

# CCH® CPELink Self-Study Courses — 2025

| COURSE TITLE   | FORMAT    | AUTHOR            | FIELD OF STUDY                                   | COURSE LEVEL | CPE | IRS PROGRAM #      | CTEC PROGRAM # |
|--|-----------|-------------------|--|--------------|-----|--------------------|----------------|
| <a href="#">Overview of the SECURE Act 2.0</a>   | On-demand | Klaralee Charlton | Taxes (2 hours)                                  | Basic        | 2   | 4VRWB-T-05698-25-S | 1075-CE-10019  |
| <a href="#">Disregarded Entities: Now You Don't See Them, Now You Do</a>               | On-demand | Bradley Burnett   | Taxes (2 hours)                                  | Basic        | 2   | 4VRWB-T-05665-25-S | 1075-CE-03860  |
| <a href="#">2025 Standards for Tennessee CPAs: State Specific Ethics</a>               | On-demand | Perry Moore       | Regulatory Ethics (2 hours)                      | Basic        | 2   |                    |                |
| <a href="#">Health Care Options for Small Businesses</a>                               | On-demand | Barbara Weltman   | Taxes (1 hour)                                   | Basic        | 1   | 4VRWB-T-05693-25-S | 1075-CE-10014  |
| <a href="#">Audit Horror Stories: What to Do When the IRS Audit Goes off the Rails</a> | On-demand | Eric Green        | Taxes (2 hours)                                  | Basic        | 2   | 4VRWB-T-05688-25-S | 1075-CE-10009  |
| <a href="#">Payroll Tax Train-Wreck: Resolving Your Client's Payroll Tax Nightmare</a> | On-demand | Eric Green        | Taxes (2 hours)                                  | Intermediate | 2   | 4VRWB-T-05687-25-S | 1075-CE-10008  |
| <a href="#">Making Your Client More Appealing: Taking the Client's Case to Appeals</a> | On-demand | Eric Green        | Taxes (2 hours)                                  | Basic        | 2   | 4VRWB-T-05686-25-S | 1075-CE-10007  |
| <a href="#">IRS Examinations of Cash Businesses</a>                                    | On-demand | Eric Green        | Taxes (2 hours)                                  | Intermediate | 2   | 4VRWB-T-05685-25-S | 1075-CE-10006  |
| <a href="#">Monthly Tax Update (May): Including The Latest on the 2025 Tax Bill</a>    | On-demand | Annette Nellen    | Taxes (2 hours)                                  | Update       | 2   | 4VRWB-U-05356-24-S | 1075-CE-03644  |
| <a href="#">Monthly Tax Update (April) - 2025</a>                                      | On-demand | Annette Nellen    | Taxes (2 hours)                                  | Update       | 2   | 4VRWB-U-05355-24-S | 1075-CE-03643  |
| <a href="#">Tax Credits for Businesses</a>   | On-demand | Barbara Weltman   | Taxes (1 hour)                                   | Basic        | 1   | 4VRWB-T-05684-25-S | 1075-CE-10005  |
| <a href="#">California Business Non-Conformity</a>                                     | On-demand | Jane Ryder        | Taxes (1 hour)                                   | Basic        | 1   | 4VRWB-T-05682-25-S | 1075-CE-10004  |
| <a href="#">Monthly Tax Update (March) - 2025</a>                                      | On-demand | Annette Nellen    | Taxes (2 hours)                                  | Update       | 2   | 4VRWB-U-05354-24-S | 1075-CE-03640  |
| <a href="#">Monthly Tax Update (February) - 2025</a>                                   | On-demand | Annette Nellen    | Taxes (2 hours)                                  | Update       | 2   | 4VRWB-U-05353-24-S | 1075-CE-03637  |
| <a href="#">Monthly Tax Update (January) -2025</a>                                     | On-demand | Annette Nellen    | Taxes (2 hours)                                  | Update       | 2   | 4VRWB-U-05350-24-S | 1075-CE-03634  |
| <a href="#">Creating Audit Trails in Microsoft Excel</a>                               | On-demand | David Ringstrom   | Specialized Knowledge and Applications (2 hours) | Intermediate | 2   |                    |                |
| <a href="#">A Basic Ethics Guidebook for Virginia CPAs – 2025 (VA-Approved)</a>        | On-demand | Allison McLeod    | Regulatory Ethics (2 hours)                      | Basic        | 2   |                    |                |
| <a href="#">Text Manipulation Techniques in Excel</a>                                  | On-demand | David Ringstrom   | Specialized                                      | Intermediate | 2   |                    |                |

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|  |           |   | Knowledge and Applications (2 hours) |              |   |                    |               |
| AI Tips and Tricks for Tax and Accounting                          | On-demand | CCH Editorial Staff                         | Information Technology (1 hour)      | Basic        | 1 |                    |               |
| Tax Rules for Vehicles   | On-demand | Barbara Weltman                             | Taxes (2 hours)                      | Basic        | 2 | 4VRWB-T-05664-25-S | 1075-CE-03859 |
| Insurance Fraud  | On-demand | Susan Harper                                | Taxes (2 hours)                      | Basic        | 2 | 4VRWB-T-05542-25-S | 1075-CE-03741 |
| Digital Assets and Cryptocurrency                                  | On-demand | Cory Campbell                               | Information Technology (2 hours)     | Basic        | 2 |                    |               |
| 2025 Estate & Financial Planning Quarterly Update (Spring)         | On-demand | Klaralee Charlton                           | Taxes (2 hours)                      | Update       | 2 | 4VRWB-U-05596-25-S | 1075-CE-03794 |
| New 2025 Federal Legislation and Analysis of Pending Tax Proposals | On-demand | Jane Ryder                                  | Taxes (2 hours)                      | Update       | 2 | 4VRWB-U-05588-25-S | 1075-CE-03787 |
| Robotics Process Automation (RPA): Best Practices and Case Studies | On-demand | Cory Campbell                               | Information Technology (2 hours)     | Basic        | 2 |                    |               |
| Casualties and Disasters: Understanding Tax Laws                   | On-demand | Susan Harper                                | Taxes (1 hour)                       | Basic        | 1 | 4VRWB-T-05541-25-S | 1075-CE-03740 |
| Ins and Outs of Alternative Investments                            | On-demand | Celia Davis<br>Clark Nuber<br>Lisa McCreedy | Taxes (2 hours)                      | Intermediate | 2 | 4VRWB-T-05548-25-S | 1075-CE-3747  |
| California Regulatory Ethics                                       | On-demand | Jane Ryder                                  | Regulatory Ethics (2 hours)          | Overview     | 2 |                    | 1075-CE-03875 |
| Basis Basics for S Corporation Shareholders                        | On-demand | James Hamill                                | Taxes (1 hour)                       | Basic        | 1 | 4VRWB-T-05530-25-S | 1075-CE-03728 |
| Tax Tales: The Wildest Cases                                       | On-demand | Susan Harper                                | Taxes (2 hours)                      | Basic        | 2 | 4VRWB-T-05591-25-S | 1075-CE-03739 |
| Lightning Fast Depreciation: The World of Federal Taxation         | On-demand | Greg White                                  | Taxes (2 hours)                      | Overview     | 2 | 4VRWB-T-05629-25-S | 1075-CE-03826 |
| Taxation of Non-fungible Tokens (NFTs)                             | On-demand | Allison McLeod                              | Taxes (2 hours)                      | Basic        | 2 | 4VRWB-T-05615-25-S | 1075-CE-03813 |
| Form 1099 and Worker Classification Issues                         | On-demand | Steven Mercatante                           | Taxes (2 hours)                      | Basic        | 2 | 4VRWB-T-05612-25-S | 1075-CE-03809 |
| Partnership Tax Updates  | On-demand | Allison McLeod                              | Taxes (2 hours)                      | Update       | 2 | 4VRWB-U-05627-25-S | 1075-CE-03824 |
| Planning for the Death of the Majority Shareholder                 | On-demand | Klaralee Charlton                           | Taxes (2 hours)                      | Intermediate | 2 | 4VRWB-T-05594-25-S | 1075-CE-03792 |
| Partnership Tax Allocations under Sections 704(b) and 704(c)       | On-demand | James Hamill                                | Taxes (2 hours)                      | Intermediate | 2 | 4VRWB-T-05529-25-S | 1075-CE-03727 |
| Basic Concepts of Individual Taxation                              | On-demand | Allison McLeod                              | Taxes (2 hours)                      | Basic        | 2 | 4VRWB-T-05614-25-S | 1075-CE-03812 |
| Turbo Charging Productivity With Artificial Intelligence           | On-demand | Stephen Yoss                                | Information Technology (2 hours)     | Basic        | 2 |                    |               |

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| 2025 Hot Tech Tools and Services for Financial Professionals                      | On-demand        | Stephen Yoss    | Specialized Knowledge (2 hours)        | Basic        | 2 |                    |               |
| What's Coming Next: Technology Strategies for CPAs                                | On-demand        | Stephen Yoss    | Information Technology (2 hours)       | Basic        | 2 |                    |               |
| Excel Functionality That Every Accountant Should Know: Intermediate               | On-demand        | Stephen Yoss    | Specialized Knowledge (2 hours)        | Basic        | 2 |                    |               |
| Excel Functionality That Every Accountant Should Know: Beginner                   | On-demand        | Stephen Yoss    | Specialized Knowledge (2 hours)        | Basic        | 2 |                    |               |
| Revenue Recognition - Top Challenges in Applying ASC 606                          | Downloadable PDF | Kelen Camehl    | Accounting (8 hours)                   | Overview     | 8 |                    |               |
| Identifying Audit Risks - Internal Controls and Audit Evidence                    | Downloadable PDF | Kelen Camehl    | Auditing (1 hour)                      | Overview     | 1 |                    |               |
| Identifying Audit Risks - Financial Reporting and Revenue Recognition             | Downloadable PDF | Kelen Camehl    | Auditing (1 hour)                      | Overview     | 1 |                    |               |
| Identifying Audit Risks - Behavioral and Management Cues                          | Downloadable PDF | Kelen Camehl    | Auditing (1 hour)                      | Overview     | 1 |                    |               |
| Form 10-K Series - Risk Factors, Controls, and Corporate Governance Disclosures   | Downloadable PDF | Kelen Camehl    | Accounting (1 hour)                    | Overview     | 1 |                    |               |
| Form 10-K Series - Management's Discussion and Analysis (MD&A)                    | Downloadable PDF | Kelen Camehl    | Accounting (1 hour)                    | Overview     | 1 |                    |               |
| Form 10-K Series - Introduction to SEC Form 10-K Requirements                     | Downloadable PDF | Kelen Camehl    | Accounting (Governmental) (1 hour)     | Overview     | 1 |                    |               |
| Form 10-K Series - Detailed Analysis of the Financial Statements Section          | Downloadable PDF | Kelen Camehl    | Accounting (1 hour)                    | Overview     | 1 |                    |               |
| Detecting Financial Statement Fraud - Revenue, Earnings, and Expense Manipulation | Downloadable PDF | Kelen Camehl    | Auditing (2 hours)                     | Overview     | 2 |                    |               |
| Detecting Financial Statement Fraud - Asset, Equity, and Reporting Mismanagement  | Downloadable PDF | Kelen Camehl    | Auditing (Governmental) (2 hours)      | Overview     | 2 |                    |               |
| Audit Red Flags - Navigating Financial, Behavioral, and Control Risks in Auditing | Downloadable PDF | Kelen Camehl    | Auditing (4 hours)                     | Overview     | 4 |                    |               |
| Accounting Principle Changes - What Every CPA Needs to Know                       | Downloadable PDF | Kelen Camehl    | Accounting (1 hour)                    | Overview     | 1 |                    |               |
| Accounting for Litigation and Legal Contingencies                                 | Downloadable PDF | Kelen Camehl    | Accounting (2 hours)                   | Overview     | 2 |                    |               |
| Accounting Estimates - Risks, Challenges, and Potential Bias                      | Downloadable PDF | Kelen Camehl    | Accounting (1 hour)                    | Overview     | 1 |                    |               |
| Accounting Estimates - Audit Techniques to Address Risks and Bias                 | Downloadable PDF | Kelen Camehl    | Auditing (1 hour)                      | Overview     | 1 |                    |               |
| Accounting Changes and Error Corrections - What Every CPA Needs to Know           | Downloadable PDF | Kelen Camehl    | Accounting (2 hours)                   | Overview     | 2 |                    |               |
| Regulatory Review for California CPAs   | On-demand        | Pat Patterson   | Regulatory Ethics (2 hours)            | Overview     | 2 |                    |               |
| Condos and HOAs: Federal Tax Issues   | On-demand        | Pat Patterson   | Taxes (2 hours)                        | Intermediate | 2 | 4VRWB-T-05590-25-S | 1075-CE-03789 |
| Condos and HOAs: GAAP, GAAS, & SSARS Issues                                       | On-demand        | Pat Patterson   | Accounting (1 hour), Auditing (1 hour) | Intermediate | 2 |                    |               |
| Net Investment Income Tax and Planning Strategies                                 | On-demand        | Barbara Weltman | Taxes (1 hour)                         | Overview     | 1 | 4VRWB-             | 1075-CE-03788 |

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| California Tax Update: Part 2  | On-demand | Douglas Kelley                                       | Taxes (2 hours)  | Update       | 2 | T-05589-25-S<br>4VRWB-<br>U-05434-25-S | 1075-CE-03720 |
| California Tax Update: Part 1  | On-demand | Douglas Kelley                                       | Taxes (2 hours)  | Update       | 2 | 4VRWB-<br>U-05433-25-S                 | 1075-CE-03719 |
| Self-Employment Tax: Today's World of Sharing, LLCs, and LPs   | On-demand | Annette Nellen                                       | Taxes (2 hours)  | Basic        | 2 | 4VRWB-<br>T-05536-25-S                 | 1075-CE-03734 |
| Recent Administrative Tax Legislation, Expiration of the (TCJA), Tax Policies, Reform and Tax Issues | On-demand | A.J. Reynolds<br>Michael Miranda                     | Taxes (2 hours)  | Basic        | 2 | 4VRWB-<br>T-05535-25-S                 | 1075-CE-03733 |
| Worker Classification: Dealing with Current Rules and What Might Lie Ahead                           | On-demand | Annette Nellen                                       | Taxes (2 hours)  | Basic        | 2 | 4VRWB-<br>T-05528-25-S                 | 1075-CE-03726 |
| Passive Loss Rules and Real Estate Professionals   | On-demand | Annette Nellen                                       | Taxes (2 hours)  | Basic        | 2 | 4VRWB-<br>T-05527-25-S                 | 1075-CE-03725 |
| IRS Trends and Developments  | On-demand | Lippes Mathias<br>Randall Andreozzi                  | Taxes (2 hours)  | Basic        | 2 | 4VRWB-<br>T-05428-25-S                 | 1075-CE-03714 |
| Solving Tax Research Puzzles   | On-demand | Jennifer Kowal                                       | Taxes (4 hours)  | Intermediate | 4 | 4VRWB-<br>T-05427-25-S                 | 1075-CE-03713 |
| Bankruptcy 101 - Why Are We Talking To You?  | On-demand | Lippes Mathias<br>Joann Sternheimer<br>Leigh Hoffman | Specialized Knowledge and Applications (2 hours)                 | Overview     | 2 |  |               |
| Current Expected Credit Risk Losses: How To Account and Audit Them                                   | On-demand | Salvatore Collemi                                    | Accounting (1 hour)  | Intermediate | 1 |  |               |
| 2025 Fraud Update  | On-demand | Robert Minniti                                       | Accounting (2 hours)   | Update       | 2 |  |               |
| W-2 & W-4 Payroll Regulatory Reporting Update  | On-demand | Miles Hutchinson                                     | Taxes (2 hours)  | Update       | 2 | 4VRWB-<br>U-05379-24-S                 | 1075-CE-03667 |
| Revenue Recognition Disclosure Requirements: Contracts with Customers                                | On-demand | Lynn Fountain  | Accounting (1 hour), Business Management & Organization (1 hour) | Intermediate | 2 |  |               |
| Fraud Focus on Internal Controls - Prevent and Protect   | On-demand | Lynn Fountain  | Accounting (1 hour), Business Management & Organization (1 hour) | Intermediate | 2 |  |               |
| Internal Controls: What Every Financial and Accounting Professional Needs to Know                    | On-demand | Lynn Fountain  | Accounting (1 hour), Business Management & Organization (1 hour) | Intermediate | 2 |  |               |
| Practical Application for Accounting for Income Taxes Based on Income                                | On-demand | Lynn Fountain  | Accounting (1 hour)  | Intermediate | 2 | 4VRWB-<br>T-05424-25-S                 | 1075-CE-03710 |
| 2025 Standards for Presentation, Compilation, and Review Services (SSARS): Winter Update             | On-demand | Pat Patterson  | Accounting (2 hours)   | Update       | 2 |  |               |
| 2025 Accounting Standards for CPAs: Winter Update  | On-demand | Pat Patterson  | Accounting (2 hours)   | Intermediate | 2 |  |               |

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| New Legislation and Updates  | On-demand | A.J. Reynolds     | Taxes (2 hours)                                 | Update       | 2 | 4VRWB-U-05461-25-S<br>4VRWB-T-05458-25-S | 1075-CE-03706 |
| Tax Implications on Changing LLC Structures                            | On-demand | A.J. Reynolds     | Taxes (2 hours)                                 | Basic        | 2 |  | 1075-CE-03705 |
| 2025 Ethics for Washington CPAs  | On-demand | Allison McLeod    | Regulatory Ethics (4 hours)                     | Basic        | 4 | 4VRWB-U-05378-24-S                       | 1075-CE-03666 |
| W-9 & 1099 Information Reporting Regulatory Update                     | On-demand | Miles Hutchinson  | Taxes (2 hours)                                 | Update       | 2 |  |               |
| Government Auditing - What's New in 2025                               | On-demand | Robert Minniti    | Auditing (Governmental) (2 hours)               | Basic        | 2 | 4VRWB-T-05198-24-S<br>4VRWB-T-05476-25-S | 1075-CE-03509 |
| Taxation of the Family Home  | On-demand | Klaralee Charlton | Taxes (2 hours)                                 | Basic        | 2 |  |               |
| Hobby Loss Rules   | On-demand | A.J. Reynolds     | Taxes (1 hour)                                  | Basic        | 1 | 4VRWB-T-05476-25-S                       | 1075-CE-03697 |
| Data Breaches, What's My Risk?   | On-demand | Robert Minniti    | Accounting (2 hours)                            | Basic        | 2 |  |               |
| Introduction to Government Accounting                                  | On-demand | Robert Minniti    | Accounting (Governmental) (2 hours)             | Basic        | 2 | 4VRWB-T-05476-25-S                       | 1075-CE-03697 |
| Introduction into Yellow Book Audits                                   | On-demand | Robert Minniti    | Auditing (Governmental) (2 hours)               | Basic        | 2 |  |               |
| Government Benefits Fraud  | On-demand | Robert Minniti    | Accounting (Governmental) (2 hours)             | Basic        | 2 | 4VRWB-T-05476-25-S                       | 1075-CE-03697 |
| Business Valuations: An Introduction                                   | On-demand | Robert Minniti    | Accounting (2 hours)                            | Basic        | 2 |  |               |
| Business Valuations: Assets/Cost Approach                              | On-demand | Robert Minniti    | Accounting (2 hours)                            | Basic        | 2 | 4VRWB-T-05476-25-S                       | 1075-CE-03697 |
| Auditing Internal Controls for Governments                             | On-demand | Robert Minniti    | Auditing (Governmental) (2 hours)               | Intermediate | 2 |  |               |
| Business Valuations: Developing Economic Outlooks in 2025              | On-demand | Robert Minniti    | Accounting (2 hours)                            | Intermediate | 2 | 4VRWB-T-05476-25-S                       | 1075-CE-03697 |
| Internal Controls for Smaller Not-For-Profit and Governmental Entities | On-demand | Robert Minniti    | Accounting (Governmental) (2 hours)             | Intermediate | 2 |  |               |
| Introduction to Accounting for Income Taxes Based on Income - Intro    | On-demand | Lynn Fountain     | Accounting (2 hours)                            | Intermediate | 2 | 4VRWB-T-05479-25-S                       | 1075-CE-03689 |
| Resolving the Most Common IRS Notices                                  | On-demand | Jim Buttonow      | Taxes (2 hours)                                 | Basic        | 2 |  |               |
| Introduction to Trusts   | On-demand | Daniel Johnson    | Specialized Knowledge and Applications (1 hour) | Overview     | 1 | 4VRWB-T-05479-25-S                       | 1075-CE-03689 |
| Form W-9/1099 Due Diligence for Accounts Payable                       | On-demand | Steven Mercatante | Taxes (2 hours)                                 | Basic        | 2 |  |               |

