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For tax and accounting practitioners

HOT TOPIC

Need a Win-Win for Your Firm? Assess Your Onboarding Process

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HOT TOPIC

Need a Win-Win for Your Firm? Assess Your Onboarding Process

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Many firms think they are doing a good job onboarding new hires and positioning them for success. Oftentimes, however, that is not the case.

In fact, a CareerBuilder survey among 2,380 hiring and human resource managers found that, when asked what their onboarding approach included, less than half of employers provide a company overview, individual training or set goals and defined expectations for the employee.

Ensuring that your firm has a deliberate, thought-out onboarding process that goes beyond the administrative basics is critical in avoiding negative financial repercussions and talent retention issues.
To help firms assess the effectiveness of their onboarding process and improve new executive integration, Egon Zehnder partners Mark Byford and Lena Triantogiannis, along with Michael D. Watkins, author of The First 90 Days, chairman of Genesis Advisers and professor at IMD, developed an Onboarding Effectiveness Assessment.¹

The Onboarding Effectiveness Assessment first helps organizations shift their mindset from basic onboarding to full “integration” (a term the authors prefer as it suggests a more aspirational goal), then assesses how well companies support leaders in new roles. This assessment gauges how well a business supports an executive around five major tasks:

- **Assuming operational leadership:** Ensure new executives are equipped with the necessary operational knowledge to act on immediate priorities and build a positive reputation.
- **Taking charge of the team:** Share insights with new leaders about their team members’ performance to arm executives with the knowledge needed to make vital people decisions and gain trust.
- **Aligning with stakeholders:** New leaders can gain broad support once they understand how decision-making works, who the influencers are and where the sources of power exist.
- **Engaging with the culture:** Ensure leaders get up to speed on the values, norms and guiding assumptions that define acceptable behavior in the new organization.
- **Defining strategic intent:** Sometimes executives are hired for their expertise in a particular approach; other times they are chosen for their ability to develop and implement an entirely new strategy. Either way, the new leader must start to shape their strategy and be clear about the path ahead.

Companies can assess their integration program by looking at how effectively they support executives in each area. Under the Onboarding Effectiveness Assessment, support comes in four levels:

- **Sink or swim:** Companies at this level do little more than provide a new executive with space and basic resources, such as technology.
- **Basic orientation:** Essentially, the company provides raw data (i.e., company policies, organizational structure and business results), and the new employee studies and interprets it independently.
- **Active assimilation:** At this level, the company organizes meetings with key stakeholders to accelerate a transfer of deeper knowledge about the business, the team, the culture and strategic priorities.
- **Accelerated integration:** This is the ideal. The company orchestrates custom-designed experiences that enable a new employee to integrate more fully and rapidly. These might include team-building workshops and deep-dive discussions about strategy. According to the researchers, no more than two percent of global companies address integration this systematically.

Justin Hummel, Head of Learning Solutions — Tax and Accounting for Thomson Reuters, agrees that, in order for firms to see success, they must view onboarding as a priority and take steps to assess the effectiveness.

“There’s got to be rigor around this. You’ve got to make it a priority and, once you’ve done that, you line up the mechanisms that you want to enlist to get at some of the answers you’re looking for,” Hummel said.

Such mechanisms to gauge success could include, according to Hummel, having conversations and regular check-ins with new associates, reviewing their activities and work metrics (such as billable hours) and comparing it with seasoned associates.

Firms that have a learning curriculum and a learning management system (LMS) in place should ensure they are reviewing the results (at both the aggregate and individual level) to identify potential issues. It is not enough to simply offer associates learning courses. Firms must follow up, which involves conversations with the associate and a review of the results.

“When you find issues, make sure you can quickly pivot and address what those issues are. I think that’s where the quantitative data really comes into play, and a lot of these learning systems give you the mechanisms to take a look at that. Who has completed? Who has not completed? How far along are they? There are a lot of mechanisms that can be employed to give you some insight into how well an employee is engaged and understanding things.”

Added Hummel, “Once you have taken a look at how well they are doing in an area, be prepared to act on whatever those learnings tell you. Either schedule follow-up training, have follow-up conversations, or plan more practical, ride-along type of exercises for them. I think that these fundamental training techniques must be communicated throughout the firm. There has to be an understanding that the better we do in preparing these employees to practice, the better off we all are because every time they are having a conversation with a customer, it reflects on all of us.”


Excerpted from a free white paper on onboarding practices from Thomson Reuters Checkpoint Learning. Find the complete publication at tax.tr.com/resources/white-papers.
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- Full-day seminar attendees receive beverage and breakfast pastries, lunch, break refreshments and a comprehensive manual.
- Week-long CPE conferences combine work and play, enabling attendees to earn 40 – 48 CPE credits in exciting locations.
- Most self-study courses are available in print format with optional video and audio presentations.
- Manuals for our flagship 1040 and Business Entities courses are now available for free on ProView eReader with a qualifying self-study purchase or Gear Up seminar registration at a Thomson Reuters-sponsored event.

PREMIER AND PREMIER PLUS SAVINGS ON PAGES 9 – 12

Subscription packages include 40% off the regular price of self-sponsored Gear Up events. Combined Gear Up/AuditWatch annual max: 24 hrs Premier, 40 hrs Premier Plus. No expiration. Details on page 7.
2018 Gear Up Conferences

Combine business with pleasure during our 2018 Gear Up fall conferences. Whether you prefer the glitz and glamour of Las Vegas or sunny Orlando, Gear Up conferences give you the opportunity to get away while completing your learning requirements.

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PREMIER AND PREMIER PLUS:
Subscription packages include significant savings when you apply your annual live event discount to Royal Flush or Magic Week. Details: page 7.
ACCOUNTING
ACCOUNTING | BASIC
16 CPE CREDITS (TWO DAYS)
8 CPE CREDITS (ONE DAY)

The 2017 Gear Up accounting course is designed to give practitioners the information they need to provide audit, review, compilation and preparation engagements for small and midsized companies. This course is more than just an update and covers a wide variety of topics including core concepts related to financial reporting and accounting and review services, in addition to critical updates to professional standards. This course also features many exhibits, examples and other practical takeaways to help you implement the content presented. 2017 topics include SSARS 21 implementation and newer SSARS standards 22 and 23 review, core concepts in financial statement presentation and disclosure, practice management and quality control issues, specialized practice areas (divorce engagements, personal financial statements and industry-specific risks and considerations) and special considerations in performing audits and reviews including using and improving analytical procedures and understanding fraud risks. This course is also available in a one-day version that addresses many of the two-day topics in lesser depth.

Live Seminars: 2018 schedule will launch this spring at cl.tr.com

Accounting Self-Study Course (One-Day)
Format: Print-Based Manual and Exam
CPE Credits: 8
Price: $149
Available Now

Accounting Self-Study Course (Two-Day)
Format: Print-Based Manual and Exam
CPE Credits: 16
Price: $239
Available Now

Supplemental Materials Available: See cl.tr.com for additional print, audio or video options.

PRACTICE DEVELOPMENT AND MANAGEMENT
BUSINESS MANAGEMENT AND ORGANIZATION | BASIC

Make more, work less and have fun doing it! We’ll teach you the 10 secrets to a successful tax and accounting practice. Learn how to develop relationships with clients and your team and build a firm that has value whether you decide to continue working or sell. These tools will help your office to work more effectively and efficiently.


TECHNOLOGY 3.1: THE NEXT STEP IN MAKING YOUR PRACTICE TECHNOLOGICALLY SAVVY

TECHNOLOGY 3.1 | BASIC
8 CPE CREDITS (ONE DAY)
4 CPE CREDITS (HALF DAY)

Now, more than ever, we face serious technology issues in tax and accounting. This course helps the busy practitioner use the best new technology in their practice and demonstrates practical real-world solutions to solve practice issues. We’ll cover identity theft and cyber-attacks, data security, Windows 10 (how and when to switch plus security tweaks and performance enhancements), using the cloud to multiply your efficiency and effectiveness, BYOD (using smart phones, tablets and ultra-book in your practice), optimizing electronic documents and workpapers in the modern accounting and tax practice, the newest apps and utility software that can make life easier in the office, security including remote access and backing up data and floware.

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Format: Print-Based Manual and Exam
CPE Credits: 8
Price: $149
Available Now

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ETHICS FOR THE TAX PROFESSIONAL
REGULATORY ETHICS | BASIC
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In many states, this course qualifies for CPA ethics. Please determine with your local licensing agency if this qualifies in your state. Not applicable in California for CPA requirements.

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Ethics for the Tax Professional Self-Study Course
Format: Print-Based Manual and Exam
CPE Credits: 2
Price: $59
Available Now

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1040 INDIVIDUAL TAX
TAXATION | BASIC
16 CPE CREDITS (TWO DAYS)

This comprehensive course covers key tax issues for completing complicated individual returns. All topics include coverage of new legislation, new cases, revenue rulings and procedures to help the busy practitioner stay current. Speakers are all practicing preparers who share practical tips to help you get ready for this tax season. Some of the hot topics we cover include why ACI matters, resolving ID theft problems, using exceptions for health insurance penalties, updates on SE tax for LLC and LLP members, using a QSEHRA in a small business and reporting in special industries including shared economy businesses and marijuana dispensaries. Tax planning tips have been added to many subjects.

Live Seminars: 2018 schedule will launch this spring at cl.tr.com

1040 Self-Study Course
Format: Print-Based Manual and Exam
CPE Credits: 16
Price: $239
Available Now

Supplemental Materials Available: See website for additional print, audio or video options.

BUSINESS ENTITIES
TAXATION | BASIC
16 CPE CREDITS (TWO DAYS)
8 CPE CREDITS (ONE DAY)

The 2017 Business Entities seminar focuses on the latest tax strategies for small business. This year’s course covers an array of changes related to the recent PATH and Surface Transportation Reauthorization Act. Besides a complete analysis of various forms of business entities, this year’s course will cover changes in return and extension deadlines, maximizing depreciation benefits under recent regulations, understanding the new variation in partnership interest rules, understanding IRS reasonable compensation calculations and a myriad of other business issues.

This course is also available in a one-day version that addresses many of the two-day topics in lesser depth.

Live Seminars: 2018 schedule will launch this spring at cl.tr.com

Business Entities Self-Study Course (One-Day)
Format: Print-Based Manual and Exam
CPE Credits: 8
Price: $149
Available Now

Business Entities Self-Study Course (Two-Day)
Format: Print-Based Manual and Exam
CPE Credits: 16
Price: $239
Available Now

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CALIFORNIA TAX UPDATE
TAXATION | UPDATE
5 CPE CREDITS (HALF DAY)

California has many of the highest tax rates in the country, making it critical to plan accordingly. We review California tax law updates and how the many changes in federal tax law have impacted California tax returns. Topics will include the court’s decision on Proposition 8, changes on reporting use tax on out-of-state purchases, major sales tax issues, mortgage forgiveness debt relief repercussions to Californians, high-income tax rates, California property tax issues, deducting property tax, the impact the hero program may have on current and future law, resident status, non-resident tax returns, timing of income in relation to moving out of state prior to selling a business, the issue of “nexus;” Proposition 30, state health exchanges, other impacts of health care reform on California tax returns and recognizing income from an out-of-state K-1.

Live Seminars: 2018 schedule will launch this spring at cl.tr.com

California Tax Self-Study Course
Format: Print-Based Manual and Exam
CPE Credits: 5
Price: $99
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EBIA Advanced Cafeteria Plans and Benefits Conference
July 2018
20 CPE CREDITS | $1,289

ESTATES AND TRUSTS
TAXATION | BASIC
8 CPE CREDITS (ONE DAY)

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Live Seminars: 2018 schedule will launch this spring at cl.tr.com

Estates and Trusts Self-Study Course
Format: Print-Based Manual and Exam
CPE Credits: 10 (Self-Study Only)
Price: $149
Available Now

Supplemental Materials Available: See website for additional print, audio or video options.

IRS AUDITS, APPEALS AND COLLECTIONS: SUCCESSFUL STRATEGIES
TAXATION | BASIC
8 CPE CREDITS (ONE DAY)

As staffing at the IRS becomes more stressed, understanding how to navigate the IRS can save the practitioner time that can translate to more effective and profitable representation of your client before the IRS. Audits have become more difficult with the increasing reliance on correspondence exams. Notices are at an all-time high as the IRS kicks their computers into high gear trying to encourage compliance from taxpayers. During this time, knowing how to effectively communicate with the IRS, presenting your response in a manner that the IRS expects and understanding IRS timelines has grown in importance. The IRS continues to present opportunities to taxpayers who have fallen out of compliance with programs such as the EXPANDED Streamlined Installment Program, offering more taxpayers the opportunity to voluntarily reclassify workers (VCSP) as employees with a much lower cost, removing liens from taxpayer credit records and providing expanded tolerances for the Offer in Compromise Program. Come away with confidence in your understanding of audits, appeals, penalty abatements, collections, how to successfully obtain an agreed Offer in Compromise and installment agreements.

