

SYNERGY2021







Shaping an informed tomorrow.







Session Catalog





November 10-13 | Nashville, TN






November 9-12 | Virtual





Session information subject to change without notice.









ACCOUNTING SESSIONS	DESCRIPTION	DATES/TIMES (CST)
<p>Advanced Accounting Services Using Accounting CS</p> <p><i>CPE Field of Study: Accounting – Technical</i></p> <p>  1.5 CPE</p> <p>LEVEL: Advanced</p>	<p>In this session, we'll go beyond the basics to demonstrate the powerful, more intricate features of Accounting CS when it comes to the clients you provide bookkeeping services for.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Set up consolidated clients • Create transaction templates and automate entries • Utilize account segments for complex chart of accounts • Import transactions via spreadsheet import <p>Participants should be familiar with setting up a client and accounting processing in Accounting CS prior to taking this session.</p>	<p>IN PERSON: 11/11 3:30 - 4:45 pm 11/12 3:30 - 4:45 pm</p> <p>VIRTUAL: 11/9 2:00 - 3:15 pm 11/10 2:00 - 3:15 pm</p>
<p>Advanced Financial Statement Formatting Using the Accounting CS Report Designer</p> <p><i>CPE Field of Study: Accounting – Technical</i></p> <p>  1.5 CPE</p> <p>LEVEL: Advanced</p>	<p>In this session, you will learn about advanced features within the Accounting CS Report Designer to further customize your clients' financial statements.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Customize date formats • Create formulas for account groupings • Use conditional expressions to alter the output of variables • Create departmental and location-based statements • Insert and format charts • Add variances and ratios to statements <p>Participants should have a basic knowledge of Accounting CS – including bookkeeping/trial balance processes, as well as experience modifying statements in the Accounting CS Report Designer.</p>	<p>IN PERSON: 11/11 10:45 am - 12:00 pm 11/12 10:45 am - 12:00 pm</p> <p>VIRTUAL: 11/12 1:00 - 2:15 pm</p>
<p>Streamlining Business Tax Workflow Using Trial Balance Tools for Accounting CS and Workpapers CS</p> <p><i>CPE Field of Study: Taxes – Technical</i></p> <p>  2 CPE</p> <p>LEVEL: Intermediate</p>	<p>In this session, you will learn about time-saving features in Accounting CS and Workpapers CS that speed year-end processing for your business clients.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Add a client's chart of accounts and account balances via Excel Spreadsheet Import • Identify and assign tax coding for integration with UltraTax CS using account grouping and standard account mapping • Import depreciation journal entries from Fixed Assets CS • Enter Tax Code Adjustments (Tax Reconciliation) • Utilize the Analyze Client Activity on-screen review tool • Print a set of financial statements • Integrate the Trial Balance with UltraTax CS <p>Participants should have a basic knowledge of Accounting CS/Workpapers CS, as well as knowledge on UltraTax CS and (if applicable) Fixed Assets CS.</p>	<p>IN PERSON: 11/10 1:00 - 2:40 pm 11/12 1:20 - 3:00 pm</p> <p>VIRTUAL: 11/9 11:00 am - 12:40 pm</p>









ACCOUNTING SESSIONS	DESCRIPTION	DATES/TIMES (CST)
<p>Streamlining Individual Tax Workflow Using OCR With Workpapers CS</p> <p><i>CPE Field of Study: Taxes – Technical</i></p> <p>  2 CPE</p> <p>LEVEL: Intermediate</p>	<p>In this session, you will learn the use of Workpapers CS to gather, manage, and process your individual tax workpapers. Particular focus will be spent on using OCR technology to extract data from a client’s workpapers to populate their tax return in UltraTax CS.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Populate clients from UltraTax CS to simplify client setup • Work with tax engagement binders • Insert client source documents • Integrate Workpapers CS with NetClient CS File Exchange and Onvio for direct download of client files • Use the Source Document Processing (OCR) feature • Learn about Source Document Processing options that allow for grouping of brokerage statements and K-1’s, along with sorting options and custom folder creation when organizing source documents • Create notes for source documents • Signoff on documents • Wrap-up a tax engagement • Roll an engagement binder forward to prepare for next year <p>Participants should have a basic knowledge of Workpapers CS – including navigating the software and setting up a client.</p>	<p>IN PERSON: 11/11 1:20 - 3:00 pm 11/13 8:30 - 10:10 am</p> <p>VIRTUAL: 11/11 11:00 am - 12:40 pm</p>
<p>Utilizing Bank Feeds With Accounting CS</p> <p><i>CPE Field of Study: Accounting – Technical</i></p> <p>  1 CPE</p> <p>LEVEL: Intermediate</p>	<p>In this session, you will learn how to link Accounting CS Bank Feeds to your client’s financial account to save time and increase productivity during data entry and bank account reconciliation.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Invite clients to link their bank accounts to Accounting CS • Use the Bank Feeds Dashboard to import transactions directly from a client’s bank account • Categorize imported bank transactions to vendors and general ledger accounts • Import electronic bank statements • Have clients retrieve their own transactions through Bank Feeds within Client Access <p>Participants should be knowledgeable about processing a client for bookkeeping services.</p>	<p>IN PERSON: 11/11 9:30 - 10:20 am 11/13 10:30 - 11:20 am</p> <p>VIRTUAL: 11/9 10:00 - 10:50 am</p>
ADVISORY SESSIONS	DESCRIPTION	DATES/TIMES (CST)
<p>Bring Your A-Game Using Your Practice Forward Tools</p> <p><i>CPE Field of Study: Business Management & Organization – Non-Technical</i></p> <p>  1 CPE</p> <p>LEVEL: Intermediate</p> <p>NEW SESSION FOR 2021</p>	<p>In this session, we will go beyond the basics and demonstrate how to enhance your Practice Forward tools to knock your Two Meeting Approach and Advisory Delivery out of the park!</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Identify opportunities to improve tools used for the Two Meeting Approach • Leverage Microsoft Tools to improve Advisory Delivery • Create stronger client deliverables <p>Participants should be familiar with Practice Forward methodology, tools, and workflow.</p>	<p>IN PERSON: 11/11 9:30 - 10:20 am 11/12 9:30 - 10:20 am</p> <p>VIRTUAL: 11/9 10:00 - 10:50 am 11/10 1:00 - 1:50 pm</p>









ADVISORY SESSIONS	DESCRIPTION	DATES/TIMES (CST)
<p>Building Client Relationships Through Advisory Engagements – An Advisory Firm Model</p> <p><i>CPE Field of Study: Business Management & Organization – Non-Technical</i></p> <p> 2 CPE</p> <p>LEVEL: Overview NEW SESSION FOR 2021</p>	<p>Do you sell a transaction or do you sell a relationship? Advisory firms are focused on selling a relationship. However, firms often struggle with how to create an engagement which contains clarity of scope and price. This session will take a deep dive into drafting your firms advisory and maintenance engagements. We will discuss up front billing strategies and annual maintenance contracts.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Identify your firm’s scope of services • Determine what client might be a fit for this engagement • Design and price your own advisory services engagement • Capture unclaimed revenue for advisory services provided but not billed • Price and bundle maintenance services by the firm 	<p>IN PERSON: 11/11 1:20 - 3:00 pm</p>
<p>Developing and Advising on Leadership Philosophy</p> <p><i>CPE Field of Study: Business Management & Organization – Non-Technical</i></p> <p> 2 CPE</p> <p>LEVEL: Overview NEW SESSION FOR 2021</p>	<p>Developing a Mission, Vision, Core Values, and Leadership Philosophy is necessary for every business leader. A leadership philosophy establishes a system for conflict prevention and resolution amongst staff and provides staff the freedom to live execute on the commander’s intent. In this session, you will acquire the mindset necessary to build out your leadership tools and learn how this methodology can become an advisory offering to business owners you work with. Both a firm case study and business client case study will be discussed.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Understand which leadership tools need to be developed by your firm • Establish a process to execute and implement the tools in your firm • Utilize what you have learned to begin developing an advisory offering 	<p>IN PERSON: 11/12 8:30 - 10:10 am</p>
<p>Helping Clients Look Forward: Using Onvio Advisory Beta Capabilities</p> <p><i>CPE Field of Study: Business Management & Organization – Non-Technical</i></p> <p>  2 CPE</p> <p>LEVEL: Basic NEW SESSION FOR 2021</p>	<p>In this session, we will showcase the Onvio Advisory Beta, an exciting new product designed to help firms provide forward-looking guidance to their clients. This session will highlight the additional advisory workflows available to them through the Onvio Advisory Beta, including tax planning for clients of all kinds and insight analysis using both Onvio Trial Balance and Onvio Tax data. Combining some of the capabilities originally found in the Planner CS and Toolbox CS products from the CS Professional Suite, the Onvio Advisory Beta introduces additional automation for your firm, including the option to automate any client-facing Microsoft Word or Excel document which you might edit on a per-client basis today, and much more!</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Tell your colleagues and staff back at the office about the full library of Advisory tools available via the Onvio Advisory Beta • Respond to your clients’ requests for guidance using Calculators and Client Handouts: quickly, efficiently, and impressively • Quickly spin-up new tax plans using Onvio Advisory Tax Planner to provide quick tax determinations to clients with “what if?” questions, as well as provide corresponding projection summaries and estimate vouchers • Instruct junior staff on using the Insights view and Opportunity Explorer lists to identify clients ripe for advisory opportunities <p>Participants should either own Practice Forward or be current or prospective participants in the Onvio Advisory Beta program; all qualified attendees not currently enrolled in the Onvio Advisory Beta program will have an opportunity to join at the conclusion of the session.</p>	<p>IN PERSON: 11/11 1:20 - 3:00 pm 11/12 1:20 - 3:00 pm</p> <p>VIRTUAL: 11/12 11:00 am - 12:40 pm</p>






ADVISORY SESSIONS	DESCRIPTION	DATES/TIMES (CST)
<p>Increase Advisory and Maintenance Revenue With Marketing</p> <p><i>CPE Field of Study: Business Management & Organization – Non-Technical</i></p> <p> 2 CPE</p> <p>LEVEL: Overview</p>	<p>In this session, you will learn how to increase advisory and maintenance revenue with marketing as Mark Martukovich shares his marketing strategies including networking, website optimization, and various social media and digital strategies including LinkedIn, videos, blogs, YouTube channels, and more. Attending this session will help you recognize the how, when, where, and with what of it all. Come learn what it takes to increase advisory and maintenance revenues with marketing.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Increase advisory and maintenance revenue • Identify marketing strategies for increasing advisory and maintenance revenue 	<p>IN PERSON: 11/12 1:20 - 3:00 pm</p>
<p>Mastering the Two Meeting Approach</p> <p><i>CPE Field of Study: Business Management & Organization – Non-Technical</i></p> <p>  1.5 CPE</p> <p>LEVEL: Overview</p> <p>NEW SESSION FOR 2021</p>	<p>In this session, you will learn a unique method of engaging with prospective clients, utilizing a value proposition meeting strategy known as the Two Meeting Approach. Two of our Advisory consultants will role-play several scenarios including client rejections, giving away high-level ideas, and piquing interest.</p> <p>Upon completion of this session, you will be able to fine tune your prospective client meeting skills using the Two Meeting Approach.</p>	<p>IN PERSON: 11/11 3:30 - 4:45 pm 11/12 3:30 - 4:45 pm</p> <p>VIRTUAL: 11/10 2:00 - 3:15 pm</p>
<p>Moving Your Practice Forward</p> <p><i>CPE Field of Study: Business Management & Organization – Non-Technical</i></p> <p>  1.5 CPE</p> <p>LEVEL: Overview</p>	<p>How are you getting paid for the value (e.g., ideas, strategies, and solutions) you bring to your clients separate from the physical compliance deliverables? How are you defining the clarity and setting the proper expectations in your client relationships? How are you creating highly duplicable services to help your clients reach their financial goals and aspirations? In this session, you will learn how to take steps to enhance clarity in client relationships, improve margins, and create a progressive set of new client services that extend beyond compliance work. We will share our consulting experiences with planning and executing a business model shift, including aligning staff, identifying monetizable new client services, adopting supportive technology and workflow, and much more. It's all part of the journey to building a firm that offers higher value to clients, operates in a more sustainable business model, and generates a healthier bottom line. Learn how to become a Breakthrough Firm that is set apart from traditional accounting practices.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Better define the scope of your client engagements • Create a structured billing strategy • Develop a standardized advisory offering 	<p>IN PERSON: 11/11 10:45 am - 12:00 pm 11/12 10:45 am - 12:00 pm</p> <p>VIRTUAL: 11/9 2:00 - 3:15 pm 11/12 1:00 - 2:15 pm</p>







