

The objective of the program is to broaden the knowledge of accountants and tax practitioners in order to relate particular specialties to the field of accounting and to examine developments in these professions.

ATTENDANCE: Accurate records of attendance will be maintained to verify and report continuing education hours. Three (3) Continuing Professional Education (CPE) units are awarded for each attended, for a possible total of twenty four (24) CPEs. To ensure the integrity of the program, student attendance will be monitored by the instructors throughout each presentation. A certificate will be available at the end of the course that you will be able to print directly from your own computer through Turbine.



COURSE NUMBERS AND DAYS:

XGD-206-5301
XGD-206-5302

Tuesdays 6:30pm – 9:30pm
Thursdays 6:30pm – 9:30pm

All classes will be presented on Zoom and administered through Turbine

COST FOR THE 8 WEEKS - \$250.00 (Regardless of how many presentations you attend).

REGISTRATION INFORMATION: Choose the course number that corresponds to the day you plan to attend the most. **If you have a schedule conflict you may attend class at one of the two days offered.** To receive CPE units, students **MUST** be registered/paid before they attend class. The course fee **MUST** be paid when you register. To register, complete the attached form and return to CCAC with a check or money order made payable to "CCAC" or call 412.788.7546 to register with a credit card at least one week before the course begins. Requests for refunds must be received 24 hours prior to the start of Week 1: Call 412.788.7546. Refunds will **NOT** be processed after the start of Week 1.
To Register Online go to our Website: <https://shopcommunityed.ccac.edu/Courses/Accountants.aspx>

Week 1: Accounting Trends and Developments

Speaker: Brian Pietrandrea

Category: Accounting & Auditing (Basic)

Tues 6/6, Thurs 6/8

How is the accounting industry changing? We'll discuss the changing landscapes, technology and other market forces that shape the accounting profession as we know it today.

Week 2: Aspects of Ethics for Accountants

Speaker: Matthew Robinowitz, JD

Category: Ethics (Basic)

Tues 6/13, Thurs 6/15

This course will cover the rules governing practice before the Internal Revenue Service, as contained in Circular 230. The course will also cover aspects of the AICPA Code of Professional Responsibility.

Week 3: Medicare Basics – What You Need to Know About Medicare

Speaker: William McKendree, JD

Category: Other (Basic)

Tues 6/20, Thurs 6/22

This presentation is an overview of the Medicare system and how it can be used to obtain affordable health services. We will examine Medicare's eligibility and enrollment criteria; the various parts that comprise the Medicare system; how these parts function and interact with each other and coordinate with non-Medicare health benefits. We will also look at how individual consumers can compare and evaluate available coverage options to achieve the most effective and affordable health coverage.

Week 4: SEC Update, Internal Controls and Ethics**Speaker: Brian Pietrandrea****Category: 2 hr Accounting & Auditing (Basic), 1 hr Ethics (Basic)****Tues 6/27, Thurs 6/29**

This class will provide an update of the latest SEC regulations and proposals; establishing and assessing an effective internal control strategy; as well as discussions pertaining a CPA's independence and conflicts of interest.

No Class This Week – Happy Independence Day!**Week 5: Process Audit Approach Part 1****Speaker: Nancy Lilling, CPA, CIA, CFE****Category: Accounting & Auditing (Basic)****Tues 7/11, Thurs 7/13**

This course will teach the basic steps to complete a process audit. This includes audit planning, risk and control identification, developing audit testing steps, workpaper documentation, and presentation of potential findings.

Week 6: Process Audit Approach Part 2**Speaker: Nancy Lilling, CPA, CIA, CFE****Category: Accounting & Auditing (Basic)****Tues 7/18, Thurs 7/20**

The course is a continuation of Part 1. Additionally, the course will teach how to develop a risk based audit plan as well as discussing open finding follow up and the subsequent Board reporting of the status of the findings.

Week 7: Retirement Planning: Utilizing Trusts and Power of Attorneys to Protect Assets**Speaker: Laurel Krajewski, Esquire****Category: Tax (Basic)****Tues 7/25, Thurs 7/27**

This course will discuss how Power of Attorneys and different types of Trusts can be utilized in retirement planning to protect assets. We will discuss the costs and benefits of each of these planning tools as well as how you can spot when a client may be a good fit for utilizing these tools so you can effectively assist clients in planning for retirement and potential long-term care.

Week 8: Liability Landscape in 2023**Speaker: Brian S. Bohn, CPWA®, CFP®, CFPA****Category: Accounting & Auditing (Basic)****Tues 8/1, Thurs 8/3**

This class will analyze the current liability environment and its effects on capital markets. This will include the fixed income market, real estate, and consumer habits.