

RI SOCIETY CPAS – 2010-2011 CPE COURSE LISTING

DATE	TITLE	FIELD OF STUDY
May		
Wed 19	Delving into the Top Twelve Issues for Partnerships, LLCs and S Corps	Taxes
Thu 20	Tough Times: Best Tax and Financial Planning Strategies for a Bad Economy	Taxes
Tue 25	Loscalzo's Audits of Defined Contribution Pension Plans (Emphasizing 401k Plans)	Accounting (4), Auditing (4)
Wed 26	Loscalzo's Current Practice Issues and Solutions In Audits of Employee Benefit Plans	Accounting (4), Auditing (4)
June		
Tue 1	Audits of 401(k) Plans	Auditing
Wed 2	Audits of 403(b) Plans: A Challenging New Audit Area	Auditing (5), Accounting (3)
Thu 3	Advanced Controller and CFO Skills	Finance
Fri 4	AICPA's Annual Update for Controllers	Finance
Mon 7	Audits of HUD-Assisted Projects	Governmental Auditing
Tue 8	Applying A-133 to Nonprofit and Governmental Organizations	Governmental Auditing
Wed 9	International versus U.S. Accounting: What in the World is the Difference?	Accounting
Mon 7-Wed 9	AICPA/AHI Staff Training - Semi-Senior	Auditing
Thu 10	Fair Value Accounting: A Critical New Skill for All CPAs	Accounting
Fri 11	Loscalzo's Compilation and Review Essentials – The New Rules for Local Practitioners	Auditing
Mon 14	Accountants Guide to Fraud in Compilations/Reviews/Audits	Accounting (4), Auditing (4)
Tue 15	Fraud: 15 NEW Hot Topics	Accounting (4), Auditing (4)
Wed 16	Introduction to Business Valuation: Critical Skill Set in Today's Fair Value Accounting World	Management Advisory Services
Thu 17	Foundations in Governmental Accounting	Governmental Accounting
Fri 18	Right The First Time: Cases In Not-For-Profit Accounting And Auditing	Governmental Accounting (4), Governmental Auditing (4)
Mon 21	FASB Review and Update: Common GAAP Issues Impacting All CPAs	Accounting
Tue 22	Public Company Update: SEC, PCAOB, and Other Developments	Accounting (4), Auditing (4)
Thu 24	AICPA's Technical Hotline Annual Update: Top 10 GAAP Speed Bumps	Accounting
Fri 25	AICPA's Technical Hotline Annual Update: Top 12 Audit Speed Bumps	Auditing
Mon 28	Advanced Partnership/LLC Workshop: How to do Optional Step-Up in Basis Under 754 and Related Provisions	Taxes
Tue 29	Comparing and Contrasting the Tax Aspects of S Corporations, Partnerships, C Corporations, Sole Proprietorships, and Limited Liability Companies	Taxes
Wed 30	Case Studies in Compliance Auditing (AM)	Auditing
Wed 30	Loscalzo's Case Studies in Complex Not-for-Profit Accounting, Disclosure and Auditing Issues (PM)	Auditing
July		
Thu 1	Identifying and Addressing the Risk of Fraud in Not-for-Profit Organizations (AM)	Auditing
Thu 1	Selecting Major Programs for OMB Circular A-133 Audits/Understanding the Requirements of Government Auditing Standards (Yellow Book)(PM)	Auditing
August		
Tue 17	Budgeting, Forecasting and Business Analytics	Specialized Knowledge and Applications (4), Accounting (4)
Wed 18	Internal Controls for Small Business Accounting Systems	Accounting
Thu 19	Paperless Office Managing Documents in a Digital World	Specialized Knowledge and Applications
Mon 23	Loscalzo's Annual FASB and AICPA Update	Accounting (4), Auditing (4)
September		
Wed 1-Fri 3	AICPA/AHI Staff Training – Basic	Auditing
Thu 16	International Taxation: To and From the United States	Taxes
Fri 17	Multistate Income Tax: Simplifying the Complexities	Taxes

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September		
Mon 20	FASB Review for Industry	Accounting
Tue 21	Loscalzo's Frequently Asked Questions in GAAP Financial Statements (PM)	Accounting
