

ADVISORY SESSION TRACK

WEDNESDAY		THURSDAY				FRIDAY				SATURDAY	
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

Advisory Featuring Practice Forward

FREE SESSION	FREE SESSION	Bring Your A-Game Using Your Practice Forward Tools	Moving Your Practice Forward	Building Client Relationships Through Advisory Engagements – An Advisory Firm Model	Transitioning To and Operating as an Advisory Firm	FREE SESSION	The Right Stuff: Transitioning Your Practice to Have The Right Relationships	Increase Advisory and Maintenance Revenue With Marketing	Mastering the Two Meeting Approach	Developing and Advising on Leadership Philosophy	The Staff Who Grew to Love Change: A Firm Case Study
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AUDIT SESSION TRACK

WEDNESDAY		THURSDAY				FRIDAY				SATURDAY	
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

Audit Basic featuring the Cloud Audit Suite (AdvancedFlow, Checkpoint Engage, Confirmation, and AuditWatch)

Introduction to AdvanceFlow – Workpapers and Trial Balance	FREE SESSION	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	Audit Confirmations: When and How to Gather External Evidence to Support Your Opinion Using Confirmation	Peer Review Insights and How to Prepare When It's Your Turn	Divisions and Consolidated Engagements in AdvanceFlow	FREE SESSION	Shoot the Breeze With the Audit SMEs: An Ask and Tell-All Experience
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Audit Intermediate/Advanced featuring the Cloud Audit Suite (AdvancedFlow, Checkpoint Engage, Confirmation, and AuditWatch)

Accounting and Auditing Update and Maximizing Research Capabilities Using Checkpoint Edge	Peer Review Insights and How to Prepare When It's Your Turn	Navigating the Path to Efficiency	Divisions and Consolidated Engagements in AdvanceFlow	FREE SESSION	Audit Confirmations: When and How to Gather External Evidence to Support Your Opinion Using Confirmation	AdvanceFlow for Reviewers	Managing in the Multi-Generational Workplace	Plan and Execute Audit Engagements using AdvanceFlow and Checkpoint Engage	Checkpoint Engage: Move Beyond the Basics	Introduction to AdvanceFlow – Workpapers and Trial Balance	Shoot the Breeze With the Audit SMEs: An Ask and Tell-All Experience
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ONVIO SESSION TRACK

WEDNESDAY		THURSDAY				FRIDAY				SATURDAY	
A - 100 mins 1:00 - 2:40 pm	B - 100 mins 3:00 - 4:40 pm	C - 50 mins 9:30 - 10:20 am	D - 75 mins 10:45 am - 12:00 pm	E - 100 mins 1:20 - 3:00 pm	F - 75 mins 3:30 - 4:45 pm	G - 50 mins 9:30 - 10:20 am	H - 75 mins 10:45 am - 12:00 pm	I - 100 mins 1:20 - 3:00 pm	J - 75 mins 3:30 - 4:45 pm	K - 100 mins 8:30 - 10:10 am	L - 50 mins 10:30 - 11:20 am

Evaluating when to migrate workflows to Onvio

This track is for customers who want to see the full version of the Onvio Platform including tax capabilities on Onvio.

What's New in Onvio	Using Onvio for a Complete End-to-End Tax Workflow	FREE SESSION	FREE SESSION	Helping Clients Look Forward: Using Onvio Advisory Beta Capabilities	Migrating From CS Professional Suite to Onvio	FREE SESSION	Onvio Project Workflow Best Practices	Onvio Document Management Best Practices	Onvio Tax Preparation and Filing	FREE SESSION	Onvio Reporting, Filtering, and Dashboard Management
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Existing Onvio customers and those customers ready to migrate firm management and advisory workflows to Onvio and continue using UltraTax CS

This track would be beneficial to customers who are currently using Onvio Firm Management and UltraTax CS or considering moving to Onvio for Firm Management and Advisory workflows in their office.

What's New in Onvio	Using UltraTax CS and Onvio for Your Firm's End-to-End Tax Workflow	FREE SESSION	FREE SESSION	Helping Clients Look Forward: Using Onvio Advisory Beta Capabilities	Migrating From CS Professional Suite to Onvio	FREE SESSION	Onvio Project Workflow Best Practices	Onvio Document Management Best Practices	FREE SESSION	FREE SESSION	Onvio Reporting, Filtering, and Dashboard Management
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TAX AND ASSET MANAGEMENT SESSION TRACK

WEDNESDAY		THURSDAY				FRIDAY				SATURDAY	
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

Tax Preparation Basic/Intermediate using UltraTax CS and Fixed Assets CS

UltraTax CS Navigation and Individual Tax Return Preparation	UltraTax CS Business Tax Return Preparation	UltraTax CS Fiduciary Tax Return Preparation	FREE SESSION	FREE SESSION	Tax Return Troubleshooting in UltraTax CS	UltraTax CS 2021 Update	Are You Taking Advantage of All the Features of Fixed Assets CS?	UltraTax CS Workflow Best Practices	FREE SESSION	FREE SESSION	Researching Within UltraTax CS
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Tax Preparation Intermediate/Advanced using UltraTax CS and Fixed Assets CS

Processing Multi-State Returns in UltraTax CS	UltraTax CS Workflow Best Practices	Time-Saving Tips on Federal Tax Research in Checkpoint	Data Mining within UltraTax CS for Advisory Opportunities	Communicating Results with Planner CS	Federal Tax Research on Checkpoint Edge	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	FREE SESSION	FREE SESSION	Consolidated and Unitary Business Returns in UltraTax CS
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