ADVISORY SESSIONS	DESCRIPTION	DATES/TIMES (CST)
<p>Practice Forward: Pass the MIC – Motivate, Innovate, and Collaborate With Your Peers</p>  <p>LEVEL: Overview NEW SESSION FOR 2021</p>	<p>In this session, join your peers and Practice Forward consultants for motivation, innovation, and collaboration as you participate in peer networking, roundtables, and a panel discussion. Share your expertise and learn from others at this exclusive in-person Practice Forward membership event.</p> <p>Upon completion of this session, participants will be able to leverage the knowledge obtained during peer networking and hosted discussions.</p> <p>Participants must be current members of Practice Forward.</p> <p>Practice Forward firms are allowed two participants at the event.</p> <p>CPE is not available for the Pass the MIC event.</p>	<p>IN PERSON: 11/10 8:30 am - 12:30 pm</p>
<p>The Right Stuff: Transitioning Your Practice to Have The Right Relationships</p> <p><i>CPE Field of Study: Business Management & Organization – Non-Technical</i></p>  1.5 CPE <p>LEVEL: Overview</p>	<p>In this session, you will hear how Brittany Lanphier has successfully transitioned her practice to include the right clients and the right relationships. Brittany will discuss her strategy, steps for transitioning, and what this has done for her practice. Brittany will discuss how she transitioned her client base to maintenance packages with clearly defined scope of work and a fixed recurring billing amount. Brittany will share the challenges she faced and how she overcame those challenges while implementing Practice Forward methodologies.</p> <p>Upon completion of this session, you will be able to implement some new strategies for working with your clients to increase revenue, reduce accounts receivables, and increase client satisfaction.</p>	<p>IN PERSON: 11/12 10:45 am - 12:00 pm</p>
<p>The Staff Who Grew to Love Change: A Firm Case Study</p> <p><i>CPE Field of Study: Business Management & Organization – Non-Technical</i></p>  1 CPE <p>LEVEL: Overview NEW SESSION FOR 2021</p>	<p>New ideas are everywhere! The promise of change is often offset by the reality of execution in our firms. In this session, the team at Harper & Co. will share how they found themselves facing major change, and not only embraced that change but have continued to embrace the seemingly ongoing, perpetual changes. Come hear their story of empowering the staff and its impact on their business. During this session, they will walk through various examples of change where the staff have proven value beyond simply following along.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Identify opportunities to empower staff • Identify impact of change willing staff • Identify improvement opportunities to internal communication 	<p>IN PERSON: 11/13 10:30 - 11:20 am</p>
<p>Transitioning to and Operating as an Advisory Firm</p> <p><i>CPE Field of Study: Business Management & Organization – Non-Technical</i></p>  1.5 CPE <p>LEVEL: Overview NEW SESSION FOR 2021</p>	<p>In this session, you will learn the strategies implemented to evolve into a successful advisory firm from a Managing Partner and Practice Manager team.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Leverage the leadership within the firm to bring about change • Lead the internal process improvement initiatives needed to become an advisory firm • Live the advisory mindset within the firm <p>Participants should be familiar with the operational aspects of a tax and accounting firm.</p>	<p>IN PERSON: 11/11 3:30 - 4:45 pm</p>







AUDITING SESSIONS	DESCRIPTION	DATES/TIMES (CST)
<p>Accounting and Auditing Update and Maximizing Research Capabilities Using Checkpoint Edge</p> <p><i>CPE Field of Study: Audit - Technical</i></p> <p>  2 CPE</p> <p>LEVEL: Intermediate NEW SESSION FOR 2021</p>	<p>In this session, you will learn new and newly effective ASUs along with newly effective attestation standards.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Describe recently issued accounting and auditing standards • Evaluate the applicability of recently effective standards • Navigate, search, and browse accounting and auditing content using Checkpoint Edge • Link from the FASB Codification to related GAAP guidance and vice versa • Utilize the Standards Tracker Tool and news updates 	<p>IN PERSON: 11/10 1:00 - 2:40 pm 11/13 8:30 - 10:10 am</p> <p>VIRTUAL: 11/10 11:00 am - 12:40 pm</p>
<p>AdvanceFlow for Reviewers</p> <p><i>CPE Field of Study: Computer Software & Applications – Non-Technical</i></p> <p>  1 CPE</p> <p>LEVEL: Intermediate</p>	<p>In this session, you will learn how to navigate in AdvanceFlow as a reviewer or a partner. You will also learn how to write review notes, sign-off, and send the engagement to a pdf.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Navigate inside of AdvanceFlow • Send engagements to pdf for purposes of review • Write review notes and receive notifications • Sign-off on workpapers 	<p>IN PERSON: 11/11 9:30 - 10:20 am 11/12 9:30 - 10:20 am</p> <p>VIRTUAL: 11/12 10:00 - 10:50 am</p>
<p>Audit Confirmations: When and How to Gather External Evidence to Support Your Opinion Using Confirmation</p> <p><i>CPE Field of Study: Audit - Technical</i></p> <p>  1.5 CPE</p> <p>LEVEL: Intermediate NEW SESSION FOR 2021</p>	<p>In this session, we will discuss the importance of obtaining evidence from outside client personnel on an audit and ways to perform electronic confirmations for effectiveness and efficiency.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Explain why teams should obtain external evidence via confirmations • List audit areas that are conducive to audit confirmations • Describe how Confirmation can be utilized to obtain electronic confirmations <p>Participants should have a working knowledge of audits.</p>	<p>IN PERSON: 11/11 3:30 - 4:45 pm 11/12 10:45 am - 12:00 pm</p> <p>VIRTUAL: 11/10 2:00 - 3:15 pm</p>
<p>Checkpoint Engage: Move Beyond the Basics</p> <p><i>CPE Field of Study: Computer Software & Applications – Non-Technical</i></p> <p>  1.5 CPE</p> <p>LEVEL: Advanced</p>	<p>In this session, you will learn additional program functionality and best practices to maximize efficiencies using Checkpoint Engage.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Rollforward client engagements and templates using Master Merge Rollforward • Maximize AdvanceFlow template design • Clear selected Audit Program procedures • Regenerate Audit Programs • Create and utilize Checkpoint Engage transfer files <p>Participants should be proficient in Checkpoint Engage.</p>	<p>IN PERSON: 11/11 3:30 - 4:45 pm 11/12 3:30 - 4:45 pm</p> <p>VIRTUAL: 11/9 2:00 - 3:15 pm 11/11 2:00 - 3:15 pm</p>







AUDITING SESSIONS	DESCRIPTION	DATES/TIMES (CST)
<p>Divisions and Consolidated Engagements in AdvanceFlow</p> <p><i>CPE Field of Study: Audit - Technical</i></p> <p>  1.5 CPE</p> <p>LEVEL: Intermediate</p>	<p>In this session, you will learn how to effectively use divisions, consolidated, and fund engagements in AdvanceFlow.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Set up and utilize divisional engagements in AdvanceFlow • Create consolidated engagements • Utilize divisions and consolidations with the engagement link <p>Participants should be familiar with navigating the trial balance area of AdvanceFlow.</p>	<p>IN PERSON: 11/11 10:45 am - 12:00 pm 11/12 3:30 - 4:45 pm</p> <p>VIRTUAL: 11/11 2:00 - 3:15 pm</p>
<p>Fund Account Structures in AdvanceFlow</p> <p><i>CPE Field of Study: Audit - Technical</i></p> <p>  1 CPE</p> <p>LEVEL: Intermediate</p>	<p>In this session, you will learn how to effectively use fund engagements in AdvanceFlow.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Set-up fund engagements in AdvanceFlow • Utilize fund reports • Use funds in financial statements <p>Participants should be familiar with navigating the trial balance area of AdvanceFlow.</p>	<p>IN PERSON: 11/11 9:30 - 10:20 am 11/12 9:30 - 10:20 am</p> <p>VIRTUAL: 11/10 10:00 - 10:50 am</p>
<p>Introduction to AdvanceFlow – Workpapers and Trial Balance</p> <p><i>CPE Field of Study: Computer Software & Applications – Non-Technical</i></p> <p>  2 CPE</p> <p>LEVEL: Basic</p>	<p>In this session, you will learn the many facets of the Trial Balance in AdvanceFlow. This includes importing and manipulating trial balance data. You will also learn how to add workpapers in AdvanceFlow. This includes lead sheets, reports, Checkpoint Tools documents, and more.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Navigate in AdvanceFlow • Import trial balance data • Manipulate trial balance data • Enter journal entries • Add workpapers to AdvanceFlow • Edit documents from AdvanceFlow • Use annotating tools in Adobe 	<p>IN PERSON: 11/10 1:00 - 2:40 pm 11/13 8:30 - 10:10 am</p> <p>VIRTUAL: 11/9 11:00 am - 12:40 pm</p>
<p>Introduction to Audit Planning and Internal Controls</p> <p><i>CPE Field of Study: Audit - Technical</i></p> <p>  1.5 CPE</p> <p>LEVEL: Basic</p> <p>NEW SESSION FOR 2021</p>	<p>This session will introduce newer auditors to the front of file-audit plans from gathering information about the client to risk assessment and the minimum performance requirements for private company audits.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • List and discuss how auditors gain an understanding and the entity including internal controls • Identify key components of the Audit plan 	<p>IN PERSON: 11/11 10:45 am - 12:00 pm 11/11 3:30 - 4:45 pm</p> <p>VIRTUAL: 11/9 2:00 - 3:15 pm</p>







AUDITING SESSIONS	DESCRIPTION	DATES/TIMES (CST)
<p>Introduction to Scoping, Sampling, and Analytical Procedures</p> <p><i>CPE Field of Study: Audit - Technical</i></p> <p>  1.5 CPE</p> <p>LEVEL: Basic NEW SESSION FOR 2021</p>	<p>This session will introduce newer auditors to the back of file-performing substantive procedures that are responsive to risks from substantive analytics to detail scope tests and sampling.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Identify ways auditors obtain audit evidence through the performance of accepted audit procedures • Perform and document effective analytical procedures • Perform and document effective scope tests and sampling procedures 	<p>IN PERSON: 11/11 10:45 am - 12:00 pm 11/12 3:30 - 4:45 pm</p> <p>VIRTUAL: 11/12 1:00 - 2:15 pm</p>
<p>Introduction to Workpapers and Documentation</p> <p><i>CPE Field of Study: Audit - Technical</i></p> <p>  1.5 CPE</p> <p>LEVEL: Basic NEW SESSION FOR 2021</p>	<p>This session will introduce newer auditors to good workpaper practices and the minimum requirements of audit documentation in audit files.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Explain the requirements of AU-C 230, Audit Documentation • List what documentation is needed and not needed in an audit file • Create, organize, and prepare audit documentation 	<p>IN PERSON: 11/11 3:30 - 4:45 pm 11/12 10:45 am - 12:00 pm</p> <p>VIRTUAL: 11/10 2:00 - 3:15 pm</p>
<p>Navigating the Path to Efficiency</p> <p><i>CPE Field of Study: Audit - Technical</i></p> <p>  1 CPE</p> <p>LEVEL: Intermediate NEW SESSION FOR 2021</p>	<p>This session will discuss various audit efficiency topics, including workflow, client interactions, and being efficient in a virtual environment.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • List ideas to improve overall efficiency in audits • Describe ways to improve efficiency in remote audits <p>Participants should have a working knowledge of audits.</p>	<p>IN PERSON: 11/11 9:30 - 10:20 am 1/12 9:30 - 10:20 am</p> <p>VIRTUAL: 11/11 10:00 - 10:50 am</p>
<p>Peer Review Insights and How to Prepare When It's Your Turn</p> <p><i>CPE Field of Study: Audit - Technical</i></p> <p>  2 CPE</p> <p>LEVEL: Intermediate NEW SESSION FOR 2021</p>	<p>This session will introduce and discuss the current environment of peer review, including the current focus of peer reviewers and how to utilize the software to facilitate compliance.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • List the 2021 topics that are the current focus of peer reviewers. • Perform the following in AdvanceFlow: Generate documents to pdf and Best Practices for security set-up within GoFileRoom. • Perform the following in Checkpoint Engage: Update for current industry content; Create Templates for consistency; Modify Audit Programs; Include workpaper references; Hide and suppress practical considerations; Utilize Guide Me and Diagnostics. <p>Participants should have a working knowledge of audits and Thomson Reuters audit software.</p>	<p>IN PERSON: 11/10 3:00 - 4:40 pm 11/12 1:20 - 3:00 pm</p> <p>VIRTUAL: 11/11 11:00 am - 12:40 pm 11/12 11:00 am - 12:40 pm</p>