Tue 21	International Accounting Standards – Differences with U.S. GAAP (AM)	Accounting
Wed 22	Loscalzo's Hands on Guide to Understanding and Testing Internal Control	Auditing
Thu 23	Small Business Retirement Plan Review: New Roth 401(k)s, KEOGHs, Traditional 401(k)s, IRAs, SEPs, and SIMPLEs	Taxes
Fri 24	The Best Income Tax, Estate Tax, and Financial-Planning Ideas of 2010	Taxes
Mon 27	Make Money For You and Your Clients:Surgent McCoy's Top Individual Tax Planning Strategies	Taxes
Tue 28	Make Money For You and Your Clients: Surgent McCoy's Top Business Tax Planning Strategies	Taxes
October		
CHANGED TO OCT 20(was 10/4)	GAAP and Disclosure Issues for the Closely Held Business	Accounting (4), Auditing (4)
Tue 5	Ethics Principles and Applications (AM)	Behavioral Ethics
Tue 5	Ethics, Leadership and the Role of the CPA (PM)	Ethics
Wed 6	Avoiding Bankruptcy - Surviving the Recession (A Case Study Approach)	Accounting (4), Auditing (4)
Thu 7	From Controller to CFO: How to Acquire the Skills Needed to Make the Leap (AM)	Personal Development
Thu 7	Identifying, Developing, and Hanging on to Talent (AM)	Management
Tue 12	Ethics for Accountants (AM)	Ethics
Tue 12	Ethics for Accountants (PM)	Ethics
Wed 13	Compilation and Review - Current Update	Auditing
Thu 14	Caesar's Wife: Tipping the Delicate Balance of Leadership and Ethics (AM)	Ethics
Thu 14	Producing Powerful Presentations: Performance and Profit (PM)	Personal Development
Thu 14	Caesar's Wife: Tipping the Delicate Balance of Leadership and Ethics (AM)	Ethics
Fri 15	ABCs of the Form 990	Taxes
Mon 18	Advanced Concepts in Estate Planning	Taxes
Tue 19	What You Need To Do Now In Estate Planning Under the New Tax Law	Taxes
Wed 20	GAAP and Disclosure Issues for the Closely Held Business	Accounting (4), Auditing (4)
Thu 21	Internal Control Essentials for Financial Managers, Accountants, and Auditors	Accounting
Fri 22	Internal Control Deficiencies: Assessment and Reporting Under SAS 115	Auditing
Mon 25	Fiduciary Income Tax Returns--Form 1041 Workshop	Taxes
Tue 26	Advanced Federal Income Taxation of Estates, Trusts, and Beneficiaries and Advanced 1041 Return Preparation Issues	Taxes
Wed 27	Business Sustainability: Keeping Lean but with More Green for the Company's Long Haul	Finance
Thu 28	Strategic Planning: A Simplified and Workable Approach for Private Companies	Business Management and Organization
Fri 29	Ex.Con Shares 15 Things You Need to Know About Fraud in a Turbulent Environment	Auditing (7), Ethics (1)
Wed 27-Fri 29	AICPA/AHI Staff Training - Beginning In-Charge	Auditing
November		
Mon 1	2010 Federal Tax Update	Taxes
Tue 2	Surgent McCoy's Comprehensive Guide to Tax Depreciaton, Amortization, and Property Transactions From Acquisition to Exchange or Disposition	Taxes
Wed 3	Complete Strategies For Maximizing Contributions, Rollovers, Distributions, and Estate Planning of IRAs, ROTH IRAs, SIMPLEs, and SEPs	Taxes
Fri 5	Professional Ethics for CPAs (AICPA Code of Ethics)	Regulatory Ethics
Fri 5	Professional Ethics for CPAs (AICPA Code of Ethics)	Regulatory Ethics
Mon 8	Advanced Update for Compilation, Review and Accounting Services	Auditing
Tue 9	Applying the Risk Assessment Standards Using a Case Study Approach	Auditing
Mon 8-Wed10	AICPA/AHI Staff Training - Supervisory	Personal Development (10), Communications (7), Business Management & Organization (7)

DATE	TITLE	FIELD OF STUDY
November		
