE Credits: 4
CPE Credits: 4 (Taxation)
Instructor: David R. Peters

8/9/2021
Surgent's Annual Tax-Planning Guide for S Corporations, Partnerships, and LLCs
Course Code: 35643211 (webcast)
IRS CE Credits: 8
CPE Credits: 8 (Taxation)
Instructor: Don P. Cochran

SEPTEMBER

9/29/2021
Estate and Life Planning Issues for the Middle-Income Client
Course Code: 35628212 (webcast)
IRS CE Credits: 8
CPE Credits: 8 (Taxation)
CFP Credits: 8
Instructor: Susan Smith

OCTOBER

10/5/2021
Surgent's Annual Tax-Planning Guide for S Corporations, Partnerships, and LLCs
Course Code: 35643212 (webcast)
IRS CE Credits: 8
CPE Credits: 8 (Taxation)
Instructor: Susan Smith

10/6/2021
The Best Individual Income Tax Update Course by Surgent
Course Code: 35647212 (webcast)
IRS CE Credits: 8
CPE Credits: 8 (Taxation)
CFP Credits: 8
Instructor: Edward A. Harter

10/7/2021
The Best S Corporation, Limited Liability, and Partnership Update Course by Surgent
Course Code: 35656212 (webcast)
IRS CE Credits: 8
CPE Credits: 8 (Taxation)
Instructor: Edward A. Harter

10/18/2021
Form 1040 Return Review Boot Camp for New and Experienced Reviewers
Course Code: 35629211 (webcast)
IRS CE Credits: 8
CPE Credits: 8 (Taxation)
Instructor: Dennis P. Riley

10/25/2021
The Best Individual Income Tax Update Course by Surgent
Course Code: 35647213 (webcast)
IRS CE Credits: 8
CPE Credits: 8 (Taxation)
CFP Credits: 8
Instructor: Sali L. Sheafor

10/26/2021
The Best S Corporation, Limited Liability, and Partnership Update Course by Surgent
Course Code: 35656213 (webcast)
IRS CE Credits: 8
CPE Credits: 8 (Taxation)
Instructor: Sali L. Sheafor

NOVEMBER

11/3/2021
Hot IRS Tax Examination Issues for Individuals and Businesses
Course Code: 35632211 (webcast)
IRS CE Credits: 8
CPE Credits: 8 (Taxation)
Instructor: Michael A. Frost

11/10/2021
Form 1040 Return Review Boot Camp for New and Experienced Reviewers
Course Code: 35629212 (webcast)
IRS CE Credits: 8
CPE Credits: 8 (Taxation)
Instructor: Dennis P. Riley

11/22/2021
The Best Individual Income Tax Update Course by Surgent
Course Code: 35647214 (webcast)
IRS CE Credits: 8
CPE Credits: 8 (Taxation)
CFP Credits: 8
Instructor: Michael E. Reilly

11/23/2021
The Best S Corporation, Limited Liability, and Partnership Update Course by Surgent
Course Code: 35656214 (webcast)
IRS CE Credits: 8
CPE Credits: 8 (Taxation)
Instructor: Michael E. Reilly

DECEMBER

12/13/2021
The Best Individual Income Tax Update Course by Surgent
Course Code: 35647215 (webcast)
IRS CE Credits: 8
CPE Credits: 8 (Taxation)
CFP Credits: 8
Instructor: Dennis P. Riley

12/14/2021
The Best S Corporation, Limited Liability, and Partnership Update Course by Surgent
Course Code: 35656215 (webcast)
IRS CE Credits: 8
CPE Credits: 8 (Taxation)
Instructor: Dennis P. Riley

12/17/2021
Surgent's Top 10 Tax Topics This Year
Course Code: 35645211 (webcast)
IRS CE Credits: 8
CPE Credits: 8 (Taxation)
Instructor: Edward A. Harter

12/21/2021
The Best Individual Income Tax Update Course by Surgent
Course Code: 35647216 (webcast)
IRS CE Credits: 8
CPE Credits: 8 (Taxation)
CFP Credits: 8
Instructor: Michael E. Reilly