AUDITING SESSIONS	DESCRIPTION	DATES/TIMES (CST)
<p>Plan and Execute Audit Engagements Using AdvanceFlow and Checkpoint Engage</p> <p><i>CPE Field of Study: Audit - Technical</i></p> <p>  2 CPE</p> <p>LEVEL: Basic</p>	<p>In this session, you will learn how to effectively use the integration between AdvanceFlow and Checkpoint Engage for your audit engagements.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Explore navigation options and tools within AdvanceFlow and Checkpoint Engage • Set up new AdvanceFlow and Checkpoint Engage engagements • Import and filter trial balances • Create lead sheets and other custom reports • Walk through the PPC Risk Based audit process • Perform sign-offs • Create Workpaper Reference Links • Customize and Complete a Disclosure Checklist • Introduced to Confirmation integration with the Cloud Audit Suite 	<p>IN PERSON: 11/11 1:20 - 3:00 pm 11/12 1:20 - 3:00 pm</p> <p>VIRTUAL: 11/12 11:00 am - 12:40 pm</p>
<p>Plan and Execute Preparation, Compilation, and Review Engagements Using AdvanceFlow and Checkpoint Engage</p> <p><i>CPE Field of Study: Computer Software & Applications – Non-Technical</i></p> <p>  1 CPE</p> <p>LEVEL: Basic</p> <p>NEW SESSION FOR 2021</p>	<p>In this session, you will learn how to effectively use AdvanceFlow and Checkpoint Engage in compilation and review engagements.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Create a new or modify an existing AdvanceFlow and Checkpoint Engage engagement • Add the appropriate engagement letter, representation letter, etc. based on engagement setup questions • Identify risk(s) • Tailor and sign-off on planning forms, procedure checklists, and workpapers • Add workpaper reference links • Utilize diagnostics 	<p>IN PERSON: 11/11 9:30 - 10:20 am 11/12 9:30 - 10:20 am</p> <p>VIRTUAL: 11/9 10:00 - 10:50 am</p>
<p>Shoot the Breeze With the Audit SMEs: An Ask and Tell-All Experience</p> <p><i>CPE Field of Study: Audit - Technical</i></p> <p> 1 CPE</p> <p>LEVEL: Panel</p> <p>NEW SESSION FOR 2021</p>	<p>In this panel discussion, you'll hear from the Thomson Reuters Professional Services audit subject matter experts who will discuss everything from methodology to software.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • List best practices related to the execution of audits • Describe the best ways to use Thomson Reuters software • Share ideas with other members of your engagement teams <p>Participants should have a working knowledge of audits and Thomson Reuters software.</p>	<p>IN PERSON: 11/13 10:30 - 11:20 am</p>







CLIENT ACCOUNTING SESSIONS	DESCRIPTION	DATES/TIMES (CST)
<p>Connecting Accounting CS and QuickBooks</p> <p><i>CPE Field of Study: Accounting - Technical</i></p> <p>  2 CPE</p> <p>LEVEL: Intermediate</p>	<p>In this session, we'll introduce the QuickBooks import capabilities of Accounting CS and Accounting CS Payroll. This session is recommended for firms that would like to begin integrating QuickBooks data with Accounting CS and Accounting CS Payroll.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Evaluate the import workflows available from Intuit products, such as QuickBooks Pro and QuickBooks Online • Import chart of accounts and balances into Accounting CS • Import client setup and transactions into Accounting CS • Examine imported data and review the associated reports • Make modifications to imported data <p>Participants should be familiar navigating in Accounting CS and have experience working in QuickBooks.</p>	<p>IN PERSON: 11/10 3:00 - 4:40 pm 11/12 1:20 - 3:00 pm</p> <p>VIRTUAL: 11/10 11:00 am - 12:40 pm 11/12 11:00 am - 12:40 pm</p>
FIRM & WORKFLOW MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES (CST)
<p>Annual Project Management Clean Up in Practice CS</p> <p><i>CPE Field of Study: Computer Software & Applications – Non-Technical</i></p> <p>  1.5 CPE</p> <p>LEVEL: Advanced</p> <p>NEW SESSION FOR 2021</p>	<p>In this session, you will learn how to effectively manage client project changes. As part of managing projects, project decisions made initially may change over time. This session will guide you through examples of change management within the Practice CS Project Management module, including: changes to internal staffing, adding or removing tasks to a project, and how to designate information to carry forward with each generation.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Manage project adjustments based on staff changes • Evaluate task assignments when projects regenerate • Review generation options and their impact on new projects moving forward • Update projects as firm workflow changes over time <p>Participants should have an understanding of project template setup and how to assign and view projects in Practice CS.</p>	<p>IN PERSON: 11/11 10:45 am - 12:00 pm 11/12 10:45 am - 12:00 pm</p> <p>VIRTUAL: 11/10 2:00 - 3:15 pm 11/12 1:00 - 2:15 pm</p>
<p>Configuring Your Dashboards in Practice CS</p> <p><i>CPE Field of Study: Computer Software & Applications – Non-Technical</i></p> <p>  1 CPE</p> <p>LEVEL: Intermediate</p> <p>NEW SESSION FOR 2021</p>	<p>In this session you will learn about best practices for staff and client dashboard configuration, setting up custom portlets, and saving dashboard layouts.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Add, remove, and arrange portlets on dashboards • Configure staff and client dashboards for efficient management of projects • Set up custom portlets using reports • Add and utilize custom portlets on dashboards • Save and restore dashboard layouts <p>Participants should have a working knowledge of Practice CS.</p>	<p>IN PERSON: 11/11 9:30 - 10:20 am 11/13 10:30 - 11:20 am</p> <p>VIRTUAL: 11/9 10:00 - 10:50 am</p>









FIRM & WORKFLOW MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES (CST)
<p>Count the Clicks: From Admin to Partner, Are You Clicking Too Much Within GoFileRoom and FirmFlow?</p> <p><i>CPE Field of Study: Computer Software & Applications – Non-Technical</i></p> <p>  1.5 CPE</p> <p>LEVEL: Basic NEW SESSION FOR 2021</p>	<p>The average person clicks their mouse 5000-7000 times a day. What if you could shave some of those off? In this session, together we will re-establish the Big Picture by demonstrating real-world scenarios for you to compare your current habits against GoFileRoom and FirmFlow's robust document and workflow management capabilities. We will highlight common pitfalls as observed through optimization consulting and demonstrate how to save, manage, and deliver your work with the fewest clicks possible. More than a Tips and Tricks session, we will weave these lessons together by exploring what a day in the life of your firm looks like, from administrative staff to partners. Come with a learning mindset and leave with a new appreciation for your tools. How many clicks can you save?</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Highlight common GoFileRoom and FirmFlow habits that may be slowing you down • Demonstrate time saving tips, tricks, and best practices for your firm • Catch up with the latest enhancements including the Homepage and enhanced Document Search • Establish and evolve the value of each role at the firm • Improve the overall flow of work through the office <p>Participants should be a current GoFileRoom user and it is preferred, but not required, that participants be a current FirmFlow user.</p>	<p>IN PERSON: 11/11 3:30 - 4:45 pm 11/12 3:30 - 4:45 pm</p> <p>VIRTUAL: 11/9 2:00 - 3:15 pm 11/10 2:00 - 3:15 pm</p>
<p>Day to Day Project Management Within Practice CS</p> <p><i>CPE Field of Study: Computer Software & Applications – Non-Technical</i></p> <p>  1.5 CPE</p> <p>LEVEL: Intermediate NEW SESSION FOR 2021</p>	<p>In this session you will learn how to manage projects using the Manage Projects screen, Staff Dashboard, and Client Dashboard. Additionally, you will learn about the various ways to complete a project, workflow best practices, and integration with UltraTax CS.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Utilize staff and client dashboards to manage your projects and workflow • Manipulate the Manage Projects screen for top-down picture of your firm's projects • Review best practices for designing your workflow • Review the setup and utilization of completion and extension events with UltraTax CS <p>Participants should have a working understanding of projects and dashboard setup in Practice CS.</p>	<p>IN PERSON: 11/11 3:30 - 4:45 pm 11/12 3:30 - 4:45 pm</p> <p>VIRTUAL: 11/12 10:00 - 10:50 am</p>
<p>GoFileRoom and FirmFlow for Power Users</p> <p><i>CPE Field of Study: Computer Software & Applications – Non-Technical</i></p> <p>  1.5 CPE</p> <p>LEVEL: Intermediate NEW SESSION FOR 2021</p>	<p>In this session, you will discover frequently missed features and functions in GoFileRoom and FirmFlow. From timesaving features and customizations to forgotten features hidden in plain sight, this session will help enhance your utilization of GoFileRoom and FirmFlow.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Locate forgotten features of Control Panel and Quick Launch • Make adjustments to your system preferences • Navigate and maximize the use of Classic and Document search • Make adjustments to your views and lists • Capture important notices using our powerful notifications system • Leverage FirmFlow routing to its full potential <p>Participants should have a working knowledge of GoFileRoom navigation and tools.</p>	<p>IN PERSON: 11/11 10:45 am - 12:00 pm 11/12 3:30 - 4:45 pm</p> <p>VIRTUAL: 11/9 2:00 - 3:15 pm 11/11 2:00 - 3:15 pm</p>







