

TAX AND ACCOUNTING PROFESSIONAL'S 2021 SYNERGY VIRTUAL SESSION SCHEDULE

TUESDAY 11/09				WEDNESDAY 11/10				THURSDAY 11/11				FRIDAY 11/12			
50 mins	100 mins	50 mins	75 mins	50 mins	100 mins	50 mins	75 mins	50 mins	100 mins	50 mins	75 mins	50 mins	100 mins	75 mins*	100 mins*
10:00 - 10:50 am	11:00 am - 12:40 pm	1:00 - 1:50 pm	2:00 - 3:15 pm	10:00 - 10:50 am	11:00 am - 12:40 pm	1:00 - 1:50 pm	2:00 - 3:15 pm	10:00 - 10:50 am	11:00 am - 12:40 pm	1:00 - 1:50 pm	2:00 - 3:15 pm	10:00 - 10:50 am	11:00 am - 12:40 pm	1:00 - 2:15 pm	1:00 - 2:40 pm
Plan and Execute Preparation, Compilation and Review Engagements Using Advance-Flow and Checkpoint Engage	Introduction to Advance-Flow – Workpapers and Trial Balance	Top 10 Microsoft Outlook Tips for Accounting Professionals	Introduction to Audit Planning and Internal Controls	Fund Account Structures in Advance-Flow	Accounting and Auditing Update and Maximizing Research Capabilities Using Checkpoint Edge	How to Customize Practice CS Using Custom Fields for Your Firm	Introduction to Workpapers and Documentation	Navigating the Path to Efficiency	Peer Review Insights and How to Prepare When It's Your Turn	Payroll Tax Compliance: 2021 and 2022 Legislative Update	Divisions and Consolidated Engagements in Advance-Flow	Advance-Flow for Reviewers	Plan and Execute Audit Engagements Using Advance-Flow and Checkpoint Engage	Introduction to Scoping, Sampling, and Analytical Procedures	UltraTax CS Workflow Best Practices
Utilizing Bank Feeds With Accounting CS	Streamlining Business Tax Workflow Using Trial Balance Tools for Accounting CS and Workpapers CS	GoSystem Tax RS Data Connection, Are You Leveraging It?	Checkpoint Engage: Move Beyond the Basics	Retaining Top Talent	Connecting Accounting CS and QuickBooks	Electronic Filing Within GoSystem Tax RS	Audit Confirmations: When and How to Gather External Evidence to Support Your Opinion Using Confirmation	Top 10 Microsoft Excel Tips for Accounting Professionals	Streamlining Individual Tax Workflow Using OCR With Workpapers CS	Finding Talent	Checkpoint Engage: Move Beyond the Basics	Client-Facing Tools to Better Serve Your Payroll Clients	Peer Review Insights and How to Prepare When It's Your Turn	Advanced Financial Statement Formatting Using the Accounting CS Report Designer	Gear Up Presents: An In-depth Analysis of the Employee Retention Credit

ALL TIMES ARE CST

ACCOUNTING	ADVISORY	AUDIT	CLIENT ACCOUNTING	FIRM MANAGEMENT	ONVIO	PAYROLL	SECURITY	TAX & ASSET MANAGEMENT	TECHNOLOGY	TRENDING
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*The Friday 1:00 pm session will hold both 75-min and 100-min sessions.

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Configuring Your Dashboards in Practice CS	Strategic Planning: Generating Revenue and Capacity Projections Using Practice CS	Re-searching Within UltraTax CS	Time-Saving Tips and Tricks With Onboarding New Payroll Clients in Accounting CS	UltraTax CS 2021 Update	SOS! Go-FileRoom and FirmFlow Rescue 101	Gear Up Presents: Common Return Omissions	Advanced Accounting Services Using Accounting CS	Retaining Top Talent	Emerging Technology in 2021 and Beyond	GoSystem Tax RS Data Connection, Are You Leveraging It?	Leveraging Payroll Batch Processing With Accounting CS	Day to Day Project Management Within Practice CS	Connecting Accounting CS and QuickBooks	Leveraging Payroll Batch Processing With Accounting CS	Data Security: Designing Your Written Information Security Plan
UltraTax CS Fiduciary Tax Return Preparation	Leveraging the Best Features and Functions of UltraTax CS	Gear Up Presents: The New Work at Home NEXUS – Extended Work From Home Creates New Issues	Advanced Accounting Services Using Accounting CS	Time-Saving Tips on Federal Tax Research in Checkpoint	Leveraging the Best Features and Functions of UltraTax CS	Bring Your A-Game Using Your Practice Forward Tools	Managing in the Multi-Generational Workplace	Making the Most Out of FirmFlow Reports	GoSystem Tax RS: Trial Balance	UltraTax CS 2021 Update	Time-Saving Tips and Tricks With Onboarding New Payroll Clients in Accounting CS	Consolidated and Unitary Business Returns in UltraTax CS	UltraTax CS Workflow Best Practices	Train the Trainer – Improving Your Presentation Skills	Onvio Document Management Best Practices