12/22/2021
The Best S Corporation, Limited Liability, and Partnership Update Course by Surgent
Course Code: 35656216 (webcast)
IRS CE Credits: 8
CPE Credits: 8 (Taxation)
Instructor: Michael E. Reilly

12/27/2021
Getting Ready for Busy Season: Key Changes Every Tax Practitioner Should Know
Course Code: 35631211 (webcast)
IRS CE Credits: 4
CPE Credits: 4 (Taxation)
Instructor: John M. Kilroy

12/27/2021
IRS Tax Examinations and Hot Issues
Course Code: 35634211 (webcast)
IRS CE Credits: 4
CPE Credits: 4 (Taxation)
Instructor: John M. Kilroy

12/28/2021
Surgent's Advanced Individual Income Tax Return Issues
Course Code: 35642211 (webcast)
IRS CE Credits: 8
CPE Credits: 8 (Taxation)
Instructor: John M. Kilroy

SPECIALIZED KNOWLEDGE

This subject area focuses on the development of professional skills and knowledge related to specialized industries and business entities. These industries are often identified by the title of an AICPA industry audit guide and employ specialized accounting principles and practices, encounter distinctive tax problems and audit issues, or require unique advisory services.

Individual programs that fall within this category could cover industry-specific accounting and auditing standards, terminology and technology, legislative or regulatory requirements, marketing or distribution systems and issues, economic structures, and sources of financing.

This description is provided by the New York State Department of Education (NYSED).

JUNE

6/10/2021
Work-Life Balance: Maximizing Productivity and Understanding Related Tax Issues
Course Code: 35217211 (webcast)
CPE Credits: Specialized Knowledge (1), Taxation (1)
Instructor: Jason W. Carney

6/10/2021
Working Remotely: Best Practices, Challenges, and Opportunities
Course Code: 35216211 (webcast)
CPE Credits: 2
Instructor: Jason W. Carney

NOVEMBER

11/5/2021
Securing a Comfortable Retirement in the Age of Spending
Course Code: 35639211 (webcast)
CPE Credits: Specialized Knowledge (4), Taxation (4)
CFP Credits: 8
Instructor: Michael A. Frost

TAXATION

This subject area includes local, state, federal and international tax compliance and tax planning for individuals, businesses, estates and trusts. Compliance includes tax return preparation and review, as well as Internal Revenue Service examinations, ruling requests and protests. Tax planning focuses on applying tax rules to prospective transactions and understanding the tax implications of unusual or complex transactions. It also includes alternative tax treatments and advising clients on tax-saving opportunities.

Programs offered in this subject area could cover tax research and theory, application of tax rules to different forms and types of taxpayers, specialized taxes, return preparation, tax authorities' examinations, rulings and appeals, tax-exempt organizations, tax accounting, and employee compensation and tax deferral plans.

This description is provided by the New York State Education Department (NYSED).

JUNE

6/10/2021
Work-Life Balance: Maximizing Productivity and Understanding Related Tax Issues
Course Code: 35217211 (webcast)
CPE Credits: Specialized Knowledge (1), Taxation (1)
Instructor: Jason W. Carney

6/17/2021
The Best Federal Tax Update Course by Surgent
Course Code: 35646211 (webcast)
CPE Credits: 8
CFP Credits: 8
IRS CE Credits: 8
Instructor: Edward A. Harter

6/18/2021
Estate and Life Planning Issues for the Middle-Income Client
Course Code: 35628211 (webcast)
CPE Credits: 8
CFP Credits: 8
IRS CE Credits: 8
Instructor: Edward A. Harter

6/23/2021
How to Settle a Client's Estate
Course Code: 35633211 (webcast)
CPE Credits: 8
IRS CE Credits: 8
Instructor: John N. Sherrick

6/24/2021
This Year's Best Income Tax, Estate Tax, and Financial-Planning Ideas
Course Code: 35659211 (webcast)
CPE Credits: 8
CFP Credits: 8
Instructor: John N. Sherrick