FIRM & WORKFLOW MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES (CST)
<p>How to Customize Practice CS Using Custom Fields for Your Firm</p> <p><i>CPE Field of Study: Computer Software & Applications – Non-Technical</i></p> <p>  1 CPE</p> <p>LEVEL: Intermediate</p>	<p>In this session, you'll see how other firms are taking advantage of the flexibility provided by the custom fields in Practice CS. We'll discuss innovative ways to track and centralize information to share with your entire firm. By taking advantage of the custom fields in Practice CS, your firm will gain efficiencies and new managing capabilities with your custom fields.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Discover ways to used custom fields • Centralize information to easily share with others in the office • Identify reporting capabilities with custom fields <p>Participants should be familiar with the setup in the Practice CS program.</p>	<p>IN PERSON: 11/11 9:30 - 10:20 am 11/13 10:30 - 11:20 am</p> <p>VIRTUAL: 11/10 1:00 - 1:50 pm</p>
<p>Integrating Practice CS With the CS Professional Suite</p> <p><i>CPE Field of Study: Computer Software & Applications – Non-Technical</i></p> <p>  1 CPE</p> <p>LEVEL: Intermediate</p> <p>NEW SESSION FOR 2021</p>	<p>In this session, you will learn how Practice CS integrates with other solutions to enhance the capabilities of both. We will discuss how these enhancements can increase the efficiency of staff who are working between programs.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Establish completion events in UltraTax CS • Send documents from Practice CS to Onvio or GoFileRoom • Share changes in client demographic information between solutions • Utilize NetClient CS to send invoices and statements to your client online <p>Participants should have a working understanding of Practice CS and be familiar other CS Professional Suite products.</p>	<p>IN PERSON: 11/12 9:30 - 10:20 am</p> <p>VIRTUAL: 11/9 2:00 - 3:15 pm</p>
<p>Leverage Practice CS as a Firm Administrator</p> <p><i>CPE Field of Study: Computer Software & Applications – Non-Technical</i></p> <p>  1.5 CPE</p> <p>LEVEL: Intermediate</p>	<p>If you use Practice CS not only for your Practice Management tool but as your CRM, Project Management, Staff Management or a combination, as a part of the administration team it is your responsibility to maintain the database and ensure the accuracy of your data. Monthly and yearly processes will help you maintain a clean database, allowing to extract the reporting you are responsible to supply. This session will touch on different areas of the program to help the administration team ensure they are leveraging the data. From the initiation and termination of a client or staff member to year end cleanup that should be considered.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Identify internal controls to ensure accurate data • Discover methods to track information • Discover how administrators can manage utilizing real-time data in the program • Identify month end and year end firm procedures <p>Participants should have an understanding of their firms processes.</p>	<p>IN PERSON: 11/11 3:30 - 4:45 pm 11/12 3:30 - 4:45 pm</p> <p>VIRTUAL: 11/12 1:00 - 2:15 pm</p>









FIRM & WORKFLOW MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES (CST)
<p>Making the Most Out of FirmFlow Reports</p> <p><i>CPE Field of Study: Computer Software & Applications – Non-Technical</i></p> <p>  1 CPE</p> <p>LEVEL: Intermediate NEW SESSION FOR 2021</p>	<p>In this session, you will learn the ins and outs of the available reports within FirmFlow. From aging reports to WIP details and summaries, this session will answer all your questions about using our built in FirmFlow reports.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Leverage the WIP reports to gain a better insight into the status of your work • Use user- and group-based reports to highlight additional issues with your work • Determine the differences between Standard and Published reports • Make bulk changes to your workflows by using our reports • Exporting reports from FirmFlow to Excel for additional functionality <p>Participants should be familiar with reporting in FirmFlow.</p>	<p>IN PERSON: 11/12 9:30 - 10:20 am 11/13 10:30 - 11:20 am</p> <p>VIRTUAL: 11/11 10:00 - 10:50 am</p>
<p>Migrating From CS Professional Suite to Onvio</p> <p><i>CPE Field of Study: Computer Software & Applications – Non-Technical</i></p> <p>  1.5 CPE</p> <p>LEVEL: Basic NEW SESSION FOR 2021</p>	<p>This session is for firms that are planning to migrate from UltraTax CS, FileCabinet CS or NetClient CS to Onvio. In this session we will cover the best practices to prepare your firm, staff, and clients to move to a new system. And discuss data decisions when moving to a single Client/Contact database and conflicts that may arise during the migration process and walk-through the migration process for each application, so you understand the data transfer process.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Understand how to communicate across staff and clients about the upcoming change • Make key data and process decisions to set the firm up for success • Understand how to begin the migration process from UltraTax CS, FileCabinet CS and NetClient CS 	<p>IN PERSON: 11/11 3:30 - 4:45 pm 11/12 3:30 - 4:45 pm</p> <p>VIRTUAL: 11/9 2:00 - 3:15 pm</p>
<p>Onvio Document Management Best Practices</p> <p><i>CPE Field of Study: Computer Software & Applications – Non-Technical</i></p> <p>  2 CPE</p> <p>LEVEL: Basic NEW SESSION FOR 2021</p>	<p>In this session, you will learn how to enhance your firm's document management efficiencies in Onvio by learning best practices for document annotation and editing, document and folder management, and increasing client involvement through document requests and approvals.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Implement appropriate best practices for adding, sharing, and cleaning up folders in your Onvio database • Display your folders in the way that you prefer • Utilize document annotation and editing capabilities • Gain efficiencies in the document collection process with document requests and approvals 	<p>IN PERSON: 11/11 1:20 - 3:00 pm 11/12 1:20 - 3:00 pm</p> <p>VIRTUAL: 11/12 1:00 - 2:40 pm</p>








FIRM & WORKFLOW MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES (CST)
<p>Onvio Project Workflow Best Practices</p> <p><i>CPE Field of Study: Computer Software & Applications – Non-Technical</i></p> <p>  1.5 CPE</p> <p>LEVEL: Basic NEW SESSION FOR 2021</p>	<p>In this session you will learn how to optimize your firm’s project workflows in Onvio through customization, utilizing dashboards, and other time saving best practices.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Increase customization in project template design • Explore how client-facing tasks can save you time and efficiently organize project documentation • Use dashboard widgets to better organize and prioritize work • Efficiently clean-up unused projects • Apply best practices for linking your Onvio documents to client projects • Efficiently update project/task status with UltraTax CS integration • Increase your effectiveness in the Projects screen and Project Management reporting with useful filters and grouping techniques that will allow your firm to quickly assess due dates, assignments, and statuses 	<p>IN PERSON: 11/11 10:45 am - 12:00 pm 11/12 10:45 am - 12:00 pm</p> <p>VIRTUAL: 11/10 2:00 - 3:15 pm</p>
<p>Onvio Reporting, Filtering, and Dashboard Management</p> <p><i>CPE Field of Study: Computer Software & Applications – Non-Technical</i></p> <p>  1 CPE</p> <p>LEVEL: Intermediate NEW SESSION FOR 2021</p>	<p>Boost your firm knowledge to locate and interpret your Onvio data quickly and efficiently. In this session, we will focus on screen configuration tips and tricks and help you efficiently capture your data real-time both on-screen and via reporting.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Manipulate data on screen and through filtering and searching within Client Setup, dashboard, and document areas • Discuss useful screen configurations to maximize workflow • Run Firm Management and Client Usage reports efficiently <p>Participants should have a working knowledge of Onvio Firm Management.</p>	<p>IN PERSON: 11/11 9:30 - 10:20 am 11/13 10:30 - 11:20 am</p> <p>VIRTUAL: 11/12 10:00 - 10:50 am</p>
<p>Reporting, Filtering, and the Manage Screens in Practice CS</p> <p><i>CPE Field of Study: Computer Software & Applications – Non-Technical</i></p> <p>  1.5 CPE</p> <p>LEVEL: Intermediate</p>	<p>In this session, you will learn when to use a report vs. real-time data on the manage screens in Practice CS. Dive deeper into filtering and nested filters, and uncover how to manipulate data real time.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Create customized nested filters • Manipulate data on screen efficiently • Create useful customized reporting for your firm by using filtering and grouping properties • Keep important reports easily at your fingertips with Report Profiles and Dashboard Custom Report Portlets <p>Participants should have a working understanding of Practice CS.</p>	<p>IN PERSON: 11/11 10:45 am - 12:00 pm 11/12 10:45 am - 12:00 pm</p> <p>VIRTUAL: 11/11 2:00 - 3:15 pm</p>









FIRM & WORKFLOW MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES (CST)
<p>SOS! GoFileRoom and FirmFlow Rescue 101</p> <p><i>CPE Field of Study: Computer Software & Applications – Non-Technical</i></p> <p>  2 CPE</p> <p>LEVEL: Intermediate NEW SESSION FOR 2021</p>	<p>Do you suspect – or fear – that your workflows are running loose, and your documents live in the wild, wild west? You are not alone. After a year of unprecedented change and disruption to how we all work, even our tools could use a little self-care. In this session, we will pull back the curtain on a GoFileRoom and FirmFlow optimization session so that you can walk away with real, actionable steps to take today to improve or maintain your investment.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Highlight common GoFileRoom and FirmFlow optimization discoveries observed throughout years of offering this popular consulting service • Demonstrate how to avoid, identify, and/or fix potential issues • Discuss proper long-term care and maintenance • Create a plan and timeline for ongoing improvements • Provide a handout for firms to take back with them <p>Participants must be a current GoFileRoom user.</p>	<p>IN PERSON: 11/10 3:00 - 4:40 pm 11/12 1:20 - 3:00 pm</p> <p>VIRTUAL: 11/10 11:00 am - 12:40 pm</p>
<p>Strategic Planning: Generating Revenue and Capacity Projections Using Practice CS</p> <p><i>CPE Field of Study: Computer Software & Applications – Non-Technical</i></p> <p>  2 CPE</p> <p>LEVEL: Advanced</p>	<p>In this session, we will take the information from Practice CS Staff management, project management, and reporting and translate it to powerful data. This data will be utilized in an Excel spreadsheet, which will be provided to participants, to help make strategic decisions regarding staffing and project revenue.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Set up and utilize the Practice CS modules for capacity planning • Run the provided custom Practice CS report along with setup to pull revenue projection numbers • Determine if you have enough staff, too much, or too little resources and determine a course of action <p>Participants should have a working understanding of the setup of Practice CS.</p>	<p>IN PERSON: 11/10 3:00 - 4:40 pm 11/12 1:20 - 3:00 pm</p> <p>VIRTUAL: 11/9 11:00 am - 12:40 pm</p>
<p>Using UltraTax CS and Onvio for Your Firm's End-to-End Tax Workflow</p> <p><i>CPE Field of Study: Computer Software & Applications – Non-Technical</i></p> <p>  2 CPE</p> <p>LEVEL: Basic NEW SESSION FOR 2021</p>	<p>In this session, we will show you how Onvio Firm Management can add tremendous value to your firm's end-to-end tax workflow when using UltraTax CS. By taking the tools offered by Onvio Firm Management and injecting into your firm's tax workflow processing, you can create opportunities for efficiency and client collaboration that weren't there before. Learn how to best take advantage of all that Onvio Firm Management has to offer by harnessing valuable document, project, and invoice integration made available directly through UltraTax.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Utilize Onvio Firm Management throughout your end-to-end tax workflow • Utilize Client Center to streamline your client collaboration processes • Gain efficiencies in the document collection process by utilizing document requests and approvals • Utilize integration with UltraTax CS to efficiently manage your tax return status, document requests, client portals, and invoice delivery • Take advantage of Onvio mobile applications for client and staff 	<p>IN PERSON: 11/10 3:00 - 4:40 pm 11/13 8:30 - 10:10 am</p> <p>VIRTUAL: 11/10 11:00 am - 12:40 pm</p>









