

TAX AND ACCOUNTING PROFESSIONAL'S 2021 SYNERGY IN-PERSON SESSION SCHEDULE

WEDNESDAY 11/10		THURSDAY 11/11				FRIDAY 11/12				SATURDAY 11/13	
A - 100 mins	B - 100 mins	C - 50 mins	D - 75 mins	E - 100 mins	F - 75 mins	G - 50 mins	H - 75 mins	I - 100 mins	J - 75 mins	K - 100 mins	L - 50 mins
1:00 - 2:40 pm	3:00 - 4:40 pm	9:30 - 10:20 am	10:45 am - 12:00 pm	1:20 - 3:00 pm	3:30 - 4:45 pm	9:30 - 10:20 am	10:45 am - 12:00 pm	1:20 - 3:00 pm	3:30 - 4:45 pm	8:30 - 10:10 am	10:30 - 11:20 am
Introduction to AdvanceFlow – Workpapers and Trial Balance	Peer Review Insights and How to Prepare When It's Your Turn	Plan and Execute Preparation, Compilation, and Review Engagements Using AdvanceFlow and Checkpoint Engage	Introduction to Audit Planning and Internal Controls	Plan and Execute Audit Engagements Using AdvanceFlow and Checkpoint Engage	Introduction to Workpapers and Documentation	Fund Account Structures in AdvanceFlow	Introduction to Workpapers and Documentation	Peer Review Insights and How to Prepare When It's Your Turn	Divisions and Consolidated Engagements in AdvanceFlow	Introduction to AdvanceFlow – Workpapers and Trial Balance	Shoot the Breeze With the Audit SMEs: An Ask and Tell-All Experience
Accounting and Auditing Update and Maximizing Research Capabilities Using Checkpoint Edge	Connecting Accounting CS and QuickBooks	Navigating the Path to Efficiency	Divisions and Consolidated Engagements in AdvanceFlow	Streamlining Individual Tax Workflow Using OCR With Workpapers CS	Audit Confirmations: When and How to Gather External Evidence to Support Your Opinion Using Confirmation	AdvanceFlow for Reviewers	Audit Confirmations: When and How to Gather External Evidence to Support Your Opinion Using Confirmation	Plan and Execute Audit Engagements Using AdvanceFlow and Checkpoint Engage	Checkpoint Engage: Move Beyond the Basics	Accounting and Auditing Update and Maximizing Research Capabilities Using Checkpoint Edge	Top 10 Microsoft Outlook Tips for Accounting Professionals
Streamlining Business Tax Workflow Using Trial Balance Tools for Accounting CS and Workpapers CS	Strategic Planning: Generating Revenue and Capacity Projections Using Practice CS	AdvanceFlow for Reviewers	Introduction to Scoping, Sampling, and Analytical Procedures	Processing Multi-State Returns in UltraTax CS	Introduction to Audit Planning and Internal Controls	Plan and Execute Preparation, Compilation, and Review Engagements Using AdvanceFlow and Checkpoint Engage	Managing in the Multi-Generational Workplace	Streamlining Business Tax Workflow Using Trial Balance Tools for Accounting CS and Workpapers CS	Introduction to Scoping, Sampling, and Analytical Procedures	Streamlining Individual Tax Workflow Using OCR With Workpapers CS	Utilizing Bank Feeds With Accounting CS

