

SYNERGY2022

for Tax and Accounting Professionals

Session Catalog

November 9-12 | Washington, D.C.

November 8-11 | Virtual

IN-PERSON

AGENDA 3-4

SESSION SCHEDULE 5-8

VIRTUAL

AGENDA 10

SESSION SCHEDULE 11-14

SESSION CATALOG 16-57

SYNERGY2022
for Tax and Accounting Professionals

In-person

Agenda & Session Schedule

WEDNESDAY 11/9	
7:00 am - 7:30 pm	Registration Desk Open
8:30 am - 12:30 pm	Practice Forward Member Event
11:00 am - 7:30 pm	Experience Zone Open
11:00 am - 7:30 pm	Sponsor Booths Open
1:00 pm - 1:50 pm	Session A
1:50 pm - 2:20 pm	Break
2:20 pm - 4:00 pm	Session B
4:00 pm - 4:25 pm	Break
4:25 pm - 5:15 pm	Session C
5:30 pm - 7:30 pm	Welcome Reception

THURSDAY 11/10	
7:00 am - 5:30 pm	Registration Desk Open
7:00 am - 5:30 pm	Experience Zone Open
7:00 am - 5:30 pm	Sponsor Booths Open
7:00 am - 8:00 am	Breakfast
8:00 am - 9:00 am	General Session 1
9:00 am - 9:30 am	Break
9:30 am - 10:45 am	Session D
10:45 am - 11:10 am	Break
11:10 am - 12:00 pm	Session E
12:00 pm - 1:15 pm	Lunch
1:15 pm - 2:15 pm	General Session 2
2:15 pm - 2:45 pm	Break
2:45 pm - 3:35 pm	Session F
3:35 pm - 4:00 pm	Break
4:00 pm - 5:15 pm	Session G
7:30 pm - 9:30 pm	Roundtables

FRIDAY 11/11	
7:00 am - 5:30 pm	Registration Desk Open
7:00 am - 5:30 pm	Experience Zone Open
7:00 am - 5:30 pm	Sponsor Booths Open
7:00 am - 8:00 am	Breakfast
8:00 am - 8:50 am	Session H
8:50 am - 9:15 am	Break
9:15 am - 10:55 am	Session I
10:55 am - 11:20 am	Break
11:20 am - 12:10 pm	Session J
12:10 pm - 1:15 pm	Lunch
1:15 pm - 2:15 pm	General Session 3
2:15 pm - 2:45 pm	Break
2:45 pm - 3:35 pm	Session K
3:35 pm - 4:00 pm	Break
4:00 pm - 5:15 pm	Session L
7:30 pm - 10:00 pm	Friday Night Event

SATURDAY 11/12	
8:00 am - 12:00 pm	Registration Desk Open
8:00 am - 12:00 pm	Experience Zone Open
8:00 am - 9:00 am	Breakfast
9:00 am - 9:50 am	Session M
9:50 am - 10:15 am	Break
10:15 am - 11:30 am	Session N

WEDNESDAY 11/9		
Session A 1:00 pm - 1:50 pm 50 mins	Session B 2:20 pm - 4:00 pm 100 mins	Session C 4:25 pm - 5:15 pm 50 mins
<ul style="list-style-type: none"> ■ Performing More Efficient Audits ■ What You Need to Know About Adopting the New Lease Standard ■ How to Customize Practice CS Using Custom Fields for Your Firm ■ Integrating Onvio with the CS Professional Suite ■ Unemployment Issues & Solutions: How Thinking Smarter about Unemployment Can Help a Business Save ■ Inflation Reduction Act: Setting the Tax Landscape ■ Tax Research - Best Practices ■ UltraTax CS Corporate Return Preparation ■ UltraTax CS Fiduciary Tax Return Preparation ■ Getting Started with Thomson Reuters APIs ■ Microsoft OneNote for Accounting Professionals ■ How to Schedule Fewer and Lead More Effective Meetings 	<ul style="list-style-type: none"> ■ Advanced Financial Statement Formatting Using the Accounting CS Report Designer ■ Tax Workflow Using Trial Balance Tools in Accounting CS and Workpapers CS ■ Moving Your Practice Forward ■ Introduction to AdvanceFlow – Workpapers and Trial Balance ■ Plan & Execute Audit Engagements using the Thomson Reuters Cloud Audit Suite ■ How healthy is your GoFileRoom and FirmFlow database - Is it Time for a Checkup? ■ Onvio Document Management Best Practices ■ Strategic Planning: Generating Revenue and Capacity Projections using Practice CS ■ Federal Tax Business Update ■ GoSystem Tax RS 1040 Specialty Tax ■ Leveraging the Best Features and Functions of UltraTax CS ■ Processing Multi-State Returns in UltraTax CS ■ UltraTax CS Navigation and Individual Tax Return Preparation ■ Using UltraTax CS and Onvio for your Firm's End-to-End Tax Workflow ■ Putting the Locks on Your Client Data 	<ul style="list-style-type: none"> ■ Taking Tax Integration to the Next Level with Onvio Trial Balance ■ From Cop to Accountant – Advisory Meets SWAT (Special Weapons And Tactics) ■ What are the top 10 advisory services in the industry that customers are seeking? ■ Fund Account Structures in AdvanceFlow ■ Execute a Successful Transition from FileCabinet CS to GoFileRoom ■ Tips for Increased Billing Efficiency in Practice CS ■ E-File Best Practices in Accounting CS ■ Introduction To Crypto ■ Partnership and Partner Reporting: K-1, K-2, K-3 – What's Next? ■ Technology Creates Opportunity in SALT ■ UltraTax CS Partnership Return Preparation ■ Unleash the Power of Checkpoint Edge ■ Microsoft Teams Essential Tips and Tricks ■ Train the Trainer – Improving Your Presentation Skills

ACCOUNTING ADVISORY AUDIT FIRM MANAGEMENT PAYROLL TAX & ASSET MANAGEMENT TECHNOLOGY TRENDING

*ALL TIMES LOCAL

THURSDAY 11/10			
Session D 9:30 am - 10:45 am 75 mins	Session E 11:10 am - 12:00 pm 50 mins	Session F 2:45 pm - 3:35 pm 50 mins	Session G 4:00 pm - 5:15 pm 75 mins
<ul style="list-style-type: none"> ■ Setting the Client Pace ■ Are You Ready for New A&A Standards and Their Impact on Your Practice? ■ Audit Planning and Risk Assessment ■ Checkpoint Engage through the Eyes of the Auditor ■ Uncover the Full Functionality of Checkpoint Engage ■ Hearing from your Onvio Firm Management Peers ■ Maintaining Project Integrity in Practice CS ■ Working with Power BI: FirmFlow and Practice Management Edition ■ Time-Saving Tips and Tricks with Onboarding New Payroll Clients in Accounting CS ■ Accrued Income Recognition: It's All About Timing ■ AdvanceFlow Options for Tax Engagements ■ Are You Taking Advantage of all the Features of Fixed Assets CS? ■ Data Mining within UltraTax CS for Advisory Opportunities ■ Federal Tax Research on Checkpoint Edge ■ GoSystem Tax RS Processing Schedule K2/K3 ■ UltraTax CS 2022 Update ■ Top 10 Microsoft Outlook Tips for Accounting Professionals ■ Achieving Success Through Daily Leadership ■ Building Strong Remote or Hybrid Work Environments ■ Hot Topics: An Editorial Panel Discussion ■ Retaining Top Talent Using Stay Interviews and Incentive Plans 	<ul style="list-style-type: none"> ■ What are the top 10 advisory services in the industry that customers are seeking? ■ Peer Review Hot Topics ■ Professional Ethics ■ Automate Your Processes with Microsoft PowerApps Using Your GoFileRoom Data ■ Effectively Communicating with Your Clients Through Onvio ■ Firm Administration Management in Practice CS: A Checklist Approach ■ Making the Most out of FirmFlow Reports ■ Client-Facing Tools to Better Serve Your Payroll Clients ■ Reuters Next: Interview with Jim Robnett, former Deputy Chief of IRS Criminal Division ■ UltraTax CS Advanced Business Topics ■ Unlocking the Puzzling World of Nonfungible Tokens (NFTs) ■ Microsoft Excel Pivot Tables 	<ul style="list-style-type: none"> ■ Grading and Evaluating Clients ■ Use Checkpoint to Power Your Role as Advisor ■ ESG (Environmental, Social, and Governance) Disclosures for Beginners ■ Data Analytics and Business Intelligence – Evolution of Auditing ■ Plan & Execute Preparation, Compilation and Review Engagements Using the Thomson Reuters Cloud Audit Suite ■ Configuring Your Dashboards in Practice CS ■ Reporting, Filtering and the Manage Screens in Practice CS ■ What's New in Onvio? ■ Payroll 2023: Federal and State Legislative Update ■ SECURE Act 2.0 – What's New ■ SurePrep Individual Tax Workflow and Integration with UltraTax CS ■ Tax Automation Tools that Earn 5 Stars from Staff and Clients ■ UltraTax CS Advanced Individual Topics ■ UltraTax CS Partnership Return Preparation ■ Introduction to Power BI / Power Platform ■ Brain Break: Trivia Time! ■ Back to the Basics of Marketing and Business Development ■ The Power of Authenticity and How it Drives High Performance 	<ul style="list-style-type: none"> ■ Time-Saving Tips and Tricks with Accounting CS General Ledger ■ Hear How your Peers Redefined Their Practice and Had Exponential Growth ■ Strategic Planning - Benchmarking and Goal Setting ■ Audit Confirmations: When and How to Gather External Evidence to Support Your Opinion Leveraging Confirmation ■ Moving your Audit & Assurance Practice from the Desktop to the Cloud ■ What went wrong? Recent Fraud Case Studies, and How Auditors Can Add Value Beyond the Internal Control Questionnaires ■ Become a Champion User and Dive Deeper with GoFileRoom and FirmFlow ■ Integrating Practice CS with the CS Professional Suite ■ Onvio Project Workflow Best Practices ■ Demystifying the Cryptic Tax Issues of Crypto and Virtual Currency ■ Federal Tax Individual Update ■ GoSystem Tax RS Import/Export Capabilities ■ Tax Return Troubleshooting in UltraTax CS ■ UltraTax CS 2022 Update ■ UltraTax CS Other Returns ■ I Took The Bait, Now What? ■ Risk Management: It's a Tech or Security Thing, Right? ■ Top 10 Microsoft Excel Tips for Accounting Professionals ■ Attracting and Retaining Talent in a Talent Strapped Economy ■ Guiding Technology Centered Change in Your Firm ■ The Mindful CPA