FIRM & WORKFLOW MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES (CST)
<p>What's New in Onvio?</p> <p><i>CPE Field of Study: Computer Software & Applications – Non-Technical</i></p> <p>  2 CPE</p> <p>LEVEL: Basic NEW SESSION FOR 2021</p>	<p>Check out the features that have been added to Onvio over the last year. In this session, we will focus on new firm management, workpaper binder, and trial balance capabilities, while also showing the progress that has been made in the areas of tax and advisory.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Understand the firm management, workpaper binder, and trial balance capabilities, and how they can save time in your workflow • Understand how to enable new functionality for your staff • Learn how new tax and advisory capabilities fit into the Onvio ecosystem 	<p>IN PERSON: 11/10 1:00 - 2:40 pm 11/12 1:20 - 3:00 pm</p> <p>VIRTUAL: 11/9 11:00 am - 12:40 pm</p>
<p>Working With Power BI: FirmFlow and Practice Management Edition</p> <p><i>CPE Field of Study: Computer Software & Applications – Non-Technical</i></p> <p>  1.5 CPE</p> <p>LEVEL: Intermediate NEW SESSION FOR 2021</p>	<p>In this session, attendees will become familiar with how Power BI can be utilized with FirmFlow or other Practice Management programs. We will discuss what Power BI is, what it is used for, and how firms can use it in their office.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Come away with knowledge about how to connect Power BI to FirmFlow or their Practice Management program • Have the knowledge on what Power BI is and how it can be used <p>Participants should be curious about Power B.I. and it helps if the firm is using Firmflow or Practice CS.</p>	<p>IN PERSON: 11/11 3:30 - 4:45 pm 11/12 10:45 am - 12:00 pm</p> <p>VIRTUAL: 11/12 1:00 - 2:15 pm</p>
PAYROLL SESSIONS	DESCRIPTION	DATES/TIMES (CST)
<p>Client-Facing Tools to Better Serve Your Payroll Clients</p> <p><i>CPE Field of Study: Computer Software & Applications – Non-Technical</i></p> <p>  1 CPE</p> <p>LEVEL: Intermediate</p>	<p>In this session, you will learn how to utilize tools available to your payroll clients for direct integration with Accounting CS.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Set up and use the Remote Payroll feature for clients to input their employees' payroll check hours and amounts • Update employee W-4 information and review check stubs and payroll tax forms through Employee Self-Service • Enable employees to enter time via the Employee Time Entry process • Use Client Access to allow clients direct access to payroll entry and payroll data in the Accounting CS application <p>Participants should be familiar with how to process payroll in Accounting CS.</p>	<p>IN PERSON: 11/12 9:30 - 10:20 am 11/13 10:30 - 11:20 am</p> <p>VIRTUAL: 11/12 10:00 - 10:50 am</p>
<p>Leveraging Payroll Batch Processing With Accounting CS</p> <p><i>CPE Field of Study: Taxes - Technical</i></p> <p>  1.5 CPE</p> <p>LEVEL: Advanced</p>	<p>In this session, you will learn how to use batch processing to streamline your payroll businesses, from paychecks and reports to tax liability payments and filings. This session focuses on helping you unlock the potentials of Accounting CS from the technical perspective to maximize efficiencies and minimize errors.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Set up and use Complete Payroll Output to streamline processing • Understand best practices to help standardize procedures for reports, tax compliance reporting, and checks • Execute best practices for timely payment of liabilities and establishing bank relationships • Leverage Accounting CS to maximize efficiencies in Bulk Filing of Tax Returns <p>Participants should have knowledge and experience processing payroll in Accounting CS.</p>	<p>IN PERSON: 11/11 3:30 - 4:45 pm 11/12 3:30 - 4:45 pm</p> <p>VIRTUAL: 11/11 2:00 - 3:15 pm 11/12 1:00 - 2:15 pm</p>









PAYROLL SESSIONS	DESCRIPTION	DATES/TIMES (CST)
<p>Payroll Tax Compliance: 2021 and 2022 Legislative Update</p> <p><i>CPE Field of Study: Taxes - Technical</i> <i>CE Type: Update</i></p> <p>  1 CPE 1 CE</p> <p>LEVEL: Overview NEW SESSION FOR 2021</p>	<p>In this session, we will discuss several topics you need to know to prepare for year-end processing, as well as the latest in federal and state payroll changes and proposals for 2022. If you offer payroll services, you won't want to miss this session.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Understand the latest tax reform items that affect payroll including: 2021-2022 President Biden and federal budget proposals, Taxpayer First Act, Truncated W-2s, 1099-NEC and 1099-MISC, new 1099 requirements for GIG economy, State Changes and Proposals, ACA/AHA requirements for employers, and Cybersecurity • Discover new IRS initiatives, payroll reconciliation, COVID-19 Legislation, state withholding, new hire reporting, escheat rules, unemployment and deficit states, state sick pay, fringe benefits, and more • Utilize tips to make year-end processing more efficient and effective 	<p>IN PERSON: 11/11 9:30 - 10:20 am 11/12 9:30 - 10:20 am</p> <p>VIRTUAL: 11/11 1:00 - 1:50 pm</p>
<p>Time-Saving Tips and Tricks With Onboarding New Payroll Clients in Accounting CS</p> <p><i>CPE Field of Study: Computer Software & Applications - Non-Technical</i></p> <p>  1.5 CPE</p> <p>LEVEL: Intermediate</p>	<p>In this session, you'll learn about different features available in Accounting CS Payroll to allow you to efficiently set up and onboard new clients into the application to start processing payroll.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Utilize client templates and the Transfer Client Information feature to standardize setup of your payroll clients • Use spreadsheet imports to save time when setting up employees and vendors • Configure employee templates to increase the efficiency of setting up employees • Prenote direct deposit information • Complete new hire reporting 	<p>IN PERSON: 11/11 10:45 am - 12:00 pm 11/12 10:45 am - 12:00 pm</p> <p>VIRTUAL: 11/9 2:00 - 3:15 pm 11/11 2:00 - 3:15 pm</p>
SECURITY SESSIONS	DESCRIPTION	DATES/TIMES (CST)
<p>Data Security in Your Remote Workplace</p> <p><i>CPE Field of Study: Information Technology - Technical</i></p> <p>  1.5 CPE</p> <p>LEVEL: Intermediate NEW SESSION FOR 2021</p>	<p>When the COVID-19 pandemic led to stay-at-home orders, brick-and-mortar offices closed and full-time remote work and virtual interaction became a must. With employees working from home and having to share remote space with school-aged children and college students, and other family members with remote work or learning requirements, it is important for firms to perform a risk assessment and put security measures in place to safeguard taxpayer information. This session will walk you through identifying areas in your remote workspace that thieves target, assessing the risks to taxpayer information in your remote workspace, and provide you with tips and strategies on measures to put in place to better safeguard taxpayer information.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Identify data security updates that impact tax professionals • Identify and assess security risks to taxpayer information in each relevant area of your remote workspace • Apply tips and strategies to safeguard taxpayer information in your remote workspace • Know what to do in the event of a data breach 	<p>IN PERSON: 11/11 10:45 am - 12:00 pm 11/12 10:45 am - 12:00 pm</p> <p>VIRTUAL: 11/10 2:00 - 3:15 pm</p>







SECURITY SESSIONS	DESCRIPTION	DATES/TIMES (CST)
<p>Data Security: Designing Your Written Information Security Plan</p> <p><i>CPE Field of Study: Information Technology - Technical</i></p> <p>  2 CPE</p> <p>LEVEL: Intermediate NEW SESSION FOR 2021</p>	<p>The Federal Trade Commission (FTC) Safeguards Rule requires tax professionals that maintain, share, transmit, or store taxpayer data to have safeguards in place to protect taxpayer information and develop a written information security plan that describes their program to protect that information. This session will walk you through the steps of designing a written information security plan for your firm.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Understand your legal requirements to safeguard taxpayer data • Identify the components of a written information security plan • Review sample data security plans to identify how risks are addressed with in the plan • Develop policies and procedures to address data security risks in your business operations 	<p>IN PERSON: 11/11 1:20 - 3:00 pm 11/13 8:30 - 10:10 am</p> <p>VIRTUAL: 11/12 1:00 - 2:40 pm</p>
TAX & ASSET MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES (CST)
<p>AdvanceFlow Options for Tax Engagements</p> <p><i>CPE Field of Study: Computer Software & Applications – Non-Technical</i></p> <p>  1.5 CPE</p> <p>LEVEL: Intermediate NEW SESSION FOR 2021</p>	<p>In this session, you will learn how to use AdvanceFlow effectively in tax engagements. We will demonstrate three ways to set up and use tax engagements in AdvanceFlow.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Set up a tax folder inside of an audit engagement • Utilize the Trial Balance Compare feature • Use the consolidated approach to accommodate your tax engagements 	<p>IN PERSON: 11/11 10:45 am - 12:00 pm 11/12 10:45 am - 12:00 pm</p> <p>VIRTUAL: 11/10 2:00 - 3:15 pm</p>
<p>Advising Clients Who Can't Pay Their Taxes</p> <p><i>CPE Field of Study: Taxes - Technical</i> <i>CE Type: Federal Tax Law</i></p> <p>  1 CPE 1 CE</p> <p>LEVEL: Intermediate</p>	<p>Many Americans are still impacted by the economic effects of the COVID-19 pandemic, which means paying taxes will be a struggle. In this session, participants will learn ways to proactively help clients who can't pay their taxes.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Help clients apply for a short-term online payment agreement • Request an installment agreement • File an offer in compromise • Ask the IRS to delay collection • Identify other options 	<p>IN PERSON: 11/11 9:30 - 10:20 am 11/12 9:30 - 10:20 am</p> <p>VIRTUAL: 11/11 1:00 - 1:50 pm</p>
<p>Are You Taking Advantage of All the Features of Fixed Assets CS?</p> <p><i>CPE Field of Study: Computer Software & Applications – Non-Technical</i></p> <p>  1.5 CPE</p> <p>LEVEL: Intermediate</p>	<p>Fixed Assets CS is a robust system for tracking depreciation, but what else can it do? This session will teach you how to use Fixed Assets CS in other ways, as well as additional features the application has to offer.</p> <p>Upon completing this session, participants will be able to apply underutilized features of Fixed Assets CS to boost your workflow efficiency.</p> <p>Participants should have a working knowledge of Fixed Assets CS.</p>	<p>IN PERSON: 11/11 10:45 am - 12:00 pm 11/12 10:45 am - 12:00 pm</p> <p>VIRTUAL: 11/9 2:00 - 3:15 pm</p>







TAX & ASSET MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES (CST)
<p>Communicating Results With Planner CS</p> <p><i>CPE Field of Study: Taxes - Technical</i></p> <p> 2 CPE</p> <p>LEVEL: Intermediate NEW SESSION FOR 2021</p>	<p>Planner CS is an invaluable tool for tax professionals who build individual tax plans for their clients. It stays current with new legislation in ways that homemade Excel spreadsheets and other solutions do not. Use the Result Finder to guide your clients to a desired result. Then quickly produce impressive deliverables to reinforce the plan to your clients.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Leverage the power of result finder • Design personalized client letters to summarize and reinforce important planning points • Create customized reports and report sets so you can efficiently produce client deliverables <p>Participants should have a working knowledge of building plans in Planner CS.</p>	<p>IN PERSON: 11/11 1:20 - 3:00 pm</p>
<p>Consolidated and Unitary Business Returns in UltraTax CS</p> <p><i>CPE Field of Study: Taxes - Technical</i> <i>CE Type: Federal Tax Law</i></p> <p>  1 CPE 1 CE</p> <p>LEVEL: Advanced</p>	<p>In this session, you will learn about consolidated and unitary state return functionality in UltraTax CS.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Prepare consolidated tax returns in UltraTax CS • Identify which states support consolidated tax returns • Take advantage of Data Sharing to prepare unitary state filings • File consolidated returns electronically <p>Participants should be familiar with filing corporate returns in UltraTax CS.</p>	<p>IN PERSON: 11/12 9:30 - 10:20 am 11/13 10:30 - 11:20 am</p> <p>VIRTUAL: 11/12 10:00 - 10:50 am</p>
<p>Data Mining Within UltraTax CS for Advisory Opportunities</p> <p><i>CPE Field of Study: Computer Software & Applications - Non-Technical</i></p> <p>  1.5 CPE</p> <p>LEVEL: Intermediate NEW SESSION FOR 2021</p>	<p>In this session you will learn how to leverage data that you already have from clients' tax returns to identify opportunities to provide advisory services to your clients.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Create data mining searches targeting specific client criteria • Design reports to list client information and letters to send directly to clients • Leverage existing data to create consulting sessions or ongoing advisory relationships <p>Participants should have a working knowledge of UltraTax CS.</p>	<p>IN PERSON: 11/11 10:45 am - 12:00 pm 11/12 3:30 - 4:45 pm</p> <p>VIRTUAL: 11/10 2:00 - 3:15 pm</p>
<p>Demystifying the Cryptic Tax Issues of Crypto and Virtual Currency</p> <p><i>CPE Field of Study: Taxes - Technical</i> <i>CE Type: Federal Tax Law</i></p> <p>  2 CPE 2 CE</p> <p>LEVEL: Intermediate NEW SESSION FOR 2021</p>	<p>Since 2014, the IRS has published administrative guidance on the taxation of virtual currency transactions. However, as virtual currency has become increasingly widespread, the IRS has placed greater scrutiny on virtual currency reporting. This session will uncover the federal income tax treatment of hard forks and airdrops, which are transactions involving cryptocurrency, and the potential tax issues associated with receiving virtual currency as a gift and disposing of multiple units of the same type of virtual currency.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Distinguish hard forks from soft forks • Define wallet-to-wallet transactions • Report the tax implications associated with virtual currency transactions 	<p>IN PERSON: 11/11 1:20 - 3:00 pm 11/13 8:30 - 10:10 am</p> <p>VIRTUAL: 11/11 11:00 am - 12:40 pm</p>