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| Preparing of Personal Financial Statements  | On-demand | Pat Patterson                                  | Accounting (2 hours)                                  | Update       | 2 |                    |               |
| Digging Deeper Into the IRS Dirty Dozen   | On-demand | Annette Nellen                                 | Taxes (2 hours)                                       | Overview     | 2 | 4VRWB-T-05475-25-S | 1075-CE-03659 |
| Government Accounting & Auditing Update - 2024 Review & 2025 Preview                            | On-demand | Robert Minniti                                 | Accounting (Governmental) (2 hours)                   | Basic        | 2 |                    |               |
| Identifying and Implementing the Proper Balance of Internal Controls                            | On-demand | Lynn Fountain                                  | Auditing (2 hours)                                    | Basic        | 2 |                    |               |
| Forecasting with Excel's Powerful Sensitivity Tools   | On-demand | Miles Hutchinson                               | Computer Software & Applications (2 hours)            | Intermediate | 2 |                    |               |
| IRS Tax Problem Solving Fundamentals  | On-demand | Jim Buttonow                                   | Taxes (2 hours)                                       | Basic        | 2 | 4VRWB-T-05474-25-S | 1075-CE-03682 |
| Assets and Liabilities Updated: For States and Local Governments                                | On-demand | Eric Berman                                    | Accounting (Governmental) (2 hours)                   | Basic        | 2 |                    |               |
| Breaking Down Recent Changes and Compliance Issues Involving Forms W-8 and W-9                  | On-demand | Steven Mercatante                              | Taxes (2 hours)                                       | Basic        | 2 | 4VRWB-T-05470-25-S | 1075-CE-03680 |
| 2025 Audit and Attestation Q & A  | On-demand | Pat Patterson                                  | Accounting (1 hour), Auditing (Governmental) (1 hour) | Basic        | 2 |                    |               |
| Gearing Up for June 30th Year-End   | On-demand | Eric Berman                                    | Accounting (Governmental) (2 hours)                   | Update       | 2 |                    |               |
| 2024 Form 990 Overview: A Walk thru of Form 990 and Common Schedules                            | On-demand | Clark Nuber<br>Sarah Huang<br>Carolyn Fjelstad | Taxes (2 hours)                                       | Basic        | 2 | 4VRWB-T-05469-25-S | 1075-CE-03613 |
| 2025 Auditing and Attestation Standards for CPAs: Spring Update                                 | On-demand | Pat Patterson                                  | Auditing (2 hours)                                    | Update       | 2 |                    |               |
| 2025 Accounting Standards for CPAs: Spring Update   | On-demand | Pat Patterson                                  | Accounting (2 hours)                                  | Intermediate | 2 |                    |               |
| Taxable Vs. Non-Taxable Fringe Benefits   | On-demand | Steven Mercatante                              | Taxes (2 hours)                                       | Basic        | 2 | 4VRWB-T-05468-25-S | 1075-CE-03676 |
| Procure to Pay - A Deep Dive into Accounts Payable  | On-demand | Anne Wheeler                                   | Accounting (2 hours)                                  | Overview     | 2 |                    |               |
| Travel Pay, T&E Reimbursements and Vicarious Liability  | On-demand | Miles Hutchinson                               | Specialized Knowledge (2 hours)                       | Basic        | 2 |                    |               |
| 2025 Statements on Standards for Accounting and Review Services (SSARS) for CPAs: Spring Update | On-demand | Pat Patterson                                  | Accounting (2 hours)                                  | Update       | 2 |                    |               |
| Tax Implications of House Flipping  | On-demand | A.J. Reynolds                                  | Taxes (2 hours)                                       | Basic        | 2 | 4VRWB-T-05473-25-S | 1075-CE-03693 |
| Consolidating Financial Data Across Multiple Workbooks  | On-demand | David Ringstrom                                | Computer Software & Applications (2 hours)            | Intermediate | 2 |                    |               |
| Creating Depreciation Schedules in Excel  | On-demand | David Ringstrom                                | Computer Software & Applications (2 hours)            | Intermediate | 2 |                    |               |

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| Introduction to Power Pivot in Excel  | On-demand | David Ringstrom   | Specialized Knowledge and Applications (2 hours) | Intermediate | 2 |                    |               |
| Mastering Excel References: Structured, Absolute, Mixed, Relative, and Spilled Ranges | On-demand | David Ringstrom   | Computer Software & Applications (2 hours)       | Intermediate | 2 |                    |               |
| AI and Microsoft Excel  | On-demand | David Ringstrom   | Specialized Knowledge and Applications (2 hours) | Intermediate | 2 |                    |               |
| The Importance of Details in the Vendor Master  | On-demand | Anne Wheeler      | Accounting (1 hour), Auditing (1 hour)           | Overview     | 2 |                    |               |
| Accelerating Payment Processes: Tips and Strategies                                   | On-demand | Anne Wheeler      | Accounting (1 hour)                              | Basic        | 1 |                    |               |
| Quality Management vs Quality Control   | On-demand | Pat Patterson     | Accounting (1 hour), Auditing (1 hour)           | Overview     | 2 |                    |               |
| GASB-103 and 104 - Gearing Up!  | On-demand | Eric Berman       | Accounting (Governmental) (2 hours)              | Overview     | 2 |                    |               |
| IRS Collection- Ability to Pay Alternatives   | On-demand | Jim Buttonow      | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-T-05467-25-S | 1075-CE-03687 |
| 2025 is The Year for Quality Management Issues  | On-demand | Pat Patterson     | Accounting (1 hour), Auditing (1 hour)           | Overview     | 2 |                    |               |
| Segregation of Duties for Core Business Processes                                     | On-demand | Lynn Fountain     | Accounting (2 hours)                             | Basic        | 2 |                    |               |
| 20 Essential Tax Problem Solving Tips   | On-demand | Jim Buttonow      | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-T-05465-25-S | 1075-CE-03688 |
| Preparation, Compilation, and Review: What's The Difference?                          | On-demand | Pat Patterson     | Accounting (2 hours)                             | Basic        | 2 |                    |               |
| Accounting and Financial Reporting in Today's Economy                                 | On-demand | Lynn Fountain     | Accounting (2 hours)                             | Intermediate | 2 |                    |               |
| Introduction to Payroll Law   | On-demand | Miles Hutchinson  | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-T-05464-25-S | 1075-CE-03670 |
| Recent Changes in Sales and Use Compliance and Reporting                              | On-demand | Steven Mercatante | Taxes (2 hours)                                  | Intermediate | 2 | 4VRWB-T-05463-25-S | 1075-CE-03675 |
| How to Successfully Use the IRS Offer in Compromise Program                           | On-demand | Jim Buttonow      | Taxes (4 hours)                                  | Basic        | 4 | 4VRWB-T-05683-25-S | 1075-CE-03684 |
| Introduction to Regular Expressions in Excel  | On-demand | David Ringstrom   | Computer Software & Applications (2 hours)       | Intermediate | 2 |                    |               |
| 1099 Corrections, B-Notice Processing, and Backup Withholding Tips for 2025           | On-demand | Steven Mercatante | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-T-05393-24-S | 1075-CE-03681 |
| IRC §751 (Hot Assets)   | On-demand | A.J. Reynolds     | Taxes (2 hours)                                  | Overview     | 2 | 4VRWB-T-05453-25-S | 1075-CE-03692 |
| Using Excel for Debt and Loan Management  | On-demand | David Ringstrom   | Specialized                                      | Intermediate | 2 |                    |               |



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|   |           |   | Knowledge and Applications (2 hours)   |              |   |                    |               |
| State and International Tax Compliance for Not-for-Profits  | On-demand | Clark Nuber<br>Frances Olson                | Taxes (2 hours)                        | Intermediate | 2 | 4VRWB-T-05460-25-S | 1075-CE-03721 |
| GASB-100, 101 and 102 - Have We Got it Yet?   | On-demand | Eric Berman                                 | Accounting (Governmental) (2 hours)    | Update       | 2 |                    |               |
| Internal Auditing - 2024 Review & 2025 Preview  | On-demand | Robert Minniti                              | Auditing (2 hours)                     | Basic        | 2 |                    |               |
| Section 1031 Exchanges: Qualification and Tax Reporting   | On-demand | James Hamill                                | Taxes (2 hours)                        | Basic        | 2 | 4VRWB-T-05459-25-S | 1075-CE-03571 |
| 2025 and the Audit Standards Board  | On-demand | Pat Patterson                               | Auditing (2 hours)                     | Basic        | 2 |                    |               |
| Form 1065 K-1s: IRS Throws Rocks at Hornets' Nest   | On-demand | Bradley Burnett                             | Taxes (2 hours)                        | Update       | 2 | 4VRWB-U-05457-25-S | 1075-CE-03556 |
| Accounting Standards for CIRAs (Common Interest Realty Associations)                              | On-demand | Pat Patterson                               | Accounting (1 hour), Auditing (1 hour) | Update       | 2 |                    |               |
| Tax Season Tune Up  | On-demand | Bradley Burnett                             | Taxes (2 hours)                        | Update       | 2 | 4VRWB-U-05455-25-S | 1075-CE-03555 |
| Auditing Standards for CPAs: Winter Update 2025   | On-demand | Pat Patterson                               | Auditing (2 hours)                     | Update       | 2 |                    |               |
| Turning Theory into Practice for Trusts and Estates   | On-demand | Michael Miranda                             | Taxes (2 hours)                        | Intermediate | 2 | 4VRWB-T-05454-25-S | 1075-CE-03661 |
| Crypto Frauds 2025 Update   | On-demand | Robert Minniti                              | Accounting (2 hours)                   | Basic        | 2 |                    |               |
| Understanding Tax Policy and Reform 2025  | On-demand | Annette Nellen                              | Taxes (2 hours)                        | Update       | 2 | 4VRWB-U-05452-25-S | 1075-CE-03636 |
| Crucial Real Estate Insights Part 4: Passive Loss Issues and Dispositions                         | On-demand | Greg White                                  | Taxes (2 hours)                        | Basic        | 2 | 4VRWB-T-05451-25-S | 1075-CE-03609 |
| Form 990PF: Tax Return Walk through and Overview of the Basics                                    | On-demand | Clark Nuber<br>Celia Davis<br>Lisa McCreedy | Taxes (2 hours)                        | Basic        | 2 | 4VRWB-T-05450-25-S | 1075-CE-03611 |
| Tax Planning for Possible TCJA Sunset   | On-demand | Michael Miranda                             | Taxes (1 hour)                         | Basic        | 1 | 4VRWB-T-05537-25-S | 1075-CE-03735 |
| Tax Reporting for Overseas Assets - Compliance Issues Incl Foreign Bank Acc Reports and Form 8938 | On-demand | Robert Misey                                | Taxes (2 hours)                        | Basic        | 2 | 4VRWB-T-05447-25-S | 1075-CE-03604 |
| Crucial Real Estate Insights Part 3: §199A Deductions for Real Estate                             | On-demand | Greg White                                  | Taxes (2 hours)                        | Basic        | 2 | 4VRWB-T-05448-25-S | 1075-CE-03608 |
| W-8 & 1042-S Non-resident Alien Regulatory Reporting Update                                       | On-demand | Miles Hutchinson                            | Taxes (2 hours)                        | Update       | 2 | 4VRWB-U-05446-25-S | 1075-CE-03668 |
| Form 709 - Tax Compliance, Review and Planning  | On-demand | Michael Miranda                             | Taxes (2 hours)                        | Basic        | 2 | 4VRWB-T-05445-25-S | 1075-CE-03632 |
| 2025 Government A&A Update: Government T&E Fraud  | On-demand | Robert Minniti                              | Accounting (Governmental) (2 hours)    | Basic        | 2 |                    |               |
| Crucial Real Estate Insights Part 2: Partial Dispositions, Removal Costs, & Max Interest Expense  | On-demand | Greg White                                  | Taxes (2 hours)                        | Basic        | 2 | 4VRWB-T-05313-24-S | 1075-CE-03607 |
| EIC Eligibility and Due Diligence   | On-demand | A.J. Reynolds                               | Taxes (2 hours)                        | Basic        | 2 | 4VRWB-T-05444-25-S | 1075-CE-03669 |



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| Intermediate Partnership Taxation  | On-demand        | James Hamill   | Taxes (4 hours)                     | Intermediate | 4 | 4VRWB-T-05443-25-S | 1075-CE-3570  |
| Form 1041: Tax Compliance, Review and Planning - Intermediate                              | On-demand        | Michael Miranda  | Taxes (2 hours)                     | Intermediate | 2 | 4VRWB-T-05442-25-S | 1075-CE-03631 |
| S Corp: Compliance & Status Matters, Tax Savings, PTET, & Other Regulations                | On-demand        | Jane Ryder   | Taxes (2 hours)                     | Basic        | 2 | 4VRWB-T-05441-25-S | 1075-CE-03605 |
| Crucial Real Estate Insights Part 1: Acquisition Strategies                                | On-demand        | Greg White   | Taxes (2 hours)                     | Basic        | 2 | 4VRWB-T-05440-25-S | 1075-CE-03603 |
| Tax for Foreign Businesses Coming to the United States                                     | On-demand        | Robert Misey   | Taxes (1 hour)                      | Basic        | 1 | 4VRWB-T-05432-25-S | 1075-CE-03718 |
| Basic Partnership Taxation   | On-demand        | James Hamill   | Taxes (4 hours)                     | Basic        | 4 | 4VRWB-T-05439-25-S | 1075-CE-03569 |
| 2024 Individual Tax Update   | On-demand        | Bradley Burnett  | Taxes (8 hours)                     | Update       | 8 | 4VRWB-U-05246-24-S | 1075-CE-03552 |
| 2025 Government A&A Update: What Changed in 2024   | On-demand        | Robert Minniti   | Accounting (Governmental) (2 hours) | Basic        | 2 |                    |               |
| Form 1041 - Tax Compliance, Review and Planning - Beginners                                | On-demand        | Michael Miranda  | Taxes (2 hours)                     | Basic        | 2 | 4VRWB-T-05438-25-S | 1075-CE-03629 |
| S Corp: Shareholder Reasonable Comp., Health Insurance, Reimbursed Expenses & Tax Planning | On-demand        | Jane Ryder   | Taxes (2 hours)                     | Basic        | 2 | 4VRWB-T-05437-25-S | 1075-CE-3606  |
| Planning and Compliance for Foreign Partnerships and Form 8865                             | On-demand        | Robert Misey   | Taxes (2 hours)                     | Basic        | 2 | 4VRWB-T-05436-25-S | 1075-CE-03601 |
| Form 706 - Tax Compliance, Review and Planning   | On-demand        | Michael Miranda  | Taxes (2 hours)                     | Basic        | 2 | 4VRWB-T-05435-25-S | 1075-CE-03628 |
| Shrinking Public Law 86-272 Protections  | On-demand        | Hodgson Russ LLP<br>Joseph Endres<br>Ariele Doolittle<br>Joseph Tantillo | Taxes (2 hours)                     | Overview     | 2 |                    |               |
| Changing Your State Tax Residency  | On-demand        | Hodgson Russ LLP<br>Andrew Wright<br>Emma Savino                         | Taxes (2 hours)                     | Overview     | 2 |                    |               |
| Managing a Multistate Voluntary Disclosure Process in an Economic Nexus World              | On-demand        | Hodgson Russ LLP<br>K. Craig Reilly<br>Brandon Bourg                     | Taxes (2 hours)                     | Basic        | 2 |                    |               |
| Multistate Income Sourcing: Performance Based vs. Market Based Sourcing                    | On-demand        | Elizabeth Pascal<br>Debra Herman<br>Hodgson Russ LLP<br>Mario Caito      | Taxes (2 hours)                     | Overview     | 2 |                    |               |
| State and Local Reporting: 1099 and SALT Issues  | On-demand        | Steven Mercatante  | Taxes (2 hours)                     | Basic        | 2 | 4VRWB-T-05253-24-S |               |
| Top Accounting and Auditing Issues for 2025 CPE Course: Module 2                           | Downloadable PDF | Kelen Camehl<br>Robert Minniti<br>Susan Harper                           | Auditing (5 hours)                  | Basic        | 5 |                    |               |
| Top Accounting and Auditing Issues for 2025 CPE Course: Module 1                           | Downloadable PDF | Robert Minniti<br>Pat Patterson  | Accounting (8 hours)                | Intermediate | 8 |                    |               |
| Top Federal Tax Issues for 2025 CPE Course: Module 2                                       | Downloadable PDF | A.J. Reynolds<br>Jim Buttonow  | Taxes (9 hours)                     | Intermediate | 9 | 4VRWB-T-05297-24-S | 1075-CE-03586 |

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|  |                  | Klaralee Charlton<br>Steven Mercatante<br>Susan Harper  |  |              |    |                        |               |
| Top Federal Tax Issues for 2025 CPE Course: Module 1           | Downloadable PDF | Barbara Weltman<br>Bradley Burnett<br>David Morrissey<br>Greg White<br>Jane Ryder<br>Steven Antico, Esq | Taxes (10 hours)                                 | Intermediate | 10 | 4VRWB-<br>T-05296-24-S | 1075-CE-03585 |
| Amending Business Income Tax Returns                           | On-demand        | Barbara Weltman   | Taxes (1 hour)                                   | Basic        | 1  | 4VRWB-<br>T-05301-24-S | 1075-CE-03590 |
| Ethics for Government Auditors                                 | On-demand        | Robert Minniti  | Auditing (2 hours)                               | Basic        | 2  |                        |               |
| Ethics for Government Accountants                              | On-demand        | Robert Minniti  | Regulatory Ethics<br>(2 hours)                   | Basic        | 2  |                        |               |
| Intelligent Accounting: Exploring AI and RPA Applications      | On-demand        | Cory Campbell   | Information<br>Technology (2<br>hours)           | Basic        | 2  |                        |               |
| 2024 Federal Tax Update  | On-demand        | Bradley Burnett   | Taxes (8 hours)                                  | Update       | 8  | 4VRWB-<br>U-05248-24-S | 1075-CE-03554 |
| Crypto Currencies & Taxes 2024 Update                          | On-demand        | Robert Minniti  | Taxes (2 hours)                                  | Update       | 2  | 4VRWB-<br>U-05212-24-S | 1075-CE-03523 |
| Accounting Oversight: Recognizing and Addressing Blind Spots   | On-demand        | Cory Campbell   | Information<br>Technology (2<br>hours)           | Basic        | 2  |                        |               |
| 2024 Partnership Update: Developments You Need to Know         | On-demand        | Greg White  | Taxes (1 hour)                                   | Update       | 1  | 4VRWB-<br>U-05225-24-S | 1075-CE-03535 |
| How to Handle the Top 10 Issues in an IRS Small Business Audit | On-demand        | Jim Buttonow  | Taxes (2 hours)                                  | Basic        | 2  | 4VRWB-<br>T-05062-23-S | 1075-CE-03362 |
| Hot Tax Topics at Year End for 2024                            | On-demand        | Annette Nellen  | Taxes (2 hours)                                  | Update       | 2  | 4VRWB-<br>U-05133-24-S | 1075-CE-03437 |
| 2024 Business Tax Update                                       | On-demand        | Bradley Burnett   | Taxes (7 hours)                                  | Update       | 7  | 4VRWB-<br>U-05539-25-S | 1075-CE-03737 |
| What's New in Microsoft 365 in 2024                            | On-demand        | David Ringstrom   | Computer Software<br>& Applications (2<br>hours) | Intermediate | 2  |                        |               |
| International Tax Year End Update                              | On-demand        | Robert Misey  | Taxes (2 hours)                                  | Update       | 2  | 4VRWB-<br>U-05207-24-S | 1075-CE-03518 |
| Getting Rid of Penalties                                       | On-demand        | Susan Harper  | Taxes (2 hours)                                  | Basic        | 2  | 4VRWB-<br>T-05165-24-S | 1075-CE-03469 |
| Cutting Edge Tax Strategies for Real Estate: Part 2            | On-demand        | Greg White  | Taxes (4 hours)                                  | Intermediate | 4  | 4VRWB-<br>T-05227-24-S | 1075-CE-03536 |
| Cutting Edge Tax Strategies for Real Estate: Part 1            | On-demand        | Greg White  | Taxes (4 hours)                                  | Intermediate | 4  | 4VRWB-<br>T-05228-24-S | 1075-CE-03537 |
| Annual Exempt Organization Tax Update                          | On-demand        | Clark Nuber<br>Jennifer Becker<br>Harris<br>Frances Olson   | Taxes (2 hours)                                  | Basic        | 2  | 4VRWB-<br>U-05120-24-S | 1075-CE-03424 |
| 2024 S Corporation Update                                      | On-demand        | Greg White  | Taxes (2 hours)                                  | Update       | 2  | 4VRWB-                 | 1075-CE-03531 |