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Bring Your A-Game Using Your Practice Forward Tools	UltraTax CS Navigation and Individual Tax Return Preparation		Integrating Practice CS With the CS Professional Suite		GoSystem Tax RS: Trial Balance		Annual Project Management Clean Up in Practice CS	Time-Saving Tips on Federal Tax Research in Checkpoint	Processing Multi-State Returns in UltraTax CS	Advising Clients Who Can't Pay Their Taxes	Reporting, Filtering, and the Manage Screens in Practice CS	Gear Up Presents: Meals and Entertainment Post-AR-PA	How Valuable is the Employee Retention Tax Credit?	Leverage Practice CS as a Firm Administrator	
	Individual Tax Provision of the American Rescue Plan Act of 2021		Count the Clicks: From Admin to Partner, Are You Clicking Too Much Within GoFile-Room and FirmFlow?		UltraTax CS Business Tax Return Preparation		Count the Clicks: From Admin to Partner, Are You Clicking Too Much Within GoFile-Room and FirmFlow?		Demystifying the Cryptic Tax Issues of Crypto and Virtual Currency		GoFile-Room and FirmFlow for Power Users	Onvio Reporting, Filtering, and Dashboard Management	Gear Up Presents: Ethics for the Tax Professional	Annual Project Management Clean Up in Practice CS	

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ACCOUNTING ADVISORY AUDIT CLIENT ACCOUNTING FIRM MANAGEMENT ONVIO PAYROLL SECURITY TAX & ASSET MANAGEMENT TECHNOLOGY TRENDING

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	 Gear Up Presents: Up to the Minute Business Tax Update		 GoFile-Room and FirmFlow for Power Users		 Is Your Interest Limited? An Analysis of the Final Regulations Under IRC Section 163(j)		 Federal Tax Research on Check-point Edge		 Gear Up Presents: The Million Dollar Surprise – New Capital Gain Rates? Estate and Trusts Changes?		 Tax Return Troubleshooting in UltraTax CS		 Helping Clients Look Forward: Using Onvio Advisory Beta Capabilities	 Working With Power BI: FirmFlow and Practice Management Edition	
	 What's New in Onvio		 Are You Taking Advantage Of All the Features of Fixed Assets CS?		 Gear Up Presents: Up to the Minute Individual Tax Update		 Advance-Flow Options for Tax Engagements		 Using Onvio for a Complete End-to-End Tax Workflow		 Gear Up Presents: Owner Basis, PPP, and Other COVID Grant Programs			 Federal Tax Research on Check-point Edge	

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			<div style="background-color: #cccccc; width: 100%; height: 15px; margin-bottom: 5px;"></div> Managing in the Multi-Generational Workplace		<div style="background-color: #008000; width: 100%; height: 15px; margin-bottom: 5px;"></div> Using UltraTax CS and Onvio for Your Firm's End-to-End Tax Workflow		<div style="background-color: #4b0082; width: 100%; height: 15px; margin-bottom: 5px;"></div> Data Mining Within UltraTax CS for Advisory Opportunities				<div style="background-color: #4b0082; width: 100%; height: 15px; margin-bottom: 5px;"></div> What's New in GoSystem Tax RS			<div style="background-color: #4b0082; width: 100%; height: 15px; margin-bottom: 5px;"></div> Query Your Database Using Form-Source Within GoSystem Tax RS	
			<div style="background-color: #800000; width: 100%; height: 15px; margin-bottom: 5px;"></div> Moving Your Practice Forward				<div style="background-color: #800000; width: 100%; height: 15px; margin-bottom: 5px;"></div> Mastering the Two Meeting Approach				<div style="background-color: #4b0082; width: 100%; height: 15px; margin-bottom: 5px;"></div> Onvio Tax Preparation and Filing			<div style="background-color: #800000; width: 100%; height: 15px; margin-bottom: 5px;"></div> Moving Your Practice Forward	
			<div style="background-color: #008000; width: 100%; height: 15px; margin-bottom: 5px;"></div> Migrating From CS Professional Suite to Onvio				<div style="background-color: #00a0c0; width: 100%; height: 15px; margin-bottom: 5px;"></div> Data Security in Your Remote Workplace								
							<div style="background-color: #008000; width: 100%; height: 15px; margin-bottom: 5px;"></div> Onvio Project Workflow Best Practices								

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