TAX & ASSET MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES (CST)
<p>Electronic Filing Within GoSystem Tax RS</p> <p><i>CPE Field of Study: Computer Software & Applications – Non-Technical</i></p> <p>  1 CPE</p> <p>LEVEL: Intermediate NEW SESSION FOR 2021</p>	<p>In this session, we will walk through recent enhancements and updates to electronic filing within GoSystem Tax RS.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Utilize the new help available for IRS and State XML errors • Utilize the new features for electronic filing to access information important to the client <p>Participants should be familiar with the basics of GoSystem Tax RS.</p>	<p>IN PERSON: 11/12 9:30 - 10:20 am</p> <p>VIRTUAL: 11/10 1:00 - 1:50 pm</p>
<p>Federal Tax Research on Checkpoint Edge</p> <p><i>CPE Field of Study: Taxes - Technical</i></p> <p>  1.5 CPE</p> <p>LEVEL: Intermediate</p>	<p>In this session, you will discover how to use Checkpoint Edge to find answers to your federal tax questions faster than ever before. You will learn how to use predictive technology and concept markers to improve the quality and precision of your queries, even when you aren't sure what keywords to use or what related topics you might need to consider.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Demonstrate how to use links on the main screen to browse materials, access tools, and more • Describe the benefits of predictive queries • Explain different ways to view and manage search results • Demonstrate how to use Concept Markers to focus your search • Describe how to view results from trusted public sites • Describe how to use Document Compare • Explain how to share Share Folders with other Checkpoint users at your firm 	<p>IN PERSON: 11/11 3:30 - 4:45 pm 11/12 3:30 - 4:45 pm</p> <p>VIRTUAL: 11/10 2:00 - 3:15 pm 11/12 1:00 - 2:15 pm</p>
<p>Gear Up Presents: An In-Depth Analysis of the Employee Retention Credit</p> <p><i>CPE Field of Study: Taxes - Technical</i> <i>CE Type: Federal Tax Law</i></p> <p>  2 CPE 2 CE</p> <p>LEVEL: Basic NEW SESSION FOR 2021</p>	<p>The purpose of the Employee Retention Credit (ERC) is to encourage employers to keep employees on the payroll, even if they are not working during the covered period due to the effects of the pandemic. In this session, we will discuss how to determine if an employer is eligible to receive the ERC, what is classified as qualified wages and how to calculate those, the impact of other tax credits and relief provisions with the ERC, how employers can claim this credit, and harvest lost opportunities.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Determine if an employer is eligible for the ERC • Identify what is classified as a qualified wage for this credit • Identify what other tax credits and relief provisions effect an employer's ability to claim this credit • Explain how an employer is able to claim this credit 	<p>IN PERSON: 11/10 3:00 - 4:40 pm 11/13 8:30 - 10:10 am</p> <p>VIRTUAL: 11/12 1:00 - 2:40 pm</p>
<p>Gear Up Presents: Common Return Omissions</p> <p><i>CPE Field of Study: Taxes - Technical</i> <i>CE Type: Federal Tax Law</i></p> <p>  1 CPE 1 CE</p> <p>LEVEL: Basic NEW SESSION FOR 2021</p>	<p>We know too well that errors and omissions in preparing tax returns can easily occur. Misconstrued client facts, misinterpreted law, and entry errors all contribute to omissions. In this session, we will unpack and discuss common return omissions.</p> <p>Upon completion of this session, participants will be able to identify common 1040 return omissions and determine their implications.</p>	<p>IN PERSON: 11/12 9:30 - 10:20 am</p> <p>VIRTUAL: 11/10 1:00 - 1:50 pm</p>







TAX & ASSET MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES (CST)
<p>Gear Up Presents: Ethics for the Tax Professional</p> <p><i>CPE Field of Study: Regulatory Ethics - Technical</i> <i>CE Type: Ethics</i></p> <p>  2 CPE 2 CE</p> <p>LEVEL: Basic NEW SESSION FOR 2021</p>	<p>The Office of Professional Responsibility (OPR) has been very busy, ensuring that Circular 230 Practitioners (that's us) follow rules that prescribe and proscribe our behavior. In this session, we will discuss what we can – and must – do to assist our clients while maintaining ethical integrity and complying with Circular 230 rules.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Describe the changes at the IRS relating to ethics • Identify how to navigate Circular 230 • Explain how the AICPA SSTS statements further illuminate Circular 230 <p>This session is applicable for CPAs in states with a non-state-specific requirement. It covers the IRS Circular 230, Professional Conduct Rules, and IRS Practice Issues.</p>	<p>IN PERSON: 11/11 1:20 - 3:00 pm 11/12 1:20 - 3:00 pm</p> <p>VIRTUAL: 11/12 11:00 am - 12:40 pm</p>
<p>Gear Up Presents: Meals and Entertainment Post-ARPA</p> <p><i>CPE Field of Study: Taxes - Technical</i> <i>CE Type: Federal Tax Law</i></p> <p>  1 CPE 1 CE</p> <p>LEVEL: Basic NEW SESSION FOR 2021</p>	<p>So much has changed with the increase in the deduction for meals and entertainment to 100%. The rules for deducting these expenses were always complex, including options for per diem allowances and strict record keeping requirements. In this session, we will review these requirements and will bring tax professionals up to date regarding recent changes.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Apply the recent changes in tax law for meals and entertainment • List the record keeping requirements for deducting these expenses • Determine the limitations that apply as well as the exceptions to those limitations • List the alternatives for deducting per-diem expenses 	<p>IN PERSON: 11/11 9:30 - 10:20 am 11/13 10:30 - 11:20 am</p> <p>VIRTUAL: 11/12 10:00 - 10:50 am</p>
<p>Gear Up Presents: Owner Basis, PPP, and Other COVID Grant Programs</p> <p><i>CPE Field of Study: Taxes - Technical</i> <i>CE Type: Federal Tax Law</i></p> <p>  1.5 CPE 1 CE</p> <p>LEVEL: Basic NEW SESSION FOR 2021</p>	<p>Late breaking 2020 legislation, the Consolidated Appropriations Act, 2021, included new rules on PPP eligibility, supplemental borrowing, and loan forgiveness. In this session, we will review the rules that now apply to PPP loans, including a discussion on the allowable uses of PPP proceeds and the loan forgiveness process.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Evaluate a borrower's eligibility for a PPP loan • Assess the borrower's applicable covered period • Explain a borrower's PPP loan forgiveness application process 	<p>IN PERSON: 11/11 10:45 am - 12:00 pm 11/12 3:30 - 4:45 pm</p> <p>VIRTUAL: 11/11 2:00 - 3:15 pm</p>
<p>Gear Up Presents: The Million Dollar Surprise – New Capital Gain Rates? Estate and Trusts Changes?</p> <p><i>CPE Field of Study: Taxes - Technical</i> <i>CE Type: Federal Tax Law</i></p> <p>  2 CPE 2 CE</p> <p>LEVEL: Basic NEW SESSION FOR 2021</p>	<p>In this session, we will take a look at estates and trusts and some of the issues surrounding them. What has or hasn't changed, especially relating to the current proposal in the American Families Plan to change the way capital gains are paid on estates. This change would not just affect the wealthy.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Describe the legislation's tax developments affecting individual taxpayers • Analyze how the developments affect your clients 	<p>IN PERSON: 11/10 1:00 - 2:40 pm 11/12 1:20 - 3:00 pm</p> <p>VIRTUAL: 11/11 11:00 am - 12:40 pm</p>









TAX & ASSET MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES (CST)
<p>Gear Up Presents: The New Work at Home NEXUS – Extended Work From Home Creates New Issues</p> <p><i>CPE Field of Study: Taxes - Technical</i></p> <p>  1 CPE</p> <p>LEVEL: Basic NEW SESSION FOR 2021</p>	<p>Telecommuting is more proliferate and more necessary than ever. In this session, we will take a look at telecommuter state Nexus guidance. We will review issues that create nexus for taxpayers for sales, payroll, and income tax; and consult with taxpayers on record keeping for multi-state returns.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Explain the impact of the recent Supreme Court Decision • Discuss the issues of registration with taxpayers • Recognize issues that create nexus for taxpayers for sales, payroll, and income tax • Consult with taxpayers on record keeping for multi-state returns 	<p>IN PERSON: 11/11 9:30 - 10:20 am 11/13 10:30 - 11:20 am</p> <p>VIRTUAL: 11/9 1:00 - 1:50 pm</p>
<p>Gear Up Presents: Up to the Minute Business Tax Update</p> <p><i>CPE Field of Study: Taxes - Technical</i> <i>CE Type: Update</i></p> <p>  2 CPE 2 CE</p> <p>LEVEL: Basic NEW SESSION FOR 2021</p>	<p>In this session, we will highlight updates relevant to small business tax advisors, including coverage of recent legislation, case law developments, and relevant notices, announcements, revenue rulings, and procedures to help the busy practitioner stay current. Value-added tax planning ideas and real-world practical examples will be discussed.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Describe recently issued tax developments affecting business taxpayers including: C Corp, S Corp, Partnership / LLC, Payroll, Estate and Gift, as well as administrative items with IRS • Analyze how the recent tax developments affect your business client(s) 	<p>IN PERSON: 11/10 1:00 - 2:40 pm 11/11 1:20 - 3:00 pm</p> <p>VIRTUAL: 11/9 11:00 am - 12:40 pm</p>
<p>Gear Up Presents: Up to the Minute Individual Tax Update</p> <p><i>CPE Field of Study: Taxes - Technical</i> <i>CE Type: Update</i></p> <p>  2 CPE 2 CE</p> <p>LEVEL: Basic NEW SESSION FOR 2021</p>	<p>This 1040 Individual Tax Update will bring you the latest breaking tax developments featuring coverage of new federal taxation legislation, IRS pronouncements, and judicial decisions recently issued. In this session, you will learn techniques and tax planning ideas on reducing taxes through effective planning and receive the most current updates on key tax issues affecting your clients. Attend this tax update and come away with real-world solutions to real-world problems.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Describe key provisions of late breaking tax law changes and developments including legislation passed by Congress, guidance issued by the Internal Revenue Service, and recent court case decisions • Provide clients with accurate and timely guidance on recent legislative updates 	<p>IN PERSON: 11/10 3:00 - 4:40 pm 11/13 8:30 - 10:10 am</p> <p>VIRTUAL: 11/10 11:00 am - 12:40 pm</p>
<p>GoSystem Tax RS Data Connection, Are You Leveraging It?</p> <p><i>CPE Field of Study: Computer Software & Applications – Non-Technical</i></p> <p>  1 CPE</p> <p>LEVEL: Intermediate NEW SESSION FOR 2021</p>	<p>Keep hearing about Data Connection? Not sure if or how it can help? This session will help you determine the answers to some of those questions.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Understand what Data Connection is and how it may be able to help with your processes • See what a Data Connection file looks like and how it is set up <p>Participants should have a working knowledge of GoSystem Tax RS.</p>	<p>IN PERSON: 11/11 9:30 - 10:20 am</p> <p>VIRTUAL: 11/9 1:00 - 1:50 pm 11/11 1:00 - 1:50 pm</p>