Live Seminars: 2018 schedule will launch this spring at cl.tr.com

IRS Audits, Appeals and Collections Self-Study Course
Format: Print-Based Manual and Exam
CPE Credits: 8
Price: $149
Available Now

Supplemental Materials Available: See website for additional print, audio or video options.
AuditWatch

TRAINING | CONSULTING | DATA SERVICES

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AuditWatch Training for tax, audit and accounting staff is available in three delivery options: public live seminars, in-house seminars and customized training. Plus AuditWatch offers consulting, data services, customized course development and more. Public live seminars offer open enrollment in major cities across the country while on-site, firm-specific seminars and customized training are tailored to meet your staff development needs. Customized webinars and materials-only training products are also available.

“Overall, AuditWatch is probably the most beneficial and well taught external CPE that I have received after close to nine years in public accounting. I have nothing but positive things to say about Shawn, the instructor, and AuditWatch. I’ve been through his course one or two times in the past, and it continues to be the best source of training that I’ve ever received. Keep doing what you’re doing. Your insights, advice and experiences shared with us are invaluable. Many thanks!”

— JR, Albuquerque, NM

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32 CPE CREDITS | AUDITING, ACCOUNTING, COMMUNICATION AND MARKETING | BASIC

*Experience: 0 – 4 months*

This session helps new auditors get off to a great start by introducing them to the auditing field, basic audit responsibilities and keys to becoming a successful professional in public accounting. The course includes case studies in common audit areas typically completed by staff accountants and provides an overview of how each area fits into the big picture.

**EXPERIENCED STAFF TRAINING — LEVEL 2**
24 CPE CREDITS | AUDITING, ACCOUNTING | INTERMEDIATE

*Experience: 5 – 21 months*

This session introduces auditors to the complete audit process and plan. It focuses on ways for staff and senior accountants to significantly participate in the risk assessment procedures, including efforts surrounding internal controls. In addition, significant time is spent on performance of further audit procedures including tests of details such as sampling, auditing estimates and analytical procedures. Finally, the course includes discussions of select technical accounting, auditing, documentation and business skills.

**BEGINNING IN-CHARGE TRAINING — LEVEL 3**
24 CPE CREDITS | AUDITING, COMMUNICATION AND MARKETING | INTERMEDIATE

*Experience: 21 – 36 months*

This session prepares auditors to take in-field responsibility for an audit engagement. It mixes discussion with case studies to provide an in-depth look at designing and completing the key steps in an audit, including completing the risk assessment procedures and making appropriate risk assessments. We include case study work on understanding, evaluating and verifying a client’s activity level controls within key business cycles. This session also includes modules on key business skills, including managing an engagement, supervising individuals and reviewing files.

**EXPERIENCED IN-CHARGE TRAINING — LEVEL 4**
24 CPE CREDITS | AUDITING, ACCOUNTING | INTERMEDIATE

*Experience: 3 – 4 years*

This course moves experienced auditors beyond the basics, building upon experiences with leading engagements and providing insights and best practices on supervising, motivating and evaluating team members. The course covers more in-depth consideration of advanced topics related to audit planning, designing audit programs, considering different audit approaches and evaluating audit results. It also provides an in-depth look at higher-level audit tasks, such as evaluating management review controls, identifying and designing tailored responses to fraud risks, auditing revenue transactions and designing tests of controls.

**BEYOND IN-CHARGE — TAKING THE NEXT STEP — LEVEL 4.5**
3 DAYS | 24 CPE CREDITS | AUDITING, ACCOUNTING, COMMUNICATION AND MARKETING, PERSONAL DEVELOPMENT | INTERMEDIATE

*Experience: 4 – 5 years*

This course prepares experienced auditors to take the next step in their development as engagement and firm leaders. Building on the concepts introduced in Level 4, the course challenges auditors to manage and champion the audit process by developing efficient audit plans, working with clients, dealing with complex accounting and audit issues and wrapping up engagements. Course material also addresses review and compilation engagements, special purpose frameworks, group audits, audit sampling, audit confirmations and presentations.

**TAKING THE LEAD — LEVEL 5**
24 CPE CREDITS | PERSONAL DEVELOPMENT, COMMUNICATION, ACCOUNTING, AUDITING | ADVANCED

*Experience: 5 – 6 years*

In this course, participants enhance technical expertise and develop critical managerial skills. In the professional development area, participants learn results-oriented leadership skills to better manage multiple engagements and teams. The course also includes presentation skills, advanced communication and negotiation, business development and career success strategies. In the technical expertise area, participants become more familiar with advanced audit issues and learn tips for reviewing audit work, developing the audit strategy and reporting.
AuditWatch University

DEVELOPING THE EXECUTIVE WITHIN — LEVEL 6
16 CPE CREDITS | PERSONAL DEVELOPMENT, ACCOUNTING, AUDITING | ADVANCED

Experience: 6+ years

This course develops individuals who consistently interact and manage at the executive level. By learning and applying a variety of methods, participants enhance their effectiveness as emerging executives. Participants also explore how to increase their business development and managerial contributions to their firms through higher-level performance. By analyzing the concept of executive presence, participants discover why it is such a critical component of business success and career advancement.

WEB-BASED NEW HIRE TRAINING “BOOT CAMP” FOR AUDIT STAFF
16 CPE CREDITS | ACCOUNTING, AUDITING | BASIC

We have taken our popular AuditWatch University Level 1: Basic Staff Training course and redesigned it to be delivered via the web. In this course, we will use WebEx, a web-based interactive learning platform, to lead participants through the key information they need to succeed as new staff auditors. The course is led by an AuditWatch instructor and combines lecture, interactive exercises and discussion. Topics include role of the staff accountant and scope of services, workpaper documentation and audit procedures, introduction to the audit plan and an in-depth review of the most common audit areas assigned to new staff, such as cash, accounts receivable, accounts payable, inventory and more!

2017 AuditWatch Schedule

AuditWatch University Public Seminar Schedule

<table>
<thead>
<tr>
<th>Seminar City</th>
<th>Level 1: Basic Staff</th>
<th>Level 2: Experienced Staff</th>
<th>Level 3: Beginning In-Charge</th>
<th>Level 4: Experienced In-Charge</th>
<th>Level 4.5: Taking the Next Step</th>
<th>Level 5: Moving Beyond In-Charge</th>
<th>Level 6: Developing the Executive Within</th>
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Atlanta, GA 10/02 – 05 8/28 – 30 8/07 – 09 8/21 – 23
Boston, MA 5/30 – 6/01 6/05 – 07 6/12 – 14
Chicago, IL – A 6/05 – 07 6/19 – 21 6/26 – 28
Cleveland, OH 11/06 – 09 8/14 – 16 10/02 – 04 10/17 – 19 10/23 – 25
Dallas/Ft. Worth, TX Area 12/04 – 07 7/10 – 12 7/24 – 26 7/31 – 8/02 8/07 – 09 8/14 – 16
Houston, TX 10/30 – 11/01 11/27 – 29 10/17 – 19
Salt Lake City, UT 8/21 – 23 11/13 – 15
San Francisco, CA – A 6/26 – 28 7/10 – 12 7/24 – 26
Washington, D.C. 7/17 – 19 8/14 – 16 7/10 – 12

EARLY BIRD DISCOUNT:
Early Bird prices shown in blue on this page. Expires: May 15, 2018.
TaxWatch University

Tax staff training

Checkpoint Learning In-House Training and AuditWatch now offer multiple levels of core tax staff training for your firm. The progressive training begins with an entry-level course focused on common topics likely to be encountered in the first year. This is followed by courses that provide greater depth on corporate tax issues, partnerships, LLCs and other special entities. This integrated curriculum is available through public seminars or in-house training.

TAXWATCH UNIVERSITY — LEVEL 1
24 CPE CREDITS | TAXATION | BASIC
Experience: 0 – 1 year

This practical, hands-on program is designed for tax professionals primarily in their first year. It provides learning opportunities surrounding common individual and corporate tax topics that they may encounter. It incorporates information on the tax rules and challenges participants to complete case studies and exercises where they apply the rules and complete actual tax forms.

TAXWATCH UNIVERSITY — LEVEL 2
24 CPE CREDITS | TAXATION | INTERMEDIATE
Experience: 1 – 2 years

This practical, hands-on program is designed for tax professionals in their first or second year. It provides learning opportunities on intermediate corporate, individual and other entity type tax topics. The course incorporates information on the tax rules and challenges participants to complete case studies and exercises where they apply the rules and complete tax forms.

TAXWATCH UNIVERSITY — LEVEL 3
24 CPE CREDITS | TAXATION | INTERMEDIATE
Experience: 2 – 3 years

This program is designed for tax professionals with multiple years’ experience. It provides learning opportunities on intermediate to advanced issues dealing with pass thru entities including S corporations, partnerships and LLCs and individual topics. The course incorporates information on the tax rules and includes challenging case studies and exercises where the rules are applied and the actual tax forms are completed.

TAXWATCH UNIVERSITY — LEVEL 4
24 CPE CREDITS | TAXATION | ADVANCED
Experience: 3 – 4 years

This program is designed to advance a tax professional into more complex taxation issues. It includes sessions on tax planning and saving strategies related to individuals and corporations. It also provides training on technical tax issues mainly related to pass-through entities including partnerships and LLCs and more advanced corporate and individual issues.

**TaxWatch University Public Seminar Schedule**

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<th>Seminar City</th>
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<td>Los Angeles, CA</td>
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**EARLY BIRD DISCOUNT:**

Early Bird prices shown in blue on this page. Expires: May 15, 2018.
Virtual Conferences

Checkpoint Learning virtual conferences break traditional barriers by giving you live, up-to-the-minute analysis on key topics from nationally recognized experts from the comfort of your own office.

You will be able to view the presenter’s content, interact with the speakers and participate in live Q&A, making the session as applicable to your practice as it possibly can be.

Virtual conference features

- Attend from anywhere with no travel costs
- Up-to-date, relevant training
- Well-known experts
- Interactive

PREMIER AND PREMIER PLUS PACKAGES ON PAGES 18 – 20

$199 special pricing per virtual conference/per attendee for Premier and Premier Plus subscribers. Call 800.231.1860 to receive special pricing. Subscription details: page 7.
IMPLEMENTING THE NEW REVENUE RECOGNITION STANDARD
VIRTUAL CONFERENCE

Revenue From Contracts With Customers (ASU 2014-09) is the most significant change to financial reporting standards in recent years. With the effective date fast approaching, this virtual conference provides an in-depth explanation of this and related standards, complete with examples and the latest implementation guidance from the AICPA and Checkpoint. Conference sessions will also include discussion of the likely impact of this new standard on specific industries and on the audit process.

**Conference Objectives:** This conference will help you identify and apply changes to financial reporting and related services from the FASB’s new standard on revenue from contracts with customers.

**Who Should Attend?** Accountants, auditors and others who need to understand the impact of new revenue recognition standards on financial reporting

**Sessions**
- Overview of the New Revenue Recognition Model
- Presentation and Disclosure Requirements
- Key Implementation Issues: Not-For-Profit Entities
- Key Implementation Issues: Construction Companies
- Implementation Issues: Other Industries
- Tax Implications
- Auditing Challenges and Considerations
- Panel Discussion and Q&A

**Conference Speakers:**
Wayne Kerr, CPA; Susan Longo, CPA; Laurie Stillwell, CPA

**Schedule**
January 11 – 12, 2018 / 10:00 a.m. – 4:00 p.m. CT

**Pricing**
Price per participant / per conference: $379
$199 for Checkpoint Learning Premier or Premier Plus subscribers

**CPE Information**
Level: Intermediate
Prerequisites: Knowledge of Accounting and Auditing
CPE Credits: 12
Field of Study: Accounting and Auditing, Tax
Platform: Presented on LearnLive
NOT-FOR-PROFIT VIRTUAL CONFERENCE

Not-for-profit entities present unique challenges to practitioners in many different areas, including financial reporting, auditing, compliance and fraud. This virtual conference provides an in-depth look at some of the most important issues in serving this diverse and sometimes complicated market segment, focusing on practical guidance, practice tips, introductions to new issues and solutions to old ones. This virtual conference will also include Q&A and panel discussions to address your questions and provide opportunities for sharing of best practices.

Conference Objectives: This conference will help you identify and address the financial reporting, auditing, compliance and consulting issues unique to employee benefit plans.