6/25/2021
The Complete Trust Workshop
Course Code: 35658211 (webcast)
CPE Credits: 8
CFP Credits: 8
Instructor: Martin J. Satinsky

6/29/2021
Employer's Handbook: Legal, Tax, and Health Care Issues
Course Code: 35210211 (webcast)
CPE Credits: Advisory Services (4), Taxation (4)
Instructor: Jason W. Carney

JULY

7/28/2021
The Best Individual Income Tax Update Course by Surgent
Course Code: 35647211 (webcast)
CPE Credits: 8
CFP Credits: 8
IRS CE Credits: 8
Instructor: John M. Kilroy

7/29/2021
The Best S Corporation, Limited Liability, and Partnership Update Course by Surgent
Course Code: 35656211 (webcast)
CPE Credits: 8
IRS CE Credits: 8
Instructor: John M. Kilroy

AUGUST

8/2/2021
Limited Liability Companies: Losses, Liquidations, Terminations, Continuations, and Sales
Course Code: 35635211 (webcast)
CPE Credits: 4
IRS CE Credits: 4
Instructor: Michael A. Frost

8/2/2021
Succession Planning for the Small Business Owner: Finding the Exit Ramp
Course Code: 35641211 (webcast)
CPE Credits: 4
Instructor: Michael A. Frost

8/3/2021
Four Tiers of Loss Limitations: A Guide to the New Rules for Pass-Through Entities
Course Code: 35630211 (webcast)
CPE Credits: 4
IRS CE Credits: 4
Instructor: Michael A. Frost

8/3/2021
S Corporation Taxation: Advanced Issues
Course Code: 35638211 (webcast)
CPE Credits: 4
IRS CE Credits: 4
Instructor: Michael A. Frost

8/4/2021
Real Estate Tax Boot Camp
Course Code: 35636211 (webcast)
CPE Credits: 8
IRS CE Credits: 8
Instructor: David R. Peters

8/5/2021
Critical Issues Involving Taxation of Construction Contractors
Course Code: 35627211 (webcast)
CPE Credits: 4
Instructor: David R. Peters

8/5/2021
Surgent's Essential Depreciation and Expensing Update
Course Code: 35644211 (webcast)
CPE Credits: 4
IRS CE Credits: 4
Instructor: David R. Peters

8/9/2021
Surgent's Annual Tax-Planning Guide for S Corporations, Partnerships, and LLCs
Course Code: 35643211 (webcast)
CPE Credits: 8
IRS CE Credits: 8
Instructor: Don P. Cochran

8/10/2021
Buying and Selling a Business: Critical Tax and Structuring Issues
Course Code: 35626211 (webcast)
CPE Credits: 8
IRS CE Credits: 8
Instructor Don P. Cochran

8/11/2021
Required Minimum Distributions: Compliance and Planning
Course Code: 35637211 (webcast)
CPE Credits: 4
Instructor: John L. Evanich, Jr.

8/11/2021
Advanced Trust Issues: A Roadmap for Success in an Increasingly Complex Area
Course Code: 35625211 (webcast)
CPE Credits: 4
Instructor: John L. Evanich, Jr.

8/12/2021
Social Security and Medicare: Planning for You and Your Clients
Course Code: 35640211 (webcast)
CPE Credits: 8
Instructor: John L. Evanich, Jr.

8/17/2021
Employer's Handbook: Legal, Tax, and Health Care Issues
Course Code: 35210212 (webcast)
CPE Credits: Advisory Services (4), Taxation (4)
Instructor: Charles A. Borek

8/17/2021
Form 990: Best Practices for Accurate Preparation
Course Code: 35607211 (webcast)
CPE Credits: 8
Instructor: Rob Lyons

SEPTEMBER

9/21/2021
FAE's Nonprofit Workshop with Allen Fetterman
Course Code: 35101211 (webcast)
CPE Credits: Accounting (5), Auditing (2), Taxation (1)
Instructor: Allen L. Fetterman