ACCOUNTING	ADVISORY	AUDIT	FIRM MANAGEMENT	PAYROLL	TAX & ASSET MANAGEMENT	TECHNOLOGY	TRENDING
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*ALL TIMES LOCAL

FRIDAY 11/11				
Session H 8:00 am - 8:50 am 50 mins	Session I 9:15 am - 10:55 am 100 mins	Session J 11:20 am - 12:10 pm 50 mins	Session K 2:45 pm - 3:35 pm 50 mins	Session L 4:00 pm - 5:15 pm 75 mins
<ul style="list-style-type: none"> ■ Taking Tax Integration to the Next Level with Onvio Trial Balance ■ What's New in Practice Forward ■ Data Analytics and Business Intelligence – Evolution of Auditing ■ What You Need to Know About Adopting the New Lease Standard ■ Execute a Successful Transition from FileCabinet CS to GoFileRoom ■ How to Customize Practice CS Using Custom Fields for Your Firm ■ Unemployment Issues & Solutions: How Thinking Smarter about Unemployment Can Help a Business Save ■ Communicating Results with Planner CS ■ GoSystem Tax RS Diagnostics and Review ■ Inflation Reduction Act: Setting the Tax Landscape ■ OneSource Income Tax Tips and Tricks ■ SurePrep Individual Tax Workflow and Integration with UltraTax CS ■ Unleash the Power of Checkpoint Edge ■ Getting Started with Thomson Reuters APIs ■ Beyond Pay and Benefits - The Ideal Environment for Retaining Talent ■ Brain Break: Mindful Meditation ■ The Power of Authenticity and How it Drives High Performance ■ How to Schedule Fewer and Lead More Effective Meetings 	<ul style="list-style-type: none"> ■ Advanced Financial Statement Formatting Using the Accounting CS Report Designer ■ Tax Workflow Using Trial Balance Tools in Accounting CS and Workpapers CS ■ Moving Your Practice Forward ■ Introduction to AdvanceFlow – Workpapers and Trial Balance ■ Plan & Execute Audit Engagements using the Thomson Reuters Cloud Audit Suite ■ How healthy is your GoFileRoom and FirmFlow database - Is it Time for a Checkup? ■ Onvio Document Management Best Practices ■ Strategic Planning: Generating Revenue and Capacity Projections using Practice CS ■ Federal Tax Business Update ■ Leveraging the Best Features and Functions of UltraTax CS ■ Processing Multi-State Returns in UltraTax CS ■ Using UltraTax CS and Onvio for your Firm's End-to-End Tax Workflow ■ Putting the Locks on Your Client Data ■ Planning for Exit: Selling to a Firm, Selling to Staff, or Deciding to Hold. How Do I Set Myself Up for Success? 	<ul style="list-style-type: none"> ■ ESG (Environmental, Social, and Governance) Disclosures for Beginners ■ Advisory Services in a 1040 Practice ■ Grading and Evaluating Clients ■ Use Checkpoint to Power Your Role as Advisor ■ Peer Review Hot Topics ■ Performing More Efficient Audits ■ Configuring Your Dashboards in Practice CS ■ Tips for Increased Billing Efficiency in Practice CS ■ What's New in Onvio? ■ Payroll 2023: Federal and State Legislative Update ■ OneSource Tax Provision (Version 2016) Basics ■ SECURE Act 2.0 – What's New ■ UltraTax CS Advanced Individual Topics ■ Unlocking the Puzzling World of Nonfungible Tokens (NFTs) ■ What's New in GoSystem Tax RS ■ Introduction to Power BI / Power Platform ■ Microsoft OneNote for Accounting Professionals ■ Brain Break: Trivia Time! ■ The Great Resignation: Leveraging a Frantic Talent Market to Create Heightened Awareness for Action 	<ul style="list-style-type: none"> ■ What's New in Practice Forward ■ Fund Account Structures in AdvanceFlow ■ Plan & Execute Preparation, Compilation and Review Engagements Using the Thomson Reuters Cloud Audit Suite ■ Automate Your Processes with Microsoft PowerApps Using Your GoFileRoom Data ■ Effectively Communicating with Your Clients Through Onvio ■ Firm Administration Management in Practice CS: A Checklist Approach ■ Making the Most out of FirmFlow Reports ■ Client-Facing Tools to Better Serve Your Payroll Clients ■ Automation & Public Accounting: How Tax Preparation is Evolving Through AI ■ GoSystem Tax RS Estimates and Extension ■ Introduction To Crypto ■ UltraTax CS Advanced Business Topics ■ UltraTax CS Corporate Return Preparation ■ Microsoft Excel Pivot Tables ■ Brain Break: Mindful Meditation ■ Train the Trainer – Improving Your Presentation Skills 	<ul style="list-style-type: none"> ■ Time-Saving Tips and Tricks with Onboarding New Payroll Clients in Accounting CS ■ Are You Ready for New A&A Standards and Their Impact on Your Practice? ■ Audit Planning and Risk Assessment ■ Checkpoint Engage through the Eyes of the Auditor ■ Moving your Audit & Assurance Practice from the Desktop to the Cloud ■ Become a Champion User and Dive Deeper with GoFileRoom and FirmFlow ■ Leveraging Onvio to Enhance your Firm's Work Style ■ Integrating Practice CS with the CS Professional Suite ■ Maintaining Project Integrity in Practice CS ■ Accrued Income Recognition: It's All About Timing ■ Are You Taking Advantage of all the Features of Fixed Assets CS? ■ Data Mining within UltraTax CS for Advisory Opportunities ■ Federal Tax Individual Update ■ Tax Return Troubleshooting in UltraTax CS ■ UltraTax CS 2022 Update ■ Risk Management: It's a Tech or Security Thing, Right? ■ Top 10 Microsoft Outlook Tips for Accounting Professionals ■ Achieving Success Through Daily Leadership ■ Building Strong Remote or Hybrid Work Environments ■ Hot Topics: An Editorial Panel Discussion ■ Retaining Top Talent Using Stay Interviews and Incentive Plans