TAX & ASSET MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES (CST)
<p>GoSystem Tax RS: Trial Balance</p> <p><i>CPE Field of Study: Computer Software & Applications – Non-Technical</i></p> <p>  2 CPE</p> <p>LEVEL: Basic NEW SESSION FOR 2021</p>	<p>In this session, you will learn about the trial balance feature in GoSystem Tax RS that will help to simplify and streamline your tax preparation process.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Import the client's Chart of Accounts • Create various types of adjustments including book, reclassifying, and tax • Set up automatic adjusting entries • Review the tax information in an accounting working trial balance format <p>Participants should be familiar with the basics of GoSystem Tax RS.</p>	<p>IN PERSON: 11/11 1:20 - 3:00 pm</p> <p>VIRTUAL: 11/10 11:00 am - 12:40 pm 11/11 11:00 am - 12:40 pm</p>
<p>How Valuable is the Employee Retention Tax Credit?</p> <p><i>CPE Field of Study: Taxes - Technical CE Type: Federal Tax Law</i></p> <p>  2 CPE 2 CE</p> <p>LEVEL: Intermediate NEW SESSION FOR 2021</p>	<p>The CARES Act of 2020 introduced new tax legislation geared towards offering a refundable tax credit to qualified employers impacted by COVID-19. Additionally, the Consolidated Appropriations Act, 2020 expanded this legislation's limit on employee creditable wages, reduced the gross receipts decline qualification requirements, and includes employers who were previously denied to qualify. In this session, we will explore the latest updates to the Employee Retention Tax Credit, analyze the shutdown provision rules and gross receipts tests, and outline the interplay between the ERTC and the PPP.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Maximize the tax benefits of the employee retention credit • Compute the employee tax credit for 2020 and 2021 • Prepare the necessary filings to claim the tax credit for 2020 and 2021 	<p>IN PERSON: 11/11 1:20 - 3:00 pm 11/12 1:20 - 3:00 pm</p> <p>VIRTUAL: 11/12 11:00 am - 12:40 pm</p>
<p>Individual Tax Provision of the American Rescue Plan Act of 2021</p> <p><i>CPE Field of Study: Taxes - Technical CE Type: Federal Tax Law</i></p> <p>  2 CPE 2 CE</p> <p>LEVEL: Intermediate NEW SESSION FOR 2021</p>	<p>Signed into law by President Biden on March 11, 2021, the American Rescue Plan Act of 2021 (ARPA) contains significant tax changes impacting individuals that all practitioners should be aware of when preparing 2021 tax returns.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Explain how to report the Recovery Rebate Credit on 2021 tax returns • Identify taxpayer-friendly changes to the Premium Tax Credit for 2021 and 2022 • Describe student loan forgiveness provisions • Identify increased benefits associated with the Child Tax Credit, the Earned Income Tax Credit, and the Child and Dependent Care Tax Credit • Describe the tax benefits associated with other relevant tax provisions 	<p>IN PERSON: 1/10 1:00 - 2:40 pm 11/12 1:20 - 3:00 pm</p> <p>VIRTUAL: 11/9 11:00 am - 12:40 pm</p>







TAX & ASSET MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES (CST)
<p>Is Your Interest Limited? An Analysis of the Final Regulations Under IRC Section 163(j)</p> <p><i>CPE Field of Study: Taxes - Technical</i> <i>CE Type: Federal Tax Law</i></p> <p>  2 CPE 2 CE</p> <p>LEVEL: Intermediate NEW SESSION FOR 2021</p>	<p>In January 2021 and July 2020, the Internal Revenue Service (“IRS”) issued final regulations under Section 163(j) defining the concept of interest for purposes of Section 163(j), computations associated with the Section 163(j) limitation, automatic and elective exceptions to the 163(j) limitation, and how the limitation applies across various types of business entities. This session focuses on analyzing the impact of the final regulations in determining which taxpayers are subject to Section 163(j), application of the \$26 million gross receipts test, determining what is an excepted trade or business, identifying tax shelters and electing real property businesses, and what constitutes business interest under Section 163(j).</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Calculate the section 163(j) business interest expense limitation and modifications under the CARES Act • Recognize the exceptions to the business interest limitation for small businesses, real estate businesses, and farming businesses • Recognize what is considered “interest” for the purposes of the limitation • Calculate “adjusted taxable income” • Apply the interest expense carryforward rules for S corporations and partnerships 	<p>IN PERSON: 11/10 3:00 - 4:40 pm 11/13 8:30 - 10:10 am</p> <p>VIRTUAL: 11/10 11:00 am - 12:40 pm</p>
<p>Leveraging the Best Features and Functions of UltraTax CS</p> <p><i>CPE Field of Study: Taxes - Technical</i> <i>CE Type: Federal Tax Law</i></p> <p>  2 CPE 2 CE</p> <p>LEVEL: Intermediate</p>	<p>Have you ever learned something new in UltraTax CS and thought, “Hmm, I wonder how long that’s been there?” Are you concerned that you may be missing other tools that can help you boost efficiency and accuracy? In this fast-paced session, we will review some of the most impactful preparation and workflow enhancements to UltraTax CS over the past several years, and review several features preparers may not be aware of.</p> <p>Upon completion of this session, participants will be able to implement time-saving features to boost productivity and assure accuracy at your firm.</p> <p>Participants should have a strong working knowledge of UltraTax CS and be familiar with navigation.</p>	<p>IN PERSON: 11/11 1:20 - 3:00 pm 11/12 1:20 - 3:00 pm</p> <p>VIRTUAL: 11/9 11:00 am - 12:40 pm 11/10 11:00 am - 12:40 pm</p>
<p>Onvio Tax Preparation and Filing</p> <p><i>CPE Field of Study: Taxes - Technical</i></p> <p>  1.5 CPE</p> <p>LEVEL: Basic NEW SESSION FOR 2021</p>	<p>This session will step you through the exciting new tax preparation and filing capabilities made available within Onvio Tax. We will walk through various individual and business tax return examples starting with the data entry involved in return preparation, moving into return review, and ending with return assembly, delivery, and e-filing. Witness how Onvio Tax combines our gold-standard tax compliance engine with a sophisticated, modern, fully digital platform like Onvio to usher in a new era of tax compliance software.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Create and open a tax return project within Onvio’s cloud-native platform • Enter income and deductions from common source documents, such as Form W-2 and 1099 • Enter business activities to prepare Schedule C and Schedule E • Utilize the Fixed Assets application for detailed asset data entry and depreciation processing • Perform data entry for corporate and partnership tax returns, including special allocation and depreciation • Use diagnostics and return summary to review data entry and forms • Deliver and electronically file completed tax returns 	<p>IN PERSON: 11/12 10:45 am - 12:00 pm 11/12 3:30 - 4:45 pm</p> <p>VIRTUAL: 11/11 2:00 - 3:15 pm</p>




TAX & ASSET MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES (CST)
<p>Processing Multi-State Returns in UltraTax CS</p> <p><i>CPE Field of Study: Taxes - Technical</i></p> <p>  2 CPE</p> <p>LEVEL: Intermediate NEW SESSION FOR 2021</p>	<p>In this session, you will learn how to prepare multi-state returns efficiently using UltraTax CS. We will look at the allocation grid used for individual returns, as well as apportionment and adjustment screens used when working with businesses.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Understand the differences between AGI and Build Up states • Process multi-state returns using the allocation utility and apportionment grid • Prepare returns for individuals filing part-year or non-resident returns <p>Participants should have a working knowledge of UltraTax CS.</p>	<p>IN PERSON: 11/10 1:00 - 2:40 pm 11/11 1:20 - 3:00 pm</p> <p>VIRTUAL: 11/11 11:00 am - 12:40 pm</p>
<p>Query Your Database Using FormSource Within GoSystem Tax RS</p> <p><i>CPE Field of Study: Computer Software & Applications - Non-Technical</i></p> <p>  1.5 CPE</p> <p>LEVEL: Intermediate NEW SESSION FOR 2021</p>	<p>FormSource is a versatile tool that allows you to query your GoSystem Tax RS client database for specific data and client characteristics. In this session, we will delve into configuration of custom reports and queries to tailor information to your client base.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Configure custom queries to leverage information already in your tax database • Locate opportunities to provide advisory and other value-added searches <p>Participants should have a working knowledge of GoSystem Tax RS.</p>	<p>IN PERSON: 11/12 3:30 - 4:45 pm</p> <p>VIRTUAL: 11/12 1:00 - 2:15 pm</p>
<p>Researching Within UltraTax CS</p> <p><i>CPE Field of Study: Taxes - Technical</i></p> <p>  1 CPE</p> <p>LEVEL: Overview</p>	<p>This session will help you understand the research tools available in UltraTax CS, including agency instructions and publications, as well as subscription-based resources from Checkpoint Edge/ Checkpoint.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Navigate to form instructions directly from Tax Forms View • Utilize shortcuts to access PPC Deskbooks and Checkpoint Edge/Checkpoint content • Configure UltraTax CS to access Checkpoint Edge/Checkpoint research content <p>Participants should be familiar with UltraTax CS.</p>	<p>IN PERSON: 11/12 9:30 - 10:20 am 11/13 10:30 - 11:20 am</p> <p>VIRTUAL: 11/9 1:00 - 1:50 pm</p>
<p>Tax Return Troubleshooting in UltraTax CS</p> <p><i>CPE Field of Study: Taxes - Technical</i></p> <p>  1.5 CPE</p> <p>LEVEL: Intermediate NEW SESSION FOR 2021</p>	<p>Something not right on your tax return, but you are too busy to call support? In this session, learn how to navigate through returns to determine what corrections may be needed to resolve calculation and electronic filing errors.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Troubleshoot calculation and electronic filing errors on tax returns • Utilize Quick Navigation links to quickly move between forms, related schedules, and worksheets • Decode electronic filing errors • Leverage review tools including tick marks and the Watch window to see calculation changes <p>Participants should have a working knowledge of UltraTax CS.</p>	<p>IN PERSON: 11/11 3:30 - 4:45 pm 11/12 10:45 am - 12:00 pm</p> <p>VIRTUAL: 11/11 2:00 - 3:15 pm</p>

TAX & ASSET MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES (CST)
<p>Time-Saving Tips on Federal Tax Research in Checkpoint</p> <p><i>CPE Field of Study: Taxes - Technical</i></p> <p>  1 CPE</p> <p>LEVEL: Intermediate</p>	<p>In this session, you will learn Checkpoint functionality tips, tricks, shortcuts, and hidden gems that will save you research time. The content covered includes features from common functionality questions, as well as features that get the biggest "ooohs" and "aaahs" when we show them.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Explain how to use Answer Path as a shortcut to finding answers • Describe where to locate Quick Tax Amounts • Explain how to access and use a Topical Index • Demonstrate tips that can be used when in a Code Section • Describe how to use Form/Line Finder • Demonstrate how to navigate to prior regs and treasury decisions <p>Participants should have a working knowledge of Checkpoint.</p>	<p>IN PERSON: 11/11 9:30 - 10:20 am 11/13 10:30 - 11:20 am</p> <p>VIRTUAL: 11/10 10:00 - 10:50 am 11/11 10:00 - 10:50 am</p>
<p>UltraTax CS 2021 Update</p> <p><i>CPE Field of Study: Taxes - Technical</i> <i>CE Type: Update</i></p> <p>  1 CPE 1 CE</p> <p>LEVEL: Overview</p> <p>NEW SESSION FOR 2021</p>	<p>This session will prepare you for the 2021 filing season by reviewing calculation changes in UltraTax CS, as well as forms added to the software.</p> <p>Upon completion of this session, participants will be able to prepare returns involving updated 2021 calculations.</p>	<p>IN PERSON: 11/11 9:30 - 10:20 am 11/12 9:30 - 10:20 am 11/13 10:30 - 11:20 am</p> <p>VIRTUAL: 11/10 10:00 - 10:50 am 11/11 1:00 - 1:50 pm</p>
<p>UltraTax CS Business Tax Return Preparation</p> <p><i>CPE Field of Study: Taxes - Technical</i> <i>CE Type: Federal Tax Law</i></p> <p>  2 CPE 2 CE</p> <p>LEVEL: Basic</p>	<p>In this session, you will learn how to prepare corporate and partnership returns in UltraTax CS, including pass-through entity owner information and multi-state apportionment.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Navigate data entry across a variety of income sources • Populate state returns with apportionment and allocation information • Prepare Schedule K-1 and track basis for pass-through entity owners • Manage fixed assets information <p>Participants should be familiar with UltraTax CS.</p>	<p>IN PERSON: 11/10 3:00 - 4:40 pm 11/13 8:30 - 10:10 am</p> <p>VIRTUAL: 11/10 11:00 am - 12:40 pm</p>