9/22/2021
Hottest Tax Topics for 2021
Course Code: 35608211 (webcast)
CPE Credits: 8
Instructor: William Murphy

9/23/2021
Income Tax Planning
Course Code: 35609211 (webcast)
CPE Credits: 8
Instructor: William Murphy

9/29/2021
Estate and Life Planning Issues for the Middle-Income Client
Course Code: 35628212 (webcast)
CPE Credits: 8
CFP Credits: 8
IRS CE Credits: 8
Instructor: Susan Smith

9/30/2021
This Year's Best Income Tax, Estate Tax, and Financial-Planning Ideas
Course Code: 35659212 (webcast)
CPE Credits: 8
CFP Credits: 8
Instructor: Susan Smith

OCTOBER

10/1/2021
Employer's Handbook: Legal, Tax, and Health Care Issues
Course Code: 35210213 (webcast)
CPE Credits: Advisory Services (4), Taxation (4)
Instructor: Charles A. Borek

10/4/2021
The Complete Guide to Payroll Taxes and 1099 Issues
Course Code: 35657211 (webcast)
CPE Credits: 8
Instructor: Susan Smith

10/5/2021
Surgent's Annual Tax-Planning Guide for S Corporations, Partnerships, and LLCs
Course Code: 35643212 (webcast)
CPE Credits: 8
Instructor: Susan Smith

10/6/2021
The Best Individual Income Tax Update Course by Surgent
Course Code: 35647212 (webcast)
CPE Credits: 8
CFP Credits: 8
IRS CE Credits: 8
Instructor: Edward A. Harter

10/7/2021
The Best S Corporation, Limited Liability, and Partnership Update Course by Surgent
Course Code: 35656212 (webcast)
CPE Credits: 8
IRS CE Credits: 8
Instructor: Edward A. Harter

10/8/2021
Construction Contractors: Critical Accounting, Auditing, and Tax Issues
Course Code: 35185211 (webcast)
CPE Credits: Accounting (4), Auditing (2), Taxation (2)
Instructor: Jeffrey Lieman

10/18/2021
Form 1040 Return Review Boot Camp for New and Experienced Reviewers
Course Code: 35629211 (webcast)
CPE Credits: 8
IRS CE Credits: 8
Instructor: Dennis P. Riley

10/19/2021
FAE's Nonprofit Workshop with Allen Fetterman
Course Code: 35101212 (webcast)
CPE Credits: Accounting (5), Auditing (2), Taxation (1)
Instructor: Allen L. Fetterman

10/25/2021
The Best Individual Income Tax Update Course by Surgent
Course Code: 35647213 (webcast)
CPE Credits: 8
CFP Credits: 8
IRS CE Credits: 8
Instructor: Sali L. Sheafor

10/26/2021
The Best S Corporation, Limited Liability, and Partnership Update Course by Surgent
Course Code: 35656213 (webcast)
CPE Credits: 8
IRS CE Credits: 8
Instructor: Sali L. Sheafor

NOVEMBER

11/3/2021
Hot IRS Tax Examination Issues for Individuals and Businesses
Course Code: 35632211 (webcast)
CPE Credits: 8
IRS CE Credits: 8
Instructor: Michael A. Frost

11/4/2021
Social Security and Medicare: Planning for You and Your Clients
Course Code: 35640212 (webcast)
CPE Credits: 8
CFP Credits: 8
Instructor: Michael A. Frost

11/5/2021
Securing a Comfortable Retirement in the Age of Spending
Course Code: 35639211 (webcast)
CPE Credits: Specialized Knowledge (4), Taxation (4)
CFP Credits: 8
Instructor: Michael A. Frost

11/10/2021
Form 1040 Return Review Boot Camp for New and Experienced Reviewers
Course Code: 35629212 (webcast)
CPE Credits: 8
IRS CE Credits: 8
Instructor: Dennis P. Riley

11/12/2021
FAE's Nonprofit Workshop with Allen Fetterman
Course Code: 35101213 (webcast)
CPE Credits: Accounting (5), Auditing (2), Taxation (1)
Instructor: Allen L. Fetterman