ACCOUNTING ADVISORY AUDIT FIRM MANAGEMENT PAYROLL TAX & ASSET MANAGEMENT TECHNOLOGY TRENDING

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SATURDAY 11/12	
Session M 9:00 am - 9:50 am 50 mins	Session N 10:15 am - 11:30 am 75 mins
<ul style="list-style-type: none"> ■ Professional Ethics ■ Integrating Onvio with the CS Professional Suite ■ Reporting, Filtering and the Manage Screens in Practice CS ■ E-File Best Practices in Accounting CS ■ Introduction to Alteryx ■ Partnership and Partner Reporting: K-1, K-2, K-3 – What’s Next? ■ Tax Research - Best Practices ■ UltraTax CS Fiduciary Tax Return Preparation ■ Microsoft Teams Essential Tips and Tricks ■ Back to the Basics of Marketing and Business Development ■ Getting Out of your Own Way: The Secret to Executing Change in your Firm 	<ul style="list-style-type: none"> ■ Time-Saving Tips and Tricks with Accounting CS General Ledger ■ Strategic Planning - Benchmarking and Goal Setting ■ Audit Confirmations: When and How to Gather External Evidence to Support Your Opinion Leveraging Confirmation ■ Uncover the Full Functionality of Checkpoint Engage ■ What went wrong? Recent Fraud Case Studies, and How Auditors Can Add Value Beyond the Internal Control Questionnaires ■ Onvio Project Workflow Best Practices ■ Working with Power BI: FirmFlow and Practice Management Edition ■ AdvanceFlow Options for Tax Engagements ■ Demystifying the Cryptic Tax Issues of Crypto and Virtual Currency ■ Federal Tax Research on Checkpoint Edge ■ UltraTax CS Other Returns ■ I Took The Bait, Now What? ■ Top 10 Microsoft Excel Tips for Accounting Professionals ■ Attracting and Retaining Talent in a Talent Strapped Economy ■ Guiding Technology Centered Change in Your Firm

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Virtual

Agenda & Session Schedule

TUESDAY 11/8	
10:00 am - 10:50 am	Session A
11:00 am - 11:50 am	Session B
12:00 pm - 1:40 pm	Session C
2:00 pm - 2:50 pm	Session D
3:00 pm - 4:15 pm	Session E
5:00 pm - 5:50 pm	Roundtables

WEDNESDAY 11/9	
10:00 am - 10:50 am	Session F
11:00 am - 11:50 am	Session G
12:00 pm - 1:40 pm	Session H
2:00 pm - 2:50 pm	Session I
3:00 pm - 4:15 pm	Session J
5:00 pm - 5:50 pm	Roundtables

THURSDAY 11/10	
10:00 am - 10:50 am	Session K
11:00 am - 11:50 am	Session L
12:00 pm - 1:00 pm	General Session 1 Replay
2:00 pm - 3:15 pm	Session M
4:00 pm - 5:00 pm	General Session 2 Replay

FRIDAY 11/11	
10:00 am - 10:50 am	Session N
11:00 am - 11:50 am	Session O
12:00 pm - 1:40 pm	Session P
2:00 pm - 3:15 pm	Session Q
4:00 pm - 5:00 pm	General Session 3 Replay

TUESDAY 11/8				
Session A 10:00 am - 10:50 am 50 mins	Session B 11:00 am - 11:50 am 50 mins	Session C 12:00 pm - 1:40 pm 100 mins	Session D 2:00 pm - 2:50 pm 50 mins	Session E 3:00 pm - 4:15 pm 75 mins
<ul style="list-style-type: none"> ■ Integrating Onvio with the CS Professional Suite ■ Partnership and Partner Reporting: K-1, K-2, K-3 – What’s Next? ■ Unleash the Power of Checkpoint Edge ■ Microsoft Excel Pivot Tables 	<ul style="list-style-type: none"> ■ Professional Ethics ■ Execute a Successful Transition from FileCabinet CS to GoFileRoom ■ Firm Administration Management in Practice CS: A Checklist Approach ■ Client-Facing Tools to Better Serve Your Payroll Clients ■ Introduction To Crypto ■ Microsoft OneNote for Accounting Professionals 	<ul style="list-style-type: none"> ■ Tax Workflow Using Trial Balance Tools in Accounting CS and Workpapers CS ■ Moving Your Practice Forward ■ Plan & Execute Audit Engagements using the Thomson Reuters Cloud Audit Suite ■ How healthy is your GoFileRoom and FirmFlow database - Is it Time for a Checkup? ■ GoSystem Tax RS 1040 Specialty Tax ■ UltraTax CS Navigation and Individual Tax Return Preparation ■ Using UltraTax CS and Onvio for your Firm’s End-to-End Tax Workflow 	<ul style="list-style-type: none"> ■ Taking Tax Integration to the Next Level with Onvio Trial Balance ■ Use Checkpoint to Power Your Role as Advisor ■ Performing More Efficient Audits ■ Configuring Your Dashboards in Practice CS ■ UltraTax CS Advanced Business Topics ■ Unlocking the Puzzling World of Nonfungible Tokens (NFTs) 	<ul style="list-style-type: none"> ■ Time-Saving Tips and Tricks with Accounting CS General Ledger ■ Audit Confirmations: When and How to Gather External Evidence to Support Your Opinion Leveraging Confirmation ■ Uncover the Full Functionality of Checkpoint Engage ■ Become a Champion User and Dive Deeper with GoFileRoom and FirmFlow ■ Integrating Practice CS with the CS Professional Suite ■ AdvanceFlow Options for Tax Engagements ■ Are You Taking Advantage of all the Features of Fixed Assets CS? ■ GoSystem Tax RS Processing Schedule K2/K3 ■ Tax Return Troubleshooting in UltraTax CS ■ Achieving Success Through Daily Leadership

WEDNESDAY 11/9				
Session F 10:00 am - 10:50 am 50 mins	Session G 11:00 am - 11:50 am 50 mins	Session H 12:00 pm - 1:40 pm 100 mins	Session I 2:00 pm - 2:50 pm 50 mins	Session J 3:00 pm - 4:15 pm 75 mins
<ul style="list-style-type: none"> ■ Fund Account Structures in AdvanceFlow ■ Tips for Increased Billing Efficiency in Practice CS ■ E-File Best Practices in Accounting CS ■ Inflation Reduction Act: Setting the Tax Landscape ■ Getting Started with Thomson Reuters APIs ■ Back to the Basics of Marketing and Business Development 	<ul style="list-style-type: none"> ■ Payroll 2023: Federal and State Legislative Update ■ UltraTax CS Partnership Return Preparation ■ What's New in GoSystem Tax RS ■ Introduction to Power BI / Power Platform ■ Microsoft Teams Essential Tips and Tricks ■ The Power of Authenticity and How it Drives High Performance 	<ul style="list-style-type: none"> ■ Moving Your Practice Forward ■ Introduction to AdvanceFlow – Workpapers and Trial Balance ■ Plan & Execute Audit Engagements using the Thomson Reuters Cloud Audit Suite ■ How healthy is your GoFileRoom and FirmFlow database - Is it Time for a Checkup? ■ Onvio Document Management Best Practices ■ Federal Tax Business Update ■ Leveraging the Best Features and Functions of UltraTax CS 	<ul style="list-style-type: none"> ■ What's New in Practice Forward ■ What You Need to Know About Adopting the New Lease Standard ■ What's New in Onvio? ■ Tax Research - Best Practices ■ UltraTax CS Corporate Return Preparation ■ Train the Trainer – Improving Your Presentation Skills 	<ul style="list-style-type: none"> ■ Are You Ready for New A&A Standards and Their Impact on Your Practice? ■ Checkpoint Engage through the Eyes of the Auditor ■ Working with Power BI: FirmFlow and Practice Management Edition ■ Time-Saving Tips and Tricks with Onboarding New Payroll Clients in Accounting CS ■ Accrued Income Recognition: It's All About Timing ■ Are You Taking Advantage of all the Features of Fixed Assets CS? ■ GoSystem Tax RS Import/Export Capabilities ■ UltraTax CS 2022 Update ■ Building Strong Remote or Hybrid Work Environments ■ Guiding Technology Centered Change in Your Firm







THURSDAY 11/10		
Session K 10:00 am - 10:50 am 50 mins	Session L 11:00 am - 11:50 am 50 mins	Session M 2:00 pm - 3:15 pm 75 mins
<ul style="list-style-type: none"> ■ Grading and Evaluating Clients ■ Professional Ethics ■ Automate Your Processes with Microsoft PowerApps Using Your GoFileRoom Data ■ Reporting, Filtering and the Manage Screens in Practice CS ■ GoSystem Tax RS Estimates and Extension ■ SurePrep Individual Tax Workflow and Integration with UltraTax CS ■ UltraTax CS Advanced Business Topics ■ Train the Trainer – Improving Your Presentation Skills 	<ul style="list-style-type: none"> ■ What are the top 10 advisory services in the industry that customers are seeking? ■ Peer Review Hot Topics ■ Effectively Communicating with Your Clients Through Onvio ■ How to Customize Practice CS Using Custom Fields for Your Firm ■ Unemployment Issues & Solutions: How Thinking Smarter about Unemployment Can Help a Business Save ■ UltraTax CS Advanced Individual Topics ■ How to Schedule Fewer and Lead More Effective Meetings 	<ul style="list-style-type: none"> ■ What went wrong? Recent Fraud Case Studies, and How Auditors Can Add Value Beyond the Internal Control Questionnaires ■ Audit Planning and Risk Assessment ■ Onvio Project Workflow Best Practices ■ Federal Tax Individual Update ■ Federal Tax Research on Checkpoint Edge ■ UltraTax CS Other Returns ■ I Took The Bait, Now What? ■ Top 10 Microsoft Excel Tips for Accounting Professionals ■ Retaining Top Talent Using Stay Interviews and Incentive Plans ■ The Mindful CPA