Who Should Attend? Accountants, auditors and others with responsibilities related to employee benefit plans.

Sessions
• Accounting and Auditing Update: EBP Focused
• Regulatory Update
• Fundamentals of Health and Welfare Plans
• Form 5500: Pitfalls and Practice Tips
• Addressing DOL Concerns and Enhancing Audit Quality
• Key Efficiency Considerations in Performing EBP Audits
• SOC 1 Reports: How Should You Really Be Using These?
• Top Ten EBP Consulting Opportunities: How Could You Be Helping Your Clients
• Panel Discussion of Key Issues and Q&A


Schedule
January 18 – 19, 2018 / 10:00 a.m. – 4:00 p.m. CT

Pricing
Price per participant/per conference: $379
$199 for Checkpoint Learning Premier or Premier Plus subscribers

CPE Information
Level: Intermediate
Prerequisites: Knowledge of Employee Benefit Plan Accounting and Auditing
CPE Credits: 12
Field of Study: Accounting, Auditing, Tax, Specialized Knowledge and Yellow Book
Platform: Presented on LearnLive

PPC’S SMART PRACTICE AIDS VIRTUAL USER CONFERENCE

This conference will help you unlock the powerful audit efficiency benefits of PPC’s SMART Practice Aids. Session topics have been carefully chosen to address the most common practice issues and questions from practitioners with a focus on practical “what you can use right now” advice to help you get the most out of SMART. This unique conference combines audit productivity best practices from our industry-leading audit efficiency experts at AuditWatch with the most useful tools, shortcuts, tips and best practices from our SMART consultants and product trainers. Join us to enhance your understanding of what SMART is designed to do: ensure your audits are designed properly, are executed effectively and fully comply with professional standards — all while eliminating unnecessary steps and streamlining the audit process.

Conference Objectives: This conference will help you identify and implement audit productivity best practices and SMART features to improve audit quality and audit efficiency.

Who Should Attend? Public accountants seeking to get the most out of PPC’s SMART Practice Aids and improve audit efficiency. For those not using SMART, this conference is also a great way to become more familiar with audit productivity best practices and the SMART suite of audit tools.

Sessions
• Integrating Audit Productivity Best Practices with SMART
• Improving the Internal Controls Evaluation Through SMART Internal Controls
• Integrating SMART With Your Engagement Software
• Enhancing the PPC Audit Process with SMART Fieldwork
• Did You Know? Leveraging Key SMART Functionality to Enhance Audit Quality and Efficiency
• Incorporating Other SMART Solutions: SMART Single Audit and SMART Compilation and Review
• Planning For The Next Generation of Cloud-Based Solutions
• Panel Discussion and Q&A

Conference Speakers: AuditWatch productivity and SMART consultants, SMART software experts and product trainers

Schedule
February 1 – 2, 2018 / 10:00 a.m. – 4:00 p.m. CT

Pricing
Price per participant / per conference: $379
$199 for Checkpoint Learning Premier or Premier Plus subscribers

CPE Information
Level: Intermediate
Prerequisites: Knowledge of risk-based auditing. Some knowledge of SMART helpful (but not required).
CPE Credits: 12
Field of Study: Auditing
EMPLOYEE BENEFIT PLANS VIRTUAL CONFERENCE

Employee benefit plans present different challenges for both accountants and financial statement auditors. Whether because of the compliance-driven procedures, regulatory oversight or nature of the financial statements themselves, accountants and auditors recognize that involvement in these plans requires specialized knowledge, experience and a unique audit approach. This virtual conference focuses on those issues critical to accounting for, auditing and consulting with clients regarding employee benefit plans including Q&A and panel discussions to address your questions and provide opportunities for sharing best practices.

Conference Objectives: This conference will help you identify and address the financial reporting, auditing, compliance and consulting issues unique to employee benefit plans.

Who Should Attend? Accountants, auditors and others with responsibilities related to employee benefit plans.

Sessions
- Accounting and Auditing Update: EBP Focused
- Regulatory Update
- Fundamentals of Health and Welfare Plans
- Form 5500: Pitfalls and Practice Tips
- Addressing DOL Concerns and Enhancing Audit Quality
- Key Efficiency Considerations in Performing EBP Audits
- SOC 1 Reports: How Should You Really Be Using These?
- Top Ten EBP Consulting Opportunities: How You Could Be Helping Your Clients
- Panel Discussion of Key Issues and Q&A


Schedule
February 22 – 23, 2018 / 10:00 a.m. – 4:00 p.m. CT

Pricing
Price per participant / per conference: $379
$199 for Checkpoint Learning Premier or Premier Plus subscribers

CPE Information
Level: Intermediate
Prerequisites: Knowledge of Employee Benefit Plan Accounting and Auditing
CPE Credits: 12
Field of Study: Accounting, Auditing, Tax, Specialized Knowledge and Yellow Book
Platform: Presented on LearnLive

GOVERNMENTAL ACCOUNTING AND AUDITING VIRTUAL CONFERENCE

This conference covers a wide array of issues and topics essential to governmental accounting and auditing, including in-depth analysis of GASB issues, uniform guidance, government auditing standards (Yellow Book), peer review issues, fraud considerations, financial statement presentation and disclosure and more. Sessions are focused on providing practical guidance and practice tips, including audit quality and efficiency considerations.

Conference Objectives: This conference will help you identify and address the financial reporting, auditing, compliance and productivity issues unique to governmental entities.

Who Should Attend? Accountants, auditors and others with responsibilities related to governmental financial reporting and / or auditing.

Sessions
- Ethics Update
- Understanding Governmental Fraud Risks
- Audit Efficiency Best Practices
- Navigating Difficult Accounting and Auditing Issues
- Testing Controls Over Compliance
- Understanding the Enhanced Peer Review and Avoiding Peer Review Issues
- Uniform Guidance Update Including the 2017 Compliance Supplement
- Governmental Accounting and Auditing Update
- Panel Discussion and Q&A

Conference Speakers: AuditWatch Team

Schedule
March 8 – 9, 2018 / 10:00 a.m. – 4:00 p.m. CT

Pricing
Price per participant / per conference: $379
$199 for Checkpoint Learning Premier or Premier Plus subscribers

CPE Information
Level: Intermediate
Prerequisites: Knowledge of Governmental Accounting and Auditing
CPE Credits: 12
Field of Study: Accounting (Governmental), Auditing (Governmental), Yellow Book
Platform: Presented on LearnLive
Webinars

CHECKPOINT LEARNING INSTRUCTOR-LED WEB-BASED EVENTS

Checkpoint Learning Webinars offer hundreds of webinars each year on the topics of most importance to you taught by nationally recognized experts.

You will be able to view the presenter’s content, interact with the speakers and participate in live Q&A, making the session as applicable to your practice as it possibly can be.

- Topics covered include: accounting and auditing current developments, audit quality and efficiency, ethics, business and financial management, personal development, practice efficiencies using PPC Tools, specialized industry, tax, technology and Yellow Book
- Webinars are priced per participant per webinar at $69 for one hour, $89 for two hours, $139 for four hours or all day for $189 (Quantity Discount available)
- Also available: customized webinars designed exclusively for your firm (call 800.387.1120 for details)

PREMIER AND PREMIER PLUS PACKAGES ON PAGES 22 – 24

Premier packages include UNLIMITED access to all one to four hour webinars; Premier Plus packages include UNLIMITED access to all webinars, including full-day. Subscription details: page 7.

QUANTITY DISCOUNT

Use offer code WEBINARBUND18 to save 10% when you purchase three or more in a single transaction for the same attendee.
More information and up-to-date schedule available online.

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<td>10 a.m.: Identifying and Correcting the Most Common Audit Inefficiencies (2 hrs.)</td>
<td>9 a.m.: Compilations, Reviews and Preparations (8 hrs.)</td>
<td>9 a.m.: Performing Effective and Efficient Single Audits (8 hrs.)</td>
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<td>12 p.m.: Travel, Entertainment and Auto Expense (2 hrs.)</td>
<td>10 a.m.: The Tax Cuts and Jobs Act: What You Need to Know Now (2 hrs.)</td>
<td>12 p.m.: SMART Tools: Risk Assessment (2 hrs.)</td>
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<td>2 p.m.: Goodwill: Who Owns It — the Individual or the Business? (2 hrs.)</td>
<td>12 p.m.: Are You Ready for Your Next Peer Review (2 hrs.)</td>
<td>2 p.m.: Supreme Court Cases on Taxation You Should Know About (2 hrs.)</td>
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<td>12 p.m.: Issues in Preparing a Statement of Cash Flows (2 hrs.)</td>
<td>9 a.m.: Fraud Detection in Financial Statements: Considerations for Accountants and Auditors (8 hrs.)</td>
<td>12 p.m.: Creating Compelling Financials and Analyses Using Excel and Dashboards (2 hrs.)</td>
<td>12 p.m.: Quarterly Technology Update Q1 2018 (2 hrs.)</td>
<td>12 p.m.: Social Security Retirement: Understanding the Benefits (2 hrs.)</td>
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<td>2 p.m.: A CPA’s Independence: Compliance With the Professional Code of Conduct and Practical Considerations (2 hrs.)</td>
<td>12 p.m.: Bill the Right Way: Learn the Art of Pricing (2 hrs.)</td>
<td>2 p.m.: How to Audit Construction Contractors (2 hrs.)</td>
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<td>9 a.m.: Accounting and Auditing Update (8 hrs.)</td>
<td>9 a.m.: Federal Tax Update (8 hrs.)</td>
<td>10 a.m.: Reviewing Tax Returns: So Much More Than Just Checking for Errors (2 hrs.)</td>
<td>10 a.m.: The Tax Cuts and Jobs Act: What You Need to Know Now (2 hrs.)</td>
<td>10 a.m.: Capitalization: Key Election (2 hrs.)</td>
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<td>12 p.m.: Quarterly Yellow Book Update Q1 2018 (2 hrs.)</td>
<td>10 a.m.: Capital Gain or Ordinary Income (2 hrs.)</td>
<td>12 p.m.: Tax Planning for High-Income Clients (2 hrs.)</td>
<td>12 p.m.: Capitalization: Key Election (2 hrs.)</td>
<td>12 p.m.: Managing Virtual Teams: Best Practice Insights (2 hrs.)</td>
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<td>2 p.m.: Key Considerations in Auditing Revenue (2 hrs.)</td>
<td>12 p.m.: M&amp;A Overview: The Acquisition Process and the Role of Accounting Professionals (2 hrs.)</td>
<td>2 p.m.: Quarterly SEC and PCAOB Update Q1 2018 (1 hr.)</td>
<td>2 p.m.: Capitalization: Key Election (2 hrs.)</td>
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<td>9 a.m.: Estates and Trusts (8 hrs.)</td>
<td>10 a.m.: Cracking the Code: Efficient and Thorough Tax Research Techniques (2 hrs.)</td>
<td>9 a.m.: Federal Tax Update (8 hrs.)</td>
<td>9 a.m.: Audit Sampling: A Comprehensive Guide to Effective and Efficient Sampling in Tests of Details and Tests of Controls (8 hrs.)</td>
<td>9 a.m.: Key Issues Related to Forms 1099 and 1098 (2 hrs.)</td>
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<td>10 a.m.: How to Handle IRS Audits and Appeals (2 hrs.)</td>
<td>12 p.m.: Charitable Contributions: Not Nearly as Simple as It May Sound (2 hrs.)</td>
<td>2 p.m.: Enhancing SMART Through Fieldwork and File Rollforward (2 hrs.)</td>
<td>10 a.m.: Key Issues Related to Forms 1099 and 1098 (2 hrs.)</td>
<td>12 p.m.: Special Tax Issues for Senior Citizen Clients (2 hrs.)</td>
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<td>12 p.m.: Revenue from Contracts With Customers: An Overview (2 hrs.)</td>
<td>2 p.m.: AuditWatch Presents: 3 Steps to Creating A Learning Strategy for Your Firm (1 hr.)</td>
<td>2 p.m.: Monthly Tax Alert (2 hrs.)</td>
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<td>2 p.m.: Adjustments to Income: So Many of Them and Always Better Than Itemized Deductions (2 hrs.)</td>
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<td>10 a.m.: Form 1065: How to Complete Schedule K-1 (2 hrs.)</td>
<td>9 a.m.: Business Entity Tax Update (8 hrs.)</td>
<td>12 p.m.: Analytical Procedures for Nonprofit Organizations (2 hrs.)</td>
<td>10 a.m.: Key Issues Related to Forms 1099 and 1098 (2 hrs.)</td>
<td>12 p.m.: Special Tax Issues for Senior Citizen Clients (2 hrs.)</td>
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<td>12 p.m.: Monthly Accounting Alert (1 hr.)</td>
<td>12 p.m.: Analytical Procedures for Nonprofit Organizations (2 hrs.)</td>
<td>2 p.m.: Creating Engaging PowerPoint Presentations (2 hrs.)</td>
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<td>1 p.m.: Monthly Corporate Tax Update (1 hr.)</td>
<td>2 p.m.: Creating Engaging PowerPoint Presentations (2 hrs.)</td>
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<td>2 p.m.: Self-Employment Tax: Sole Proprietors, Partners and LLC Members (2 hrs.)</td>
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## FEBRUARY

More information and up-to-date schedule available online.