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Emerging Technology in 2021 and Beyond	SOS! GoFileRoom and FirmFlow Rescue 101	Fund Account Structures in AdvanceFlow	Train the Trainer – Improving Your Presentation Skills	Communicating Results With Planner CS	Checkpoint Engage: Move Beyond the Basics	Navigating the Path to Efficiency	Train the Trainer – Improving Your Presentation Skills	Connecting Accounting CS and QuickBooks	Managing in the Multi-Generational Workplace	Emerging Technology in 2021 and Beyond	Client-Facing Tools to Better Serve Your Payroll Clients
Gear Up Presents: Up to the Minute Business Tax Update	Gear Up Presents: Up to the Minute Individual Tax Update	Utilizing Bank Feeds With Accounting CS	Advanced Financial Statement Formatting Using the Accounting CS Report Designer	Data Security: Designing Your Written Information Security Plan	Advanced Accounting Services Using Accounting CS	Payroll Tax Compliance: 2021 and 2022 Legislative Update	Advanced Financial Statement Formatting Using the Accounting CS Report Designer	UltraTax CS Workflow Best Practices	Advanced Accounting Services Using Accounting CS	Data Security: Designing Your Written Information Security Plan	Configuring Your Dashboards in Practice CS
Gear Up Presents: The Million Dollar Surprise – New Capital Gain Rates? Estate and Trusts Changes?	Gear Up Presents: An In-depth Analysis of the Employee Retention Credit	Payroll Tax Compliance: 2021 and 2022 Legislative Update	Time-Saving Tips and Tricks With Onboarding New Payroll Clients in Accounting CS	Gear Up Presents: Ethics for the Tax Professional	Leveraging Payroll Batch Processing With Accounting CS	Client-Facing Tools to Better Serve Your Payroll Clients	Time-Saving Tips and Tricks With Onboarding New Payroll Clients in Accounting CS	Strategic Planning: Generating Revenue and Capacity Projections Using Practice CS	Leveraging Payroll Batch Processing With Accounting CS	Gear Up Presents: Up to the Minute Individual Tax Update	How to Customize Practice CS Using Custom Fields for Your Firm
Individual Tax Provision of the American Rescue Plan Act of 2021	Is Your Interest Limited? An Analysis of the Final Regulations Under IRC Section 163(j)	Configuring Your Dashboards in Practice CS	Annual Project Management Clean Up in Practice CS	Gear Up Presents: Up to the Minute Business Tax Update	Day to Day Project Management Within Practice CS	Integrating Practice CS With the CS Professional Suite	Annual Project Management Clean Up in Practice CS	SOS! GoFileRoom and FirmFlow Rescue 101	Day to Day Project Management Within Practice CS	Gear Up Presents: An In-depth Analysis of the Employee Retention Credit	Making the Most Out Of FirmFlow Reports

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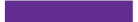
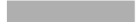

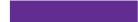
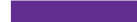
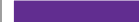
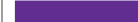
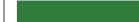
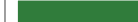
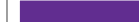










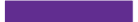
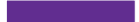
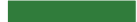

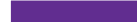


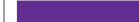
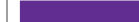








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SYNERGY2021

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UltraTax CS Navigation and Individual Tax Return Preparation	UltraTax CS Business Tax Return Preparation	How to Customize Practice CS Using Custom Fields for Your Firm	Reporting, Filtering and the Manage Screens in Practice CS	Demystifying the Cryptic Tax Issues of Crypto and Virtual Currency	Leverage Practice CS as a Firm Administrator	Making the Most Out Of FirmFlow Reports	Reporting, Filtering and the Manage Screens in Practice CS	Gear Up Presents: Ethics for the Tax Professional	Leverage Practice CS as a Firm Administrator	Demystifying the Cryptic Tax Issues of Crypto and Virtual Currency	Time-Saving Tips on Federal Tax Research in Checkpoint
Processing Multi-State Returns in UltraTax CS	UltraTax CS Workflow Best Practices	Top 10 Microsoft Outlook Tips for Accounting Professionals	GoFileRoom and FirmFlow for Power Users	How Valuable is the Employee Retention Tax Credit?	Count the Clicks: From Admin to Partner, Are You Clicking Too Much Within GoFileRoom and FirmFlow?	Researching Within UltraTax CS	Data Security in Your Remote Workplace	Gear Up Presents: The Million Dollar Surprise – New Capital Gain Rates? Estate and Trusts Changes?	Count the Clicks: From Admin to Partner, Are You Clicking Too Much Within GoFileRoom and FirmFlow?	Is Your Interest Limited? An Analysis of the Final Regulations Under IRC Section 163(j)	Gear Up Presents: Meals and Entertainment Post-ARPA
What's New in Onvio	Using UltraTax CS and Onvio for Your Firm's End-to-End Tax Workflow	Time-Saving Tips on Federal Tax Research in Checkpoint	Data Security in Your Remote Workplace	GoSystem Tax RS: Trial Balance	Federal Tax Research on Checkpoint Edge	Gear Up Presents: Common Return Omissions	Working With Power BI: FirmFlow and Practice Management Edition	Individual Tax Provision of the American Rescue Plan Act of 2021	Federal Tax Research on Checkpoint Edge	UltraTax CS Business Tax Return Preparation	Gear Up Presents: The New Work at Home NEXUS – Extended Work From Home Creates New Issues
	Using Onvio for a Complete End-to-End Tax Workflow	Gear Up Presents: Meals and Entertainment Post-ARPA	Gear Up Presents: Owner Basis, PPP, and Other COVID Grant Programs	Leveraging the Best Features and Functions of UltraTax CS	Working With Power BI: FirmFlow and Practice Management Edition	Top 10 Microsoft Excel Tips for Accounting Professionals	Tax Return Troubleshooting in UltraTax CS	How Valuable is the Employee Retention Tax Credit?	Gear Up Presents: Owner Basis, PPP, and Other COVID Grant Programs	Developing and Advising on Leadership Philosophy	Researching Within UltraTax CS