FRIDAY 11/11			
Session N 10:00 am - 10:50 am 50 mins	Session O 11:00 am - 11:50 am 50 mins	Session P 12:00 pm - 1:40 pm 100 mins	Session Q 2:00 pm - 3:15 pm 75 mins
<ul style="list-style-type: none"> ■ ESG (Environmental, Social, and Governance) Disclosures for Beginners ■ Plan & Execute Preparation, Compilation and Review Engagements Using the Thomson Reuters Cloud Audit Suite ■ Making the Most out of FirmFlow Reports ■ SECURE Act 2.0 – What’s New ■ SurePrep Individual Tax Workflow and Integration with UltraTax CS ■ Microsoft Excel Pivot Tables 	<ul style="list-style-type: none"> ■ What’s New in Practice Forward ■ Data Analytics and Business Intelligence – Evolution of Auditing ■ What’s New in Onvio? ■ GoSystem Tax RS Diagnostics and Review ■ UltraTax CS Advanced Individual Topics ■ UltraTax CS Fiduciary Tax Return Preparation ■ How to Schedule Fewer and Lead More Effective Meetings 	<ul style="list-style-type: none"> ■ Advanced Financial Statement Formatting Using the Accounting CS Report Designer ■ Strategic Planning: Generating Revenue and Capacity Projections using Practice CS ■ Federal Tax Business Update ■ Leveraging the Best Features and Functions of UltraTax CS ■ Processing Multi-State Returns in UltraTax CS ■ Using UltraTax CS and Onvio for your Firm’s End-to-End Tax Workflow ■ Putting the Locks on Your Client Data 	<ul style="list-style-type: none"> ■ Strategic Planning - Benchmarking and Goal Setting ■ Moving your Audit & Assurance Practice from the Desktop to the Cloud ■ Maintaining Project Integrity in Practice CS ■ Data Mining within UltraTax CS for Advisory Opportunities ■ Demystifying the Cryptic Tax Issues of Crypto and Virtual Currency ■ Federal Tax Individual Update ■ UltraTax CS 2022 Update ■ Top 10 Microsoft Outlook Tips for Accounting Professionals ■ Attracting and Retaining Talent in a Talent Strapped Economy





*ALL VIRTUAL AGENDA TIMES HOSTED IN THE EASTERN TIME ZONE






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Session Catalog







ACCOUNTING SESSIONS	DESCRIPTION	DATES/TIMES (EST)
<p>Advanced Financial Statement Formatting Using the Accounting CS Report Designer</p> <p>TAP22001-IP1, TAP22001-IP2 TAP22001-V1</p> <p><i>CPE Field of Study: Accounting – Technical</i></p> <p>  2 CPE</p> <p>LEVEL: Advanced</p>	<p>In this session, you will learn about advanced features within the Accounting CS Report Designer to further customize your clients’ financial statements.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Customize date formats • Create formulas for account groupings • Use conditional expressions to alter the output of variables • Create departmental and location-based statements • Insert and format charts • Add variances and ratios to statements <p>PREREQUISITES: Participants should have a basic knowledge of Accounting CS including bookkeeping/trial balance processes, as well as experience modifying statements in the Accounting CS Report Designer.</p>	<p>IN-PERSON: 11/9 2:20 pm - 4:00 pm (100 min) 11/11 9:15 am - 10:55 am (100 min)</p> <p>VIRTUAL: 11/11 12:00 pm - 1:40 pm (100 min)</p>
<p>ESG (Environmental, Social, and Governance) Disclosures for Beginners</p> <p>TAP22002-IP1, TAP22002-IP2 TAP22002-V1</p> <p><i>CPE Field of Study: Accounting – Technical</i></p> <p>  1 CPE</p> <p>LEVEL: Overview</p> <p><i>NEW SESSION FOR 2022</i></p>	<p>In this session, you will learn about ESG (Environmental, Social, and Governance), where practice and regulators stand, and what disclosures may be required in the future.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Articulate what ESG disclosures are about • Understand who the main standard setters in that field are • Hold a conversation with your clients on where regulations stand • Have a better idea of the disclosures that may be required of your clients 	<p>IN-PERSON: 11/10 2:45 pm - 3:35 pm (50 min) 11/11 11:20 am - 12:10 pm (50 min)</p> <p>VIRTUAL: 11/11 10:00 am - 10:50 am (50 min)</p>
<p>Taking Tax Integration to the Next Level with Onvio Trial Balance</p> <p>TAP22003-IP1, TAP22003-IP2 TAP22003-V1</p> <p><i>CPE Field of Study: Taxes – Technical</i></p> <p>  1 CPE</p> <p>LEVEL: Basic</p> <p><i>NEW SESSION FOR 2022</i></p>	<p>During this session, your firm will learn how to efficiently import, enter, and adjust your client’s trial balance to import into your tax software.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Import trial balance accounts and balances to quickly establish and update your client’s charts of accounts • Utilize tax code automation built with artificial intelligence (AI) to remember and better predict tax code assignment • Add tax adjustments and tax code groupings to ensure that all balances flow to the proper lines of your client returns • Customize Tax and GAAP views in your trial balance screen to easily access the data that you need • Review and confirm data through reports and using tickmarks in the trial balance <p>PREREQUISITES: Participants should be familiar with using the trial balance within Onvio.</p>	<p>IN-PERSON: 11/9 4:25 pm - 5:15 pm (50 min) 11/11 8:00 am - 8:50 am (50 min)</p> <p>VIRTUAL: 11/8 2:00 pm - 2:50 pm (50 min)</p>









ACCOUNTING SESSIONS	DESCRIPTION	DATES/TIMES (EST)
<p>Tax Workflow Using Trial Balance Tools in Accounting CS and Workpapers CS</p> <p>TAP22004-IP1, TAP22004-IP2 TAP22004-V1</p> <p><i>CPE Field of Study: Taxes – Technical</i></p> <p>  2 CPE</p> <p>LEVEL: Intermediate</p>	<p>In this session, you will learn about time-saving features in Accounting CS and Workpapers CS that speed year end processing for your business clients.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Add a client’s chart of accounts and account balances via Excel Spreadsheet Import • Identify and assign tax coding for integration with UltraTax CS using account grouping and standard account mapping • Import depreciation journal entries from Fixed Assets CS • Enter Tax Code Adjustments (Tax Reconciliation) • Utilize the Analyze Client Activity on-screen review tool • Print a set of financial statements • Integrate the Trial Balance with UltraTax CS <p>PREREQUISITES: Participants should have a basic knowledge of Accounting CS or Workpapers CS, as well as knowledge on UltraTax CS and (if applicable) Fixed Assets CS.</p>	<p>IN-PERSON: 11/9 2:20 pm - 4:00 pm (100 min) 11/11 9:15 am - 10:55 am (100 min)</p> <p>VIRTUAL: 11/8 12:00 pm - 1:40 pm (100 min)</p>
<p>Time-Saving Tips and Tricks with Accounting CS General Ledger</p> <p>TAP22005-IP1, TAP22005-IP2 TAP22005-V1</p> <p><i>CPE Field of Study: Accounting – Technical</i></p> <p>  1.5 CPE</p> <p>LEVEL: Intermediate</p> <p><i>NEW SESSION FOR 2022</i></p>	<p>In this session, we’ll go beyond the basics to demonstrate various tips and tricks with Accounting CS General Ledger to help boost your bookkeeping efficiency.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Understanding Bank Feeds Dashboard to import transactions • Utilize templates to help standardize your workflow • Use application tools to help analyze client data • Import transactions from spreadsheets • Create report profiles for efficient report output <p>PREREQUISITES: Participants should be familiar with setting up a client and understand basic accounting processing procedures in Accounting CS.</p>	<p>IN-PERSON: 11/10 4:00 pm - 5:15 pm (75 min) 11/12 10:15 am - 11:30 am (75 min)</p> <p>VIRTUAL: 11/8 3:00 pm - 4:15 pm (75 min)</p>