11/15/2021
Sid Kess/FAE's Individual Tax Update
Course Code: 35601211 (webcast)
CPE Credits: 8
Instructors: Sharon Kreider/Karen Brosi

11/16/2021
Sid Kess/FAE's Business Tax Update
Course Code: 35602211 (webcast)
CPE Credits: 8
Instructors: Sharon Kreider/Karen Brosi

11/22/2021
The Best Individual Income Tax Update Course by Surgent
Course Code: 35647214 (webcast)
CPE Credits: 8
CFP Credits: 8
IRS CE Credits: 8
Instructor: Michael E. Reilly

11/23/2021
The Best S Corporation, Limited Liability, and Partnership Update Course by Surgent
Course Code: 35656214 (webcast)
CPE Credits: 8
IRS CE Credits: 8
Instructor: Michael E. Reilly

11/29/2021
1040 Tax Return Workshop - Day 1
Course Code: 35605211 (webcast)
CPE Credits: 8
Instructor: David Peters

11/30/2021
1040 Tax Return Workshop - Day 2
Course Code: 35605212 (webcast)
CPE Credits: 8
Instructor: David Peters

DECEMBER

12/6/2021
A Day with Hodgson Russ: Selected NY State and City Tax Topics Workshop
Course Code: 35603211 (webcast)
CPE Credits: 8
Instructors: Mark S. Klein/ Joseph N. Endres

12/8/2021
FAE's Nonprofit Workshop with Allen Fetterman
Course Code: 35101214 (webcast)
CPE Credits: Accounting (5), Auditing (2), Taxation (1)
Instructor: Allen L. Fetterman

12/13/2021
The Best Individual Income Tax Update Course by Surgent
Course Code: 35647215 (webcast)
CPE Credits: 8
CFP Credits: 8
IRS CE Credits: 8
Instructor: Dennis P. Riley

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IRS CE Credits: 8
Instructor: Edward A. Harter

12/17/2021
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Course Code: 35645211 (webcast)
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IRS CE Credits: 8
Instructor: Michael E. Reilly

12/27/2021
Getting Ready for Busy Season: Key Changes Every Tax Practitioner Should Know
Course Code: 35631211 (webcast)
CPE Credits: 4
IRS CE Credits: 4
Instructor: John M. Kilroy

12/27/2021
IRS Tax Examinations and Hot Issues
Course Code: 35634211 (webcast)
CPE Credits: 4
IRS CE Credits: 4
Instructor: John M. Kilroy

12/28/2021
Surgent's Advanced Individual Income Tax Return Issues
Course Code: 35642211 (webcast)
CPE Credits: 8
IRS CE Credits: 8
Instructor: John M. Kilroy

MAY

5/10/2022
Employer's Handbook: Legal, Tax, and Health Care Issues
Course Code: 33210214 (in-person)/ 35210214 (webcast)
CPE Credits: Advisory Services (4), Taxation (4)
Instructor: Charles A. Borek

5/11/2022
FAE's Nonprofit Workshop with Allen Fetterman
Course Code: 21101215 (in-person) / 35101215 (webcast)
CPE Credits: Accounting (5), Auditing (2), Taxation (1)
Instructor: Allen L. Fetterman

5/12/2022
Critical Issues That CPAs in Industry Will Need to Face This Year
Course Code 33208211 (in-person)/ 35208211 (webcast)
CPE Credits: Accounting (2), Taxation (2)
Instructor: Carl F. Shultz

5/18/2022
FAE's Nonprofit Workshop with Allen Fetterman (Albany)
Course Code: 21101246 (in-person)
CPE Credits: Accounting (5), Auditing (2), Taxation (1)
Instructor: Allen L. Fetterman

REGISTRATION POLICIES

CANCELLATION/REFUND POLICY

Cancellation requests must be made 14 days in advance of the program to receive a refund; a $50 processing fee will be charged. For requests made less than 14 days in advance of the program, fees are not refundable. Cancellation requests will not be accepted on or after the presentation date.