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| 2024 Form 1099 Filing Update  | On-demand | Steven Mercatante             | Taxes (2 hours)                        | Update       | 2 | U-05221-24-S<br>4VRWB-U-05254-24-S | 1075-CE-03559 |
| Section 199A Qualified Business Income  | On-demand | James Hamill                  | Taxes (2 hours)                        | Basic        | 2 | 4VRWB-T-05263-24-S                 | 1075-CE-03568 |
| Integration and Sharing Data for Financial Professionals  | On-demand | Stephen Yoss                  | Information Technology (2 hours)       | Basic        | 2 |                                    |               |
| Getting Ready for Calendar Year End 2024 Financial Reporting Season and What Is Happening in 2025 | On-demand | Eric Berman                   | Accounting (Governmental) (2 hours)    | Update       | 2 |                                    |               |
| 2024 New Quality Management Issues and Updates  | On-demand | Pat Patterson                 | Accounting (1 hour), Auditing (1 hour) | Intermediate | 2 |                                    |               |
| 2024 Business Federal Tax Update  | On-demand | Greg White                    | Taxes (5 hours)                        | Update       | 5 | 4VRWB-U-05229-24-S                 | 1075-CE-03691 |
| Tax Issues for the Gig Economy  | On-demand | Barbara Weltman               | Taxes (1 hour)                         | Overview     | 1 | 4VRWB-T-05270-24-S                 | 1075-CE-03576 |
| Estate Administration Process: A Practitioner's Guide   | On-demand | Klaralee Charlton             | Taxes (2 hours)                        | Basic        | 2 | 4VRWB-T-05073-23-S                 | 1075-CE-03377 |
| 1120 Preparation and Planning 6: Estimated Taxes and Special Topics (2025 Edition)                | On-demand | Greg White<br>Barbara Weltman | Taxes (1 hour)                         | Basic        | 1 | 4VRWB-T-05309-24-S                 | 1075-CE-03597 |
| 1120 Preparation and Planning 5: Tax and Payments (2025 Edition)                                  | On-demand | Greg White<br>Barbara Weltman | Taxes (1 hour)                         | Basic        | 1 | 4VRWB-T-05310-24-S                 | 1075-CE-03598 |
| 1120 Preparation and Planning 4: Deductions-Part 2 (2025 Edition)                                 | On-demand | Greg White<br>Barbara Weltman | Taxes (2 hours)                        | Basic        | 2 | 4VRWB-T-05308-24-S                 | 1075-CE-03596 |
| 1120 Preparation and Planning 3: Deductions-Part 1 (2025 Edition)                                 | On-demand | Greg White<br>Barbara Weltman | Taxes (2 hours)                        | Basic        | 2 | 4VRWB-T-05307-24-S                 | 1075-CE-03595 |
| 1120 Preparation and Planning 2: Income (2025 Edition)  | On-demand | Greg White<br>Barbara Weltman | Taxes (2 hours)                        | Basic        | 2 | 4VRWB-T-05306-24-S                 | 1075-CE-03594 |
| 1120 Preparation and Planning 1: Introduction to Form 1120 (2025 Edition)                         | On-demand | Greg White<br>Barbara Weltman | Taxes (1 hour)                         | Basic        | 1 | 4VRWB-T-05304-24-S                 | 1075-CE-03593 |
| 1040 Preparation and Planning 12: Figuring Tax Liability and Making Tax Payments (2025)           | On-demand | Barbara Weltman<br>Greg White | Taxes (1 hour)                         | Basic        | 1 | 4VRWB-T-05302-24-S                 | 1075-CE-03591 |
| 1040 Preparation and Planning 11: Tax Credits (2025)  | On-demand | Barbara Weltman<br>Greg White | Taxes (2 hours)                        | Basic        | 2 | 4VRWB-T-05298-24-S                 | 1075-CE-03587 |
| 1040 Preparation and Planning 10: Other Taxes (2025)  | On-demand | Barbara Weltman<br>Greg White | Taxes (2 hours)                        | Basic        | 2 | 4VRWB-T-05299-24-S                 | 1075-CE-03588 |
| 1040 Preparation and Planning 9: Standard Deduction and Itemized Deductions (2025)                | On-demand | Barbara Weltman<br>Greg White | Taxes (3 hours)                        | Basic        | 3 | 4VRWB-T-05303-24-S                 | 1075-CE-03592 |
| 1040 Preparation and Planning 8: Adjustments to Gross Income (2025)                               | On-demand | Barbara Weltman<br>Greg White | Taxes (2 hours)                        | Intermediate | 2 | 4VRWB-T-05300-24-S                 | 1075-CE-03589 |
| 1040 Preparation and Planning 7: Other Income and Exclusions (2025)                               | On-demand | Barbara Weltman<br>Greg White | Taxes (2 hours)                        | Basic        | 2 | 4VRWB-T-05294-24-S                 | 1075-CE-03584 |
| 1040 Preparation and Planning 6: Gross Income: Business, Farm, and Rental Income (2025)           | On-demand | Barbara Weltman<br>Greg White | Taxes (6 hours)                        | Intermediate | 6 | 4VRWB-T-05293-24-S                 | 1075-CE-3583  |
| 1040 Preparation and Planning 5: Gross Income: Capital Gains and Losses (2025)                    | On-demand | Barbara Weltman<br>Greg White | Taxes (6 hours)                        | Basic        | 6 | 4VRWB-T-05292-24-S                 | 1075-CE-03582 |

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| 1040 Preparation and Planning 4: Gross Income: Interest, Dividends, and Other Ordinary (2025) | On-demand | Barbara Weltman<br>Greg White | Taxes (2 hours)                        | Basic        | 2 | 4VRWB-T-05291-24-S | 1075-CE-03581 |
| 1040 Preparation and Planning 3: Gross Income: Compensation and Fringe Benefits (2025)        | On-demand | Barbara Weltman<br>Greg White | Taxes (2 hours)                        | Intermediate | 2 | 4VRWB-T-05290-24-S | 1075-CE-03579 |
| 1040 Preparation and Planning 2: Filing Status (2025)   | On-demand | Barbara Weltman<br>Greg White | Taxes (1 hour)                         | Basic        | 1 | 4VRWB-T-05276-24-S | 1075-CE-03577 |
| 1040 Preparation and Planning 1: Fundamentals (2025)  | On-demand | Greg White<br>Barbara Weltman | Taxes (2 hours)                        | Basic        | 2 | 4VRWB-T-05277-24-S | 1075-CE-03578 |
| Analyzing Payroll Data in Microsoft Excel   | On-demand | David Ringstrom               | Specialized Knowledge (2 hours)        | Basic        | 2 |                    |               |
| Estate & Financial Planning Year End Update 2024  | On-demand | Klaralee Charlton             | Taxes (2 hours)                        | Update       | 2 | 4VRWB-U-05197-24-S | 1075-CE-03508 |
| The Dirty Dozen Tax Scams: What You Should Know to Protect Your Clients                       | On-demand | Susan Harper                  | Taxes (2 hours)                        | Basic        | 2 | 4VRWB-T-05164-24-S | 1075-CE-03468 |
| 1099-NEC/MISC Federal and State Filing Tips   | On-demand | Steven Mercatante             | Taxes (2 hours)                        | Basic        | 2 | 4VRWB-T-05256-24-S | 1075-CE-03561 |
| 2024 Leases Update  | On-demand | Pat Patterson                 | Accounting (1 hour), Auditing (1 hour) | Update       | 2 |                    |               |
| Current Due Process Documents and Projects of the GASB  | On-demand | Eric Berman                   | Auditing (Governmental) (2 hours)      | Update       | 2 |                    |               |
| 2024 Tax Updates for Businesses   | On-demand | Barbara Weltman               | Taxes (1 hour)                         | Update       | 1 | 4VRWB-U-05261-24-S | 1075-CE-03566 |
| Preparing Form 1065: Part 2   | On-demand | Greg White                    | Taxes (4 hours)                        | Basic        | 4 | 4VRWB-T-05224-24-S | 1075-CE-03534 |
| Building Your Professional Presence   | On-demand | Annette Nellen                | Personal Development (2 hours)         | Basic        | 2 |                    |               |
| Audits-Real Life Examples of Audit Trouble Shooting, Audit Negotiations, & Successful Audit   | On-demand | Jane Ryder                    | Taxes (2 hours)                        | Basic        | 2 | 4VRWB-T-05190-24-S | 1075-CE-03501 |
| 2024 Tax Updates for Individuals  | On-demand | Barbara Weltman               | Taxes (1 hour)                         | Update       | 1 | 4VRWB-U-05260-24-S | 1075-CE-03565 |
| 2024 GAAP, GAAS, & SSARS Update   | On-demand | Pat Patterson                 | Accounting (1 hour), Auditing (1 hour) | Update       | 2 |                    |               |
| Preparing Form 1065: Part 1   | On-demand | Greg White                    | Taxes (4 hours)                        | Basic        | 4 | 4VRWB-T-05220-24-S | 1075-CE-03530 |
| IRS Compliance Enforcement Update and Trends  | On-demand | Jim Buttonow                  | Taxes (2 hours)                        | Basic        | 2 | 4VRWB-T-05061-23-S | 1075-CE-03361 |
| 2024 Individual Federal Tax Update  | On-demand | Greg White                    | Taxes (4 hours)                        | Update       | 4 | 4VRWB-U-05233-24-S | 1075-CE-03542 |
| Automation For Increasing Personal Efficiency and Effectiveness                               | On-demand | Stephen Yoss                  | Information Technology (2 hours)       | Basic        | 2 |                    |               |
| 2024 LLCs: Reducing Self-employment Tax and Maximizing the 20% Passthrough Deduction          | On-demand | Greg White                    | Taxes (2 hours)                        | Intermediate | 2 | 4VRWB-T-05231-24-S | 1075-CE-03540 |

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| 2024 Accounting and Auditing Update   | On-demand | Lewis Fisher      | Accounting (1 hour), Auditing (1 hour) | Update       | 2 |                    |               |
| 2024 Accounting and Auditing End-of-Year Tune-up                                    | On-demand | Pat Patterson     | Accounting (1 hour), Auditing (1 hour) | Update       | 2 |                    |               |
| 1120-S Mastery and Planning - Part 2  | On-demand | Greg White        | Taxes (4 hours)                        | Basic        | 4 | 4VRWB-T-05222-24-S | 1075-CE-03532 |
| Examination of Income   | On-demand | Susan Harper      | Taxes (2 hours)                        | Basic        | 2 | 4VRWB-T-05163-24-S | 1075-CE-03467 |
| Corporate Transparency Act Compliance and BOI Reporting                             | On-demand | Jane Ryder        | Taxes (1 hour)                         | Basic        | 1 | 4VRWB-T-05191-24-S | 1075-CE-03633 |
| Form 1042/1042-S Reporting  | On-demand | Steven Mercatante | Taxes (2 hours)                        | Basic        | 2 | 4VRWB-T-05255-24-S | 1075-CE-03560 |
| Top Occupational Fraud Schemes  | On-demand | Lynn Fountain     | Accounting (1 hour), Auditing (1 hour) | Basic        | 2 |                    |               |
| Partnership and S Corporation Tax Filing Issues                                     | On-demand | James Hamill      | Taxes (2 hours)                        | Basic        | 2 | 4VRWB-T-05262-24-S | 1075-CE-03567 |
| 2024 Major Audit Issues   | On-demand | Pat Patterson     | Auditing (2 hours)                     | Update       | 2 |                    |               |
| 1120-S Mastery and Planning - Part 1  | On-demand | Greg White        | Taxes (4 hours)                        | Basic        | 4 | 4VRWB-T-05223-24-S | 1075-CE-03533 |
| Not-for-Profits and Common Mistakes on Financials                                   | On-demand | Pat Patterson     | Accounting (1 hour), Auditing (1 hour) | Update       | 2 |                    |               |
| Embracing Technology Change in Accounting   | On-demand | Cory Campbell     | Information Technology (2 hours)       | Basic        | 2 |                    |               |
| Detecting and Preventing Cash Frauds  | On-demand | Robert Minniti    | Accounting (2 hours)                   | Basic        | 2 |                    |               |
| The Chicken Wing Fraud - An Analysis of Government Procurement Frauds               | On-demand | Robert Minniti    | Accounting (Governmental) (2 hours)    | Basic        | 2 |                    |               |
| Working with a Start-Up Business  | On-demand | Robert Minniti    | Business Law (2 hours)                 | Basic        | 2 |                    |               |
| Cybersecurity 2024: Proactive Defense for CPAs                                      | On-demand | Stephen Yoss      | Information Technology (2 hours)       | Basic        | 2 |                    |               |
| Representing Your Client in an IRS Audit  | On-demand | Jim Buttonow      | Taxes (2 hours)                        | Basic        | 2 | 4VRWB-T-05060-23-S | 1075-CE-03359 |
| Preparing U.S. Personal Tax Returns for Cross Border Persons: Common Top Tax Issues | On-demand | Robert Misey      | Taxes (2 hours)                        | Basic        | 2 | 4VRWB-T-05208-24-S | 1075-CE-03519 |
| Audit Update  | On-demand | Garth Sheriff     | Auditing (2 hours)                     | Intermediate | 2 |                    |               |
| Risk Based Auditing - Establishing a Methodology                                    | On-demand | Lynn Fountain     | Accounting (1 hour), Auditing (1 hour) | Basic        | 2 |                    |               |
| Digital Asset Broker Reporting Update   | On-demand | Annette Nellen    | Taxes (2 hours)                        | Update       | 2 | 4VRWB-U-05130-24-S | 1075-CE-03434 |

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| 1099-MISC Reporting of Rents, Royalties, Med Service Providers, Fringe Benefit                       | On-demand | Steven Mercatante | Taxes (2 hours)                        | Basic        | 2 | 4VRWB-T-05259-24-S | 1075-CE-03564 |
| 2024 Auditing Standards for CPAs: Fall Update  | On-demand | Pat Patterson     | Auditing (2 hours)                     | Update       | 2 |                    |               |
| Keys of Service Organization Control (SOC) Reports - Following SSAE 18 Requirements                  | On-demand | Lynn Fountain     | Accounting (1 hour), Auditing (1 hour) | Basic        | 2 |                    |               |
| 10 Actions You Must Take in an IRS Field Audit   | On-demand | Jim Buttonow      | Taxes (2 hours)                        | Basic        | 2 | 4VRWB-T-05059-23-S | 1075-CE-03358 |
| Equity Compensation - Alternatives Pt. 2   | On-demand | Daniel Johnson    | Taxes (1 hour)                         | Advanced     | 1 | 4VRWB-T-05171-24-S | 1075-CE-03475 |
| Fundamentals of the Business Tax Balance Sheet   | On-demand | Jane Ryder        | Taxes (2 hours)                        | Basic        | 2 | 4VRWB-T-05184-24-S | 1075-CE-03494 |
| Equity Compensation - Alternatives Pt. 1   | On-demand | Daniel Johnson    | Taxes (1 hour)                         | Advanced     | 1 | 4VRWB-T-05172-24-S | 1075-CE-03476 |
| Dealerships: Accounting & Auditing Update  | On-demand | Lewis Fisher      | Accounting (1 hour), Auditing (1 hour) | Basic        | 2 |                    |               |
| The (FDTA) Proposed Rules and Continuing Disclosure Agreements That Impact States and Local Governme | On-demand | Eric Berman       | Accounting (Governmental) (2 hours)    | Intermediate | 2 |                    |               |
| How to Train Your Clients - Terminate  | On-demand | Susan Harper      | Taxes (1 hour)                         | Basic        | 1 | 4VRWB-T-05158-24-S | 1075-CE-03462 |
| Navigating the Hobby Loss Rules IRC 183  | On-demand | Susan Harper      | Taxes (1 hour)                         | Basic        | 1 | 4VRWB-T-05161-24-S | 1075-CE-03600 |
| S Corporation Taxation Strategies  | On-demand | Greg White        | Taxes (5 hours)                        | Basic        | 5 | 4VRWB-T-05232-24-S | 1075-CE-03541 |
| 2024 Accounting Standards for CPAs: Fall Update  | On-demand | Pat Patterson     | Accounting (2 hours)                   | Update       | 2 |                    |               |
| Python in Excel for Auditors   | On-demand | David Ringstrom   | Specialized Knowledge (2 hours)        | Intermediate | 2 |                    |               |
| Social Security and Medicare FAQs  | On-demand | Theodore Sarenski | Taxes (2 hours)                        | Overview     | 2 | 4VRWB-T-05237-24-S | 1075-CE-03546 |
| Improving Audit Quality with AI: Explore How AI Solutions are Helping Firms                          | On-demand | Deepak Lalit      | Specialized Knowledge (1 hour)         | Basic        | 1 |                    |               |
| Phishing, Vishing, & Smishing: Protecting your Organization from Frauds in 2024                      | On-demand | Robert Minniti    | Accounting (2 hours)                   | Basic        | 2 |                    |               |
| Income in Respect of a Decedent  | On-demand | Klaralee Charlton | Taxes (2 hours)                        | Basic        | 2 | 4VRWB-T-05194-24-S | 1075-CE-03505 |
| How To Train Your Clients - Maintain   | On-demand | Susan Harper      | Taxes (1 hour)                         | Basic        | 1 | 4VRWB-T-05160-24-S | 1075-CE-03464 |
| Cybersecurity for Small Business Accountants   | On-demand | Robert Minniti    | Accounting (2 hours)                   | Basic        | 2 |                    |               |
| Medicare and Its Various Rules   | On-demand | Theodore Sarenski | Taxes (1 hour)                         | Overview     | 1 | 4VRWB-T-05236-24-S | 1075-CE-03545 |
| Reporting Illegal & Unethical Acts   | On-demand | Robert Minniti    | Regulatory Ethics (2 hours)            | Basic        | 2 |                    |               |
| Equity Compensation - Stock Options Pt. 2  | On-demand | Daniel Johnson    | Taxes (1 hour)                         | Advanced     | 1 | 4VRWB-             | 1075-CE-03477 |

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|  |           |   |  |              |   | T-05173-24-S       |               |
| IRS Compliance by Notice: How to Resolve the Most Common IRS Notices                 | On-demand | Jim Buttonow                              | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-T-05058-23-S | 1075-CE-03357 |
| Unleashing The Power of Microsoft AI – A Comprehensive Guide                         | On-demand | Stephen Yoss                              | Information Technology (2 hours)                 | Basic        | 2 |                    |               |
| Equity Compensation - Stock Options Pt. 1  | On-demand | Daniel Johnson                            | Finance (1 hour)                                 | Basic        | 1 |                    |               |
| Miscellaneous Social Security Issues and Biggest Social Security Mistakes            | On-demand | Theodore Sarenski                         | Taxes (1 hour)                                   | Basic        | 1 | 4VRWB-T-05235-24-S | 1075-CE-03544 |
| Social Security Disability Benefits  | On-demand | Theodore Sarenski                         | Taxes (1 hour)                                   | Overview     | 1 | 4VRWB-T-05240-24-S | 1075-CE-03548 |
| How to Train Your Clients - Engage   | On-demand | Susan Harper                              | Taxes (1 hour)                                   | Basic        | 1 | 4VRWB-E-05252-24-S | 1075-CE-03463 |
| Managing Budgets Quickbooks Online   | On-demand | David Ringstrom                           | Specialized Knowledge and Applications (2 hours) | Basic        | 2 |                    |               |
| Intro to Nonqualified Deferred Compensation (NQDC)                                   | On-demand | Daniel Johnson                            | Taxes (1 hour)                                   | Basic        | 1 | 4VRWB-T-05167-24-S | 1075-CE-03471 |
| Ten Tech Productivity Life Hacks to Save Time  | On-demand | Stephen Yoss                              | Information Technology (2 hours)                 | Basic        | 2 |                    |               |
| Audits A-Z Practices and Procedures for Audit Representation                         | On-demand | Jane Ryder                                | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-T-05189-24-S | 1075-CE-03499 |
| Self-Dealing: Tales from the Trenches  | On-demand | Clark Nuber<br>Sarah Huang<br>Celia Davis | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-T-05127-24-S | 1075-CE-03431 |
| 1099 Reporting Payments for Middlemen, Agents, Liens and Garnishments                | On-demand | Steven Mercatante                         | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-T-05258-24-S | 1075-CE-03563 |
| Overview of the 2024 Yellow Book   | On-demand | Diane Edelstein                           | Auditing (Governmental) (2 hours)                | Basic        | 2 |                    |               |
| IRS Collection Trends and the 4 Alternatives When Your Clients Owe Back Taxes        | On-demand | Jim Buttonow                              | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-T-05057-23-S | 1075-CE-03356 |
| Capital Assets Recognition, Measurement and Reporting Due to the Release of GASB-104 | On-demand | Eric Berman                               | Accounting (Governmental) (2 hours)              | Update       | 2 |                    |               |
| Transforming Tax with AI: How AI Can Help Tax Professionals with Their Workflows     | On-demand | Wolters Kluwer Sales                      | Information Technology (1 hour)                  | Intermediate | 1 |                    |               |
| Update on Secure Act, Secure 2.0 Act, and Proposed Regulations                       | On-demand | Klaralee Charlton                         | Taxes (2 hours)                                  | Update       | 2 | 4VRWB-U-05195-24-S | 1075-CE-03506 |
| The Statement of Cash Flows: Compliance & Presentation Update                        | On-demand | Lewis Fisher                              | Accounting (2 hours)                             | Update       | 2 |                    |               |
| Proper Documentation Methods for Internal Audit and Internal Controls Processes      | On-demand | Lynn Fountain                             | Accounting (1 hour), Auditing (1 hour)           | Basic        | 2 |                    |               |
| Pen to Paper PTET for Form 1065 & Form 1120-S  | On-demand | Jane Ryder                                | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-             | 1075-CE-03491 |