ADVISORY SESSIONS	DESCRIPTION	DATES/TIMES (EST)
<p>Advisory Services in a 1040 Practice</p> <p>TAP22007-IP1</p> <p><i>CPE Field of Study: Business Management & Organization</i></p> <p> 1 CPE</p> <p>LEVEL: Basic</p> <p><i>NEW SESSION FOR 2022</i></p>	<p>In this session, Brittany Lanphier will discuss the development and delivery of advisory services for individual tax clients. It is a myth that the advisory firm model only applies to business clients! You will learn about the many opportunities available to provide value to your individual tax clients through proactive tax planning and education. Brittany will discuss her process for identifying these advisory service opportunities in new and existing clients, packaging and pricing those services, and delivering effectively on those services with your clients.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Identify the best individual advisory opportunities for their firm based on their existing strengths • Develop a plan of action for developing those services within your firm. 	<p>IN-PERSON: 11/11 11:20 am - 12:10 pm (50 min)</p>
<p>From Cop to Accountant – Advisory Meets SWAT (Special Weapons And Tactics)</p> <p>TAP22120-IP1</p> <p><i>CPE Field of Study: Business Management & Organization</i></p> <p> 1 CPE</p> <p>LEVEL: Basic</p> <p><i>NEW SESSION FOR 2022</i></p>	<p>In this session you will learn how a traditional Accounting firm transformed their business model using the Practice Forward methodology and the team structures utilized by SWAT that was the catalyst to running a profitable and efficient firm. You will learn the strategy they used to redesign the team structure while offering advisory and compliance services, as well as the benefits they gained by using non-traditional roles to staff their firm. This yielded higher profits, improved efficiencies and a desirable culture.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Discuss how to redesign your firm with a new team structure • Identify the benefits of hiring someone with non-tradition accounting background • Shift staff roles for improved effectiveness • Build better culture with trust using your new firm model 	<p>IN-PERSON: 11/9 4:25 pm - 5:15 pm (50 min)</p>
<p>Grading and Evaluating Clients</p> <p>TAP22008-IP1, TAP22008-IP2 TAP22008-V1</p> <p><i>CPE Field of Study: Business Management & Organization</i></p> <p>  1 CPE</p> <p>LEVEL: Advanced</p> <p><i>NEW SESSION FOR 2022</i></p>	<p>Are you looking for more time to work on developing your firm? One way firms are finding more time is by taking a closer look at their client base, categorizing clients, grading clients, deciding on the best plan for retaining the clients that meet their ideal client persona, and deciding on a plan for tactfully transitioning clients out of the firm who no longer fit their ideal client persona.</p> <p>In this session, you will learn how to utilize the Practice Forward Tools to grade and evaluate clients. The session will address the ideal timing, ideal client persona, and ideal process for initiating a grading and evaluation initiative in your firm. In addition, the session will address the process of transitioning those clients that no longer fit the firm's ideal client persona out of the firm.</p> <p>Upon completion of this session, you will be able to:</p> <ul style="list-style-type: none"> • Implement a Grading and Evaluation Initiative for your firm • Create a transition plan for those clients that no longer fit the firm's ideal client persona • Utilize the Practice Forward tools for grading, evaluating and transitioning clients. <p>PREREQUISITES: This session is designed for Practice Forward firms who have an existing client base and desire more time for developing the firm.</p>	<p>IN-PERSON: 11/10 2:45 pm - 3:35 pm (50 min) 11/11 11:20 am - 12:10 pm (50 min)</p> <p>VIRTUAL: 11/10 10:00 am - 10:50 am (50 min)</p>







ADVISORY SESSIONS	DESCRIPTION	DATES/TIMES (EST)
<p>Hear How your Peers Redefined Their Practice and Had Exponential Growth</p> <p>TAP22009-IP1</p> <p><i>CPE Field of Study: Business Management & Organization</i></p> <p> 1.5 CPE</p> <p>LEVEL: Overview</p> <p><i>NEW SESSION FOR 2022</i></p>	<p>In this panel discussion, you'll hear from your Practice Forward peers who will share the perspective they've gained as a result of offering advisory services. Discussions can range from how they implemented pieces of Advisory methodology to sharing their expertise on how they strengthened their client relationships to utilizing the documents within the Practice Forward library to engage their clients in Advisory services.</p> <p>Upon completion of this session, participants will be able to leverage the knowledge obtained during the hosted discussion.</p> <p>PREREQUISITES: Participants should be interested in implementing Advisory in their firm or be a current member of Practice Forward.</p>	<p>IN-PERSON: 11/10 4:00 pm - 5:15 pm (75 min)</p>
<p>Moving Your Practice Forward</p> <p>TAP22010-IP1, TAP22010-IP2 TAP22010-V1, TAP22010-V2</p> <p><i>CPE Field of Study: Business Management & Organization</i></p> <p>  2 CPE</p> <p>LEVEL: Overview</p>	<p>How are you getting paid for the value (e.g., ideas, strategies, and solutions) you bring to your clients separate from the physical compliance deliverables? How are you defining the clarity and setting the proper expectations in your client relationships? How are you creating highly duplicable services to help your clients reach their financial goals and aspirations? In this session, you will learn how to take steps to enhance clarity in client relationships, improve margins, and create a progressive set of new client services that extend beyond compliance work. We will share our consulting experiences with planning a business model shift, including identifying monetizable new client services, adopting supportive technology and workflow, and much more.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Better define the scope of your client engagements • Create a structured billing strategy • Develop a standardized advisory offering 	<p>IN-PERSON: 11/9 2:20 pm - 4:00 pm (100 min) 11/11 9:15 am - 10:55 am (100 min)</p> <p>VIRTUAL: 11/8 12:00 pm - 1:40 pm (100 min) 11/9 12:00 pm - 1:40 pm (100 min)</p>
<p>Practice Forward Connect</p> <p>TAP22011-IP1</p> <p><i>CPE Field of Study: Business Management & Organization</i></p> <p> 3 CPE</p> <p>LEVEL: Overview</p> <p><i>NEW SESSION FOR 2022</i></p>	<p>In this session, join your peers and Practice Forward consultants as you participate in advisory focused learning, networking, and dynamic interactive collaboration. Share your expertise and learn from others at this exclusive in-person Practice Forward membership event.</p> <p>Upon completion of this session, participants will be able to leverage the knowledge obtained.</p> <p>PREREQUISITES: Participants must be current members of Practice Forward.</p>	<p>IN-PERSON: 11/9 8:30 am - 12:30 pm (240 min)</p>
<p>Setting the Client Pace</p> <p>TAP22012-IP1</p> <p><i>CPE Field of Study: Business Management & Organization</i></p> <p> 1.5 CPE</p> <p>LEVEL: Advanced</p> <p><i>NEW SESSION FOR 2022</i></p>	<p>Over the last few years firms have sometimes struggled with the feeling that their clients are dictating the relationship with the firm as opposed to the firm managing the relationship. In this session, you will learn how to set the pace of your relationships with your clients through the use of improved communications and expectation setting to better manage resources and gain efficiencies.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Define Client Pacing and it's benefits to both the clients and the firm • Utilize tools in the Practice Forward Content to improve communication with clients to set expectations • Develop a Client Pacing strategy for your firm <p>PREREQUISITES: It is encouraged that participants are current members of Practice Forward and have a working knowledge of the Practice Forward library of documents, but it is not a requirement to attend the session.</p>	<p>IN-PERSON: 11/10 9:30 am - 10:45 am (75 min)</p>