TAX & ASSET MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES (CST)
<p>UltraTax CS Fiduciary Tax Return Preparation</p> <p><i>CPE Field of Study: Taxes - Technical</i> <i>CE Type: Federal Tax Law</i></p> <p>  1 CPE 1 CE</p> <p>LEVEL: Basic NEW SESSION FOR 2021</p>	<p>In this session, you will learn how to prepare fiduciary returns in UltraTax CS, including simple, complex, and grantor trusts on form 1041, as well as charitable trusts on Form 5227.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Prepare form 1041 for simple, complex, and grantor trusts • Complete beneficiary data entry and allocations • Prepare Form 5227 for charitable trusts • Allocate income to state returns <p>Participants should be familiar with UltraTax CS.</p>	<p>IN PERSON: 11/11 9:30 - 10:20 am 11/13 10:30 - 11:20 am</p> <p>VIRTUAL: 11/9 10:00 - 10:50 am</p>
<p>UltraTax CS Navigation and Individual Tax Return Preparation</p> <p><i>CPE Field of Study: Taxes - Technical</i> <i>CE Type: Federal Tax Law</i></p> <p>  2 CPE 2 CE</p> <p>LEVEL: Basic</p>	<p>In this session, learn how to navigate UltraTax CS and enter information in individual returns to reflect a variety of situations, from W-2 wages to sole proprietorships and retirement income.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Prepare 1040 Returns in UltraTax CS • Report income from a variety of sources including Forms W-2 and 1099 • Prepare Schedules C and E for business owners and track fixed asset information • Track passive activity and basis carryovers and limitations • Utilize data entry tools including Source Data Entry and Diagnostics 	<p>IN PERSON: 11/10 1:00 - 2:40 pm 11/12 1:20 - 3:00 pm</p> <p>VIRTUAL: 11/9 11:00 am - 12:40 pm</p>
<p>UltraTax CS Workflow Best Practices</p> <p><i>CPE Field of Study: Computer Software & Applications – Non-Technical</i></p> <p>  2 CPE</p> <p>LEVEL: Intermediate</p>	<p>Attending this session will help you understand best practices for an efficient, optimized UltraTax CS Workflow. A consultant specialized in UltraTax CS will discuss the preparation process from the beginning to end of the tax engagement, with a focus on the UltraTax CS status system.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Establish custom client status events • Determine the status of tax returns on an office-wide or more focused basis • Optimize your UltraTax CS workflow <p>Participants should be familiar with preparing returns in UltraTax CS.</p>	<p>IN PERSON: 11/10 3:00 - 4:40 pm 11/12 1:20 - 3:00 pm</p> <p>VIRTUAL: 11/12 11:00 am - 12:40 pm 11/12 1:00 - 2:40 pm</p>
<p>Using Onvio for a Complete End-to-End Tax Workflow</p> <p><i>CPE Field of Study: Computer Software & Applications – Non-Technical</i></p> <p>  2 CPE</p> <p>LEVEL: Basic NEW SESSION FOR 2021</p>	<p>How many steps are involved in your firm's tax workflow? What if you could automate or even eliminate some of these steps? On average, how long does it take your firm to process a single tax return from start to finish? What if you could save 15, 30, or even 45 minutes for each return? And what would you do with all that extra time? In this session, you'll witness the latest enhancements made to Onvio designed to bring efficiency to your firm's end-to-end tax workflow. We'll step through both individual and business tax workflow examples. Along the way we'll highlight how the Onvio ecosystem and features within it are designed to drive client collaboration, eliminate workflow redundancies, and save firms and their clients' time.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Process a 1040 tax organizer round-trip using Onvio Tax and Onvio Client Center • Identify ways to automate and streamline return preparation and review using Onvio Tax • See how Onvio Tax interacts with other aspects of Onvio, such as trial balance capabilities, to add efficiency to your firm's tax workflow 	<p>IN PERSON: 11/10 3:00 - 4:40 pm 11/13 8:30 - 10:10 am</p> <p>VIRTUAL: 11/11 11:00 am - 12:40 pm</p>

TAX & ASSET MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES (CST)
<p>What's New in GoSystem Tax RS?</p> <p><i>CPE Field of Study: Taxes - Technical</i></p> <p>  1.5 CPE</p> <p>LEVEL: Basic NEW SESSION FOR 2021</p>	<p>In this session, you will learn about new features in GoSystem Tax RS for the upcoming 2021 tax year. This will assist your firm in processing returns efficiently for next year's tax season.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Understand data entry changes within GoSystem Tax RS • Understand changes to the formsource capabilities • Utilize help resources to assist with understanding these changes <p>Participants should have a working knowledge of GoSystem Tax RS.</p>	<p>IN PERSON: 11/11 3:30 - 4:45 pm</p> <p>VIRTUAL: 11/11 2:00 - 3:15 pm</p>
TECHNOLOGY SESSIONS	DESCRIPTION	DATES/TIMES (CST)
<p>Emerging Technology in 2021 and Beyond</p> <p><i>CPE Field of Study: Computer Software & Applications - Non-Technical</i></p> <p>  2 CPE</p> <p>LEVEL: Overview NEW SESSION FOR 2021</p>	<p>In this session, we will take a look at some of the new innovations and technology that are in play in the year 2021. Who is doing what with automation? What about robots? We'll also look at what technology to look out for in years to come.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Be informed about what innovative technology is being used in 2021 • Begin considering which technologies they can put to use within their own office <p>Participants should have an interest in new technology.</p>	<p>IN PERSON: 11/10 1:00 - 2:40 pm 11/13 8:30 - 10:10 am</p> <p>VIRTUAL: 11/11 11:00 am - 12:40 pm</p>
<p>Top 10 Microsoft Excel Tips for Accounting Professionals</p> <p><i>CPE Field of Study: Computer Software & Applications - Non-Technical</i></p> <p>  1 CPE</p> <p>LEVEL: Intermediate</p>	<p>In this session, we will discuss how you can be more efficient with Microsoft Excel. Do you consider yourself proficient with Excel but not an expert? You won't want to miss this session.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Apply 10 quick tips to bring greater efficiency to using Microsoft Excel • Identify how to easily navigate and utilize timesaving functions • Apply consistent formatting • Customize the status bar <p>Participants should have a basic, working knowledge of the Microsoft Office Suite to attend this session.</p>	<p>IN PERSON: 11/12 9:30 - 10:20 am</p> <p>VIRTUAL: 11/11 10:00 - 10:50 am</p>
<p>Top 10 Microsoft Outlook Tips for Accounting Professionals</p> <p><i>CPE Field of Study: Computer Software & Applications - Non-Technical</i></p> <p>  1 CPE</p> <p>LEVEL: Intermediate NEW SESSION FOR 2021</p>	<p>In this session, we will discuss how you can take your knowledge of Microsoft Outlook to a whole new level. You'll walk away with several quick solutions that will make you more efficient. If you're new to Outlook, or have been using Outlook for years, you won't want to miss this session.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Take advantage of Outlook's advanced email, calendar, and task functions • Create and use templates to drastically reduce time • Identify how to clean up your inbox by scheduling emails as calendar appointments or tasks <p>Participants should have a basic, working knowledge of the Microsoft Office Suite to attend this session.</p>	<p>IN PERSON: 11/11 9:30 - 10:20 am 11/13 10:30 - 11:20 am</p> <p>VIRTUAL: 11/9 1:00 - 1:50 pm</p>

TRENDS IN THE PROFESSION SESSIONS	DESCRIPTION	DATES/TIMES (CST)
<p>Finding Talent</p> <p><i>CPE Field of Study: Personnel/Human Resources – Non-Technical</i></p> <p>  1 CPE</p> <p>LEVEL: Intermediate</p>	<p>Finding talent is a continual struggle for most firms. How do you fill your people pipeline? Do you have a recruiting strategy? This session will focus on different methods for finding talent; from intern to experienced. We will also discuss the options of developing talent from within to meet your needs.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Determine your firm’s ideal staff characteristics • Develop your firm’s Recruiting Plan <p>Participants should be familiar with the operational aspects of an accounting and tax practice.</p>	<p>IN PERSON: 11/12 9:30 - 10:20 am</p> <p>VIRTUAL: 11/11 1:00 - 1:50 pm</p>
<p>Managing in the Multi-Generational Workplace</p> <p><i>CPE Field of Study: Personnel/Human Resources – Non-Technical</i></p> <p>  1.5 CPE</p> <p>LEVEL: Intermediate</p> <p>NEW SESSION FOR 2021</p>	<p>In this session, we will discuss the generations that make up the current workforce and highlight key techniques and strategies for effective interactions.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Describe the generations that make up the current workforce • Explore key differences, characteristics, and behaviors of each generation • Learn techniques and strategies for effective interactions with multi-generational teams in the public accounting environment 	<p>IN PERSON: 11/12 10:45 am - 12:00 pm 11/12 3:30 - 4:45 pm</p> <p>VIRTUAL: 11/9 2:00 - 3:15 pm 11/10 2:00 - 3:15 pm</p>
<p>Retaining Top Talent</p> <p><i>CPE Field of Study: Personnel/Human Resources – Non-Technical</i></p> <p>  1 CPE</p> <p>LEVEL: Intermediate</p>	<p>In this session, we will explore some initiatives to help increase employee engagement and retain talent.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Learn strategies that you can incorporate in your firm to help retain top talent • Gain a better understanding of the potential impact retention strategies have on your bottom line • Learn how to utilize the strategies to better “keep your finger on the pulse” of employee engagement within your firm <p>Participants should be familiar with the operational aspects of an accounting and tax practice.</p>	<p>IN PERSON: 11/11 9:30 - 10:20 am 11/13 10:30 - 11:20 am</p> <p>VIRTUAL: 11/10 10:00 - 10:50 am 11/11 10:00 - 10:50 am</p>

TRENDS IN THE PROFESSION SESSIONS	DESCRIPTION	DATES/TIMES (CST)
<p>Train the Trainer – Improving Your Presentation Skills</p> <p><i>CPE Field of Study: Communications & Marketing - Non-Technical</i></p> <p>  1.5 CPE</p> <p>LEVEL: Basic</p>	<p>In this session, you'll learn how to improve your skills in delivering live presentations. Whether you instruct your own staff or deliver training or demonstrations for clients, you will learn tips and tricks for more effective presentations.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Manage classroom dynamics • Engage an audience, whether in person or remote • Identify levels of learning, and how to meet an audience's expectations 	<p>IN PERSON: 11/11 10:45 am - 12:00 pm 11/12 10:45 am - 12:00 pm</p> <p>VIRTUAL: 11/12 1:00 - 2:15 pm</p>
<p>Train Your Staff to Take Your Job</p> <p><i>CPE Field of Study: Personnel/Human Resources – Non-Technical</i></p> <p> 1.5 CPE</p> <p>LEVEL: Basic</p> <p>NEW SESSION FOR 2021</p>	<p>In this session, you will learn how to develop and put into action a plan for training your staff to eventually take your job.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Identify staff that are ready for and want to take on the challenge • Communicate the plan and feedback • Create a checklist of training topics • Delegate responsibilities • Empower staff to make firm decisions <p>Participants should be familiar with the operational aspects of an accounting and tax practice.</p>	<p>IN PERSON: 11/11 10:45 am - 12:00 pm</p>