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<td>10 a.m.: Implementing the New Nonprofit Financial Reporting Model (2 hrs.)</td>
<td>10 a.m.: Capitalization: Improvements (or Repairs?) (2 hrs.)</td>
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<td>12 p.m.: Fair Value Accounting Rules (2 hrs.)</td>
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<td>2 p.m.: Basis Calculations: S Corporations, Partnerships, LLCs (2 hrs.)</td>
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<td>10 a.m.: Fiduciary Returns: The Ins and Outs of Form 1041 (2 hrs.)</td>
<td>9 a.m.: Performing Efficient Audits of Employee Benefit Plans (8 hrs.)</td>
<td>10 a.m.: Quarterly Technology Update Q1 2018 (2 hrs.)</td>
<td>9 a.m.: Accounting and Auditing Update (8 hrs.)</td>
<td>9 a.m.: Government and Nonprofit Update (8 hrs.)</td>
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<td>12 p.m.: Partnership/LLCs: Advanced Topics (2 hrs.)</td>
<td>12 p.m.: PPC 101: Making the Most of the Methodology (2 hrs.)</td>
<td>12 p.m.: Tax Credits for Personal and Business: Available by the Dozen (2 hrs.)</td>
<td>12 p.m.: Estate and Gift Tax Update (2 hrs.)</td>
<td>12 p.m.: Filing Status, Kiddie Tax and Divorce (2 hrs.)</td>
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<td>2 p.m.: SMART Tools: Internal Controls (2 hrs.)</td>
<td>2 p.m.: Income That is Taxed at Zero or Close to It (2 hrs.)</td>
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<td>2 p.m.: Excel: Big Data Tools (2 hrs.)</td>
<td>2 p.m.: Decedent's Final Tax Return: The Client Died But You Didn't... Time for Action (2 hrs.)</td>
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<td>10 a.m.: The Tax Cuts and Jobs Act: What You Need to Know Now (2 hrs.)</td>
<td>10 a.m.: Quarterly Technology Update Q1 2018 (2 hrs.)</td>
<td>9 a.m.: Federal Tax Update (8 hrs.)</td>
<td>10 a.m.: Above the Line Thinking: The Power of Positive Leadership (2 hrs.)</td>
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<td>12 p.m.: Monthly Tax Alert (2 hrs.)</td>
<td>12 p.m.: Tax Credits for Personal and Business: Available by the Dozen (2 hrs.)</td>
<td>10 a.m.: Quarterly Yellow Book Update Q1 2018 (2 hrs.)</td>
<td>12 p.m.: Preparing Form 709: What You Need to Know About Filing a Gift Tax Return (2 hrs.)</td>
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<td>12 p.m.: PPC 101: Making the Most of the Methodology (2 hrs.)</td>
<td>12 p.m.: Excel: Big Data Tools (2 hrs.)</td>
<td>2 p.m.: Professional Ethics in Practice: Recent Changes for CPAs (2 hrs.)</td>
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<td>9 a.m.: Fundamental Audit Strategies (8 hrs.)</td>
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<td>9 a.m.: The Next Step in Audit Sampling: Statistical Sampling and Data Extraction (2 hrs.)</td>
<td>9 a.m.: Business Entity Tax Update (8 hrs.)</td>
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<td>2 p.m.: Reviewing Tax Returns: So Much More Than Just Checking for Errors (2 hrs.)</td>
<td>12 p.m.: Maximize Your Firm Practice Growth: Find Your Unique Marketing and Sales Strategies (2 hrs.)</td>
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<td>10 a.m.: The Next Step in Audit Sampling: Statistical Sampling and Data Extraction (2 hrs.)</td>
<td>10 a.m.: Cracking the Code: Hands-On Tax Research (2 hrs.)</td>
<td>10 a.m.: Cracking the Code: Hands-On Tax Research (2 hrs.)</td>
<td>2 p.m.: Strategic Alliances: Creating Value and Gaining Knowledge Through Corporate Partnership (2 hrs.)</td>
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<td>2 p.m.: Quarterly SEC and PCAOB Update Q1 2018 (1 hr.)</td>
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<td>10 a.m.: Social Security Retirement: Do I Take It Now? (2 hrs.)</td>
<td>10 a.m.: Revenue From Contracts With Customers: Implementation Considerations (2 hrs.)</td>
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<td>12 p.m.: Monthly Accounting Alert (1 hr.)</td>
<td>2 p.m.: Polish Your Presentation Skills: Best Practices of Dynamic Presenters (2 hrs.)</td>
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**LEARNING: ONLINE — WEBINARS**

**MARCH**

More information and up-to-date schedule available online.

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<td>10 a.m.: Quarterly Sales and Use Tax Update for Controllers and Financial Managers (2 hrs.)</td>
<td>9 a.m.: Operational Finance for Accounting Professionals (8 hrs.)</td>
<td>2 p.m.: Introduction to Business Combinations and Consolidations (2 hrs.)</td>
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<td>10 a.m.: How to Audit Construction Contractors (2 hrs.)</td>
<td>9 a.m.: Federal Tax Update (8 hrs.)</td>
<td>10 a.m.: M&amp;A Overview: The Corporate Divestiture Process and the Role of Accounting Professionals (2 hrs.)</td>
<td>2 p.m.: Performing Efficient Audits of Employee Benefit Plans (2 hrs.)</td>
<td>12 p.m.: IRAs: The Complexities and Benefits (2 hrs.)</td>
<td>2 p.m.: What Your Kids Never Learned About Managing Money (2 hrs.)</td>
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<td>2 p.m.: Assisting With the Defined Contribution Retirement Plan Recommendation (2 hrs.)</td>
<td>10 a.m.: M&amp;A Overview: The Corporate Divestiture Process and the Role of Accounting Professionals (2 hrs.)</td>
<td>2 p.m.: Performing Efficient Audits of Employee Benefit Plans (2 hrs.)</td>
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<td>9 a.m.: Accounting and Auditing Update (8 hrs.)</td>
<td>10 a.m.: Quarterly Technology Update Q1 2018 (2 hrs.)</td>
<td>10 a.m.: IRS Examination Issues: What’s Hot and Being Scrutinized (2 hrs.)</td>
<td>10 a.m.: Quarterly Yellow Book Update Q1 2018 (2 hrs.)</td>
<td>9 a.m.: S Corporations: From Formation to Liquidation (8 hrs.)</td>
<td>10 a.m.: Tax Planning for High-Income Clients (2 hrs.)</td>
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<td>2 p.m.: Monthly Tax Alert (2 hrs.)</td>
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<td>2 p.m.: Preparing Form 706 (2 hrs.)</td>
<td>10 a.m.: Tax Planning for High-Income Clients (2 hrs.)</td>
<td>12 p.m.: Business Ethics in Corporate Accounting (2 hrs.)</td>
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<td>2 p.m.: Social Security Retirement: Planning for Retirement (2 hrs.)</td>
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<td>10 a.m.: Enhancing SMART Through Fieldwork and File Rollforward (2 hrs.)</td>
<td>9 a.m.: Cracking the Code: Efficient and Thorough Tax Research Techniques (2 hrs.)</td>
<td>10 a.m.: Single Audit: Sampling Considerations in Testing Internal Controls and Compliance (2 hrs.)</td>
<td>10 a.m.: Revenue From Contracts With Customers: An Overview (2 hrs.)</td>
<td>9 a.m.: Performing Efficient Audits of Employee Benefit Plans (8 hrs.)</td>
<td>2 p.m.: Goodwill: Who Owns It, the Individual or the Business? (2 hrs.)</td>
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<td>12 p.m.: Tax Planning for Cancellation of Debt (2 hrs.)</td>
<td>10 a.m.: Single Audit: Sampling Considerations in Testing Internal Controls and Compliance (2 hrs.)</td>
<td>2 p.m.: Bill the Right Way: Learn the Art of Pricing (2 hrs.)</td>
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<td>10 a.m.: Excel Best Practices (2 hrs.)</td>
<td>2 p.m.: A CPA’s Independence: Compliance With the Professional Code of Conduct and Practical Considerations (2 hrs.)</td>
<td>10 a.m.: Key Considerations in Auditing Revenue (2 hrs.)</td>
<td>10 a.m.: Wrapping Up Engagements: Efficiency Techniques That Work (2 hrs.)</td>
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<td>2 p.m.: Avoiding Common Peer Review and Other Issues (2 hrs.)</td>
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<td>12 p.m.: Monthly Accounting Alert (1 hr.)</td>
<td>2 p.m.: Capitalization: Dispositions (Including Partial) of MACRS Property (2 hrs.)</td>
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Online Courses

ONLINE AND iPAD-ENABLED CPE COURSES

The Checkpoint Learning Online Course library includes more than 550 interactive online courses and 2,600 credits of CPE training available exclusively on the Checkpoint Learning platform.

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Our 2017 tax update courses have arrived! These in-depth, interactive online courses provide an overview of the most current information on tax rules, legislation, regulations and issues in specific tax areas. Course material is comprehensive, with authoritative references, examples, rules, limitations and exceptions.

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Taxes | 8 CPE Credits | $119

2017 SPECIALIZED TAX REVIEW
Taxes | 13 CPE Credits | $169

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Taxes | 4 CPE Credits | $79

INDIVIDUAL INCOME TAX: ABOVE-THE-LINE DEDUCTIONS
Taxes | 6 CPE Credits | $99

INDIVIDUAL INCOME TAX: EARNED INCOME
Taxes | 6 CPE Credits | $99

Hot topics

2016 FASB UPDATES TO REVENUE RECOGNITION
Accounting | 1 CPE Credit | $29

Paul Munter, PhD, CPA, reviews ASU 2014-09 on revenue recognition, as well as the recent updates to that guidance provided by the FASB. The updates in ASU 2016-08 (gross versus net), ASU 2016-10 (performance obligations and licensing), and ASU 2016-12 (targeted improvements and practical expedients) are all included and the impact of those updates on the initial guidance is considered. Other than the guidance covered within this program, no additional major changes are expected related to recognition and measurement prior to the effective date of the Topic 606 on revenue recognition.

2017 ACCOUNTING UPDATE
Accounting | 8 CPE Credits | $136

This course provides an update of recent guidance issued in 2016. It covers leases, share-based payments, liabilities and equity, revenue recognition, not-for-profits, cash flows and credit losses.

CASUALTY LOSSES AND DISASTER RELIEF
Taxes | 1 CPE Credit | $29

With hurricanes hitting the Gulf Coast states and causing widespread flooding and billions of dollars in property damage, wildfires burning up the Pacific Northwest, and tornados in between, now is an appropriate time to revisit the federal income tax rules for disaster-related personal casualty losses. This course covers tax reporting for personal casualty losses, business casualty losses, and involuntary conversions.

PERSONAL AND PROFESSIONAL ETHICS FOR TEXAS CPAS
Regulatory Ethics | 4 CPE Credits | $79 – $89

This course is approved by the TSBPA to meet the requirements for ethical training. An individual applying for certification must complete a board approved ethics course no more than six months prior to submission of the application. Proof of completion of this course must be submitted with the application. Beginning on January 1, 2005, every licensee must take an ethics course that has been approved by the board every two years. This course has been recently revised to include the most up-to-date changes in the Rules of Professional Conduct issued by the Texas State Board of Public Accountancy. In addition, this course contains enhanced coverage of important issues impacting the Rules of Professional Conduct as well as additional improvements in both form and content. Available as interactive online course or video-based course.

THE BOTTOM LINE AND CORPORATE WELLNESS PROGRAMS
Specialized Knowledge | 1 CPE Credit | $29

A majority of employers offer wellness programs for their employees. This course will examine how corporate wellness programs have evolved by looking at the tangible and intangible benefits of such programs. It will also discuss the emerging and multifaceted wellness strategies that companies might consider in order to encourage employee engagement. Learn how a sound corporate wellness strategy can generate a solid return on investment while promoting healthy habits among employees. This chapter will guide you through some of the issues and considerations related to wellness and wellness programs.
Productivity

Looking to improve your productivity or marketing in 2018? We have an array of courses on tools that can help.