Wed 10	Loscalzo's Tax, Cash and Modified Cash Basis Financial Statements and Other Alternatives to GAAP (OCBOA)	Accounting
Mon 15	Surgent McCoy's Advanced Individual Income Tax Return Issues	Taxes
Tue 16	The Best S Corporation, Limited Liability, and Partnership Update Course By Surgent McCoy	Taxes
Wed 17	Acquisitions to Grow the Business Structure, Due Diligence & Financing	Accounting (4), Business Management (4)
Thu 18	Cases in Corporate Ethics - Discussion of Real Life Conflicts (AM)	Ethics
Thu 18	Making Ethics Work - Cases in Ethical Decision Making (PM)	Ethics
Fri 19	Surgent McCoy's Federal Tax Camp	Taxes
Mon 22	Frequent Frauds Found in Governments and Not-For-Profits	Governmental Auditing
Tue 23	Governmental Accounting and Reporting: Putting It All Together	Governmental Accounting
Tue 30	Advanced FASB Review and Update: Tackling the Tougher GAAP Issues	Accounting
December		
Wed 1	Accounting and Auditing Update	Accounting (2), Auditing (2)
Wed 1	The Revised Yellow Book for Financial Audits	Governmental Auditing
Wed 1	Real-World Business Ethics for CPAs in Business & Industry: How Will You React?	Behavioral Ethics
Wed 1	Introduction to IFRS: Grasping the Big Picture	Accounting
Wed 1	Preventing Common OMB A-133 & Yellow Book Deficiencies: A Case Study Approach	Governmental Auditing
Wed 1	Financial Forecasting: Planning for Success	Finance
Thu 2	Compilation, Review, and Accounting Service Update	Auditing
Thu 2	Annual Update for State & Local Governments and Not-For-Profits	Governmental Accounting (2), Governmental Auditing (2)
Thu 2	Controller's Update: Latest Trends for Today's Financial Manager	Finance
Thu 2	Identifying and Communicating Internal Control Deficiencies Under SAS No. 115	Auditing
Thu 2	Revenue and Cash Receipts: Common Frauds and Internal Controls	Auditing
Thu 2	Taking Planning and Budgeting to a Higher Level: Critical Skills to Make the Trip	Finance
Mon 6	How To Use A Service Organization Report Properly(Part 1)/The Dangers Of Improper Revenue Recognition(Part 2)	Accounting (2); Auditing (2)
Mon 6	Meeting Workpaper Documentation Requirements (Part 1)/Using Nonstatistical Sampling For Efficient Audits (Part 2)	Auditing
Mon 6	A Day of Accounting (2) & Auditing (6)	Accounting (2); Auditing (6)
Wed 8	Nonprofit Auditing and Accounting Update	Governmental Accounting (4), Governmental Auditing (4)
Thu 9	Not-for-Profit Accounting & Reporting: From Start to Finish	Governmental Accounting
Fri 10	Social Security, Medicare, and Prescription Drug Retirement Benefits:What Every Baby Boomer Needs To Know Now	Taxes
Mon 13	Loscalzo's Annual FASB and AICPA Update	Accounting (4), Auditing (4)
Wed 15	The Top 50 Mistakes Practitioners Make and How to Fix Them: Dealing With the Internal Revenue Service	Taxes
Thu 16	Preparing the Form 990 For Nonprofit Organizations	Taxes
Fri 17	Annual Tax Forum	Taxes
Fri 17	Annual Tax Forum - Potpourri of Current Tax Developments - #1	Taxes
Fri 17	Annual Tax Forum - Estate and Gift Tax & Planning Update - #2	Taxes
Fri 17	Annual Tax Forum - 2010 Developments in S Corps, Partnerships & Disregarded Entities - #3	Taxes
Fri 17	Annual Tax Forum - What's New at the RI Division of Taxation - #4	Taxes
Mon 20	Converting Your Pension and IRAS to ROTH IRAS- A Major New Strategy Your Clients Must Consider	Taxes
January 2011		
Tue 11	Preparing Individual Tax Returns For New Staff and Para-Professionals	Taxes
Wed 12	The Complete Guide to Preparing Limited Liability Company, Partnership, and S Corporation Federal Income Tax Returns	Taxes