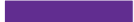

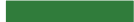

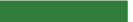
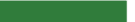
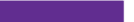
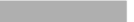


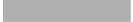




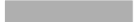

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		 Gear Up Presents: The New Work at Home NEXUS – Extended Work From Home Creates New Issues	 Train Your Staff to Take Your Job	 Building Client Relationships through Advisory Engagements – An Advisory Firm Model	 Tax Return Troubleshooting in UltraTax CS	 Advising Clients Who Can't Pay Their Taxes	 AdvanceFlow Options for Tax Engagements	 UltraTax CS Navigation and Individual Tax Return Preparation	 GoFileRoom and FirmFlow for Power Users	 Using UltraTax CS and Onvio for Your Firm's End-to-End Tax Workflow	 UltraTax CS 2021 Update
		 Advising Clients Who Can't Pay Their Taxes	 Data Mining Within UltraTax CS for Advisory Opportunities	 Helping Clients Look Forward: Using Onvio Advisory Beta Capabilities	 What's New in GoSystem Tax RS?	 UltraTax CS 2021 Update	 Are You Taking Advantage Of All the Features of Fixed Assets CS?	 Leveraging the Best Features and Functions of UltraTax CS	 Data Mining Within UltraTax CS for Advisory Opportunities	 Using Onvio for a Complete End-to-End Tax Workflow	 UltraTax CS Fiduciary Tax Return Preparation
		 UltraTax CS 2021 Update	 AdvanceFlow Options for Tax Engagements	 Onvio Document Management Best Practices	 Transitioning To and Operating as an Advisory Firm	 Electronic Filing Within GoSystem Tax RS	 The Right Stuff: Transitioning Your Practice to Have The Right Relationships	 Increase Advisory and Maintenance Revenue With Marketing	 Query Your Database Using Form-Source Within GoSystem Tax RS		 Consolidated and Unitary Business Returns in UltraTax CS
		 GoSystem Tax RS Data Connection, Are You Leveraging It?	 Are You Taking Advantage Of All the Features of Fixed Assets CS?		 Mastering the Two Meeting Approach	 Consolidated and Unitary Business Returns in UltraTax CS	 Moving Your Practice Forward	 Onvio Document Management Best Practices	 Mastering the Two Meeting Approach		 The Staff Who Grew to Love Change: A Firm Case Study

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		 UltraTax CS Fiduciary Tax Return Preparation	 Moving Your Practice Forward		 Migrating From CS Professional Suite to Onvio	 Bring Your A-Game Using Your Practice Forward Tools	 Onvio Project Workflow Best Practices	 What's New in Onvio	 Onvio Tax Preparation and Filing		 Retaining Top Talent
		 Bring Your A-Game Using Your Practice Forward Tools	 Onvio Project Workflow Best Practices			 Finding Talent	 Onvio Tax Preparation and Filing	 Helping Clients Look Forward: Using Onvio Advisory Beta Capabilities	 Migrating From CS Professional Suite to Onvio		 Onvio Reporting, Filtering, and Dashboard Management
		 Retaining Top Talent									
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