BRANDING YOUR FIRM WITH LINKEDIN
COMMUNICATIONS AND MARKETING | 2 CPE CREDITS | $59

MANAGING WHAT PEOPLE SAY ABOUT YOUR CPA FIRM
BUSINESS MANAGEMENT AND ORGANIZATION | 2 CPE CREDITS | $59

MICROSOFT EXCEL 2016: USEFUL FUNCTIONS FOR CPAs
COMPUTER SOFTWARE AND APPLICATIONS | 4 CPE CREDITS | $79

MICROSOFT EXCEL 2016: WORKING WITH FORMULAS AND FUNCTIONS
COMPUTER SOFTWARE AND APPLICATIONS | 5 CPE CREDITS | $89

TECHNOLOGY ADD-ONS TO INCREASE PRODUCTIVITY
COMPUTER SOFTWARE AND APPLICATIONS | 1 CPE CREDIT | $29

ONESOURCE

OneSource provides a wide array of corporate tax software for global tax compliance and accounting decision making. Both large and small entities still have many questions when it comes to preparing 1099s, TINs, B-Notices and 1042s. Before you start preparing these forms or responding, it’s good to brush up on the recent changes with the following courses that OneSource customers may find extremely useful.

B-NOTICES 101
TAXES | 2 CPE CREDITS | $49

AVOIDING THE PITFALLS OF FORM 1099
TAXES | 1 CPE CREDIT | $29

INTRODUCTION FOR FORM 1042-S (WITH SOME HELP FROM ONESOURCE)
TAXES | 1 CPE CREDIT | $29

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Didn’t find what you’re looking for here? Visit us online for additional titles and topics. You’ll find quarterly updates in tax, changes to the accounting guidance or yellow book, and many other courses designed to deepen your understanding of the complex tax and accounting areas impacting your clients. Whether those clients are internal or external, we’ve got you covered with everything from firm management to time management and life balance.
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- The annual Federal Tax Review is a must-have for RIA® customers.
- Quickfinder income tax training courses are a great way to teach and test new tax preparers.
- The Checkpoint Learning print-based self-study product line includes both manuals and DVDs that work for either individual use or group study.

PREMIER AND PREMIER PLUS PACKAGES ON PAGE 29

Both Premier and Premier Plus subscription packages include UNLIMITED access to all PPC Self-Study courses/exams. Subscription details: page 7.

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PPC® self-study courses
Related PPC Guides Available — See pages 35 – 37 and 46 – 50

CPE RELATED TO PPC GUIDE TOPICS AND AVAILABLE TO SUPPLEMENT GUIDE USE
Self-study courses related to the following Guides are available in electronic format to optimize your use of the PPC approach and earn CPE credit. The courses can be downloaded from our website.

- Audit Risk Assessment
- Auditor’s Reports
- Audits of Employee Benefit Plans
- Audits of Financial Institutions
- Audits of Local Governments*
- Audits of Nonprofit Organizations*
- Audits of Nonpublic Companies
- Business Valuations
- Cash, Tax and Other Bases of Accounting
- Compilation and Review Engagements
- Construction Contractors
- GAAP
- Homeowners’ Associations
- HUD Audits*
- Nonprofit GAAP*
- PPC’s 1040 Deskbook
- PPC’s 1041 Deskbook
- PPC’s 1065 Deskbook
- PPC’s 1120S Deskbook
- Preparing Financial Statements
- Preparing Governmental Financial Statements*
- Preparing Nonprofit Financial Statements*
- Quality Control
- Single Audits*
- Write-Up Services

* Eligible for Yellow Book CPE

Quickfinder self-study courses

1040 INCOME TAX PREPARATION
9 CPE CREDITS | BASIC | $99
Based on the guidance found in the popular PPC Tax Deskbook Series, this course focuses on the preparation of individual tax returns and utilizes a key issue approach in covering topics ranging from filing status to exemptions, income and adjustments, personal deductions, tax calculations and tax planning opportunities.

ETHICS FOR TAX PROFESSIONALS
2 CPE CREDITS | BASIC | $39
Understand rules and regulations governing the tax profession and the practical application of these rules in the daily operation of tax professionals’ businesses. This course covers IRS and AICPA requirements and standards and meets the two-hour ethics requirement for EAs.

Checkpoint Learning print-based self-study courses

Our print-based self-study courses (some with DVDs) are a great option for those who want to have a printed manual for future reference. The self-study courses also lend themselves well to group study.

AUDITING UPDATE 2017
2 CPE CREDITS | $50

AUDITS OF 401(K) PLANS
8 CPE CREDITS | $139

COMPILATION AND REVIEW GUIDE
11 CPE CREDITS | $189

ETHICS FOR CPAs
4 CPE CREDITS | $109

FORM 1040: A PRACTICAL GUIDE
30 CPE CREDITS | $309

GAAP GUIDE: COMPLETE
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Formats: DVD plus online and video streaming
CPE Credits: 33
Price: $959

CPE NETWORK GOVERNMENTAL AND NONPROFIT ACCOUNTING REPORT (QUARTERLY)
ACCOUNTING AND AUDITING (GOVERNMENTAL) | UPDATE
A must-view for firms looking to stay ahead of the competition, this essential report will establish a quality standard for your company. Your subscription will keep your staff abreast of important GAO (Yellow Book), OMB and other governmental and nonprofit issues relevant in the current financial operating environment.

Experts include: Lee Ann Watters, CPA and principal with Mountjoy; Chilton, Medely, LLP and Jennifer F. Louis, CPA.
Formats: DVD plus online and video streaming
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Price: $749

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- Price: $499

**FORENSIC ACCOUNTING CERTIFICATE PROGRAM**

The demand has never been higher for professionals with proven education and skills to handle fraud investigation and identification, income reconstruction, damage calculation, litigation support and dispute resolution. Increase your range of services and career opportunities related to fraud and forensic accounting.

- Format: 7 online courses plus final online exam
- CPE Credits: 32
- Price: $499

**TANGIBLE PROPERTY CERTIFICATE PROGRAM**

Can you differentiate between a repair of a major asset and a replacement or distinguish between standalone assets and component parts? This program helps you gain a thorough understanding of the lifecycle of an asset and be able to confidently advise clients.

- Format: 6 online courses plus final online exam
- CPE Credits: 31
- Price: $499

**RETIREMENT PLANNING CERTIFICATE PROGRAM**

Is your firm fully serving the growing population of pre-retirees? Help your clients build a better future with the Checkpoint Learning Retirement Planning Certificate Program. You’ll gain thorough knowledge of all aspects of retirement planning and help clients obtain peace of mind and a concrete plan for their desired retirement lifestyle.

- Format: 8 online courses plus final online exam
- CPE Credits: 30
- Price: $499

**TAX FUNDAMENTALS CERTIFICATE PROGRAM**

Tax practitioners are obligated to provide their clients with the most accurate information and advice in complying with tax reporting requirements — which means every member of your tax preparation team will benefit from having the general knowledge in a broad range of tax topics. Develop a stronger, smarter tax team that understands the concepts behind tax form completion.

- Format: 8 online courses plus final online exam
- CPE Credits: 40
- Price: $499

**TAX RESEARCH CERTIFICATE PROGRAM**

This program imparts foundational tax research knowledge to help ensure consistency and accuracy every time. Ideal for CPAs or future CPAs, tax accountants, senior tax accountants and tax managers who need current federal and state tax research skills.

- Format: 3 webinars, 3 online courses plus graded case study
- CPE Credits: 21
- Price: $599

Are you ready to guide small business clients through the start-up process? There are 28.8 million small businesses in the U.S., with a boom period for new start-ups ahead. This program provides the tools you need to advise on business plans, financing, business income and SE tax issues, fraud and more.

- Format: 8 online courses plus final online exam
- CPE Credits: 38
- Price: $499
You know it’s vital that your staff is competent in tax research. If your team doesn’t understand the research process or makes mistakes, it can cost time, money, and client confidence. The Checkpoint Learning Tax Research Certificate Program equips your staff to expertly conduct federal and state tax research. This program includes online learning, live instructor-led webinars, and a tailored case study with feedback provided. Gain a higher level of confidence with your staff members’ tax research work.

With the Checkpoint Learning Tax Research Certificate Program, you’re on solid ground.
Our federal tax product line includes the most comprehensive guidance from our RIA, WG&L and PPC experts.

**NEWLY REVISED! RIA FEDERAL TAX HANDBOOK, 2018 EDITION**
Designed to provide quick and easy answers to critical tax questions, the Federal Tax Handbook offers insightful guidance on federal tax law, including the latest regulations, rulings and revenue procedures as well as precise explanations about changes that could impact your business or your clients. You’ll get specific guidance on key tax topics — including individual, trust, partnership and corporate taxation, deductions, credits, capital gains, IRAs, SIMPLE and pension plans, education incentives, passive activity losses, employee benefits, estate and gift taxes and more. And, you’ll be able to quickly navigate any tax questions that arise with:

- Detailed coverage of the latest tax legislation
- A tax calendar
- Income, estate, gift and select excise tax rates and Social Security tax thresholds
- Advice on which forms to use to report transactions
- Depreciation and inclusion amount tables
- Extensive professional guidance from our expert editorial team

Available in print and eBook formats, this extensive resource offers premier guidance on federal tax law to ensure you always have immediate access to the answers you need.

FTHP: $102.75 / 2018 Edition
Formats: Print or eBook
Call for pricing on higher quantities. | Available February 2018

**NEWLY REVISED! RIA COMPLETE INTERNAL REVENUE CODE, WINTER 2018 EDITION**
The entire federal tax code and its history is at your fingertips with RIA’s Complete Internal Revenue Code. Speed research with the complete legislative history and comprehensive topic index in this convenient, easy-to-use volume. Properly apply the code section using cautions from our editorial experts and key information about special rules and dates. RIA’s Complete Internal Revenue Code includes all legislative changes up to its publication date and a complete history of all amendments affecting a code section.

IR1P: $161.25 / 2018 Winter Edition
Formats: Print or eBook
Call for pricing on higher quantities. | Available February 2018

**NEWLY REVISED! RIA GUIDE TO SALES AND USE TAXES, 2018 EDITION**
For times when you need a quick look-up rather than comprehensive research or when you need an answer for a new state, RIA’s Guide to Sales and Use Taxes provides state-by-state summaries of sales and use taxes. The Guide uses a uniform format for easy access to information on liability, exemptions, basis, rates, returns, payments, refunds and other important issues, including:

- Overview of sales and use tax concepts
- State by state summaries of who, what and when
- Who collects or pays the tax
- What’s taxable
- When is the payment due
- Rules for out-of-state sellers
- Requirements for exemption certificates
- Vendor licensing and registration
- Penalties and interest

This Guide is an essential resource for any state tax professional with clients who sell in multiple states.

GSUP: $144 / Softbound, updated annually
Format: Print
Call for pricing on higher quantities.

**NEWLY REVISED! RIA FEDERAL TAX REGULATIONS, WINTER 2018 EDITION**
All final, temporary and proposed treasury regulations are at your fingertips with RIA’s Federal Tax Regulations, a comprehensive, easy-to-use, eight-volume desk set. Speed your research with two comprehensive topic indexes and get a complete picture on federal tax regulatory topics since proposed and final regulations under the same code section are published together. Editorially added cautions provide you with key information about special rules and effective dates needed to properly apply the regulation.

RG1P: $230.50/ 2018 Winter Edition
Formats: Print or eBook
Call for pricing on higher quantities. | Available February 2018
We offer guidance in a variety of formats and depths to meet the specialized needs of your tax practice.

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Which tax preparation publication do I need? Quickfinder Handbooks and PPC’s Deskbooks have their own unique yet complementary styles. For quick answers at your fingertips, choose Quickfinder Handbooks. When you face challenging or more in-depth questions or issues or you want numerous examples with filled-in forms and time-saving practice aids, only PPC’s Deskbooks will do. Together they make the perfect combination of tax preparation reference materials for any tax professional.

Quickfinder Handbooks. Quickfinder Handbooks are a tax preparer’s best quick reference for common tax questions and issues. Each Handbook uses plain language, charts and tables to answer questions easily. Various examples highlight real-life situations. Whether you’re simply looking up tax rates and amounts or seeking basic tax rules, you’ll find your answer fast.

PPC’s Deskbooks. Using the unique key issue approach, PPC’s Deskbooks provide the practical, how-to guidance you need for preparing federal tax returns. For each type of return, our Deskbooks identify the challenging issues and give you workable solutions, examples, filled-in forms and interactive practice aids to help you resolve issues in a timely, efficient and consistent manner. Each Deskbook comes with its own unique Quick Reference Binder containing numerous practice aids including tables, elections, worksheets, checklists, flowcharts and others.