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| Risk Management for Government Entities  | On-demand | Robert Minniti    | Accounting (Governmental) (2 hours)    | Basic    | 2 |                    |               |
| Info Reporting for Foreign Activities of U.S. Partnerships and Partners on Schedules K-2 and K-3 | On-demand | Robert Misey      | Taxes (2 hours)                        | Basic    | 2 | 4VRWB-T-05209-24-S | 1075-CE-03520 |
| AI for Auditors: Explore Practical Use Cases for Audit Professionals at All Levels               | On-demand | Deepak Lalit      | Auditing (1 hour)                      | Overview | 1 |                    |               |
| Sourcing Rules for International Taxation of US and Foreign Persons                              | On-demand | Robert Misey      | Taxes (2 hours)                        | Basic    | 2 | 4VRWB-T-05251-24-S | 1075-CE-03557 |
| Professional Standards for Preparation and Compilation Engagements                               | On-demand | Pat Patterson     | Accounting (2 hours)                   | Update   | 2 |                    |               |
| Project Management Tools and Techniques  | On-demand | Garth Sheriff     | Personal Development (2 hours)         | Basic    | 2 |                    |               |
| Payroll Fraud  | On-demand | Robert Minniti    | Accounting (2 hours)                   | Basic    | 2 |                    |               |
| Review, Compilation & Preparation: Q&A   | On-demand | Pat Patterson     | Accounting (2 hours)                   | Update   | 2 |                    |               |
| Time Management Tools  | On-demand | Garth Sheriff     | Personal Development (2 hours)         | Basic    | 2 |                    |               |
| Providing Effective Feedback To Your Staff   | On-demand | Garth Sheriff     | Personal Development (2 hours)         | Basic    | 2 |                    |               |
| Business Development and Networking  | On-demand | Garth Sheriff     | Personal Development (2 hours)         | Basic    | 2 |                    |               |
| Effectively Managing and Controlling Travel and Entertainment (T&E) Expenses                     | On-demand | Lynn Fountain     | Accounting (1 hour), Auditing (1 hour) | Basic    | 2 |                    |               |
| Partnership Basis: Inside & Outside  | On-demand | Jane Ryder        | Taxes (2 hours)                        | Basic    | 2 | 4VRWB-T-05179-24-S | 1075-CE-03487 |
| International Cross Border Transactions  | On-demand | Allison McLeod    | Taxes (2 hours)                        | Basic    | 2 | 4VRWB-T-05244-24-S | 1075-CE-03551 |
| Equity Compensation - Tax Reporting  | On-demand | Daniel Johnson    | Taxes (1 hour)                         | Advanced | 1 | 4VRWB-T-05170-24-S | 1075-CE-03474 |
| Taxation of Foreign-Owned U.S. Corporations and Completing Form 5472                             | On-demand | Robert Misey      | Taxes (2 hours)                        | Basic    | 2 | 4VRWB-T-05206-24-S | 1075-CE-03517 |
| 2024's Biggest Security and Privacy Concerns Under IRS Tax Rules                                 | On-demand | Stephen Yoss      | Information Technology (2 hours)       | Basic    | 2 | 4VRWB-T-05154-24-S | 1075-CE-3458  |
| Overview of the 2024 Uniform Guidance  | On-demand | Diane Edelstein   | Auditing (Governmental) (2 hours)      | Basic    | 2 |                    |               |
| Common Frauds in Not For Profits   | On-demand | Robert Minniti    | Accounting (2 hours)                   | Basic    | 2 |                    |               |
| Social Security Survivor Benefits  | On-demand | Theodore Sarenski | Taxes (1 hour)                         | Overview | 1 | 4VRWB-             | 1075-CE-03550 |

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| Taxation of Life Insurance Proceeds  | On-demand | Klaralee Charlton   | Taxes (2 hours)                                  | Basic        | 2 | T-05242-24-S<br>4VRWB-<br>T-05072-23-S | 1075-CE-03376 |
| Utilizing the IRS Offer in Compromise Program for your Financially Distressed Client | On-demand | Jim Buttonow  | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-<br>T-05056-23-S                 | 1075-CE-03355 |
| Attest Engagements and Quality Risk Assessments                                      | On-demand | Pat Patterson   | Auditing (2 hours)                               | Intermediate | 2 |  |               |
| Taxation of U.S. Owners of Foreign Corporations and Completing Form 5471             | On-demand | Robert Misey  | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-<br>T-05205-24-S                 | 1075-CE-03516 |
| Reasonable Compensation  | On-demand | Susan Harper  | Taxes (1 hour)                                   | Basic        | 1 | 4VRWB-<br>T-05166-24-S                 | 1075-CE-03470 |
| Focus Areas for June 30th Year-End Audits and Financial Reporting                    | On-demand | Eric Berman   | Accounting (Governmental) (2 hours)              | Overview     | 2 |  |               |
| Hands On With QuickBooks Online Accountant (QBOA) for Public Accounting              | On-demand | Stephen Yoss  | Specialized Knowledge and Applications (2 hours) | Basic        | 2 |  |               |
| Navigating Cyber Threats Exploring the NEW NIST Framework                            | On-demand | Robert Minniti  | Auditing (Governmental) (2 hours)                | Basic        | 2 |  |               |
| Estate Tax Issues for Taxpayers with Non-Citizen Spouses                             | On-demand | Klaralee Charlton   | Taxes (2 hours)                                  | Intermediate | 2 | 4VRWB-<br>T-05071-23-S                 | 1075-CE-03375 |
| Accounting for Transfers of Financial Assets   | On-demand | Miles Hutchinson  | Accounting (1 hour)                              | Basic        | 1 |  |               |
| Alternative Investments for NFPs   | On-demand | Clark Nuber<br>Jennifer Becker<br>Harris<br>Frances Olson | Taxes (2 hours)                                  | Intermediate | 2 | 4VRWB-<br>T-05101-24-S                 | 1075-CE-03404 |
| Email Disclaimers  | On-demand | Susan Harper  | Regulatory Ethics (1 hour)                       | Basic        | 1 |  |               |
| GIG Economy Tax Compliance & Tax Savings and Form 1099-K                             | On-demand | Jane Ryder  | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-<br>T-05185-24-S                 | 1075-CE-03495 |
| Practical Advice for Preventing Organizational Data Breaches                         | On-demand | Stephen Yoss  | Information Technology (2 hours)                 | Basic        | 2 |  |               |
| Tax Planning for State PTET SALT Workaround  | On-demand | Jane Ryder  | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-<br>T-05182-24-S                 | 1075-CE-03492 |
| Schedule C of Form 1040  | On-demand | Allison McLeod  | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-<br>T-05218-24-S                 | 1075-CE-03528 |
| Social Security Benefits & Claiming of Benefits                                      | On-demand | Theodore Sarenski   | Taxes (2 hours)                                  | Overview     | 2 | 4VRWB-<br>T-05239-24-S                 | 1075-CE-03547 |
| The SECURE Act 2.0   | On-demand | Allison McLeod  | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-<br>U-05195-24-S                 | 1075-CE-03526 |
| Successful Schedule C Audits   | On-demand | Jane Ryder  | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-<br>T-05180-24-S                 | 1075-CE-03490 |
| Embracing Transformation: Change Management in the Accounting World                  | On-demand | Cory Campbell   | Information Technology (2 hours)                 | Basic        | 2 |  |               |
| Divorce and the Tax Implications   | On-demand | A.J. Reynolds   | Taxes (1 hour)                                   | Basic        | 1 | 4VRWB-                                 | 1075-CE-03423 |

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| Social Security History/Overview   | On-demand | Theodore Sarenski                            | Taxes (1 hour)                       | Overview     | 1 | T-05118-24-S<br>4VRWB-<br>T-05241-24-S | 1075-CE-03549 |
| A Review of Common Income Tax Treaty Provisions and Uses   | On-demand | Robert Misey                                 | Taxes (2 hours)                      | Basic        | 2 | 4VRWB-<br>T-05210-24-S                 | 1075-CE-03521 |
| Auditing Standards for CPAs: Summer Update   | On-demand | Pat Patterson                                | Auditing (2 hours)                   | Update       | 2 |  |               |
| Personal Financial Statement Preparation Issues  | On-demand | Pat Patterson                                | Accounting (2 hours)                 | Intermediate | 2 |  |               |
| Reporting Generation Skipping Transfers on Form 709  | On-demand | Klaralee Charlton                            | Taxes (2 hours)                      | Intermediate | 2 | 4VRWB-<br>T-05070-23-S                 | 1075-CE-03371 |
| Categorize Workers & the New Overtime & New Independent Contractor Rules 2024                        | On-demand | Robert Minniti                               | Accounting (2 hours)                 | Update       | 2 |  |               |
| Client Representation Before the IRS Appeals Division  | On-demand | Samantha Gozlan                              | Taxes (2 hours)                      | Intermediate | 2 | 4VRWB-<br>T-05201-24-S                 | 1075-CE-03512 |
| IRS Audit Technique Guide: Exploring the Entertainment Industry                                      | On-demand | Susan Harper                                 | Taxes (1 hour),<br>Auditing (1 hour) | Basic        | 2 | 4VRWB-<br>T-05157-24-S                 | 1075-CE-03461 |
| Fraud in Today's Workplace: What Accountants Need to Know  | On-demand | Stephen Yoss                                 | Accounting (2 hours)                 | Basic        | 2 |  |               |
| Issues on Quality Management Standards   | On-demand | Pat Patterson                                | Auditing (2 hours)                   | Basic        | 2 |  |               |
| Reporting Generation Skipping Transfers on Form 706  | On-demand | Klaralee Charlton                            | Taxes (2 hours)                      | Intermediate | 2 | 4VRWB-<br>T-05069-23-S                 | 1075-CE-03370 |
| Single Audit Update: What to Know and How to Prepare   | On-demand | Clark Nuber<br>Troy Rector<br>Kelly Rancourt | Auditing<br>(Governmental) (2 hours) | Intermediate | 2 |  |               |
| Client Representation Before the IRS Collection Division   | On-demand | Gary Bluestein                               | Taxes (2 hours)                      | Intermediate | 2 | 4VRWB-<br>T-05193-24-S                 | 1075-CE-03504 |
| Audits - What to Expect for Sole Proprietors, Schedule E Rentals, Form 1040 Losses, Schedule a Audit | On-demand | Jane Ryder                                   | Taxes (2 hours)                      | Basic        | 2 | 4VRWB-<br>T-05187-24-S                 | 1075-CE-03497 |
| Like-Kind Exchanges  | On-demand | Allison McLeod                               | Taxes (2 hours)                      | Basic        | 2 | 4VRWB-<br>T-05204-24-S                 | 1075-CE-03515 |
| 2023 Form 990 Schedules: A Deeper Dive into Common Schedules   | On-demand | Clark Nuber<br>Lisa McCreedy<br>Sarah Huang  | Taxes (2 hours)                      | Intermediate | 2 | 4VRWB-<br>T-05100-24-S                 | 1075-CE-03403 |
| Client Representation Before the IRS Exam Division   | On-demand | Samantha Gozlan                              | Taxes (2 hours)                      | Intermediate | 2 | 4VRWB-<br>T-05202-24-S                 | 1075-CE-03513 |
| Virtual Currency: A Simple Approach and Overview   | On-demand | A.J. Reynolds                                | Taxes (1 hour)                       | Basic        | 1 | 4VRWB-<br>T-05117-24-S                 | 1075-CE-03422 |
| Overview of Passive Foreign Investment Companies (PFICs)   | On-demand | Robert Misey                                 | Taxes (2 hours)                      | Basic        | 2 | 4VRWB-<br>T-05211-24-S                 | 1075-CE-03522 |
| Planning for the Estate Tax Exemption Cliff  | On-demand | Klaralee Charlton                            | Taxes (2 hours)                      | Intermediate | 2 | 4VRWB-<br>T-05068-23-S                 | 1075-CE-03369 |
| Can Fraudsters Really Steal My Home  | On-demand | Robert Minniti                               | Accounting (2 hours)                 | Basic        | 2 |  |               |
| Form 4797, A Deep Dive, Sale of Business Property  | On-demand | A.J. Reynolds                                | Taxes (2 hours)                      | Basic        | 2 | 4VRWB-<br>T-05112-24-S                 | 1075-CE-03416 |
| Review, Compilation & Preparation: The Differences?  | On-demand | Pat Patterson                                | Accounting (2 hours)                 | Update       | 2 |  |               |
| Basis: S Corp Shareholders Form 7203 and Partnership Basis   | On-demand | Jane Ryder                                   | Taxes (2 hours)                      | Basic        | 2 | 4VRWB-                                 | 1075-CE-03498 |

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| Introduction to Python in Excel  | On-demand | David Ringstrom    | Statistics (2 hours)                               | Advanced     | 2 |                    |               |
| Correcting S Corp & Partnership Basis for ERC, Prior Year PPP Loans & Other Issues                   | On-demand | Jane Ryder         | Taxes (2 hours)                                    | Basic        | 2 | 4VRWB-T-05186-24-S | 1075-CE-03496 |
| Business Performance: KPIs and KRIs  | On-demand | Cory Campbell      | Information Technology (2 hours)                   | Basic        | 2 |                    |               |
| Understanding Forfeitures for CPAs   | On-demand | Randall Andreozzi  | Taxes (2 hours)                                    | Overview     | 2 | 4VRWB-T-05149-24-S | 1075-CE-03452 |
| Professional Ethics: An FTX Story  | On-demand | Garth Sheriff      | Behavioral Ethics (2 hours)                        | Basic        | 2 | 4VRWB-E-05219-24-S | 1075-CE-03529 |
| Introduction to Audit Data Analytics   | On-demand | Garth Sheriff      | Auditing (1 hour), Information Technology (1 hour) | Basic        | 2 |                    |               |
| Avoiding Procedural and Tax Complexities When Naming Minors in your Estate Plan                      | On-demand | Klaralee Charlton  | Taxes (2 hours)                                    | Basic        | 2 | 4VRWB-T-05067-23-S | 1075-CE-03368 |
| Excel Formula's Accountants & Financial Professionals Need to Know                                   | On-demand | Stephen Yoss       | Specialized Knowledge (2 hours)                    | Basic        | 2 |                    |               |
| Important Insights on Forms K2 and K3 and Other Timely and Significant IRS Campaigns and Initiatives | On-demand | Richard Blumenthal | Taxes (2 hours)                                    | Overview     | 2 | 4VRWB-T-05199-24-S | 1075-CE-03510 |
| Basics of Nexus: Understanding State Tax Issues  | On-demand | Annette Nellen     | Taxes (2 hours)                                    | Basic        | 2 | 4VRWB-T-05011-23-S | 1075-CE-03305 |
| Tax Procedure  | On-demand | Allison McLeod     | Taxes (2 hours)                                    | Basic        | 2 | 4VRWB-T-04991-23-S | 1075-CE-03278 |
| 2024 GAAP, GAAS, SSARS, & Other Accounting Issues - Part 2   | On-demand | Pat Patterson      | Accounting (4 hours)                               | Update       | 4 |                    |               |
| SSARS 25 - Updated Rules for Reviews & Compilations  | On-demand | Robert Minniti     | Accounting (2 hours)                               | Basic        | 2 |                    |               |
| 2024 GAAP, GAAS, SSARS, & Other Accounting Issues - Part 1   | On-demand | Pat Patterson      | Accounting (2 hours), Auditing (2 hours)           | Update       | 4 |                    |               |
| Opportunity Zones  | On-demand | James Hamill       | Taxes (2 hours)                                    | Intermediate | 2 | 4VRWB-T-05050-23-S | 1075-CE-03350 |
| Fraud Trends for The Future - Targeted Attacks   | On-demand | Lynn Fountain      | Accounting (2 hours)                               | Overview     | 2 |                    |               |
| Business Analytics for the CFOs Function   | On-demand | Gary Cokins        | Finance (2 hours)                                  | Overview     | 2 |                    |               |
| Administering & Mitigating Tax Consequences for Retirement Plans Paid to Trusts                      | On-demand | Klaralee Charlton  | Taxes (2 hours)                                    | Intermediate | 2 | 4VRWB-T-05066-23-S | 1075-CE-03367 |
| Auditing Crypto 2024   | On-demand | Robert Minniti     | Auditing (2 hours)                                 | Basic        | 2 |                    |               |
| State and Local 1099 Reporting Changes in 2024   | On-demand | Steven Mercatante  | Taxes (2 hours)                                    | Basic        | 2 | 4VRWB-T-05083-24-S | 1075-CE-03385 |
| Regulatory Ethics Guidebook for Tax and Accounting Professionals                                     | On-demand | Allison McLeod     | Regulatory Ethics (4 hours)                        | Basic        | 4 | 4VRWB-E-05214-24-S | 1075-CE-3525  |
| The Intersection of Fiduciary Accounting and Taxation  | On-demand | Klaralee Charlton  | Accounting (2 hours)                               | Intermediate | 2 |                    |               |
| Ethics Checklist for Tax Practitioners   | On-demand | Annette Nellen     | Regulatory Ethics                                  | Basic        | 2 | 4VRWB-             | 1075-CE-3303  |

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| The Future is Generative AI! What CPAs Need To Know                                       | On-demand | Garth Sheriff     | (2 hours)<br>Information Technology (1 hour), Behavioral Ethics (1 hour) | Basic        | 2 | E-05009-23-S       |               |
| 2024 Fraud Review   | On-demand | Robert Minniti    | Accounting (4 hours)   | Basic        | 4 |                    |               |
| Employee Benefit Plans Audit Update: Accounting Principles and Auditing Considerations    | On-demand | Lewis Fisher      | Auditing (2 hours)   | Update       | 2 |                    |               |
| Real Estate for Financial and Tax Professionals - Part 1                                  | On-demand | Daniel Johnson    | Taxes (1 hour)   | Advanced     | 1 | 4VRWB-T-05169-24-S | 1075-CE-03473 |
| Real Estate for Financial and Tax Professionals - Part 2                                  | On-demand | Daniel Johnson    | Taxes (1 hour)   | Advanced     | 1 | 4VRWB-T-05168-24-S | 1075-CE-03472 |
| Avoiding the Most Common Missteps in Tax Problem Solving                                  | On-demand | Jim Buttonow      | Taxes (2 hours)  | Basic        | 2 | 4VRWB-T-05055-23-S | 1075-CE-03354 |
| Automating Excel-based Financial Statements: Power BI                                     | On-demand | David Ringstrom   | Specialized Knowledge and Applications (2 hours)                         | Intermediate | 2 |                    |               |
| Medical Related Tax Changes for Individuals and Businesses                                | On-demand | Barbara Weltman   | Taxes (1 hour)   | Basic        | 1 | 4VRWB-T-05203-24-S | 1075-CE-03514 |
| ERTC: Updates on IRS Guidance, Withdrawal, Repayment, & Audits Plus New Claims            | On-demand | Jane Ryder        | Taxes (2 hours)  | Basic        | 2 | 4VRWB-T-05178-24-S | 1075-CE-03484 |
| Cleaning Up Deceased Taxpayers' Tax Problems  | On-demand | Klaralee Charlton | Taxes (2 hours)  | Basic        | 2 | 4VRWB-T-05065-23-S | 1075-CE-03366 |
| Introduction to Power BI  | On-demand | David Ringstrom   | Specialized Knowledge and Applications (2 hours)                         | Basic        | 2 |                    |               |
| Form 1041 Reporting for Partnership Income and Sales                                      | On-demand | Klaralee Charlton | Taxes (2 hours)  | Basic        | 2 | 4VRWB-T-05064-23-S | 1075-CE-03365 |
| Financial Statement Fraud   | On-demand | Susan Harper      | Auditing (2 hours)   | Basic        | 2 |                    |               |
| Fraud Trends for the Future - Need for Real-time Risk Assessment - Part 2                 | On-demand | Lynn Fountain     | Accounting (1 hour), Auditing (1 hour)                                   | Overview     | 2 |                    |               |
| Fraud Trends for the Future - Need for Real-time Risk Assessment - Part 1                 | On-demand | Lynn Fountain     | Auditing (2 hours)   | Basic        | 2 |                    |               |
| Fraud Essentials: What is Tax Fraud and its Consequences?                                 | On-demand | Susan Harper      | Taxes (2 hours)  | Basic        | 2 | 4VRWB-T-04888-23-S | 1075-CE-03324 |
| Top 7 Trends in Management Accounting   | On-demand | Gary Cokins       | Accounting (2 hours)   | Overview     | 2 |                    |               |
| The Basics of 1099 Reporting  | On-demand | Steven Mercatante | Taxes (2 hours)  | Basic        | 2 | 4VRWB-T-05082-24-S | 1075-CE-03384 |
| Using AI in Business Valuations   | On-demand | Robert Minniti    | Specialized Knowledge (2 hours)  | Basic        | 2 |                    |               |
| Sec. 199A Cutting Edge Tax Strategies: The Ground Rules and Planning to Optimize the QBID | On-demand | Greg White        | Taxes (2 hours)  | Basic        | 2 | 4VRWB-T-05045-23-S | 1075-CE-03345 |