ADVISORY SESSIONS	DESCRIPTION	DATES/TIMES (EST)
<p>Strategic Planning – Benchmarking and Goal Setting</p> <p>TAP22013-IP1, TAP22013-IP2 TAP22013-V1</p> <p><i>CPE Field of Study: Business Management & Organization</i></p> <p>  1.5 CPE</p> <p>LEVEL: Advanced NEW SESSION FOR 2022</p>	<p>As your firm continues to embrace the Practice Forward methodologies by identifying the right types of clients to serve and developing your advisory services, it is also time to begin strategically setting goals to continue to grow your practice in the right direction. In this session, you will learn how to use the Practice Forward Tools to assist in your firm’s strategic planning initiatives. What does the firm’s client base look like in 2 years and beyond? What are the desired revenue goals 2 years and beyond? This session will address the setting of goals and the measurement and monitoring of goals.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Utilize the Practice Forward tools to create goals for continued Advisory growth • Implement the measurement and monitoring strategies into your firm’s current processes and procedures <p>PREREQUISITES: It is encouraged that participants are current members of Practice Forward and have a working knowledge of the Practice Forward methodology, but it is not a requirement to attend the session.</p>	<p>IN-PERSON: 11/10 4:00 pm - 5:15 pm (75 min) 11/12 10:15 am - 11:30 am (75 min)</p> <p>VIRTUAL: 11/12 2:00 pm - 3:15 pm (75 min)</p>
<p>Use Checkpoint to Power Your Role as Advisor</p> <p>TAP22014-IP1, TAP22014-IP2 TAP22014-V1</p> <p><i>CPE Field of Study: Computer Software & Applications</i></p> <p>  1 CPE</p> <p>LEVEL: Intermediate NEW SESSION FOR 2022</p>	<p>This session is recommended for anyone who is interested in expanding their existing Advisory services, or is new to Advisory and wants to learn more about this rapidly growing service. During this session, you will learn about the Tax Planning and Advisory content available on Checkpoint Classic and Checkpoint Edge and what to expect in future Advisory content.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Explain how to find Tax Planning & Advisory content on Checkpoint Classic and Checkpoint Edge • Demonstrate how to link to Tax & Advisory content from within other documents • Describe what you can expect from future Advisory content on Checkpoint Classic and Checkpoint Edge 	<p>IN-PERSON: 11/10 2:45 pm - 3:35 pm (50 min) 11/11 11:20 am - 12:10 pm (50 min)</p> <p>VIRTUAL: 11/8 2:00 pm - 2:50 pm (50 min)</p>
<p>What are the top 10 advisory services in the industry that customers are seeking?</p> <p>TAP22015-IP1, TAP22015-IP2 TAP22015-V1</p> <p><i>CPE Field of Study: Business Management & Organization</i></p> <p>  1 CPE</p> <p>LEVEL: Advanced NEW SESSION FOR 2022</p>	<p>Attending this session will help you move your Advisory Services offerings beyond the base level by exploring the top 10 Advisory services sought after by clients.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Leverage the information gained with their current advisory offerings • Execute a plan for enhancing your existing offerings or creating new offerings. <p>PREREQUISITES: It is encouraged that participants are current members of Practice Forward and have a working knowledge of the Practice Forward library of documents, but it is not a requirement to attend the session.</p>	<p>IN-PERSON: 11/9 4:25 pm - 5:15 pm (50 min) 11/10 11:10 am - 12:00 pm (50 min)</p> <p>VIRTUAL: 11/10 11:00 am - 11:50 am (50 min)</p>







ADVISORY SESSIONS	DESCRIPTION	DATES/TIMES (EST)
<p>What's New in Practice Forward</p> <p>TAP22016-IP1, TAP22016-IP2 TAP22016-V1, TAP22016-V2</p> <p><i>CPE Field of Study: Business Management & Organization</i></p> <p>  1 CPE</p> <p>LEVEL: Update</p> <p>NEW SESSION FOR 2022</p>	<p>In this session, you will learn about the new additions to Practice Forward for 2022. This will assist your firm in growing your Advisory business in an efficient and deliberate manner.</p> <p>Upon completion of this session, you will walk away with knowledge of the new additions to Practice Forward content and begin to incorporate the new tools into your firm's library of Advisory tools.</p> <p>PREREQUISITES: Participants should be current members of Practice Forward and have a working knowledge of the Practice Forward library of documents.</p>	<p>IN-PERSON: 11/11 8:00 am - 8:50 am (50 min) 11/11 2:45 pm - 3:35 pm (50 min)</p> <p>VIRTUAL: 11/9 2:00 pm - 2:50 pm (50 min) 11/11 11:00 am - 11:50 am (50 min)</p>
AUDITING SESSIONS	DESCRIPTION	DATES/TIMES (EST)
<p>Are You Ready for New A&A Standards and Their Impact on Your Practice?</p> <p>TAP22018-IP1, TAP22018-IP2 TAP22018-V1</p> <p><i>CPE Field of Study: Accounting – Technical</i></p> <p>  1.5 CPE</p> <p>LEVEL: Intermediate</p> <p>NEW SESSION FOR 2022</p>	<p>In this session, you will learn new and newly adopted and effective accounting and auditing standards.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Describe recent updates to GAAP and GAAS guidance • Evaluate the applicability of new accounting and auditing standards to your practice and your clients • Share this information with other members of your team 	<p>IN-PERSON: 11/10 9:30 am - 10:45 am (75 min) 11/11 4:00 pm - 5:15 pm (75 min)</p> <p>VIRTUAL: 11/9 3:00 pm - 4:15 pm (75 min)</p>
<p>Audit Confirmations: When and How to Gather External Evidence to Support Your Opinion Leveraging Confirmation</p> <p>TAP22019-IP1, TAP22019-IP2 TAP22019-V1</p> <p><i>CPE Field of Study: Audit – Technical</i></p> <p>  1.5 CPE</p> <p>LEVEL: Intermediate</p>	<p>This session will discuss the importance of obtaining evidence from external information sources on an audit, key relevant guidance (SAS 142 effective 12/31/22), and how to utilize Confirmation to perform electronic confirmations for effectiveness and efficiency.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Explain why teams should obtain external evidence via confirmations • List audit areas that are conducive to audit confirmations • Describe how Confirmation can be used to centralize and simplify electronic confirmations • Discuss how to use Confirmation to obtain client authorization, initiate requests, and retrieve responses for electronic confirmations <p>PREREQUISITES: Participants should have a working knowledge of audits.</p>	<p>IN-PERSON: 11/10 4:00 pm - 5:15 pm (75 min) 11/12 10:15 am - 11:30 am (75 min)</p> <p>VIRTUAL: 11/8 3:00 pm - 4:15 pm (75 min)</p>







AUDITING SESSIONS	DESCRIPTION	DATES/TIMES (EST)
<p>Audit Planning and Risk Assessment</p> <p>TAP22020-IP1, TAP22020-IP2 TAP22020-V1</p> <p><i>CPE Field of Study: Audit – Technical</i></p> <p>  1.5 CPE</p> <p>LEVEL: Basic</p>	<p>This session will discuss the front of file–audit planning from client acceptance / continuance, calculating materiality, gathering information about the client, and performing effective and efficient risk assessments for private company audits.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • List steps for client acceptance and continuance • Describe the PPC approach for materiality • List and discuss how auditors gain an understanding and the entity • Identify risks of material misstatements while gaining an understanding of the entity and its environment 	<p>IN-PERSON: 11/10 9:30 am - 10:45 am (75 min) 11/11 4:00 pm - 5:15 pm (75 min)</p> <p>VIRTUAL: 11/10 2:00 pm - 3:15 pm (75 min)</p>
<p>Checkpoint Engage through the Eyes of the Auditor</p> <p>TAP22021-IP1, TAP22021-IP2 TAP22021-V1</p> <p><i>CPE Field of Study: Audit – Technical</i></p> <p>  1.5 CPE</p> <p>LEVEL: Intermediate</p> <p><i>NEW SESSION FOR 2022</i></p>	<p>Take the next steps to perform consistent, high quality, efficient audits. An audit expert will share suggestions, guidance and best practices to fully utilize this cloud-based audit platform.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Describe best practices to performing effective and efficient risk-based audit procedures using Checkpoint Engage • List benefits of using a cloud-based solution on your audits 	<p>IN-PERSON: 11/10 9:30 am - 10:45 am (75 min) 11/11 4:00 pm - 5:15 pm (75 min)</p> <p>VIRTUAL: 11/9 3:00 pm - 4:15 pm (75 min)</p>
<p>Data Analytics and Business Intelligence – Evolution of Auditing</p> <p>TAP22022-IP1, TAP22022-IP2 TAP22022-V1</p> <p><i>CPE Field of Study: Audit – Technical</i></p> <p>  1 CPE</p> <p>LEVEL: Basic</p> <p><i>NEW SESSION FOR 2022</i></p>	<p>In this session, we will discuss the direction of the profession like artificial intelligence, electronic verification, continuous auditing concepts, audit analytics, and Thomson Reuters products and platforms support that migration.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Describe how future audits may change with a data driven approach • Identify how TR products and platforms will enhance the audit of the future • Share this information with other members of their team 	<p>IN-PERSON: 11/10 2:45 pm - 3:35 pm (50 min) 11/11 8:00 am - 8:50 am (50 min)</p> <p>VIRTUAL: 11/11 11:00 am - 11:50 am (50 min)</p>
<p>Fund Account Structures in AdvanceFlow</p> <p>TAP22023-IP1, TAP22023-IP2 TAP22023-V1</p> <p><i>CPE Field of Study: Audit – Technical</i></p> <p>  1 CPE</p> <p>LEVEL: Intermediate</p>	<p>In this session, you will see how to effectively create and utilize fund engagements in AdvanceFlow.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Set up fund engagements in AdvanceFlow • Utilize fund reports • Use funds in financial statements <p>PREREQUISITES: Participants should be familiar with navigating the trial balance area of AdvanceFlow.</p>	<p>IN-PERSON: 11/9 4:25 pm - 5:15 pm (50 min) 11/11 2:45 pm - 3:35 pm (50 min)</p> <p>VIRTUAL: 11/9 10:00 am - 10:50 am (50 min)</p>