PPC’S 1040 DESKBOOK — NOW WITH INTERACTIVE PRACTICE AIDS*

Quickly and easily resolve the key issues encountered when preparing individual tax returns with the detailed, easy-to-understand and affordable tax return focused guidance, real life examples and illustrations of completed forms provided in PPC’s 1040 Deskbook. The Deskbook provides workflow guidance, tools and other practice aids that will save time and help ensure returns are accurately prepared, and a tax planning roadmap enables owners and/or staff to identify potential tax planning opportunities for clients.

TDB: $310 / 2 Volumes
Formats: Print • Checkpoint
Checkpoint: Call for pricing.

Related self-study course available — see page 29

PPC’S 706/709 DESKBOOK — NOW WITH INTERACTIVE PRACTICE AIDS*

PPC’s 706/709 Deskbook breaks down the complexities of federal estate, gift and GST tax issues and provides clear guidance for preparing or reviewing Forms 706, 709 and related GST tax forms. This Deskbook leads you through the compliance process using a forms-based format, explaining the impact of recent important legislation, cases and rulings. Streamline your client service by relying on our comprehensive, user-friendly guidance.

706: $310 / 2 Volumes
Formats: Print • Checkpoint
Checkpoint: Call for pricing.

Related self-study course available — see page 29

PPC’S 1041 DESKBOOK — NOW WITH INTERACTIVE PRACTICE AIDS*

Cut through the complexity of preparing fiduciary income tax returns with the practical step-by-step guidance on the basics of Form 101 preparation found in PPC’s 1041 Deskbook. Get an understanding of more complex issues, including determining fiduciary accounting income and distributable net income (DNI), computing the distribution deduction, understanding when the net investment income applies and how it’s calculated, allocating capital gains and depreciation, reporting income in respect of a decedent, filing Form 1041 in the estate or trust’s final year and understanding the reporting requirements for foreign trusts and charitable trusts.

T41: $310 / 2 Volumes
Formats: Print • Checkpoint
Checkpoint: Call for pricing.

Related self-study course available — see page 29

* Interactive Practice Aids are only available on Checkpoint format.

“Our firm has used the PPC Deskbook series for over 10 years. It is a very practical, easy to use guide that is the go-to resource for our team. Checkpoint provides links from this resource to primary sources and further explanatory materials, making it an easy first stop for compliance-related questions.”

— Accounting Firm Partner, Washington D.C.
PPC’S 1065 DESKBOOK — NOW WITH INTERACTIVE PRACTICE AIDS*
Partnerships are a “top priority” for the Small Business/Self-Employed (SB/SE) Division, according to the SB/SE Commissioner. With the key issues, examples, completed Schedule K-1s and other forms, checklists, worksheets and other quality control tools you’ll find in PPC’s 1065 Deskbook, you and your staff can solve the difficult or unclear issues encountered when preparing Form 1065. The Deskbook points out elections and other tax-saving opportunities while preparing the return; plus, the tax planning roadmap highlights planning opportunities that you and your staff can pursue after busy season.

T65: $310 / 2 Volumes
Formats: Print • eBook • Checkpoint
Checkpoint: Call for pricing.
Related self-study course available — see page 29

PPC’S 1120 DESKBOOK — NOW WITH INTERACTIVE PRACTICE AIDS*
Given the IRS’s emphasis on practitioner due diligence, proper preparation of your clients’ returns is more important than ever. With the key issues, examples tied to completed forms, checklists, worksheets and other quality control tools you’ll find in PPC’s 1120 Deskbook, you and your staff can solve the difficult, unclear or misunderstood issues encountered when preparing Form 1120. The Deskbook points out elections and other tax-saving opportunities while preparing the return; plus, the tax planning roadmap highlights planning opportunities that you and your staff can pursue after busy season.

T20: $310 / 2 Volumes
Formats: Print • eBook • Checkpoint
Checkpoint: Call for pricing.

PPC’S 1120S DESKBOOK — NOW WITH INTERACTIVE PRACTICE AIDS*
For more than 25 years, PPC’s 1120S Deskbook has used a “key issue” approach to solve the tough reporting issues that practitioners and their staff face. The key issues tell you what to do and show you how to do it with real-life examples, many of which are tied to completed forms. Since proper Schedule K-1 preparation is so important, there are dozens of filled-in Schedule K-1s with the lines and codes for reporting pass-through items to the shareholders. The Deskbook also points out elections and other tax-saving opportunities while preparing the return; plus, the tax planning roadmap highlights post-busy season planning opportunities for you and your staff.

T25: $310 / 2 Volumes
Formats: Print • eBook • Checkpoint
Checkpoint: Call for pricing.
Related self-study course available — see page 29

PPC’S 5500 DESKBOOK — NOW WITH INTERACTIVE PRACTICE AIDS*
PPC’s 5500 Deskbook provides line-by-line guidance for completing the Form 5500 series returns (Forms 5500, 5500-SF, 5500-EZ, 8955-SSA) and the related schedules. Determine filing requirements, obtain the information needed to complete the reporting requirements and correctly complete returns with this efficient approach. Guidance focuses on the tax return and includes real-life examples and illustrations of completed forms, as well as practice aids, to save you time and help you understand compliance requirements.

T55: $310 / 2 Volumes
Formats: Print • eBook • Checkpoint
Checkpoint: Call for pricing.

FEDERAL DEPRECIATION HANDBOOK AND FEDERAL DEPRECIATION CALCULATOR
Make tax-efficient decisions and elections when an asset is placed in service with the expert guidance on tax depreciation and other cost recovery issues found in the Federal Depreciation Handbook. The Handbook explains how to structure business property transactions to optimize federal income tax results when performing general tax planning or transactional consulting services and includes guidance on applying the tangible property regulations and related IRS procedural releases, which specify the allowable tax treatment of costs to acquire, repair or improve tangible property.

Federal Depreciation Calculator (included with the Federal Depreciation Handbook on Checkpoint)
The Federal Depreciation Handbook on Checkpoint comes with a Depreciation Calculator to perform quick and easy depreciation calculations for tax planning or for determining the most appropriate depreciation elections when an asset is placed into service. The Depreciation Calculator also generates a depreciation schedule for the life of the asset.

With the Depreciation Calculator, tax practitioners will be able to:
• Determine depreciation deductions for MACRS assets
• Generate printable, savable and editable depreciation schedules for single assets
• Enter user notes to document conclusions (e.g., elections)

DEPP: $117 / Call for pricing on higher quantities.
Formats: Print • eBook • Checkpoint
Checkpoint: Call for pricing.
PPC’S 990 DESKBOOK — NOW WITH INTERACTIVE PRACTICE AIDS*
Get detailed and easy-to-understand return guidance complete with real life examples and illustrations of completed forms with PPC’s 990 Deskbook. Confidently navigate everything from the basics to more complex issues, such as unrelated business income, with step-by-step guidance. Save time and ensure returns are consistently and accurately prepared with an organizer, various checklists, a roadmap for each form, tools and other practice aids. Forms 990, 990-EZ, 990-T, 990-PF, 1023 and 1023-EZ are covered.

990: $310 / 2 Volumes
Formats: Print • eBook • Checkpoint
Checkpoint: Call for pricing.
Related self-study course available — see page 29

PREMIUM QUICKFINDER HANDBOOK
The Premium Quickfinder Handbook is your trusted source for quick reference to tax principles that apply when preparing individual, business and fiduciary income, estate and gift, tax-exempt organization and payroll tax returns. It covers the essentials of preparing these tax filings, including detailed, true-to-life examples with completed forms and line-by-line explanations. It also addresses tax law changes and IRS developments — all in a concise, easy-to-use format.

Whether you’re simply looking up an amount or rate, want to determine how the tax rules apply to a transaction or event or need to know how to report a particular tax item on the return, the Handbook gets you the accurate answers you need quickly.

QPE: $75 / $71 (eBook)
3-Ring Binder Print: $78
Formats: Bound Print • eBook • 3-Ring Binder Print

SMALL BUSINESS QUICKFINDER HANDBOOK
Forms 1065, 1120, 1120S, 1041, 706, 709 and 990
The Small Business Quickfinder Handbook is your trusted source for quick reference to tax principles that apply when preparing business and fiduciary income, estate and gift, tax-exempt organization and payroll tax returns. It covers the essentials of preparing these tax filings — including detailed, true-to-life examples with filled-in forms and line-by-line explanations — and thoroughly addresses tax law changes and IRS developments, all in a concise, easy-to-use format.

From start-up to termination issues and everything in between — including employee benefits, accounting methods and principles, deductions, credits and tax planning — the Handbook is a unique, one-stop solution for your many tax questions.

QSB: $53 / $49 (eBook)
3-Ring Binder Print: $56
Formats: Bound Print • eBook • 3-Ring Binder Print

““I have used a Premium Quickfinder Handbook for several tax seasons. I find it easy to find the information I am looking for. I tried a competitor’s product once, and that’s when I truly found how easy Quickfinder is to use. I don’t plan on ever using anything else.”” — Accounting Firm Staff Member, Vinita, OK

““I go to the homes or offices of many of my clients with my laptop to prepare their returns. Having all the Quickfinders on my Android™ is an easy way to look up answers to questions without having to open another window on my laptop, as well as an easy way to read or skim the Quickfinder [Handbooks] without having to take my laptop along.”” — Owner/Individual Tax Preparer, Long Island, NY
Tax Topic 14-2:

Savings Incentive

Big savings? That’s right up our alley.

Save up to 12% on Quickfinder®. The Quickfinder Build Your Own Bundle is the best value for your budget. With our quantity discount pricing, you can choose the Quickfinder products you want in the quantities and formats you need to build your perfect tax quick reference library.

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Find out more at tax.tr.com/qfsave12
QUICKFINDER ANNUAL TAX UPDATE
Stay up to date on changes affecting your clients and any significant tax developments that occurred during the calendar year with the Quickfinder Annual Tax Update. This single go-to resource covers relevant new tax legislation, court cases, tax regulations and IRS pronouncements affecting individuals and small businesses.

You’ll get an explanation of the tax developments that have occurred, as well as illustrative examples and practical insights needed to understand their impact. You’ll also get handy reference tables and charts to help you quickly locate answers and respond to client questions.

Whether you are preparing for busy season, getting up to speed on new tax rules or simply looking for a new rate or amount, the Quickfinder Annual Tax Update will save you valuable time and provide accurate answers.

Q17TP: $53 / $49 (eBook)
Formats: Bound Print • eBook

QUICKFINDER TAX TABLES FOR INDIVIDUAL RETURNS
Quickly answer client questions without flipping through pages with this durable, laminated, six-page fold out tool. Quickfinder Tax Tables are the easy way to keep important facts and figures at your fingertips.

QLI: $16 / $12 (eBook)
Formats: Print • eBook

INDIVIDUALS — SPECIAL TAX SITUATIONS QUICKFINDER HANDBOOK
In addition to the general tax rules that apply to all individuals, some individuals are subject to special tax rules that apply to them because of their occupation, investments or life events. As a tax preparer, you’ll likely encounter these types of clients, so it’s important to have a tax resource specifically designed to answer the questions you’ll face when preparing their returns.

The Individuals — Special Tax Situations Quickfinder Handbook will save you time and money on uncommon tax issues you’ll encounter when preparing individual returns. It covers more than 30 types of unique taxpayers.

QSS: $53 / $49 (eBook)
Formats: Bound Print • eBook

ALL STATES QUICKFINDER HANDBOOK
Get a complete, concise and consistent summary of instructions for filing out-of-state individual income tax returns with the All States Quickfinder Handbook. The Handbook covers returns for all 50 states and the District of Columbia, presenting topics in a consistent form — making it faster and easier for you to find information for any state.

Quickly find the state tax filing information you need with the clear language and easy-to-use, tabbed format in this Handbook. Answer critical questions for each state, including:

• What are the new tax developments for this filing year?
• Who is required to file in this state?

Plus, the Handbook includes:

• A summary of state forms for resident, part-year and nonresident taxpayers
• Information about income, additions, subtractions, deductions, exemptions and credits
• Time-saving tax tables and tax rate schedules
• Hard-to-find city, county and school district information — summarized and quickly accessible
• Worksheets to assist you in correctly calculating amounts to report on the form
• Information on when returns are due, where and how to file them and how to obtain an extension
• How to make estimated tax payments, along with information on making electronic payments

QST: $83 / $79 (eBook)
Formats: Bound Print • eBook
Available February 2018

DEPRECIATION QUICKFINDER HANDBOOK
Get quick answers to your business property questions in a concise, easy-to-use format. Determine the right recovery period, compute the right amount of depreciation, decide whether expenses need to be capitalized, manage the special rules for autos and other listed property, claim the Section 179 and bonus depreciation deductions, correct depreciation errors, work with like-kind exchanges and involuntary conversions and simplify a host of other complex tax issues with this valuable resource.