All requests must be submitted in writing by email, fax, or regular mail.

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Transfers to another program or another person may be made without a charge if the request is made 14 days in advance of the program. Transfers and substitutions requested less than 14 days in advance of the program will be charged a $25 processing fee, with exceptions as noted below:

Transfers requested on the day of the program are not permitted, unless one of the two conditions apply:

1. The request is for a transfer from (in-person) to (webcast) versions of the same seminar or conference subject to the availability of seats.
2. The request is for a transfer from (webcast) to (in-person) versions of the same seminar or conference subject to the availability of seats and payment of price difference.

Transfers/Substitutions will not be permitted once materials have been uploaded and made available to registrants. All requests must be submitted in writing by email, fax, or regular mail.

COURSE CANCELLATION POLICY

In the event that a program must be canceled, registrants will be notified immediately and a refund and/or transfer to another event will be processed with no fee. Registrants will be notified of the rescheduled program. The NYSSCPA/FAE does not assume financial responsibility for penalties or expenses incurred by registrants who must cancel travel arrangements due to course cancellation.

LATE ARRIVALS AND EARLY DEPARTURES POLICY

Anyone who arrives at the program late or leaves early will have his or her CPE credits adjusted accordingly. CPE credit is granted at a rate of one credit hour for every 50 minutes of in-class participation.

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A registrant who does not attend a program is considered a no-show and forfeits his or her payment and/or CPE hours. To avoid being a no-show, please follow the cancellation/transfer/substitution guidelines before the program date.

LATE REGISTRANT POLICY

All persons registering for a FAE paperless program after 7:00 a.m. the day before the program are considered late registrants. Materials for your course can be found at cpe.nysscpa.org/current-registrations, and a link is included in your registration receipt. No other notices will be sent regarding course materials.

WALK-IN POLICY

All individuals are permitted to register on the day of the seminar or conference at no additional fee, subject to the availability of seats. Please be advised: As a walk-in, program materials will not be provided on-site. You will be able to access materials once your order is entered in the system. A link to access the materials will be included in your registration receipt.

PROGRAM MATERIALS POLICY

Program materials will be available to access online. All materials will be accessed through the myCPE portal—cpe.nysscpa.org. If materials have been posted before you register for a course, you will be alerted to this in your registration email and can access materials immediately. Otherwise, you will be notified via email that materials are ready for download, at least 3 business days in advance of the course. All notifications about material changes or updates will be made via email.

Once e-materials have been uploaded there will be no refunds, transfers, or substitutions.

Program materials are designed specifically for the program and are available only to participants. The materials, or portions thereof, are not available for sale to individuals or institutions and may not be reproduced.

EMAIL POLICY

Any pertinent notifications about a CPE course will be made via email. This includes, but is not limited to, course cancellations, date changes, venue changes, material updates, and registration receipts. You will be notified using your email address on file with us; please make sure to keep it accurate and up-to-date. You can change this by calling customer service at 800-537-3635 or by editing your Member Profile.

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By registering and attending a seminar, program, conference, session, or other event (collectively, an "Event") sponsored by the New York State Society of CPAs, the Foundation for Accounting Education, The Moynihan Scholarship Fund, Inc., or any affiliated entity thereof (collectively, the "Society"), you acknowledge and agree that the Society has the right at the Event to record, film, photograph, or capture your voice and/or likeness in any media now available or hereafter developed and to distribute, broadcast, use, or otherwise globally to disseminate, in perpetuity, such media for any purpose whatsoever without any further approval from you or any payment to you. You further acknowledge and agree that all such media and all rights therein are the sole property of the Society. Without limiting the foregoing, the foregoing includes the right to edit such media, the right to use the media alone or together with other information, and the right to license others to use or disseminate the media.

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If you plan to attend a program and will need assistance relating to a disability or have a special dietary requirement, please contact customer service at 800-537-3635, at least 5–7 business days prior to the event.

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21-0008

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