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| IRAs and Roth IRAs: Cradle to Grave - How to Sock It Away and Make It Count                        | On-demand        | Bradley Burnett | Taxes (8 hours)                                  | Intermediate | 8 | 4VRWB-T-05090-24-S | 1075-CE-03392 |
| IRS Innocent Spouse Relief: 4 Types of Tax Relief Available Potentially for a Spouse Who Files MFJ | On-demand        | Susan Harper    | Taxes (1 hour)                                   | Basic        | 1 | 4VRWB-T-05123-24-S | 1075-CE-03427 |
| Criminal Tax For Accountants: What Every Practitioner Needs to Know                                | On-demand        | Eric Green      | Taxes (2 hours)                                  | Intermediate | 2 | 4VRWB-T-05021-23-S | 1075-CE-03315 |
| Sec. 199A Cutting Edge Tax Strategies for Wage, Property, and Other Limits                         | On-demand        | Greg White      | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-T-05044-23-S | 1075-CE-03344 |
| Breaking Down Excel Formulas   | On-demand        | David Ringstrom | Specialized Knowledge and Applications (2 hours) | Basic        | 2 |                    |               |
| Using AI in an Audit   | On-demand        | Robert Minniti  | Auditing (2 hours)                               | Basic        | 2 |                    |               |
| 2024 Preparation, Compilation, Review, Audit, and Attestation: Differences                         | On-demand        | Pat Patterson   | Auditing (2 hours)                               | Update       | 2 |                    |               |
| Trends in How We Work and Do Business and Their Tax Relevance                                      | On-demand        | Annette Nellen  | Taxes (2 hours)                                  | Overview     | 2 | 4VRWB-T-05007-23-S | 1075-CE-03301 |
| Sec. 199A Cutting Edge Tax Strategies for Specified Service Trades or Businesses (SSTBs)           | On-demand        | Greg White      | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-T-04989-23-S | 1075-CE-03276 |
| IRS Penalties and Abatements   | On-demand        | Allison McLeod  | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-T-04989-23-S | 1075-CE-03276 |
| Essential Knowledge to Resolve the Most Common Tax Problems  | On-demand        | Jim Buttonow    | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-T-05054-23-S | 1075-CE-03353 |
| Audits of Cash Businesses  | On-demand        | Eric Green      | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-T-05020-23-S | 1075-CE-03314 |
| Sec. 199A Cutting Edge Tax Strategies for Rental Real Estate                                       | On-demand        | Greg White      | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-T-05042-23-S | 1075-CE-03342 |
| Using AI in a Government Audit   | On-demand        | Robert Minniti  | Auditing (Governmental) (2 hours)                | Basic        | 2 |                    |               |
| 2024 GAAP Update   | On-demand        | Lewis Fisher    | Accounting (2 hours)                             | Update       | 2 |                    |               |
| Using AI in a Fraud Investigation  | On-demand        | Robert Minniti  | Auditing (2 hours)                               | Basic        | 2 |                    |               |
| Ethics Spin from Engaging a Client to Terminating a Client   | On-demand        | Susan Harper    | Behavioral Ethics (1 hour)                       | Basic        | 1 | 4VRWB-E-05124-24-S | 1075-CE-3428  |
| 199A - Is a Rental a Trade or Business (Case Law & discusses Safe Harbor)                          | On-demand        | A.J. Reynolds   | Taxes (1 hour)                                   | Basic        | 1 | 4VRWB-T-05119-24-S | 1075-CE-03414 |
| Rental Properties with Emphasis on Short-Term  | On-demand        | A.J. Reynolds   | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-T-05109-24-S | 1075-CE-03413 |
| 529 Plans, Coverdell ESAs, and ABLE Accounts   | On-demand        | Barbara Weltman | Taxes (2 hours)                                  | Overview     | 2 | 4VRWB-T-05153-24-S | 1075-CE-03456 |
| A Back and Forth Discussion of CPA Ethics  | On-demand        | Allison McLeod  | Regulatory Ethics (4 hours)                      | Basic        | 4 |                    |               |
| A Back and Forth Discussion of Ethics for Mississippi CPAs   | On-demand        | Allison McLeod  | Regulatory Ethics (3 hours)                      | Basic        | 4 |                    |               |
| SEC Top Focus Areas: Non-GAAP Financial Measures   | On-demand        | Kelen Camehl    | Accounting (1 hour)                              | Basic        | 1 |                    |               |
| AI & Accounting – What You Need to Know  | Downloadable PDF | Kelen Camehl    | Accounting (4 hours)                             | Basic        | 4 |                    |               |

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| Understanding the Basics of Robotic Process Automation (RPA)   | Downloadable PDF | Kelen Camehl  | Accounting (1 hour)                        | Basic        | 1 |                    |               |
| SEC Climate-Related Disclosures – What You Need To Know  | Downloadable PDF | Kelen Camehl  | Accounting (2 hours)                       | Basic        | 2 |                    |               |
| SEC Climate-Related Disclosures – Overview   | Downloadable PDF | Kelen Camehl  | Accounting (1 hour)                        | Basic        | 1 |                    |               |
| AI Series – Technologies in Accounting Software  | Downloadable PDF | Kelen Camehl  | Accounting (1 hour)                        | Basic        | 1 |                    |               |
| AI Series – Audit & Compliance   | Downloadable PDF | Kelen Camehl  | Auditing (1 hour)                          | Basic        | 1 |                    |               |
| SEC Climate-Related Disclosures – Deep Dive  | Downloadable PDF | Kelen Camehl  | Accounting (4 hours)                       | Basic        | 4 |                    |               |
| AI Series – Leveraging AI for Data Analysis & Reporting  | Downloadable PDF | Kelen Camehl  | Accounting (1 hour)                        | Basic        | 1 |                    |               |
| AI Series – Ethics & Regulations   | Downloadable PDF | Kelen Camehl  | Accounting (1 hour)                        | Basic        | 1 |                    |               |
| AI Series – Considerations for Organizations When Adopting AI  | Downloadable PDF | Kelen Camehl  | Accounting (1 hour)                        | Basic        | 1 |                    |               |
| AI Series – Considerations in Tax Preparation & Research   | Downloadable PDF | Kelen Camehl  | Taxes (1 hour)                             | Basic        | 1 | 4VRWB-T-05152-24-S | 1075-CE-03455 |
| AI Series – Future Trends in AI & Software for CPAs  | Downloadable PDF | Kelen Camehl  | Accounting (1 hour)                        | Basic        | 1 |                    |               |
| AI Series – Introduction to Artificial Intelligence  | Downloadable PDF | Kelen Camehl  | Accounting (1 hour)                        | Basic        | 1 |                    |               |
| Amending Form 1040: Filing 1040X   | On-demand        | Barbara Weltman   | Taxes (1 hour)                             | Basic        | 1 | 4VRWB-T-05136-24-S | 1075-CE-03440 |
| Unusual Lease Accounting Issues: Disclosures, Cancellations, Dispositions, and Statement Presentatio | On-demand        | Pat Patterson   | Accounting (1 hour), Auditing (1 hour)     | Update       | 2 |                    |               |
| Navigating the Top 10 IRS Issues for Small Businesses  | On-demand        | Susan Harper  | Taxes (2 hours)                            | Basic        | 2 | 4VRWB-T-05096-24-S | 1075-CE-03398 |
| The Road to Compliance: Understanding the Corporate Transparency Act and FinCEN Beneficial Ownership | On-demand        | David Morrissy<br>Steven Antico, Esq<br>Garfunkel Wild P.C. | Finance (1 hour)                           | Overview     | 1 | 4VRWB-T-05102-24-S | 1075-CE-3406  |
| Elder Care and Taxes   | On-demand        | Barbara Weltman   | Taxes (2 hours)                            | Basic        | 2 | 4VRWB-T-05126-24-S | 1075-CE-03430 |
| The Master Budget and Sub-Budgets  | On-demand        | Rob Stephens  | Finance (3 hours)                          | Basic        | 3 |                    |               |
| The Budgeting Process  | On-demand        | Rob Stephens  | Finance (2 hours)                          | Basic        | 2 |                    |               |
| Budgeting Alternatives   | On-demand        | Rob Stephens  | Finance (3 hours)                          | Basic        | 3 |                    |               |
| Charitable Contributions by Individuals and Businesses   | On-demand        | Barbara Weltman   | Taxes (1 hour)                             | Basic        | 1 | 4VRWB-T-05097-24-S | 1075-CE-03399 |
| Excel Macros versus Power Query  | On-demand        | David Ringstrom   | Computer Software & Applications (2 hours) | Intermediate | 2 |                    |               |
| IRAs and Conversions   | On-demand        | Greg White  | Taxes (2 hours)                            | Basic        | 2 | 4VRWB-T-05041-23-S | 1075-CE-03341 |
| Safeguarding Data  | On-demand        | Robert Minniti  | Accounting (2 hours)                       | Basic        | 2 |                    |               |
| Red Flags in Small Business Valuations   | On-demand        | Robert Minniti  | Accounting (2 hours)                       | Basic        | 2 |                    |               |
| GASB-100, 101 and 102  | On-demand        | Eric Berman   | Accounting (Governmental) (2 hours)        | Update       | 2 |                    |               |
| Cybersecurity Implications for the Accounting Profession   | On-demand        | Cory Campbell   | Information Technology (2 hours)           | Basic        | 2 |                    |               |



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| Big Data Unleashed: Opportunities and Challenges in Accounting                | On-demand | Cory Campbell     | Information Technology (2 hours)                 | Basic        | 2 |                    |               |
| By the Numbers Update on IRS Compliance Enforcement Initiatives               | On-demand | Jim Buttonow      | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-T-05053-23-S | 1075-CE-03352 |
| Analytics-Based Enterprise Performance Management (EPM) Tax Liens and Levies  | On-demand | Gary Cokins       | Finance (2 hours)                                | Basic        | 2 |                    |               |
|   | On-demand | Eric Green        | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-T-05019-23-S | 1075-CE-03313 |
| GASB-94, 96 and 99 for Calendar Year Governments                              | On-demand | Eric Berman       | Accounting (Governmental) (2 hours)              | Overview     | 2 |                    |               |
| The Schedule of Expenditures of Federal Awards (SEFA)                         | On-demand | Diane Edelstein   | Auditing (Governmental) (2 hours)                | Basic        | 2 |                    |               |
| Preparing & Reporting on Personal Financial Statements                        | On-demand | Robert Minniti    | Accounting (2 hours)                             | Basic        | 2 |                    |               |
| Resolving Payroll Tax Issues  | On-demand | Eric Green        | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-T-05018-23-S | 1075-CE-03312 |
| The 10 Best (and 3 Worst) Excel Features for Accountants                      | On-demand | David Ringstrom   | Specialized Knowledge and Applications (2 hours) | Basic        | 2 |                    |               |
| IRS Compliance Trends and 10 Actions You Should Take To Help Your Client      | On-demand | Jim Buttonow      | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-T-05052-23-S | 1075-CE-03351 |
| Tips to 1042/1042-S Report Successfully in 2024                               | On-demand | Steven Mercatante | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-T-05077-23-S | 1075-CE-03379 |
| Partnership Tax Filing Issues   | On-demand | James Hamill      | Taxes (2 hours)                                  | Intermediate | 2 | 4VRWB-T-05048-23-S | 1075-CE-03348 |
| Auditing Excel Spreadsheets   | On-demand | David Ringstrom   | Specialized Knowledge and Applications (2 hours) | Basic        | 2 |                    |               |
| Accounting Fraud & Embezzlement: Case Studies from the Trenches               | On-demand | Allison McLeod    | Regulatory Ethics (2 hours)                      | Basic        | 2 |                    | 1075-CE-03275 |
| Preparing the Statement of Cash Flow  | On-demand | Robert Minniti    | Accounting (2 hours)                             | Basic        | 2 |                    |               |
| Reviewing Partnership Agreements to Identify Key Tax Issues                   | On-demand | James Hamill      | Taxes (2 hours)                                  | Intermediate | 2 | 4VRWB-T-05047-23-S | 1075-CE-03347 |
| Obtaining Innocent Spouse Relief  | On-demand | Eric Green        | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-T-05016-23-S | 1075-CE-03310 |
| Advanced PivotTable Techniques  | On-demand | David Ringstrom   | Specialized Knowledge and Applications (2 hours) | Advanced     | 2 |                    |               |
| Fraud Evaluations: A Guide for The Compliance Professional                    | On-demand | Lynn Fountain     | Auditing (2 hours)                               | Basic        | 2 |                    |               |
| Predictive Accounting: Driver-Based Budgeting and Rolling Financial Forecasts | On-demand | Gary Cokins       | Accounting (2 hours)                             | Overview     | 2 |                    |               |
| International Tax Treaties  | On-demand | Allison McLeod    | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-             | 1075-CE-03274 |

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| 1099 Reporting Attorney and Settlement Payments  | On-demand | Steven Mercatante | Taxes (2 hours)  | Basic        | 2 | T-04987-23-S<br>4VRWB-<br>T-05039-23-S | 1075-CE-03339 |
| The Latest and Greatest in Helping Clients Claim Home Energy Credits                       | On-demand | Annette Nellen    | Taxes (2 hours)  | Overview     | 2 | 4VRWB-<br>T-05003-23-S                 | 1075-CE-03292 |
| How the IRS's New Strategic Operating Plan Will Affect Tax Professionals and Their Clients | On-demand | Eric Green        | Taxes (2 hours)  | Basic        | 2 | 4VRWB-<br>T-05017-23-S                 | 1075-CE-03311 |
| Allowable Costs under Uniform Guidance   | On-demand | Diane Edelstein   | Accounting (Governmental) (1 hour), Auditing (Governmental) (1 hour) | Basic        | 2 |  |               |
| FATCA: How to Comply with Minimal Withholding, Tax, & Penalty Impact                       | On-demand | Miles Hutchinson  | Taxes (2 hours)  | Basic        | 2 | 4VRWB-<br>T-04830-23-S                 | 1075-CE-03073 |
| Sarbanes Oxley (SOX) Section 404   | On-demand | Lynn Fountain     | Accounting (1 hour), Auditing (1 hour)                               | Basic        | 2 |  |               |
| Taking Your Accounts Payable Function Beyond Best Practice                                 | On-demand | Mary Schaeffer    | Accounting (2 hours)   | Basic        | 2 |  |               |
| Effectively Working with the IRS: Using IRS Transcripts and Current IRS Online Tools       | On-demand | Jim Buttonow      | Taxes (2 hours)  | Basic        | 2 | 4VRWB-<br>T-05034-23-S                 | 1075-CE-03333 |
| Taxation of Business Entities  | On-demand | Allison McLeod    | Taxes (2 hours)  | Basic        | 2 | 4VRWB-<br>T-04986-23-S                 | 1075-CE-03271 |
| Federal Taxation of Cannabis   | On-demand | Greg White        | Taxes (2 hours)  | Basic        | 2 | 4VRWB-<br>T-05015-23-S                 | 1075-CE-03309 |
| Change Management - Making it Work   | On-demand | Robert Minniti    | Specialized Knowledge and Applications (2 hours)                     | Basic        | 2 |  |               |
| Intermediate PivotTable Techniques   | On-demand | David Ringstrom   | Specialized Knowledge and Applications (2 hours)                     | Intermediate | 2 |  |               |
| IRS Audits and Appeals: A Practical and Technical Approach                                 | On-demand | Greg White        | Taxes (2 hours)  | Intermediate | 2 | 4VRWB-<br>T-05014-23-S                 | 1075-CE-03308 |
| The Future of Accounting: Big Data and Artificial Intelligence                             | On-demand | Cory Campbell     | Information Technology (2 hours)                                     | Basic        | 2 |  |               |
| High Interest Rate Estate Planning Opportunities   | On-demand | Klaralee Charlton | Taxes (2 hours)  | Intermediate | 2 | 4VRWB-<br>T-05063-23-S                 | 1075-CE-03364 |
| Roles of IRS Criminal Investigation  | On-demand | Susan Harper      | Taxes (1 hour)   | Basic        | 1 | 4VRWB-<br>T-05025-23-S                 | 1075-CE-03321 |
| Understanding the New Forms K-2 and K-3  | On-demand | Allison McLeod    | Taxes (2 hours)  | Basic        | 2 | 4VRWB-<br>T-04984-23-S                 | 1075-CE-03269 |
| Cash Versus Accrual Accounting   | On-demand | Robert Minniti    | Accounting (2 hours)   | Basic        | 2 |  |               |
| Small Business Retirement Plans: Picking the Best Plan for Your Client                     | On-demand | Greg White        | Taxes (2 hours)  | Basic        | 2 | 4VRWB-<br>T-05013-23-S                 | 1075-CE-03307 |

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| Sarbanes Oxley (SOX) Overview  | On-demand | Lynn Fountain     | Auditing (1 hour),<br>Accounting (1 hour)        | Basic        | 2 |                    |               |
| Roles of IRS - Stakeholder Liaison & National Taxpayer Advocate                                    | On-demand | Susan Harper      | Taxes (1 hour)                                   | Basic        | 1 | 4VRWB-T-05024-23-S | 1075-CE-03319 |
| Partnership Debt Sharing Under Section 752   | On-demand | James Hamill      | Taxes (2 hours)                                  | Intermediate | 2 | 4VRWB-T-05031-23-S | 1075-CE-03329 |
| The Controllershship Series: Future Role of the Controller: Part 1                                 | On-demand | Lynn Fountain     | Accounting (2 hours)                             | Basic        | 2 |                    |               |
| Obtaining and Understanding Your Client's IRS Account Information                                  | On-demand | Jim Buttonow      | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-T-05033-23-S | 1075-CE-03331 |
| PCI 4.0 Compliance and Credit Card Frauds  | On-demand | Robert Minniti    | Accounting (2 hours)                             | Basic        | 2 |                    |               |
| The Controllershship Series: Future Role of the Controller: Part 2                                 | On-demand | Lynn Fountain     | Accounting (2 hours)                             | Basic        | 2 |                    |               |
| Excel 101: Pivot Tables Basics   | On-demand | David Ringstrom   | Specialized Knowledge and Applications (2 hours) | Basic        | 2 |                    |               |
| New Overtime Rules for 2024 & Worker Categorization  | On-demand | Robert Minniti    | Accounting (2 hours)                             | Basic        | 2 |                    |               |
| The IRS Collection Process   | On-demand | Susan Harper      | Taxes (1 hour)                                   | Basic        | 1 | 4VRWB-T-05023-23-S | 1075-CE-03318 |
| Digital Assets - What to Ask Clients and What To Do with the Answers                               | On-demand | Annette Nellen    | Taxes (2 hours)                                  | Intermediate | 2 | 4VRWB-T-05001-23-S | 1075-CE-03290 |
| Last Minute Form 1099 Filing Tips  | On-demand | Steven Mercatante | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-T-05036-23-S | 1075-CE-03336 |
| Accounts Payable Internal Controls to Protect Against Fraud and Promote Efficiency                 | On-demand | Mary Schaeffer    | Accounting (2 hours)                             | Basic        | 2 |                    |               |
| The IRS Examination Process  | On-demand | Susan Harper      | Taxes (1 hour)                                   | Basic        | 1 | 4VRWB-T-05022-23-S | 1075-CE-03317 |
| S Corporation Basis: How to Calculate the Stock Basis  | On-demand | Jennifer Kowal    | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-T-04877-23-S | 1075-CE-03117 |
| Form 1041: Advanced Concepts in Fiduciary Income Tax (Part 2)                                      | On-demand | Klaralee Charlton | Taxes (4 hours)                                  | Basic        | 4 | 4VRWB-T-05125-24-S | 1075-CE-03429 |
| Form 1041: Basic Trust & Estate Income Tax Preparation (Part 1)                                    | On-demand | Klaralee Charlton | Taxes (4 hours)                                  | Basic        | 4 | 4VRWB-T-05088-24-S | 1075-CE-03390 |
| Preparing Form 706: The Federal Estate Tax Return  | On-demand | Steven Siegel     | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-T-04967-23-S | 1075-CE-03242 |
| 2023 C Corporations Update   | On-demand | Bradley Burnett   | Taxes (2 hours)                                  | Update       | 2 | 4VRWB-U-04895-23-S | 1075-CE-03144 |
| The Biggest Mistakes Made During Tax Season that Trigger IRS Enforcement!                          | On-demand | Eric Green        | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-T-04932-23-S | 1075-CE-03204 |
| How to Properly Perform an Agreed-Upon Procedures Engagement                                       | On-demand | Salvatore Collemi | Auditing (2 hours)                               | Intermediate | 2 |                    |               |
| Dealing with Duplicate Data in Excel   | On-demand | David Ringstrom   | Computer Software & Applications (2 hours)       | Intermediate | 2 |                    |               |
| Tax Savings With Exports Using The Deduction for Foreign Derived Intangible Income and the IC-DISC | On-demand | Robert Misey      | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-T-04960-23-S | 1075-CE-03233 |