For tax professionals who need more information on business property issues, this Handbook is the perfect companion to the widely relied upon 1040 and Small Business Quickfinder Handbooks. It concisely explains how to handle business property issues on tax returns and how to plan business property transactions for optimal tax results.

QDE: $53 / $49 (eBook)
Formats: Bound Print • eBook
Available as eBooks
HEALTH CARE REFORM QUICKFINDER HANDBOOK
Health care reform has had a significant impact on individuals and employers. The employer mandate to provide insurance coverage, the individual mandate to obtain coverage, credits and subsidies to help individuals purchase coverage, exchanges for acquiring coverage, reporting requirements and taxes are just some of the many changes that are impacting your clients. They are likely to have questions, and we’ve got answers. Our Health Care Reform Quickfinder Handbook makes it easy for you to quickly locate answers to help your clients stay in compliance.
Topics covered in the Handbook include:
• Obtaining insurance through a state exchange/market
• Premium and cost sharing assistance for individuals
• Health insurance mandate for employers
• Penalty for not providing insurance to employees
• Employees of small employers eligible for state exchange participation
• Other taxes
• Notice and reporting requirements
• Health plan market reforms
• Health care reform resources

QHC: $53/ $49 (eBook)
Formats: Bound Print • eBook

PPC’S GUIDE TO HEALTH CARE REFORM
Stay current on the latest changes and new guidance.
Health care reform legislation has significantly altered the landscape for obtaining and providing health care benefits. PPC’s Guide to Health Care Reform provides practical, easy-to-understand guidance on the key provisions of the Patient Protection, Affordable Care Act and the Health Care and Education Reconciliation Act of 2010. Stay up to date on the latest guidance that has been issued, and help your clients stay in compliance and avoid or minimize penalties and other costs brought on by health care reform.
Topics discussed include:
• The mandate requiring employers to provide affordable health insurance coverage to full-time employees and their dependents or pay a penalty
• The mandate requiring individuals to have minimal essential health insurance coverage or pay a penalty and the premium assistance and cost-sharing subsidies that will be available to help individuals pay for coverage
• Numerous notice and reporting requirements placed on employers, plans, plan sponsors and insurers
• Information on the additional 0.9% Medicare tax and the 3.8% tax on net investment income
• Provisions affecting health care plans and the benefits they provide, including nondiscrimination requirements for fully insured plans, required coverage for employees’ adult children to age 26, prohibition on annual and lifetime limits and pre-existing condition exclusions, cost-sharing limits, expanded coverage of preventive services, maximum waiting periods and specific rules for grandfathered plans
• Coverage of the small employer health insurance credit available to help eligible small employers offset the cost of providing insurance to employees
You’ll also get real-life examples, worksheets, completed forms, quick reference charts of implementation dates, client letters and a newsletter that alerts you to new developments as they occur.

HCR: $370 / 1 Volume / Updated bi-annually
Formats: Print • Checkpoint
Checkpoint: Call for pricing. Checkpoint version updates monthly.
**TAX PLANNING FOR INDIVIDUALS QUICKFINDER HANDBOOK**

**Income, Estate and Gift Tax Planning for Individuals**

Tax rules change from year to year and sometimes drastically. Whether it's simply rates and amounts or the addition or expiration of new tax provisions, keeping ahead of clients is a challenge for any tax practitioner. And many clients expect more from their tax practitioner than just preparing their tax returns. They want their practitioner to alert them to tax-saving ideas or simply be ready when they call with questions throughout the year.

Get quick answers to a broad range of individual tax planning topics with the Tax Planning for Individuals Quickfinder Handbook. Unlike other tax planning publications, this Handbook presents the material using Quickfinder’s unique quick reference format with charts, tables and examples — plus plain-language descriptions of tax-saving strategies.

With the Handbook, you’ll get:

- A broad range of tax planning ideas sure to reduce your individual clients’ federal tax burdens
- Numerous tables and charts with the most current information and amounts to help you quickly answer questions and determine which strategies apply to your clients
- A variety of real-life examples

QIP: $53 / $49 (eBook)
Formats: Bound Print • eBook

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**IRA AND RETIREMENT PLAN QUICKFINDER HANDBOOK**

The tax rules for IRAs and retirement plans can be confusing, often differing from plan to plan with important amounts changing from year to year. The IRA and Retirement Plan Quickfinder Handbook provides quick answers to questions involving eligibility, making contributions, limits on contributions and elective deferrals, covering employees, how distributions are taxed and when they are required, penalties and selecting beneficiaries — just to name a few.

Whether encountering questions when preparing returns or advising a client on his or her retirement plan options, this Handbook will provide you with the answers you need in a quick-access, easy-to-read format — with no need to search through multiple publications or websites. In addition, you’ll have all the different IRA and retirement plan amounts right at your fingertips.

This Handbook covers:

- The ins and outs of traditional and Roth IRAs with numerous examples to illustrate the key features
- The similarities and differences between SEPs, SIMPLE-IRAs, solo 401(k)s and other small business retirement plans, including key factors to consider when choosing a plan
- What you need to know about how distributions are taxed, how beneficiaries can impact payouts and what’s required for a tax-free rollover

QIR: $53 / $49 (eBook)
Formats: Bound Print • eBook

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**PPC’S GUIDE TO RETIREMENT PLANNING**

With the increasing number of baby boomers considering retirement, the country’s aging population requires in-depth retirement planning to live comfortably while retired and to facilitate an orderly transfer of accumulated wealth. Clients planning for retirement and those already retired have unique financial planning needs. Accordingly, financial planning for clients of all ages includes a broad range of issues and services. This Guide covers every aspect of retirement planning — from cash flow and investments to Social Security, Medicare and asset protection.

Whether your client is a baby boomer ready to retire or a new college graduate with years to save, you and your staff will be able to identify, market and profitably complete retirement planning engagements with this Guide’s practical approach, comprehensive guidance, informative examples and helpful practice aids.

POC: $315 / 2 Volumes
Formats: Print • Checkpoint
Checkpoint: Call for pricing.
Social Security and Medicare Quickfinder Handbook

As the baby boomers move into their retirement years, tax and financial professionals are likely to encounter questions from their clients about Social Security and Medicare. The Social Security and Medicare Quickfinder Handbook is an affordable, easy-to-use Handbook that provides the answers you need quickly. Here’s what you’ll get with this useful tool:

- Coverage of all aspects of Social Security benefits — including eligibility, worker and family benefits, disability benefits, the SSI program plus income tax issues to consider
- Information on Medicare eligibility and enrollment plus the different types of coverage and costs
- Coverage of eldercare insurance, including long-term care and Medigap insurance policies

QSM: $53 / $49 (eBook)
Formats: Bound Print • eBook

PPC’s Tax Planning Guide: S Corporations

PPC’s Tax Planning for S Corporations explains the tax consequences of electing and maintaining S status, operating the S corporation and terminating the S election. It covers other tax issues, too, such as reorganizing the corporation, maintaining a QSub subsidiary, redeeming S stock or liquidating the S corporation. The Guide also addresses shareholder issues, such as maximizing basis in stock and debt, making tax-efficient distributions, transferring S shares and estate planning.

TSC: $315 / 3 Volumes
Formats: Print • Checkpoint
Checkpoint: Call for pricing.

PPC’s Tax Planning Guide: Partnerships

To help clients receive all of the benefits that partnerships offer, PPC’s Tax Planning Guide: Partnerships uses a lifecycle approach to cover all major aspects of partnership taxation. The guidance and practice tools address the tax consequences of organizing, operating and terminating a partnership as well as acquiring, holding and disposing of partnership interests. The Guide covers other issues, too, such as family partnerships, partner retirement or death and partner estate planning.

TPS: $315 / 3 Volumes
Formats: Print • Checkpoint
Checkpoint: Call for pricing.

PPC’s Tax Planning Guide: Closely Held Corporations

Based on the lifecycle of forming, operating and disposing of a closely held corporation, PPC’s Tax Planning Guide: Closely Held Corporations addresses the issues that are encountered when responding to client questions or planning transactions — from forming and operating the corporation to planning a tax-favored reorganization or liquidation. It also addresses the related shareholder issues, such as removing income from the corporation in the most tax efficient manner, implementing a fringe benefit, deferred compensation or qualified pension plan or passing ownership on to family members, just to name a few.

TCH: $315 / 3 Volumes
Formats: Print • Checkpoint
Checkpoint: Call for pricing.

PPC’s Guide to Tax Planning for High Income Individuals

PPC’s Guide to Tax Planning for High Income Individuals contains the strategies necessary to help your clients minimize the impact of higher tax rates and lower deductions and maximize the after-tax return on their investments. This Guide contains the detailed strategies you need to help clients minimize the impact of the 39.6% ordinary income and 20% capital gains rates. In addition, the Guide explains the 3.8% net investment income tax, additional 0.9% Medicare tax and strategies necessary to limit your client’s exposure to these taxes.

TIN: $315 / 2 Volumes
Formats: Print • Checkpoint
Checkpoint: Call for pricing.

“[I] work for a small nonprofit wearing many hats. Several employees approaching retirement have raised questions regarding SS and Medicare. Having purchased several of your publications in the past, I did not hesitate to purchase Social Security and Medicare Quickfinder Handbook. This is an excellent reference tool, concise and easy to use!”

—Controller, E. Syracuse, NY

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IRS notices continue to be on the rise as the IRS shifts to enhance the taxpayer experience through the creation of online accounts where taxpayers can independently resolve their issues.

If a client receives a notice, they are likely to turn to you as their trusted advisor for guidance.

With Thomson Reuters Checkpoint IRS Response Library, you can simply search by notice number or topic to respond to the IRS and your clients using a variety of tax resolution tools. These tools include scripts, response documents and practice aids. In addition, you can confidently generate a step-by-step workplan so that you can project billable hours and resolve the issue efficiently and effectively. The Library includes expanded coverage of penalties, including first time penalty abatement and taxpayer advocate services.

It also provides practical guidance for efficiently handling individual, business and payroll post-filing issues and effectively dealing with the IRS in many types of engagements.

IRLQ: $340 / One user
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PPC’S GUIDE TO DEALING WITH THE IRS

Unlike other publications that repeat the tax practice rules, PPC’s Guide to Dealing with the IRS shows you how to apply the rules for your clients’ benefit with more than 150 tools and practice aids so you and your staff can work efficiently and effectively with the IRS. You’ll get step-by-step guidance for more than 40 matters, work programs for major engagements, checklists for preparing forms and summaries of the law. There are chapters on avoiding penalties, complying with the Circular 230 rules of practice and managing client matters and profiling typical client situations — including strategies, completed forms and other practice aids for completing the engagement.

Written and reviewed by experienced practitioners, the 23rd edition of the Guide to Dealing with the IRS provides the guidance and tools that you and your staff need to effectively and efficiently work with the IRS. Don’t trust your tax practice livelihood to anyone else!

IRS: $315 / 2 Volumes
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PPC’S GUIDE TO TAX-RELATED IDENTITY THEFT

Identity theft is the fastest growing crime in America. Chances are that you have clients who will be victims or you may be the victim in the event of a security breach in your business.

As your client’s trusted advisor, it’s important to know how to resolve tax identity theft issues. Likewise, in the event of a security breach, it is important to know the immediate steps to take.

PPC’s Guide to Tax-Related Identity Theft provides step-by-step guidance and practical aids to help you resolve tax ID theft issues, meet your requirements for safeguarding taxpayer data and know what to do in the event of a security breach. Federal- and state-specific guidance (including the District of Columbia) is provided in this comprehensive Guide.

Fed-State Tax ID Theft Issues

Identify when tax ID theft has occurred and quickly resolve the issue for your clients, including filing complaints with the FTC. File complaints with the FTC, report the theft to the IRS and the state, handle a rejected return due to misuse of SSN, get the taxpayer advocate office involved and deal with post identity theft issues with the help of this Guide. You’ll be better equipped to handle tax ID theft matters of all kinds for your clients or provide them with information to address ID theft issues themselves.

Fed-State Security Breach Requirements

This Guide provides guidance and practical aids for businesses and tax professionals seeking to safeguard taxpayer data and know how to respond in the event of a security breach according to federal and state guidelines (including the District of Columbia).

Play a valued role in helping your clients regain their tax identity or recover from a security breach with PPC’s Guide to Tax-Related Identity Theft.