AUDITING SESSIONS	DESCRIPTION	DATES/TIMES (EST)
<p>Introduction to AdvanceFlow – Workpapers and Trial Balance</p> <p>TAP22024-IP1, TAP22024-IP2 TAP22024-V1</p> <p><i>CPE Field of Study: Computer Software & Applications</i></p> <p>  2 CPE</p> <p>LEVEL: Basic</p>	<p>In this session, we will discuss the many facets of the Trial Balance in AdvanceFlow. This includes importing and manipulating trial balance data. You will also see how to add workpapers in AdvanceFlow including: leadsheets, reports, Checkpoint Tools documents, and more.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Navigate in AdvanceFlow • Import trial balance data • Manipulate trial balance data • Enter journal entries • Add workpapers to AdvanceFlow • Edit documents from AdvanceFlow • Use annotating tools in Adobe 	<p>IN-PERSON: 11/9 2:20 pm - 4:00 pm (100 min) 11/11 9:15 am - 10:55 am (100 min)</p> <p>VIRTUAL: 11/9 12:00 pm - 1:40 pm (100 min)</p>
<p>Moving your Audit & Assurance Practice from the Desktop to the Cloud</p> <p>TAP22025-IP1, TAP22025-IP2 TAP22025-V1</p> <p><i>CPE Field of Study: Computer Software & Applications</i></p> <p>  1.5 CPE</p> <p>LEVEL: Overview</p> <p>NEW SESSION FOR 2022</p>	<p>Are creating efficiencies, and providing improved client service, goals for your firm? If so, now is the time to move your firm from the desktop to the cloud. In this session, we will uncover how to maximize efficiencies with Checkpoint Engage – independent of your firm’s use of engagement management software.</p> <p>Upon completion, participants will be able to:</p> <ul style="list-style-type: none"> • Understand the benefits of using Checkpoint Engage, Thomson Reuters’ cloud-based audit solution • Maximize management of Checkpoint Engage workpapers using AdvanceFlow or another engagement management software • Demonstrate the migration process from SMART Practice Aids and Checkpoint Tools to Checkpoint Engage <p>PREREQUISITES: While there are no prerequisites, use of SMART Practice Aids is preferred.</p>	<p>IN-PERSON: 11/10 4:00 pm - 5:15 pm (75 min) 11/11 4:00 pm - 5:15 pm (75 min)</p> <p>VIRTUAL: 11/11 2:00 pm - 3:15 pm (75 min)</p>
<p>Peer Review Hot Topics</p> <p>TAP22026-IP1, TAP22026-IP2 TAP22026-V1</p> <p><i>CPE Field of Study: Audit – Technical</i></p> <p>  1 CPE</p> <p>LEVEL: Intermediate</p> <p>NEW SESSION FOR 2022</p>	<p>This session will introduce and discuss the current environment of peer review including the current focus of peer reviewers and how to avoid common deficiencies.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • List common peer review deficiencies • Identify best practices to avoid common deficiencies • Apply the information on your engagements and share takeaways with your teams 	<p>IN-PERSON: 11/10 11:10 am - 12:00 pm (50 min) 11/11 11:20 am - 12:10 pm (50 min)</p> <p>VIRTUAL: 11/10 11:00 am - 11:50 am (50 min)</p>







AUDITING SESSIONS	DESCRIPTION	DATES/TIMES (EST)
<p>Performing More Efficient Audits</p> <p>TAP22027-IP1, TAP22027-IP2 TAP22027-V1</p> <p><i>CPE Field of Study: Audit – Technical</i></p> <p>  1 CPE</p> <p>LEVEL: Intermediate</p>	<p>This session will discuss various audit efficiency topics, including workflow, client interactions, and being efficient in a virtual or on-site environment.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • List ideas to improve overall efficiency in audits while maintaining quality • Describe ways to improve efficiency in remote audits 	<p>IN-PERSON: 11/9 1:00 pm - 1:50 pm (50 min) 11/11 11:20 am - 12:10 pm (50 min)</p> <p>VIRTUAL: 11/8 2:00 pm - 2:50 pm (50 min)</p>
<p>Plan & Execute Audit Engagements using the Thomson Reuters Cloud Audit Suite</p> <p>TAP22028-IP1, TAP22028-IP2 TAP22028-V1, TAP22028-V2</p> <p><i>CPE Field of Study: Audit – Technical</i></p> <p>  2 CPE</p> <p>LEVEL: Basic</p>	<p>In this session, you see how to maximize integration between AdvanceFlow and Checkpoint Engage for your audit engagements.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Set up new AdvanceFlow and Checkpoint Engage engagements • Import and filter trial balances • Create leadsheets and other custom reports • Identify and assess risks • Review/modify audit programs • Utilize Linkage View • Generate documents • Perform procedural and document-level sign-offs • Create Workpaper Reference Links • Customize and Complete a Disclosure Checklist 	<p>IN-PERSON: 11/9 2:20 pm - 4:00 pm (100 min) 11/11 9:15 am - 10:55 am (100 min)</p> <p>VIRTUAL: 11/8 12:00 pm - 1:40 pm (100 min) 11/9 12:00 pm - 1:40 pm (100 min)</p>
<p>Plan & Execute Preparation, Compilation and Review Engagements Using the Thomson Reuters Cloud Audit Suite</p> <p>TAP22029-IP1, TAP22029-IP2 TAP22029-V1</p> <p><i>CPE Field of Study: Audit – Technical</i></p> <p>  1 CPE</p> <p>LEVEL: Basic</p>	<p>In this session, you see how to maximize integration between AdvanceFlow and Checkpoint Engage for your compilation and review engagements.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Set up new AdvanceFlow and Checkpoint Engage engagements • Import and filter trial balances • Create leadsheets and other custom reports • Add, review, and modify workpapers • Identify and assess risks • Review/modify audit programs • Generate documents • Perform procedural and document-level sign-offs • Create Workpaper Reference Links • Discuss Info and Confirmation integration with the Cloud Audit Suite 	<p>IN-PERSON: 11/10 2:45 pm - 3:35 pm (50 min) 11/11 2:45 pm - 3:35 pm (50 min)</p> <p>VIRTUAL: 11/11 10:00 am - 10:50 am (50 min)</p>






AUDITING SESSIONS	DESCRIPTION	DATES/TIMES (EST)
<p>Professional Ethics</p> <p>TAP22030-IP1, TAP22030-IP2 TAP22030-V1, TAP22030-V2</p> <p><i>CPE Field of Study: Regulatory Ethics – Technical</i></p> <p>  1 CPE</p> <p>LEVEL: Basic</p> <p><i>NEW SESSION FOR 2022</i></p>	<p>This session will cover the basic framework of the AICPA Code of Conduct and provide illustrative examples and case studies to enhance the participant’s understanding.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Understand the AICPA Code of Conduct and related rules • Apply knowledge of the Code of Conduct to your practice and clients 	<p>IN-PERSON:</p> <p>11/10 11:10 am - 12:00 pm (50 min)</p> <p>11/12 9:00 am - 9:50 am (50 min)</p> <p>VIRTUAL:</p> <p>11/8 11:00 am - 11:50 am (50 min)</p> <p>11/10 10:00 am - 10:50 am (50 min)</p>
<p>Uncover the Full Functionality of Checkpoint Engage</p> <p>TAP22031-IP1, TAP22031-IP2 TAP22031-V1</p> <p><i>CPE Field of Study: Audit – Technical</i></p> <p>  1.5 CPE</p> <p>LEVEL: Advanced</p>	<p>Have you ever wished that you had a “Tips & Tricks” resource for using Checkpoint Engage? In this session, you will see additional program functionality that we’ve compiled based on actual questions received from Checkpoint Engage users. We’ll also review best practices to maximize efficiencies using Checkpoint Engage.</p> <p>Upon completion, participants will be able to:</p> <ul style="list-style-type: none"> • Rollforward client engagements and templates to incorporate latest industry title content • Perform a master merge rollforward • Create templates • Copy Checkpoint Engage engagements from one engagement binder to another • Clear selected Audit Program procedures • Regenerate Audit Programs <p>PREREQUISITES: Participants should be proficient in Checkpoint Engage.</p>	<p>IN-PERSON:</p> <p>11/10 9:30 am - 10:45 am (75 min)</p> <p>11/12 10:15 am - 11:30 am (75 min)</p> <p>VIRTUAL:</p> <p>11/8 3:00 pm - 4:15 pm (75 min)</p>
<p>What went wrong? Recent Fraud Case Studies, and How Auditors Can Add Value Beyond the Internal Control Questionnaires</p> <p>TAP22032-IP1, TAP22032-IP2 TAP22032-V1</p> <p><i>CPE Field of Study: Taxes – Technical</i></p> <p>  1.5 CPE</p> <p>LEVEL: Basic</p> <p><i>NEW SESSION FOR 2022</i></p>	<p>This session will cover several recent fraud case studies, what they have in common, and how inquiry, team brainstorming, and “thinking outside of the checklist” can help add value to your client’s internal controls.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Learn to brainstorm with your team by providing examples of what could go wrong • Leverage examples to go from “Do you...” to “How do you...” to help identify what can go wrong 	<p>IN-PERSON:</p> <p>11/10 4:00 pm - 5:15 pm (75 min)</p> <p>11/12 10:15 am - 11:30 am (75 min)</p> <p>VIRTUAL:</p> <p>11/10 2:00 pm - 3:15 pm (75 min)</p>