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| Preparing Form 709: The Federal Gift Tax Return  | On-demand | Steven Siegel   | Taxes (2 hours)                              | Basic        | 2 | 4VRWB-T-04966-23-S | 1075-CE-03241 |
| 2023 Estate & Financial Planning Quarterly Update (Fall)                                 | On-demand | Klaralee Charlton   | Taxes (2 hours)                              | Update       | 2 | 4VRWB-U-04772-23-S | 1075-CE-02953 |
| Fair Value Options for Financial Instruments   | On-demand | Pat Patterson   | Accounting (2 hours)                         | Intermediate | 2 |                    |               |
| Fair Value Measurements  | On-demand | Pat Patterson   | Accounting (2 hours)                         | Intermediate | 2 |                    |               |
| Advanced Partnership Taxation Concepts   | On-demand | Greg White  | Taxes (4 hours)                              | Advanced     | 4 | 4VRWB-T-04926-23-S | 1075-CE-03193 |
| Tax Credits for Individuals  | On-demand | Barbara Weltman   | Taxes (1 hour)                               | Basic        | 1 | 4VRWB-T-05085-24-S | 1075-CE-03387 |
| ASC 606 Revenue Recognition: Considerations for Identifying the Contract Part 2          | On-demand | Lynn Fountain   | Accounting (2 hours)                         | Basic        | 2 |                    |               |
| Year-End Tax Update for Not-for-Profits  | On-demand | Clark Nuber<br>Frances Olson<br>Jennifer Becker<br>Harris | Taxes (2 hours)                              | Update       | 2 | 4VRWB-U-04975-23-S | 1075-CE-03253 |
| Trust Fundamentals: A Practical Primer for Tax Practitioners                             | On-demand | Steven Siegel   | Taxes (2 hours)                              | Basic        | 2 | 4VRWB-T-04965-23-S | 1075-CE-03240 |
| Strategy Management with a Strategy Map and its Balanced Scorecard                       | On-demand | Gary Cokins   | Business Management & Organization (2 hours) | Basic        | 2 |                    |               |
| Accounting for Financial Instruments with Characteristics of Both Liabilities and Equity | On-demand | Pat Patterson   | Accounting (2 hours)                         | Intermediate | 2 |                    |               |
| Searching for Hidden Assets  | On-demand | Robert Minniti  | Auditing (2 hours)                           | Basic        | 2 |                    |               |
| How to Avoid Common Peer Review Pitfalls   | On-demand | Salvatore Collemi   | Auditing (2 hours)                           | Intermediate | 2 |                    |               |
| Wrapping Up 2023, What You Need to Know for Calendar Year end Governments                | On-demand | Eric Berman   | Accounting (Governmental) (2 hours)          | Update       | 2 |                    |               |
| 2023 Best Practices: W2 and W4 Update  | On-demand | Miles Hutchinson  | Taxes (2 hours)                              | Update       | 2 | 4VRWB-U-04829-23-S | 1075-CE-03072 |
| Excel 101: Lookup Formulas   | On-demand | David Ringstrom   | Computer Software & Applications (2 hours)   | Basic        | 2 |                    |               |
| ASC 606 Revenue Recognition: Considerations for Identifying the Contract Part 1          | On-demand | Lynn Fountain   | Accounting (2 hours)                         | Basic        | 2 |                    |               |
| Reporting in a Single Audit  | On-demand | Diane Edelstein   | Auditing (Governmental) (2 hours)            | Basic        | 2 |                    |               |
| Mastering Audit Documentation  | On-demand | Salvatore Collemi   | Auditing (2 hours)                           | Intermediate | 2 |                    |               |
| Taxation of Foreign Partnerships and How to Report the Information Required by Form 8865 | On-demand | Robert Misey  | Taxes (2 hours)                              | Basic        | 2 | 4VRWB-T-04959-23-S | 1075-CE-03232 |
| Accountants and Malpractice: Can We Get Sued for This?                                   | On-demand | Allison McLeod  | Regulatory Ethics (2 hours)                  | Basic        | 2 |                    |               |
| Tax Practice: Becoming a Tax Ninja   | On-demand | Greg White  | Taxes (4 hours)                              | Basic        | 4 | 4VRWB-T-04927-23-S | 1075-CE-03196 |

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| Mastering Audit Sampling  | On-demand | Salvatore Collemi | Auditing (2 hours)                         | Intermediate | 2 |                    |               |
| Schedule E of Form 1040 or 1040-SR  | On-demand | Barbara Weltman   | Taxes (1 hour)                             | Basic        | 1 | 4VRWB-T-04983-23-S | 1075-CE-03267 |
| Deciphering Excel Error Prompts   | On-demand | David Ringstrom   | Computer Software & Applications (2 hours) | Intermediate | 2 |                    |               |
| Fixed Asset Accounting  | On-demand | Robert Minniti    | Accounting (2 hours)                       | Basic        | 2 |                    |               |
| Travel and Entertainment Best Practices: Prevent Fraud and Comply with IRS Regs                     | On-demand | Mary Schaeffer    | Accounting (2 hours)                       | Basic        | 2 |                    |               |
| 1099 Attorney and Settlement Reporting for AP and Tax Professionals                                 | On-demand | Steven Mercatante | Taxes (2 hours)                            | Basic        | 2 | 4VRWB-T-04946-23-S | 1075-CE-03221 |
| How to Avoid the Most Common Errors in Tax Problem Solving  | On-demand | Jim Buttonow      | Taxes (2 hours)                            | Basic        | 2 | 4VRWB-T-04842-23-S | 1075-CE-03084 |
| Employee Fraud: The Misappropriation of Assets  | On-demand | Robert Minniti    | Accounting (3 hours)                       | Basic        | 3 |                    |               |
| Demystifying Accounting for Blockchain, Cryptocurrency, and NFTs                                    | On-demand | Stephen Yoss      | Accounting (2 hours)                       | Basic        | 2 |                    |               |
| ASC 740 Part 2: Practical Application for Income Taxes Based on Income                              | On-demand | Lynn Fountain     | Accounting (2 hours)                       | Intermediate | 2 |                    |               |
| The Financial Reporting Model is almost done - What is in it  | On-demand | Eric Berman       | Accounting (Governmental) (2 hours)        | Update       | 2 |                    |               |
| Form 1041 Basics  | On-demand | Klaralee Charlton | Taxes (2 hours)                            | Basic        | 2 | 4VRWB-T-04736-23-S | 1075-CE-02917 |
| Passive Activities: Becoming a Tax Ninja Part 4   | On-demand | Greg White        | Taxes (2 hours)                            | Basic        | 2 | 4VRWB-T-04914-23-S | 1075-CE-03178 |
| Passive Activities: Becoming a Tax Ninja Part 3   | On-demand | Greg White        | Taxes (2 hours)                            | Basic        | 2 | 4VRWB-T-04913-23-S | 1075-CE-03401 |
| Family Trusts: Planning to Preserve, Protect and Transfer Wealth for Your Clients                   | On-demand | Steven Siegel     | Taxes (2 hours)                            | Basic        | 2 | 4VRWB-T-04963-23-S | 1075-CE-03236 |
| Settling Your Tax Bill for Less: Myths vs. Reality  | On-demand | Jim Buttonow      | Taxes (2 hours)                            | Basic        | 2 | 4VRWB-T-04841-23-S | 1075-CE-03083 |
| Tax Issues Involving Troubled Borrowers   | On-demand | Jennifer Kowal    | Taxes (2 hours)                            | Intermediate | 2 | 4VRWB-T-04870-23-S | 1075-CE-03110 |
| The Balance Sheet: Reporting in Compliance with GAAP  | On-demand | Lewis Fisher      | Accounting (2 hours)                       | Basic        | 2 |                    |               |
| Passive Activities: Becoming a Tax Ninja Part 2   | On-demand | Greg White        | Taxes (2 hours)                            | Basic        | 2 | 4VRWB-T-04912-23-S | 1075-CE-03176 |
| Form 1099-MISC Explained  | On-demand | Steven Mercatante | Taxes (2 hours)                            | Basic        | 2 | 4VRWB-T-04786-23-S | 1075-CE-02964 |
| How to Account and Audit under the New Leasing Standard   | On-demand | Salvatore Collemi | Accounting (1 hour), Auditing (1 hour)     | Intermediate | 2 |                    |               |
| ASC 740 Part 1: Practical Application for Accounting for Income Taxes Based on Income               | On-demand | Lynn Fountain     | Accounting (2 hours)                       | Basic        | 2 |                    |               |
| Choice of Entity for Foreign Operations via Checking-the-Box: Elections on Form 8832 and Compliance | On-demand | Robert Misey      | Taxes (2 hours)                            | Basic        | 2 | 4VRWB-T-04958-23-S | 1075-CE-03231 |

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| Passive Activities: Becoming a Tax Ninja Part 1                         | On-demand        | Greg White   | Taxes (2 hours)                            | Basic        | 2  | 4VRWB-T-04911-23-S | 1075-CE-03175 |
| QuickBooks Desktop/Microsoft Excel Data Analysis                        | On-demand        | David Ringstrom  | Computer Software & Applications (2 hours) | Intermediate | 2  |                    |               |
| Partnership and LLC Taxation: Entities Taxed as Partnerships            | On-demand        | Greg White   | Taxes (5 hours)                            | Basic        | 5  | 4VRWB-T-04845-23-S | 1075-CE-03268 |
| Becoming a Tax Ninja: Tax Accounting Methods Part 4                     | On-demand        | Greg White   | Taxes (2 hours)                            | Basic        | 2  | 4VRWB-T-04920-23-S | 1075-CE-03183 |
| Becoming a Tax Ninja: Tax Accounting Methods Part 3                     | On-demand        | Greg White   | Taxes (2 hours)                            | Basic        | 2  | 4VRWB-T-04919-23-S | 1075-CE-03182 |
| Testing Internal Controls in a Single Audit                             | On-demand        | Diane Edelstein  | Auditing (Governmental) (2 hours)          | Basic        | 2  |                    |               |
| Top Federal Tax Issues for 2024 CPE Course: Module 2                    | Downloadable PDF | Greg White<br>Susan Harper<br>Robert Minniti                             | Taxes (10 hours)                           | Basic        | 10 | 4VRWB-T-04979-23-S | 1075-CE-03262 |
| Top Federal Tax Issues for 2024 CPE Course: Module 1                    | Downloadable PDF | James Hamill<br>Klaralee Charlton<br>Barbara Weltman<br>Ariele Doolittle | Taxes (8 hours)                            | Basic        | 8  | 4VRWB-T-04978-23-S | 1075-CE-03261 |
| Becoming a Tax Ninja: Tax Accounting Methods Part 2                     | On-demand        | Greg White   | Taxes (2 hours)                            | Basic        | 2  | 4VRWB-T-04918-23-S | 1075-CE-03181 |
| Excel's XLOOKUP Function  | On-demand        | David Ringstrom  | Computer Software & Applications (2 hours) | Basic        | 2  |                    |               |
| Accessing Your Company's Data in Power Query and Power BI               | On-demand        | Stephen Yoss   | Computer Software & Applications (2 hours) | Intermediate | 2  |                    |               |
| Becoming a Tax Ninja: Tax Accounting Methods Part 1                     | On-demand        | Greg White   | Taxes (2 hours)                            | Basic        | 2  | 4VRWB-T-04917-23-S | 1075-CE-03180 |
| Impact on Reasonable Compensation for S Corp Shareholder: Employees     | On-demand        | Greg White   | Taxes (2 hours)                            | Intermediate | 2  | 4VRWB-T-04916-23-S | 1075-CE-03179 |
| How To Conduct a Proper Group Audit Engagement                          | On-demand        | Salvatore Collemi  | Auditing (2 hours)                         | Intermediate | 2  |                    |               |
| Audit Technique Guide: The Entertainment Industry                       | On-demand        | Susan Harper   | Auditing (2 hours)                         | Basic        | 2  |                    |               |
| How To Perform An Effective Internal Inspection of Your Attest Practice | On-demand        | Salvatore Collemi  | Auditing (2 hours)                         | Intermediate | 2  |                    |               |
| Preparation Engagements and Professional Standards                      | On-demand        | Pat Patterson  | Accounting (2 hours)                       | Update       | 2  |                    |               |
| Preparing Form 1120S: Part 2  | On-demand        | Greg White   | Taxes (4 hours)                            | Basic        | 4  | 4VRWB-T-04910-23-S | 1075-CE-03167 |
| Tax Aspects to Lawsuits, Awards, and Settlements                        | On-demand        | Susan Harper   | Taxes (2 hours)                            | Basic        | 2  | 4VRWB-T-04954-23-S | 1075-CE-03227 |
| Preparing Form 1120S: Part 1  | On-demand        | Greg White   | Taxes (4 hours)                            | Basic        | 4  | 4VRWB-T-04909-23-S | 1075-CE-02901 |
| U.S. Tax Treaties: Planning, Application, and Compliance                | On-demand        | Robert Misey   | Taxes (2 hours)                            | Basic        | 2  | 4VRWB-T-04957-23-S | 1075-CE-03230 |
| Sleeper Features and Functions in Microsoft Excel                       | On-demand        | David Ringstrom  | Computer Software                          | Intermediate | 2  |                    |               |

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| Private Foundation Pitfalls: Self-Dealing, Taxable Expenditures, and More                     | On-demand | Clark Nuber<br>Sarah Huang<br>Celia Davis | & Applications (2 hours)<br>Taxes (2 hours)                          | Basic        | 2 | 4VRWB-T-04943-23-S | 1075-CE-03218 |
| A Review of AU-C Section 240 and the New NOCLAR Rules   | On-demand | Robert Minniti                            | Auditing (2 hours)   | Basic        | 2 |                    |               |
| Like-Kind Exchanges: Qualify as a Valid Section 1031 Exchange                                 | On-demand | Jennifer Kowal                            | Taxes (2 hours)  | Basic        | 2 | 4VRWB-T-04875-23-S | 1075-CE-03115 |
| Preparation, Compilation, and Review: Q & A   | On-demand | Pat Patterson                             | Accounting (2 hours)   | Update       | 2 |                    |               |
| Complying with the Revenue Recognition – Step 5 Recognize Revenue                             | On-demand | Lynn Fountain                             | Accounting (2 hours)   | Basic        | 2 |                    |               |
| Assessing Risk Considering GASB Statement No. 102 and Related Audit Risk Assessments          | On-demand | Eric Berman<br>Kurt Schlicker             | Accounting (Governmental) (1 hour), Auditing (Governmental) (1 hour) | Intermediate | 2 |                    |               |
| 2023 Estate & Financial Planning Quarterly Update (Summer)                                    | On-demand | Klaralee Charlton                         | Taxes (2 hours)  | Update       | 2 | 4VRWB-U-04771-23-S | 1075-CE-02952 |
| Combat Fraud with Effective Internal Controls   | On-demand | Susan Harper                              | Business Management & Organization (2 hours)                         | Basic        | 2 |                    |               |
| Implementing Excel Spreadsheet Internal Controls  | On-demand | David Ringstrom                           | Computer Software & Applications (2 hours)                           | Intermediate | 2 |                    |               |
| Best Practices: Mitigating Data Breaches & Vulnerabilities; and Appropriate Incident Response | On-demand | Susan Harper                              | Taxes (2 hours)  | Basic        | 2 | 4VRWB-T-04952-23-S | 1075-CE-03225 |
| Transfer Pricing and How to Complete Form 5472  | On-demand | Robert Misey                              | Taxes (2 hours)  | Basic        | 2 | 4VRWB-T-04956-23-S | 1075-CE-03229 |
| Automating Excel-Based Financial Statements Part 2  | On-demand | David Ringstrom                           | Computer Software & Applications (2 hours)                           | Intermediate | 2 |                    |               |
| Expense Reimbursement Fraud   | On-demand | Robert Minniti                            | Auditing (2 hours)   | Basic        | 2 |                    |               |
| When Your Client Dies: Final Form 1040, Post-Death Elections and More                         | On-demand | Steven Siegel                             | Taxes (2 hours)  | Intermediate | 2 | 4VRWB-T-04961-23-S | 1075-CE-03234 |
| How the U.S. Taxes Foreign Subsidiaries and How to Complete Form 5471                         | On-demand | Robert Misey                              | Taxes (2 hours)  | Basic        | 2 | 4VRWB-T-04955-23-S | 1075-CE-03228 |
| How to Properly Tailor Your Audit Program   | On-demand | Salvatore Collemi                         | Auditing (2 hours)   | Intermediate | 2 |                    |               |
| Coming in From the Cold: How to Help Non-Filers   | On-demand | Eric Green                                | Taxes (2 hours)  | Basic        | 2 | 4VRWB-T-04928-23-S | 1075-CE-03200 |
| Accounts Payable Best Practices for Financial Professionals                                   | On-demand | Mary Schaeffer                            | Accounting (2 hours)   | Basic        | 2 |                    |               |
| Internal Audit Trends 2023  | On-demand | Robert Minniti                            | Auditing (2 hours)   | Basic        | 2 |                    |               |
| Tax Consequences of Business Breakups   | On-demand | Jennifer Kowal                            | Taxes (2 hours)  | Basic        | 2 | 4VRWB-T-04873-23-S | 1075-CE-03113 |
| Automating Excel-Based Financial Statements Part 1  | On-demand | David Ringstrom                           | Computer Software & Applications (2 hours)                           | Intermediate | 2 |                    |               |