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ON CHECKPOINT

Address all of a client’s business tax planning needs from startup through dissolution and everything in between with the practical solutions from PPC’s Business Tax Planning Library.

The Library consists of:

- Buying or Selling a Business
- Compensation and Benefits
- Limited Liability Companies
- Real Estate Taxation
- Small Employer Retirement Plans
- Tax Planning for Closely Held Corporations
- Tax Planning for Partnerships
- Tax Planning for S Corporations

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Format: Checkpoint

PPC’S GUIDE TO LIMITED LIABILITY COMPANIES

LLCs are the only entities combining limited liability for all owners with the flexibility of partnership taxation. To help you capitalize on this “entity of choice,” PPC’s Guide to Limited Liability Companies addresses the tax and nontax issues you and your staff will encounter when answering client questions or planning transactions. In addition, dozens of practice aids are included to assist practitioners performing complicated calculations. Plus, for each state, there are excerpts of relevant LLC law and a table of default state law provisions.

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PPC’S GUIDE TO AUDITS OF NONPUBLIC COMPANIES

PPC’s Guide to Audits of Nonpublic Companies provides an industry-leading audit approach for nonpublic commercial entities that is thorough, yet practical, effective and efficient. Identify risks and select appropriate audit procedures to respond to those risks with planning tools and an approach that is easy to implement whether you have a large audit practice or perform only a few audits. It includes comprehensive guidance and a complete set of practice aids, including audit programs for continuing and initial audits, engagement letters, confirmation letters and disclosure checklists.

ASB: $350 / 3 Volumes
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Related self-study course available — see page 29

PPC’S GUIDE TO AUDITS OF NONPROFIT ORGANIZATIONS

Nonprofit organizations may require compilations, reviews, audits or single audits. Perform audits and engagements for your nonprofit clients in accordance with professional standards with PPC’s Guide to Audits of Nonprofit Organizations. The Guide contains report examples and multiple sets of audit programs including a set of initial audit programs, a core set appropriate for any audit engagement and a set appropriate for audits of many small organizations. Ensure you stay in compliance with professional standards and peer review requirements with dozens of timesaving tools. You’ll be able to serve your nonprofit clients with ease and have critical information and tools at hand.

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Get detailed guidance on the AICPA audit reporting standards and more than 275 audit report illustrations and drafting forms including reports modified for GAAP departures, scope limitations, going concern uncertainties and numerous other situations. Choose and draft the proper audit report with confidence and get the guidance you need to explain it to your client.

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Local government audits require specialized guidance and tools to address their unique audit and accounting requirements. Correctly perform these audits in an effective and efficient manner, from regular GAAS audits to Government Auditing Standards (Yellow Book) Audits to Single Audits, with the audit programs, checklists, confirmations and auditor reports in PPC’s Guide to Audits of Local Governments. This Guide provides the most comprehensive set of audit materials available on the market, representing the gold standard for audits of local governments.

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Provide a wide range of services to construction contractors with the discussions of authoritative GAAP auditing, compilation, review, consulting and tax requirements as well as “how to” advice and specially tailored practice aids included in PPC’s Guide to Construction Contractors. This Guide includes dozens of timesaving tools to help you comply with professional standards and peer review requirements.

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Updated for SSAE No. 18 and SSARS No. 22 and 23
PPC’s Guide to Nontraditional Engagements addresses situations where a client asks you to perform a service other than the traditional compilation, review or audit of financial statements. It provides extensive guidance and a complete set of practice aids for many types of engagements, including agreed-upon procedures engagements, examinations and reviews, compliance with terms of a contract or specified requirements, engagements on pro forma financial information, audits of specified elements and many more.

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PPC’s Guide to Audits of Financial Institutions provides guidance and practice aids for financial statement audits of banks, savings institutions and credit unions. It covers all key areas of a financial institution audit, including loan reviews, sampling, confirmation procedures, allowance for loan loss, investments in marketable equity and debt securities, foreclosed assets, real estate investments and income tax provisions. Get all the guidance and practice aids you need to perform an integrated audit of the financial statements and internal control over financial reporting.

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Updated For SSARS No. 23

Compilation and review engagements require comprehensive, up-to-date reference resources to help ensure that you’re complying with the latest accounting standards. Perform your engagements correctly and efficiently with the hundreds of practice aids, sample reports, sample disclosures and financial statements included in PPC’s Guide to Compilation and Review.

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- The basics of compilation and review services
- In-depth guidance for specific entities and unique engagements, such as personal financial statements and nonprofit organizations
- Streamlined forms and checklists
- Engagement and management representation letters
- Accountant’s reports and procedure checklists
- Discussions to help you understand new accounting requirements

Authored by respected experts with decades of practice experience, PPC’s Guide to Compilation and Review Engagements has been regarded as the authority for compilation and review engagements for more than 30 years.

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Updated For SSARS No. 23

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- An overview of the requirements of AR-C 70, Preparation of Financial Statements, including differences from the requirements of compilation engagements
- Discussions to help you determine if this is a service you wish to provide to your clients
- Examples to help you determine when AR-C 70 is applicable to your practice and, therefore, you need to structure your engagement to comply with its requirements
- Explanations of how your firm’s quality control policies impact financial statement preparation services
- Engagement letters, procedures checklists, disclaimers and other practice aids
- Illustrative financial statements
- Illustrative headers, legends and selected disclosures describing the applicable financial reporting framework, indicating that no assurance is provided, disclosing departures from the applicable financial reporting framework and disclosing the omission of substantially all disclosures

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Establish and maintain a quality control system and pass peer review with the streamlined approach for firms that provide only compilation, review and preparation services outlined in this Guide.

The Guide is designed to assist compilation and review firms in developing, implementing and maintaining a system of quality control that incorporates the requirements of SQCS 8 and satisfies AICPA peer review requirements in the most efficient way possible.

It includes:

- Step-by-step instructions, checklists and practice aids for use in designing, implementing, documenting and monitoring the firm’s Quality Control (QC) system
- Guidance on the essentials for developing and implementing policies and procedures for each of the six QC elements — firm leadership, relevant ethical requirements, acceptance and continuance, human resources, engagement performance and monitoring
- Model QC documents for different firm types, covering small firms with multiple partners and staff as well as sole practitioner firms with and without professional staff
- A peer review chapter that provides the information you need to navigate the peer review process and pass peer review with ease

Whether you’re a sole practitioner or in a firm with several partners, if you perform only compilation, review and preparation services, this Guide is specifically developed for you.

GCRP: $260
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PPC’S GUIDE TO SINGLE AUDITS
Performing single audits requires compliance with an array of complex regulatory and professional requirements. Comply with the rules, regulations and guidelines for single audits of both governments and nonprofits accurately and efficiently while increasing your audit profits with PPC’s Guide to Single Audits.

Save valuable research time with in-depth guidance on compliance testing, reporting and audit strategy for single audits. Make your single audits more efficient with audit programs (including the PPC compliance and audit program, Audits of Federal Award Programs — Compliance Requirements), engagement checklists, correspondence and illustrated reports. The publication’s coverage of single audits performed under the audit requirements in OMB’s Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards (Uniform Guidance) makes it the most comprehensive Guide of its type.

CSA: $380 / 2 Volumes
Formats: Print • Checkpoint
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Performing single audits has always been a complex and challenging process. In fact, many auditors shy away from governmental and nonprofit audits because of the difficult and ever-changing single audit requirements.

Now you can simplify these engagements with SMART Practice Aids — Single Audit Suite from Thomson Reuters Checkpoint.

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• Complete Checkpoint Tools documents related to your single audit, such as the Federal Programs, Risk of Material Noncompliance Assessment Worksheet, Inherent Risk of Noncompliance Assessment Form and Compliance Testing Worksheet

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• Roll forward relevant information on planning forms, federal award audit programs and award tracking for use in subsequent single audits

Intuitive automation means you can easily perform the following:

• Import and track Federal Award expenditures

• Conclude whether a program specific audit can be elected or if a single audit is required

• Determine if an auditee qualifies as a “low-risk auditee”

• Identify and test major programs and create compliance audit programs

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PSDQ: N/A / One user
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* Refer to legend on page 67

PPC’S GUIDE TO PREPARING NONPROFIT FINANCIAL STATEMENTS
Skillfully prepare nonprofit financial statements in accordance with the latest professional requirements with PPC’s Guide to Preparing Nonprofit Financial Statements. Achieve consistency in the style, format and technical quality of these financial statements.

• Get from the trial balance to the completed financial statements (including notes) in account-by-account, statement-by-statement sequence

• Ensure the completeness of disclosures with a comprehensive disclosure checklist

• Learn from numerous example financial statements, practical application insights and how-to examples

This Guide is specifically designed to address the AICPA Audit and Accounting Guide, Not-for-Profit Entities and FASB guidance affecting nonprofit organizations.

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Related self-study course available — see page 29
PPC’S GUIDE TO PREPARING FINANCIAL STATEMENTS
Preparation of complete and accurate financial statements and related notes can be very challenging. Get the tools you need to quickly and efficiently create financial statements and note disclosures that comply with the latest accounting and financial reporting requirements with PPC’s Guide to Preparing Financial Statements.

The Guide is a financial statement preparer’s manual tailored especially for preparers of financial statements for nonpublic companies. It takes you from the trial balance to the completed financial statements (including notes) in statement-by-statement, account-by-account sequence, regardless of whether the statements are audited, reviewed, compiled or prepared by accountants in industry. You can use the information, including a disclosure checklist, to prepare financial statements and disclosures in accordance with generally accepted accounting principles or another comprehensive basis of accounting.

When you encounter a new reporting issue, it’s beneficial to see how other financial statement preparers may have reported the same or a similar issue. The Trends volume presents 30 sets of illustrative real-life financial statements and notes from a variety of industries using various reporting bases, referenced by an easy-to-use finding list and index to help you quickly find helpful illustrations.

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Accounting principles generally accepted in the United States of America (GAAP) for nongovernmental entities are voluminous, complex and constantly changing. PPC’s Guide to GAAP is an up-to-date, comprehensive and easy-to-use resource for researching and applying GAAP. With its clear and concise guidance, examples, practical considerations and disclosure checklist, you’ll find this Guide to be a valuable, timesaving tool for researching and applying GAAP.

GAP: $210 / 1 Volume
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PPC’S GUIDE TO REVENUE RECOGNITION NEW
The Financial Accounting Standards Board has issued ASU 2014-09 and six other Accounting Standards Updates (referred to as the new revenue recognition guidance) that change how entities record and report revenue. These new requirements will be effective for public companies for years beginning after December 15, 2017, and for nonpublic companies for years beginning after December 15, 2018.

PPC’s Guide to Revenue Recognition provides easy-to-understand guidance on the new requirements of this suite of standards. It explains the five step approach that must be used to recognize and measure revenue and compares/contrasts those with the current accounting guidance.

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VAL: $395 / 3 Volumes
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• PPC’s Practice Aids for Audits of Health Care Entities (Special-Purpose Governmental Entities) provides a complete set of practice aids for auditing governmental health care entities that report as special-purpose governments engaged only in business-type activities (that is, whose financial statements are prepared using enterprise fund accounting and reporting).

These Practice Aids provide you with the only complete set of audit practice aids on the market today that address the specific issues faced and unique audit risks encountered when auditing investor-owned, nonprofit and special-purpose governmental health care entities that are not subject to Single Audit requirements.

PHCGQ: $990 / One user
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PPC’s Practice Aids for Reporting on Controls of Service Organizations — SOC 2 Engagements are loaded with the practical guidance, real-life examples and timesaving checklists and practice aids to give you the knowledge you need to confidently and competently perform complex SOC 2 engagements under SSAE No. 18 and the 2015 AICPA Guide, Reporting on Controls at a Service Organization Relevant to Security, Availability, Processing Integrity, Confidentiality or Privacy. They are editable Microsoft® Word and Excel® practice aids containing extensive practical considerations and tips to help you to help you conduct SOC 2 engagements effectively and efficiently. Save hours of time by not having to tailor your existing practice aids for SOC 2 engagements.

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PRSQ: $605 / One user
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PPC’S PRACTICE AIDS FOR AUDITS PERFORMED UNDER INTERNATIONAL STANDARDS
PPC’s Practice Aids for Audits Performed Under International Standards is a streamlined, technically sound audit approach performed under the ISAs for nonlisted commercial entities that follow IFRS. These Practice Aids provide auditors with a flexible, adaptable audit process that is thorough yet practical, effective yet efficient. PPC customers will find the audit approach presented in the Practice Aids to be consistent with that of other PPC U.S. audit products, making it easily integrated into existing firm practices and quality control procedures. The audit approach in these Practice Aids further enhances audit quality for international engagements by ensuring compliance with ISAs.

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