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|   |           |  | hours)   |              |   |                        |               |
| Form 990-T and Unrelated Business Income                              | On-demand | Clark Nuber<br>Megan Ryan<br>Danielle Wright | Taxes (2 hours)                                  | Intermediate | 2 | 4VRWB-<br>T-04949-23-S | 1075-CE-03224 |
| CAPEX Analysis using Discounted Cash Flow Techniques                  | On-demand | Miles Hutchinson                             | Finance (2 hours)                                | Intermediate | 2 |                        |               |
| Fraud Roundup: Newer Frauds and How to Spot Them When Targeted        | On-demand | Mary Schaeffer                               | Accounting (1<br>hour), Auditing (1<br>hour)     | Basic        | 2 |                        |               |
| Data and Statistical Analytics Using Microsoft Excel                  | On-demand | Stephen Yoss                                 | Computer Science<br>(2 hours)                    | Intermediate | 2 |                        |               |
| Developing a Digital Mindset  | On-demand | Cory Campbell                                | Information<br>Technology (2<br>hours)           | Basic        | 2 |                        |               |
| Tax Practice Standards  | On-demand | Allison McLeod                               | Regulatory Ethics<br>(2 hours)                   | Basic        | 2 | 4VRWB-<br>E-04796-23-S | 1075-CE-3021  |
| Money Laundering  | On-demand | Robert Minniti                               | Accounting (1<br>hour), Auditing (1<br>hour)     | Basic        | 2 |                        |               |
| Corporate Tax: Formation and Operation                                | On-demand | Jennifer Kowal                               | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-<br>T-04872-23-S | 1075-CE-03112 |
| Employee Benefit Plans: Contribution and Distribution Testing         | On-demand | Lewis Fisher                                 | Auditing (2 hours)                               | Basic        | 2 |                        |               |
| The Criminal Investigation Process                                    | On-demand | Eric Green                                   | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-<br>T-04881-23-S | 1075-CE-03121 |
| Tax Ethics and Circular 230   | On-demand | Jennifer Kowal                               | Regulatory Ethics<br>(2 hours)                   | Basic        | 2 | 4VRWB-<br>E-04871-23-S | 1075-CE-03111 |
| Creating Error-Proof Excel Spreadsheets                               | On-demand | David Ringstrom                              | Computer Software<br>& Applications (2<br>hours) | Intermediate | 2 |                        |               |
| Risks and Internal Controls for Employees Working From Home           | On-demand | Robert Minniti                               | Auditing (2 hours)                               | Basic        | 2 |                        |               |
| Employee Benefit Plans: Auditing Investments                          | On-demand | Lewis Fisher                                 | Auditing (2 hours)                               | Basic        | 2 |                        |               |
| Minimizing Data Entry in Excel  | On-demand | David Ringstrom                              | Computer Software<br>& Applications (2<br>hours) | Intermediate | 2 |                        |               |
| Tax Return Identity Theft   | On-demand | Robert Minniti                               | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-<br>T-04891-23-S | 1075-CE-03140 |
| Handling the OID and Below Market Loan Rules                          | On-demand | Jennifer Kowal                               | Taxes (2 hours)                                  | Intermediate | 2 | 4VRWB-<br>T-04869-23-S | 1075-CE-03109 |
| W-9 Best Practices  | On-demand | Steven Mercatante                            | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-<br>T-04808-23-S | 1075-CE-03006 |
| Database Basics for Financial Professionals                           | On-demand | Stephen Yoss                                 | Computer Software<br>& Applications (2<br>hours) | Intermediate | 2 |                        |               |
| Employee Benefit Plans: Internal Controls and SOC 1 Reports           | On-demand | Lewis Fisher                                 | Auditing (2 hours)                               | Basic        | 2 |                        |               |
| The Inflation Reduction Act - What the IRS is doing with \$80 Billion | On-demand | Susan Harper                                 | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-<br>T-04835-23-S | 1075-CE-03076 |
| Post Death IRA Transactions   | On-demand | Klaralee Charlton                            | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-<br>T-04732-23-S | 1075-CE-02913 |
| CPA's Guidebook for Ethical Behavior: Code of Professional            | On-demand | Allison McLeod                               | Regulatory Ethics                                | Basic        | 2 |                        |               |

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| Conduct  |           |                                | (2 hours)  |              |   |                    |               |
| ChatGPT for Tax: A Quick Guide to Successful Tax Research                                  | On-demand | Greg White                     | Taxes (1 hour)                                   | Basic        | 1 | 4VRWB-T-04896-23-S | 1075-CE-03145 |
| Theft of Data & Intellectual Property  | On-demand | Susan Harper                   | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-T-04834-23-S | 1075-CE-03075 |
| Leveraging Linked Workbooks in Excel   | On-demand | David Ringstrom                | Computer Software & Applications (2 hours)       | Intermediate | 2 |                    |               |
| Securities Fraud   | On-demand | Susan Harper                   | Specialized Knowledge and Applications (2 hours) | Basic        | 2 |                    |               |
| Charitable Remainder Trusts and Preparing Form 5227  | On-demand | Steven Siegel                  | Taxes (2 hours)                                  | Intermediate | 2 | 4VRWB-T-04803-23-S | 1075-CE-03015 |
| Filing Form 7203   | On-demand | Greg White                     | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-T-04858-23-S | 1075-CE-03100 |
| GAAP Presentation of Financial Statements  | On-demand | Lynn Fountain                  | Auditing (2 hours)                               | Basic        | 2 |                    |               |
| S Corporations Part 4: Ordinary Losses on Stock Sales, Exit Strategies, and K-1 Conformity | On-demand | Greg White                     | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-T-04857-23-S | 1075-CE-03099 |
| Interest Expense Deduction Individuals and Businesses                                      | On-demand | Barbara Weltman<br>Sidney Kess | Taxes (1 hour)                                   | Basic        | 1 | 4VRWB-U-04948-23-S | 1075-CE-03223 |
| Procurement Standards under Uniform Guidance   | On-demand | Diane Edelstein                | Auditing (Governmental) (2 hours)                | Basic        | 2 |                    |               |
| Other than GASB-94 and 96, What You Need to Know for this June 30 Year-End                 | On-demand | Eric Berman                    | Accounting (Governmental) (2 hours)              | Update       | 2 |                    |               |
| Sarbanes-Oxley Update - 20 Years Later: Examining Fraud Risks                              | On-demand | Lynn Fountain                  | Auditing (2 hours)                               | Basic        | 2 |                    |               |
| Emerging Technology for Your Organization  | On-demand | Cory Campbell                  | Information Technology (2 hours)                 | Intermediate | 2 |                    |               |
| Inside Excel's Conditional Formatting Feature  | On-demand | David Ringstrom                | Computer Software & Applications (2 hours)       | Intermediate | 2 |                    |               |
| S Corporations Part 3: Maximizing the §199A QBID and Other Planning Insights               | On-demand | Greg White                     | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-T-04856-23-S | 1075-CE-03098 |
| Reporting Charitable Bequests on Form 706 and Form 1041                                    | On-demand | Klaralee Charlton              | Taxes (2 hours)                                  | Intermediate | 2 | 4VRWB-T-04865-23-S | 1075-CE-03107 |
| S Corporations Part 2: Determining Reasonable Compensation                                 | On-demand | Greg White                     | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-T-04855-23-S | 1075-CE-03097 |
| Basics of Fraud Investigations   | On-demand | Robert Minniti                 | Auditing (2 hours)                               | Basic        | 2 |                    |               |
| S Corporations Part 1: Converting C Corps to S Corps and Preserving S Status               | On-demand | Greg White                     | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-T-04854-23-S | 1075-CE-03096 |
| Charitable Contribution Deduction: Rules & Changes   | On-demand | Susan Harper                   | Taxes (1 hour)                                   | Basic        | 1 | 4VRWB-T-04823-23-S | 1075-CE-03065 |
| 1099 Essentials  | On-demand | Steven Mercatante              | Taxes (2 hours)                                  | Basic        | 2 | 4VRWB-T-04807-23-S | 1075-CE-03005 |
| Auditing and Internal Control Issues   | On-demand | Pat Patterson                  | Auditing (2 hours)                               | Intermediate | 2 |                    |               |

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| Are You Really Ready? Effective Disaster Recovery & Business Continuity Planning                  | On-demand | Stephen Yoss      | Information Technology (2 hours)           | Basic        | 2 |                    |               |
| Tax Planning for Purchases and Sales of Property: Part 2  | On-demand | Greg White        | Taxes (2 hours)                            | Basic        | 2 | 4VRWB-T-04853-23-S | 1075-CE-03095 |
| Regulatory Ethics Guidebook for CPAs: AICPA Code of Professional Conduct                          | On-demand | Allison McLeod    | Regulatory Ethics (4 hours)                | Basic        | 4 |                    |               |
| Mid-Year Tax Update   | On-demand | Greg White        | Taxes (4 hours)                            | Update       | 4 | 4VRWB-U-04852-23-S | 1075-CE-03094 |
| Federal Income Taxation of Trusts and Estates   | On-demand | Steven Siegel     | Taxes (2 hours)                            | Basic        | 2 | 4VRWB-T-04802-23-S | 1075-CE-03014 |
| Tax Planning for Purchases and Sales of Property: Part 1  | On-demand | Greg White        | Taxes (2 hours)                            | Basic        | 2 | 4VRWB-T-04851-23-S | 1075-CE-03093 |
| Handling Changes to W-8 and W-9   | On-demand | Steven Mercatante | Taxes (2 hours)                            | Basic        | 2 | 4VRWB-T-04806-23-S | 1075-CE-03004 |
| Artificial Intelligence (AI) and Robotics Process Automation (RPA)                                | On-demand | Cory Campbell     | Information Technology (2 hours)           | Intermediate | 2 |                    |               |
| Maximizing Social Security Benefits   | On-demand | Greg White        | Taxes (2 hours)                            | Basic        | 2 | 4VRWB-T-04850-23-S | 1075-CE-03092 |
| Tax Strategies for Partnerships Part 4: Maximizing the QBID and Minimizing Self-Employment Taxes  | On-demand | Greg White        | Taxes (2 hours)                            | Basic        | 2 | 4VRWB-T-04849-23-S | 1075-CE-03091 |
| Using Excel What-If Analysis: When, Why, and How  | On-demand | David Ringstrom   | Computer Software & Applications (2 hours) | Intermediate | 2 |                    |               |
| Tax Strategies for Partnerships Part 3: Allocations, Partnership Audit Rules, and Self-Employment | On-demand | Greg White        | Taxes (2 hours)                            | Basic        | 2 | 4VRWB-T-04847-23-S | 1075-CE-03089 |
| Understanding the Federal Gift Tax  | On-demand | Steven Siegel     | Taxes (2 hours)                            | Overview     | 2 | 4VRWB-T-04800-23-S | 1075-CE-03013 |
| International Tax: An Overview of PFICs   | On-demand | Patrick McCormick | Taxes (2 hours)                            | Basic        | 2 | 4VRWB-T-04836-23-S | 1075-CE-03077 |
| Tax Strategies for Partnerships Part 2: Operating Issues  | On-demand | Greg White        | Taxes (2 hours)                            | Basic        | 2 | 4VRWB-T-04846-23-S | 1075-CE-03088 |
| IRS Audit Technique Guide - Exploring the Construction Industry                                   | On-demand | Susan Harper      | Taxes (2 hours)                            | Basic        | 2 | 4VRWB-T-04822-23-S | 1075-CE-03064 |
| Managing Difficult Personalities  | On-demand | Lynn Fountain     | Auditing (2 hours)                         | Basic        | 2 |                    |               |
| QuickBooks Online/Microsoft Excel Data Analysis   | On-demand | David Ringstrom   | Computer Science (2 hours)                 | Intermediate | 2 |                    |               |
| Tax Strategies for Partnerships Part 1: Formation, Purchase, and Sales of Partnership Interests   | On-demand | Greg White        | Taxes (2 hours)                            | Basic        | 2 | 4VRWB-T-04844-23-S | 1075-CE-03086 |
| Tax Strategies for Passive Activities   | On-demand | Greg White        | Taxes (2 hours)                            | Basic        | 2 | 4VRWB-T-04843-23-S | 1075-CE-03085 |
| Minimizing Expense Reimbursement Headaches Caused by the Traveler, the Manager, and Fraud         | On-demand | Mary Schaeffer    | Accounting (2 hours)                       | Basic        | 2 |                    |               |
| The Future of Internal Audit  | On-demand | Lynn Fountain     | Auditing (2 hours)                         | Basic        | 2 |                    |               |
| Introduction to Power Query Part 2  | On-demand | David Ringstrom   | Computer Software & Applications (2 hours) | Intermediate | 2 |                    |               |

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| Introduction to Power Query Part 1  | On-demand | David Ringstrom   | Computer Software & Applications (2 hours) | Intermediate | 2 |                    |               |
| A Basic Ethics Guidebook for New York CPAs  | On-demand | Allison McLeod    | Regulatory Ethics (4 hours)                | Basic        | 4 |                    |               |
| Transfer Taxes for the Multinational Individual   | On-demand | Patrick McCormick | Taxes (2 hours)                            | Intermediate | 2 | 4VRWB-T-04825-23-S | 1075-CE-03067 |
| A Basic Ethics Guidebook for Arizona CPAs   | On-demand | Allison McLeod    | Regulatory Ethics (4 hours)                | Basic        | 4 |                    |               |
| Not-for-Profit Issues: Accounting and Auditing Update   | On-demand | Pat Patterson     | Accounting (1 hour), Auditing (1 hour)     | Update       | 2 |                    |               |
| Filtering Techniques for Excel Data   | On-demand | David Ringstrom   | Computer Software & Applications (2 hours) | Intermediate | 2 |                    |               |
| Google Workspace vs. Microsoft 365 What's Right For Your Organization?                          | On-demand | Stephen Yoss      | Computer Software & Applications (2 hours) | Basic        | 2 |                    |               |
| Gearing Up for GASB-94 and 96, as amended by GASB-99 along with related Implementation Guidance | On-demand | Eric Berman       | Accounting (Governmental) (2 hours)        | Overview     | 2 |                    |               |
| Beyond Excel's VLOOKUP Function   | On-demand | David Ringstrom   | Computer Software & Applications (2 hours) | Intermediate | 2 |                    |               |
| A Basic Ethics Guidebook for Florida CPAs   | On-demand | Allison McLeod    | Regulatory Ethics (4 hours)                | Basic        | 4 |                    |               |
| Internal Audit: Keys to Managing an Effective Function  | On-demand | Lynn Fountain     | Auditing (2 hours)                         | Basic        | 2 |                    |               |
| Creating Powerful and Effective Presentations with PowerPoint                                   | On-demand | Stephen Yoss      | Computer Software & Applications (2 hours) | Basic        | 2 |                    |               |
| Behavioral Finance  | On-demand | Rob Stephens      | Finance (5 hours)                          | Basic        | 5 |                    |               |
| Measuring and Managing Customer Profitability   | On-demand | Gary Cokins       | Accounting (2 hours)                       | Basic        | 2 |                    |               |
| Internal Audit Standards - Executing the Audit Engagement                                       | On-demand | Lynn Fountain     | Auditing (2 hours)                         | Basic        | 2 |                    |               |
| Income Taxation of Trusts and Estates and Preparing Form 1041 Part 2                            | On-demand | Steven Siegel     | Taxes (4 hours)                            | Intermediate | 4 | 4VRWB-T-04799-23-S | 1075-CE-03012 |
| Income Taxation of Trusts and Estates and Preparing Form 1041 Part 1                            | On-demand | Steven Siegel     | Taxes (4 hours)                            | Intermediate | 4 | 4VRWB-T-04798-23-S | 1075-CE-03011 |
| An Accountant's Detailed Guide to Databases, Integration, and Data Sharing                      | On-demand | Stephen Yoss      | Computer Software & Applications (4 hours) | Intermediate | 4 |                    |               |
| Internal Audit Standards - Managing Internal Audit Work   | On-demand | Lynn Fountain     | Auditing (2 hours)                         | Basic        | 2 |                    |               |
| International Tax: Basics of Income Sourcing  | On-demand | Patrick McCormick | Taxes (2 hours)                            | Overview     | 2 |                    |               |
| Quality Management Standards: Update  | On-demand | Pat Patterson     | Accounting (1 hour), Auditing (1 hour)     | Intermediate | 2 |                    |               |
| Excel Chart Speed Tips  | On-demand | David Ringstrom   | Computer Software & Applications (2 hours) | Basic        | 2 |                    |               |

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|  |           |                            | hours)   |              |   |                    |               |  |
| 2023 Governmental Entities and Cyber Frauds                                | On-demand | Robert Minniti             | Accounting (Governmental) (1 hour), Auditing (Governmental) (1 hour) | Basic        | 2 |                    |               |  |
| Introduction to Environmental, Social and Governance (ESG) for Accountants | On-demand | Lynn Fountain              | Accounting (2 hours)   | Basic        | 2 |                    |               |  |
| Preparation vs. Compilation: What Is It?                                   | On-demand | Pat Patterson              | Accounting (1 hour), Auditing (1 hour)                               | Intermediate | 2 |                    |               |  |
| Everyday Tax Rules: Tax Tips from 38 Years in the Trenches                 | On-demand | Greg White                 | Taxes (2 hours)  | Basic        | 2 | 4VRWB-T-04724-23-S | 1075-CE-02998 |  |
| Digging into Excel's Data Validation Feature                               | On-demand | David Ringstrom            | Computer Software & Applications (2 hours)                           | Intermediate | 2 |                    |               |  |
| Private Foundation Grantmaking Strategies and Best Practices               | On-demand | Clark Nuber<br>Sarah Huang | Taxes (2 hours)  | Intermediate | 2 | 4VRWB-T-04782-23-S | 1075-CE-02959 |  |
| Accounting for Intangibles and Research and Development Costs              | On-demand | Pat Patterson              | Accounting (2 hours)   | Intermediate | 2 |                    |               |  |
| Common Estate Planning Mistakes and How to Avoid Them                      | On-demand | Steven Siegel              | Taxes (2 hours)  | Basic        | 2 | 4VRWB-T-04801-23-S | 1075-CE-03010 |  |
| Basics of Fiduciary Accounting   | On-demand | Klaralee Charlton          | Accounting (2 hours)   | Basic        | 2 |                    |               |  |
| GAAP vs IFRS Update  | On-demand | Pat Patterson              | Accounting (2 hours)   | Intermediate | 2 |                    |               |  |
| Can You and Should You Aggregate for Sections 465, 469, and 199A           | On-demand | James Hamill               | Taxes (2 hours)  | Basic        | 2 | 4VRWB-T-04787-23-S | 1075-CE-02989 |  |
| Advanced Staff Training: Writing Audit Reports                             | On-demand | Robert Minniti             | Auditing (2 hours)   | Advanced     | 2 |                    |               |  |
| Advanced Staff Training: Reviewing Work Papers & Field Work                | On-demand | Robert Minniti             | Auditing (2 hours)   | Advanced     | 2 |                    |               |  |
| Advanced Staff Training: Auditing Payroll                                  | On-demand | Robert Minniti             | Auditing (2 hours)   | Advanced     | 2 |                    |               |  |
| Advanced Staff Training: Auditing Notes and Disclosures                    | On-demand | Robert Minniti             | Auditing (2 hours)   | Advanced     | 2 |                    |               |  |
| Advanced Staff Training: Accepting New Clients & Client Review             | On-demand | Robert Minniti             | Auditing (2 hours)   | Advanced     | 2 |                    |               |  |
| Intermediate Staff Training: Auditing Revenue Recognition                  | On-demand | Robert Minniti             | Auditing (2 hours)   | Basic        | 2 |                    |               |  |
| Intermediate Staff Training: Auditing Inventory                            | On-demand | Robert Minniti             | Auditing (2 hours)   | Intermediate | 2 |                    |               |  |
| Intermediate Staff Training: Auditing Internal Controls                    | On-demand | Robert Minniti             | Auditing (2 hours)   | Intermediate | 2 |                    |               |  |
| Basic Staff Training: Auditing Expense Reimbursements                      | On-demand | Robert Minniti             | Auditing (2 hours)   | Basic        | 2 |                    |               |  |
| Basic Staff Training: Inventory & Cost of Goods Sold Audit Concepts        | On-demand | Robert Minniti             | Auditing (2 hours)   | Basic        | 2 |                    |               |  |
| Basic Staff Training: Cash & Related Fraud Risks Audit Concepts            | On-demand | Robert Minniti             | Auditing (2 hours)   | Basic        | 2 |                    |               |  |
| Basic Staff Training: Auditing for Corruption                              | On-demand | Robert Minniti             | Auditing (2 hours)   | Basic        | 2 |                    |               |  |
| Distributing Capital Gains on Form 1041                                    | On-demand | Klaralee Charlton          | Taxes (2 hours)  | Intermediate | 2 | 4VRWB-T-04776-23-S | 1075-CE-02967 |  |
| Cryptocurrency Risk Financial Statement Disclosure Requirements            | On-demand | Robert Minniti             | Auditing (2 hours)   | Basic        | 2 |                    |               |  |
| Basic Staff Training: Auditing Fixed Assets                                | On-demand | Robert Minniti             | Auditing (2 hours)   | Basic        | 2 |                    |               |  |
| Basic Staff Training: Auditing Cash Receipts                               | On-demand | Robert Minniti             | Auditing (2 hours)   | Basic        | 2 |                    |               |  |
| How to Help Your Clients Claim Energy Credits Over the Next 10 Years       | On-demand | Annette Nellen             | Taxes (1 hour)   | Basic        | 1 | 4VRWB-T-04661-22-S | 1075-CE-02972 |  |
| Cybersecurity for Tax Professionals  | On-demand | Robert Minniti             | Taxes (2 hours)  | Basic        | 2 | 4VRWB-             | 1075-CE-02751 |  |

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|   |                  |  |  |              |   |                    | T-04550-22-S  |  |
| Mastering Adobe Acrobat for Financial Professionals                                       | On-demand        | Stephen Yoss                                       | Computer Software Basic & Applications (2 hours)                     |              | 2 |                    |               |  |
| Employment Tax Fraud: More Common than Expected!  | On-demand        | Susan Harper                                       | Taxes (2 hours)  | Basic        | 2 | 4VRWB-T-04779-22-S | 1075-CE-03056 |  |
| Electronic Data Analysis  | On-demand        | Robert Minniti                                     | Auditing (2 hours)   | Basic        | 2 |                    |               |  |
| California 8-Hour Annuity Training  | Downloadable PDF | Paul Winn  | Specialized Knowledge (8 hours)                                      | Basic        | 8 |                    |               |  |
| Introduction to Business Intelligence (BI)  | On-demand        | Lynn Fountain                                      | Auditing (2 hours)   | Basic        | 2 |                    |               |  |
| A CPAs Guidebook to Ethical Behavior: A CPE Ethics Course for Texas CPAs                  | On-demand        | Allison McLeod                                     | Regulatory Ethics (4 hours)  | Basic        | 4 |                    |               |  |
| Basic Staff Training: Auditing Accounts Receivable & Revenue                              | On-demand        | Robert Minniti                                     | Auditing (2 hours)   | Basic        | 2 |                    |               |  |
| Basic Staff Training: Auditing Accounts Receivable  | On-demand        | Robert Minniti                                     | Auditing (2 hours)   | Basic        | 2 |                    |               |  |
| Bringing Artificial Intelligence to Your Organization                                     | On-demand        | Stephen Yoss                                       | Information Technology (2 hours)                                     | Basic        | 2 |                    |               |  |
| Multistate Income Allocation and Apportionment  | On-demand        | Hodgson Russ LLP                                   | Taxes (2 hours)  | Basic        | 2 |                    |               |  |
| Basic Staff Training: Auditing Accounts Payable   | On-demand        | Robert Minniti                                     | Auditing (2 hours)   | Basic        | 2 |                    |               |  |
| Basic Staff Training: Accounts Payable, Expenditures, & Related Fraud Risks               | On-demand        | Robert Minniti                                     | Auditing (2 hours)   | Basic        | 2 |                    |               |  |
| Automation for Increasing Personal Efficiency and Effectiveness                           | On-demand        | Stephen Yoss                                       | Information Technology (2 hours)                                     | Basic        | 2 |                    |               |  |
| A Closer Look Into Installment Sales  | On-demand        | Jennifer Kowal                                     | Taxes (2 hours)  | Intermediate | 2 | 4VRWB-T-04541-22-S | 1075-CE-02742 |  |
| SSARS 26 and Quality Management   | On-demand        | Pat Patterson                                      | Auditing (2 hours)   | Intermediate | 2 |                    |               |  |
| Sales and Use Tax Considerations for Early Stage Companies                                | On-demand        | Hodgson Russ LLP                                   | Taxes (2 hours)  | Overview     | 2 |                    |               |  |
| Governmental Accounting and Auditing Update: Year-End Planning                            | On-demand        | K. Craig Reilly<br>Ariele Doolittle<br>Eric Berman | Accounting (Governmental) (1 hour), Auditing (Governmental) (1 hour) | Update       | 2 |                    |               |  |
| Capital Gain or Ordinary Income?  | On-demand        | Jennifer Kowal                                     | Taxes (2 hours)  | Intermediate | 2 | 4VRWB-T-04540-22-S | 1075-CE-02741 |  |
| Local Tax Issues for Multistate Businesses  | On-demand        | Debra Herman<br>Hodgson Russ LLP                   | Taxes (2 hours)  | Basic        | 2 |                    |               |  |
| Analyzing Financial Efficiency and Performance Ratios                                     | On-demand        | Lynn Fountain                                      | Auditing (2 hours)   | Basic        | 2 |                    |               |  |
| New Auditor's Reporting Standards   | On-demand        | Salvatore Collemi                                  | Auditing (2 hours)   | Intermediate | 2 |                    |               |  |
| Costly Pitfalls in Old Estate Planning Documents  | On-demand        | Klaralee Charlton                                  | Taxes (2 hours)  | Basic        | 2 | 4VRWB-T-04467-22-S | 1075-CE-02667 |  |
| Creating an Effective and Efficient Travel and Entertainment Expense Reimbursement Policy | On-demand        | Mary Schaeffer                                     | Accounting (2 hours)   | Basic        | 2 |                    |               |  |
| Multistate Tax Issues for Financial Services  | On-demand        | K. Craig Reilly                                    | Taxes (2 hours)  | Basic        | 2 |                    |               |  |

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| Hodgson Russ LLP  |           |                   |  |              |   |
| Audit Evidence Standard SAS 142: Good or Bad<br>Leveraging Big Data for Public Accounting           | On-demand | Pat Patterson     | Auditing (2 hours)   | Intermediate | 2 |
|   | On-demand | Stephen Yoss      | Information Technology (2 hours)                                     | Basic        | 2 |
| Crypto Basics and Audit Considerations<br>Excel's LET and LAMBDA Functions                          | On-demand | Robert Minniti    | Auditing (2 hours)   | Basic        | 2 |
|   | On-demand | David Ringstrom   | Computer Software & Applications (2 hours)                           | Advanced     | 2 |
| Cost Effective Internal Controls for Small Businesses   | On-demand | Robert Minniti    | Accounting (1 hour), Auditing (1 hour)                               | Intermediate | 2 |
| Foundations for a Strong Internal Audit Department  | On-demand | Lynn Fountain     | Auditing (2 hours)   | Basic        | 2 |
| Fraud Risks When Conducting Remote Audits   | On-demand | Robert Minniti    | Auditing (2 hours)   | Basic        | 2 |
| Introduction to Pooled Employer Plans   | On-demand | Klaralee Charlton | Taxes (2 hours)  | Basic        | 2 |
| 4VRWB-1075-CE-02803<br>T-04602-22-S   |           |                   |  |              |   |
| Auditing Procedures and Practices: Audit Supervision<br>Introduction to Excel Macros: Part 2        | On-demand | Pat Patterson     | Auditing (2 hours)   | Intermediate | 2 |
|   | On-demand | David Ringstrom   | Computer Software & Applications (2 hours)                           | Basic        | 2 |
| Mastering the AICPA SSARS Requirements  | On-demand | Salvatore Collemi | Auditing (2 hours)   | Basic        | 2 |
| Developing and Deploying Effective Cloud Cyber Security: Best Practices for Your Organization       | On-demand | Stephen Yoss      | Computer Software & Applications (2 hours)                           | Basic        | 2 |
| Ethics for Colorado CPAs  | On-demand | Allison McLeod    | Regulatory Ethics (4 hours)  | Basic        | 4 |
| Master Vendor File Best Practices   | On-demand | Mary Schaeffer    | Accounting (2 hours)   | Basic        | 2 |
| Government Risk Assessments   | On-demand | Robert Minniti    | Accounting (Governmental) (2 hours)                                  | Basic        | 2 |
| Governmental Accounting and Auditing Update: Building on the Leases Framework                       | On-demand | Eric Berman       | Accounting (Governmental) (1 hour), Auditing (Governmental) (1 hour) | Update       | 2 |
| Best Vendor Accounts Payable Policies and Practices   | On-demand | Mary Schaeffer    | Accounting (2 hours)   | Basic        | 2 |
| Introduction to Excel Macros: Part 1  | On-demand | David Ringstrom   | Computer Software & Applications (2 hours)                           | Basic        | 2 |
| Compilation and Review in the Red Zone  | On-demand | Pat Patterson     | Accounting (2 hours)   | Intermediate | 2 |
| Excel Spreadsheet Accessibility Features  | On-demand | David Ringstrom   | Computer Software & Applications (2 hours)                           | Basic        | 2 |
| Auditing Procedures and Practices: Analytical Procedures<br>Business Valuations: Writing the Report | On-demand | Pat Patterson     | Auditing (2 hours)   | Intermediate | 2 |
|   | On-demand | Robert Minniti    | Specialized  | Basic        | 2 |



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|  |                  |                   | Knowledge (2 hours)                              |              |    |                    |               |  |
| How to Prepare for Your Upcoming AICPA Peer Review                             | On-demand        | Salvatore Collemi | Auditing (2 hours)                               | Intermediate | 2  |                    |               |  |
| QuickBooks Online Accountant (QBOA) for Public Accounting                      | On-demand        | Stephen Yoss      | Computer Software & Applications (2 hours)       | Basic        | 2  |                    |               |  |
| Building Effective Budget Spreadsheets in Excel                                | On-demand        | David Ringstrom   | Computer Software & Applications (2 hours)       | Intermediate | 2  |                    |               |  |
| Diversity, Equity, and Inclusion: Building Confidence and Trust                | On-demand        | Lynn Fountain     | Personnel/HR (2 hours)                           | Basic        | 2  |                    |               |  |
| Diversity, Equity, and Inclusion: Unconscious Bias Impact                      | On-demand        | Lynn Fountain     | Behavioral Ethics (2 hours)                      | Basic        | 2  |                    |               |  |
| Diversity, Equity, and Inclusion: Leadership Skills                            | On-demand        | Lynn Fountain     | Personnel/HR (2 hours)                           | Basic        | 2  |                    |               |  |
| Auditing Procedures and Practices: Audit Documentation                         | On-demand        | Pat Patterson     | Auditing (2 hours)                               | Intermediate | 2  |                    |               |  |
| Getting Ahead of the Emerging Technology Curve: Blockchain, AI, and Big Data   | On-demand        | Stephen Yoss      | Information Technology (2 hours)                 | Basic        | 2  |                    |               |  |
| IRAs: What You Need to Know About Contributions, Conversions and Distributions | On-demand        | Greg White        | Taxes (2 hours)                                  | Basic        | 2  | 4VRWB-T-04518-22-S | 1075-CE-02720 |  |
| Spreadsheet Skyscrapers vs. Spreadsheet Sprawl                                 | On-demand        | David Ringstrom   | Computer Software & Applications (2 hours)       | Basic        | 2  |                    |               |  |
| Cybersecurity: What do Accountants Really Need to Know?                        | On-demand        | Cory Campbell     | Information Technology (2 hours)                 | Intermediate | 2  |                    |               |  |
| Employment Law Issues Accountants Need to Know                                 | On-demand        | Robert Minniti    | Business Law (2 hours)                           | Basic        | 2  |                    |               |  |
| Introduction to Forensic Accounting  | On-demand        | Lynn Fountain     | Accounting (2 hours)                             | Basic        | 2  |                    |               |  |
| Disability Insurance Products and Principles                                   | Downloadable PDF | Paul Winn         | Specialized Knowledge and Applications (3 hours) | Basic        | 3  |                    |               |  |
| Business Loan Basics   | On-demand        | Rob Stephens      | Accounting (2 hours)                             | Basic        | 2  |                    |               |  |
| Managing Cash Flow   | On-demand        | Rob Stephens      | Accounting (3 hours)                             | Basic        | 3  |                    |               |  |
| Diversity, Equity, and Inclusion: Building a Strong Culture                    | On-demand        | Lynn Fountain     | Personnel/HR (2 hours)                           | Basic        | 2  |                    |               |  |
| Working with Whistleblowers Reporting Illegal Acts                             | On-demand        | Robert Minniti    | Regulatory Ethics (2 hours)                      | Basic        | 2  |                    |               |  |
| How Accounting Works and Reporting Guidelines                                  | On-demand        | Miles Hutchinson  | Accounting (2 hours)                             | Basic        | 2  |                    |               |  |
| Diversity, Equity, and Inclusion: Understanding the Requirements               | On-demand        | Lynn Fountain     | Personnel/HR (2 hours)                           | Basic        | 2  |                    |               |  |
| GAAP Hot Topics: What You Need to Know   | Downloadable PDF | Kelen Camehl      | Accounting (16 hours)                            | Basic        | 16 |                    |               |  |

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|   |                  |                                      | hours)   |              |   |  |
| Multistate PTETs and Resident Credits   | On-demand        | Elizabeth Pascal<br>Hodgson Russ LLP | Taxes (2 hours)  | Basic        | 2 |  |
| Complying with Revenue Recognition Standards  | On-demand        | Lynn Fountain                        | Accounting (2 hours)   | Basic        | 2 |  |
| Establishing a Good Tone at the Top   | On-demand        | Robert Minniti                       | Accounting (1 hour), Auditing (1 hour)                               | Intermediate | 2 |  |
| Tax Implications in a Remote Work Environment: State Tax Nexus and Income Tax Issues              | On-demand        | Ariele Doolittle<br>Hodgson Russ LLP | Taxes (2 hours)  | Basic        | 2 |  |
| Excel Logic: IF, AND, OR, and Beyond  | On-demand        | David Ringstrom                      | Computer Software & Applications (2 hours)                           | Intermediate | 2 |  |
| Leveraging Microsoft Teams Effectively for Your Organization                                      | On-demand        | Stephen Yoss                         | Computer Software & Applications (2 hours)                           | Basic        | 2 |  |
| Real World Blockchain Applications  | On-demand        | Robert Minniti                       | Accounting (2 hours)   | Basic        | 2 |  |
| Environmental, Social, and Governance: A New Landscape  | On-demand        | Pat Patterson                        | Accounting (1 hour), Auditing (1 hour)                               | Basic        | 2 |  |
| Employee Fraud: Bid Rigging   | On-demand        | Robert Minniti                       | Accounting (2 hours)   | Basic        | 2 |  |
| Big Data: Possibilities and Probabilities   | On-demand        | Cory Campbell                        | Information Technology (2 hours)                                     | Intermediate | 2 |  |
| Business Valuations: Income Approach  | On-demand        | Robert Minniti                       | Auditing (2 hours)   | Basic        | 2 |  |
| Governmental Accounting and Auditing Update: GASB-87, Leases: An Overview for Lessees and Lessors | On-demand        | Eric Berman                          | Accounting (Governmental) (1 hour), Auditing (Governmental) (1 hour) | Update       | 2 |  |
| Materiality Changes   | On-demand        | Pat Patterson                        | Auditing (2 hours)   | Intermediate | 2 |  |
| Six Ways to Sum in Excel  | On-demand        | David Ringstrom                      | Computer Software & Applications (2 hours)                           | Intermediate | 2 |  |
| Business Valuations: Market Approach  | On-demand        | Robert Minniti                       | Auditing (2 hours)   | Basic        | 2 |  |
| Accounting for Software Sales   | Downloadable PDF | Kelen Camehl                         | Accounting (1 hour)  | Basic        | 1 |  |
| Internal Audit Challenges During COVID Times  | On-demand        | Lynn Fountain                        | Auditing (2 hours)   | Intermediate | 2 |  |
| Value-Based Enterprise Management in Government   | On-demand        | Gary Cokins                          | Business Management & Organization (2 hours)                         | Overview     | 2 |  |
| Auditing for Waste in a Government Entity   | On-demand        | Robert Minniti                       | Auditing (Governmental) (2 hours)                                    | Basic        | 2 |  |
| Designing Effective KPIs and Performance Dashboards   | On-demand        | Miles Hutchinson                     | Business Management &  | Basic        | 2 |  |

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|   |           |  | Organization (2 hours)                              |              |   |
| Introduction to Business Valuations   | On-demand | Robert Minniti   | Auditing (2 hours)                                  | Basic        | 2 |
| Regulation S-K  | On-demand | Kelen Camehl   | Accounting (1 hour) Overview                        |              | 1 |
| Coops: GAAP, GAAS, and SSARS Issues   | On-demand | Pat Patterson  | Accounting (1 hour), Auditing (1 hour)              | Intermediate | 2 |
| The Impact of the Digital Revolution on the Accounting Profession             | On-demand | Gary Cokins  | Computer Software Overview & Applications (2 hours) |              | 2 |
| Non-Profit Entity Financial Statements  | On-demand | Pat Patterson  | Accounting (3 hours)                                | Basic        | 3 |
| Building a Data Warehouse: DIY Approach to Getting All Your Data in One Place | On-demand | Stephen Yoss   | Information Technology (2 hours)                    | Basic        | 2 |
| QuickBooks/Excel Report Speed Tips Part 2                                     | On-demand | David Ringstrom  | Computer Software & Applications (2 hours)          | Intermediate | 2 |
| QuickBooks/Excel Report Speed Tips: Part 1                                    | On-demand | David Ringstrom  | Computer Software & Applications (2 hours)          | Intermediate | 2 |
| ASC 606 Revenue Recognition: Identifying the Transaction Price                | On-demand | Lynn Fountain  | Accounting (2 hours)                                | Basic        | 2 |
| Financial Reporting Tips and Tricks   | On-demand | David Ringstrom  | Computer Software & Applications (2 hours)          | Intermediate | 2 |
| State Taxation of Passthrough Entities and the Federal Deduction              | On-demand | Hodgson Russ LLP<br>Christopher Doyle<br>Elizabeth Pascal<br>William Turkovich | Taxes (2 hours)                                     | Basic        | 2 |
| Corporate Controller in Today's Environment: Part 2                           | On-demand | Miles Hutchinson   | Business Management & Organization (2 hours)        | Basic        | 2 |
| Corporate Controller in Today's Environment: Part 1                           | On-demand | Miles Hutchinson   | Business Management & Organization (2 hours)        | Basic        | 2 |
| Small Business Tax Frauds   | On-demand | Robert Minniti   | Accounting (1 hour), Auditing (1 hour)              | Basic        | 2 |
| Fundamentals of Hedge Fund NAV Accounting                                     | On-demand | Rita BasuMallick   | Accounting (2 hours)                                | Intermediate | 2 |
| Ethical and Audit Considerations of Cryptocurrency                            | On-demand | Blair Cook<br>Jennifer Nicholson   | Auditing (1 hour)                                   | Basic        | 1 |
| Mastering the Six Traits of Executive You                                     | On-demand | Blair Cook<br>Jennifer Nicholson   | Personnel/HR (5 hours)                              | Basic        | 5 |
| Corporate Finance Principles  | On-demand | Blair Cook   | Finance (1 hour)                                    | Basic        | 1 |

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| How to Analyze Financial Statements  | On-demand        | Miles Hutchinson | Accounting (2 hours)                         | Basic        | 2 |
| How to Deal with Difficult People  | On-demand        | Lynn Fountain    | Business Management & Organization (2 hours) | Basic        | 2 |
| Benefits and Hazards of Excel Office 365   | On-demand        | David Ringstrom  | Computer Software & Applications (2 hours)   | Basic        | 2 |
| Change Management: Being A Catalyst CFO  | On-demand        | Blair Cook       | Management Services (1 hour)                 | Basic        | 1 |
| Capital Budgeting: Analysis that Improves Long-term ROI                              | On-demand        | Blair Cook       | Finance (1 hour)                             | Intermediate | 1 |
| Presentation Skills for Finance Professionals and Executives that Make an Impact     | On-demand        | Blair Cook       | Management Services (1 hour)                 | Basic        | 1 |
| Working with the Cloud During Tough Times  | On-demand        | Stephen Yoss     | Information Technology (2 hours)             | Basic        | 2 |
| The Art of Being A Good Manager: Part 2: Generational and Cultural Considerations    | On-demand        | Lynn Fountain    | Personnel/HR (2 hours)                       | Basic        | 2 |
| The Art of Being A Good Manager: Part 1: Traits and Skills in the New Normal         | On-demand        | Lynn Fountain    | Personnel/HR (2 hours)                       | Basic        | 2 |
| Introduction to Cyber Fraud  | On-demand        | Robert Minniti   | Accounting (1 hour), Auditing (1 hour)       | Basic        | 2 |
| ASC 606 Revenue Recognition: Allocating Transaction Price to Performance Obligations | On-demand        | Lynn Fountain    | Accounting (2 hours)                         | Basic        | 2 |
| Accounting for Managers  | On-demand        | Robert Minniti   | Accounting (2 hours)                         | Basic        | 2 |
| ASC 606 Revenue Recognition: Complying with the Revenue Recognition Standards        | On-demand        | Lynn Fountain    | Accounting (2 hours)                         | Basic        | 2 |
| ASC 606 Revenue Recognition: Identify Performance Obligations                        | On-demand        | Lynn Fountain    | Accounting (2 hours)                         | Basic        | 2 |
| Excel 101: Introduction to Spreadsheets Part 2                                       | On-demand        | David Ringstrom  | Computer Software & Applications (2 hours)   | Basic        | 2 |
| Excel 101: Introduction to Spreadsheets Part 1                                       | On-demand        | David Ringstrom  | Computer Software & Applications (2 hours)   | Basic        | 2 |
| Taming Large Excel Spreadsheets  | On-demand        | David Ringstrom  | Computer Software & Applications (2 hours)   | Intermediate | 2 |
| Cloud Computing for Accountants and Financial Professionals                          | On-demand        | Stephen Yoss     | Information Technology (2 hours)             | Basic        | 2 |
| Accounting for Business Combinations   | Downloadable PDF | Kelen Camehl     | Accounting (4 hours)                         | Overview     | 4 |
| Bankruptcy Basics  | On-demand        | Robert Minniti   | Finance (2 hours)                            | Basic        | 2 |
| Common Frauds in Small Businesses  | On-demand        | Robert Minniti   | Accounting (1 hour)                          | Basic        | 2 |

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| <a href="#">A Basic Ethics Guidebook for Minnesota CPAs</a> | On-demand | Allison McLeod | hour), Auditing (1<br>hour)<br>Regulatory Ethics<br>(4 hours) | Basic | 4 |
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