AUDITING SESSIONS	DESCRIPTION	DATES/TIMES (EST)
<p>What You Need to Know About Adopting the New Lease Standard</p> <p>TAP22033-IP1, TAP22033-IP2 TAP22033-V1</p> <p><i>CPE Field of Study: Accounting – Technical</i></p> <p>  1 CPE</p> <p>LEVEL: Basic NEW SESSION FOR 2022</p>	<p>This session provides an overview of the guidance for lessees with a focus on those provisions representing major substantive changes to financial reporting. The focus will be on areas such as lease definition, classification, lease schedule, lease term, payment and transition.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Determine whether a contract contains a lease in accordance with the new lease standard • Describe the lease accounting requirements under the new lease standard, from the viewpoint of the lessee • List the transition requirements under the new lease standard, from the viewpoint of the lessee • List the disclosure requirements under the new lease standard, from the viewpoint of the lessee 	<p>IN-PERSON: 11/9 1:00 pm - 1:50 pm (50 min) 11/11 8:00 am - 8:50 am (50 min)</p> <p>VIRTUAL: 11/9 2:00 pm - 2:50 pm (50 min)</p>
FIRM & WORKFLOW MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES (EST)
<p>Automate Your Processes with Microsoft PowerApps Using Your GoFileRoom Data</p> <p>TAP22034-IP1, TAP22034-IP2 TAP22034-V1</p> <p><i>CPE Field of Study: Computer Software & Applications</i></p> <p>  1 CPE</p> <p>LEVEL: Basic NEW SESSION FOR 2022</p>	<p>Are you finding tasks tedious and time consuming? Are you finding you're spending too much time on certain task? Tasks in the office should not be tedious and time consuming. Let us introduce your firm to Microsoft PowerApps and delegate your work. Utilizing Source Development Kit (SDK) technology, find out how you can connect your GoFileRoom data to PowerApps. Perform bulk updates for user, documents, and system bulk updates. Let's take it to the basics and work smarter and not harder.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Become Familiar with the GoFileRoom connectors available within Microsoft • Connect your GoFileRoom data with PowerApps • Identify opportunities to utilize PowerApps within your firm's environment <p>PREREQUISITES: Participants should have business development knowledge and knowledge of data points within GoFileRoom.</p>	<p>IN-PERSON: 11/10 11:10 am - 12:00 pm (50 min) 11/11 2:45 pm - 3:35 pm (50 min)</p> <p>VIRTUAL: 11/10 10:00 am - 10:50 am (50 min)</p>
<p>Become a Champion User and Dive Deeper with GoFileRoom and FirmFlow</p> <p>TAP22035-IP1, TAP22035-IP2 TAP22035-V1</p> <p><i>CPE Field of Study: Computer Software & Applications</i></p> <p>  1.5 CPE</p> <p>LEVEL: Intermediate NEW SESSION FOR 2022</p>	<p>Do you feel you are missing key features in GoFileRoom and FirmFlow to make your job easier? In this session we will look at underutilized features of the program to help do your job efficiently. We will also provide time saving tips locating documents quickly, using silent profiles, utilizing notifications and workflow tools.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Uncover features of Control Panel and Quick Launch • Reduce your clicks when searching • Navigate and maximize the use of Classic and Document search • Capture important notices using our powerful notifications system • Leverage FirmFlow routing to its full potential <p>PREREQUISITES: Participants should have a working knowledge of GoFileRoom navigation and tools.</p>	<p>IN-PERSON: 11/10 4:00 pm - 5:15 pm (75 min) 11/11 4:00 pm - 5:15 pm (75 min)</p> <p>VIRTUAL: 11/8 3:00 pm - 4:15 pm (75 min)</p>







FIRM & WORKFLOW MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES (EST)
<p>Configuring Your Dashboards in Practice CS</p> <p>TAP22036-IP1, TAP22036-IP2 TAP22036-V1</p> <p><i>CPE Field of Study: Computer Software & Applications</i></p> <p>  1 CPE</p> <p>LEVEL: Intermediate</p>	<p>In this session you will learn about best practices for staff and client dashboard configuration, setting up custom portlets, and saving dashboard layouts.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Add, remove, and arrange portlets on dashboards • Configure staff and client dashboards for efficient management of projects • Set up custom portlets using reports • Add and utilize custom portlets on dashboards • Save and restore dashboard layouts <p>PREREQUISITES: Participants should have a working understanding of Practice CS</p>	<p>IN-PERSON: 11/10 2:45 pm - 3:35 pm (50 min) 11/11 11:20 am - 12:10 pm (50 min)</p> <p>VIRTUAL: 11/8 2:00 pm - 2:50 pm (50 min)</p>
<p>Effectively Communicating with Your Clients Through Onvio</p> <p>TAP22037-IP1, TAP22037-IP2 TAP22037-V1</p> <p><i>CPE Field of Study: Computer Software & Applications</i></p> <p>  1 CPE</p> <p>LEVEL: Basic</p> <p>NEW SESSION FOR 2022</p>	<p>In this session, we will discuss how firms use Onvio to easily communicate, share, and organize documents seamlessly with their clients. Delve into best practices and feedback from other firms that have rolled out Client Center successfully. Finally, we will discuss sharing information with multiple types of clients and daily usage tips and tricks.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Successfully introduce Client Center to diverse types of clients • Implement shared folder design efficiencies for Client Center • Use document approvals and requests to securely increase your document assembly <p>PREREQUISITES: Participants should have a working knowledge of Onvio.</p>	<p>IN-PERSON: 11/10 11:10 am - 12:00 pm (50 min) 11/11 2:45 pm - 3:35 pm (50 min)</p> <p>VIRTUAL: 11/10 11:00 am - 11:50 am (50 min)</p>
<p>Execute a Successful Transition from FileCabinet CS to GoFileRoom</p> <p>TAP22038-IP1, TAP22038-IP2 TAP22038-V1</p> <p><i>CPE Field of Study: Computer Software & Applications</i></p> <p>  1 CPE</p> <p>LEVEL: Intermediate</p> <p>NEW SESSION FOR 2022</p>	<p>Has your firm outgrown FileCabinet CS? If you are ready or thinking about moving to GoFileRoom, this session will uncover what considerations your firm should know for a successful transition by helping to determine when to transition and comparing the two programs to uncover potential internal procedural changes.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Determine when to make the transition to GoFileRoom • Recognize key differences from FileCabinet CS & GoFileRoom • Analyze current processes in FileCabinet CS to recognize procedural changes <p>PREREQUISITES: Participants should be current FileCabinet CS users.</p>	<p>IN-PERSON: 11/9 4:25 pm - 5:15 pm (50 min) 11/11 8:00 am - 8:50 am (50 min)</p> <p>VIRTUAL: 11/8 11:00 am - 11:50 am (50 min)</p>







FIRM & WORKFLOW MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES (EST)
<p>Firm Administration Management in Practice CS: A Checklist Approach</p> <p>TAP22039-IP1, TAP22039-IP2 TAP22039-V1</p> <p><i>CPE Field of Study: Computer Software & Applications</i></p> <p>  1 CPE</p> <p>LEVEL: Advanced NEW SESSION FOR 2022</p>	<p>In this session, we will look at workflows that focus on the administrator’s role in maintaining the data integrity of Practice CS. We will approach these workflows as checklists designed to take the guesswork out areas like staff setup and termination within Practice CS, period reconciliation and advancement, client information updates, and year-end data clean up.</p> <p>Upon completion of this session, participants will be able to develop checklists for:</p> <ul style="list-style-type: none"> • Staff New Hire Setup • Staff Termination • End-of-Period Advancement • Client Change • Year-end data clean up <p>PREREQUISITES: Participants should have a working understanding of Practice CS.</p>	<p>IN-PERSON: 11/10 11:10 am - 12:00 pm (50 min) 11/11 2:45 pm - 3:35 pm (50 min)</p> <p>VIRTUAL: 11/8 11:00 am - 11:50 am (50 min)</p>
<p>Hearing from your Onvio Firm Management Peers</p> <p>TAP22040-IP1</p> <p><i>CPE Field of Study: Computer Software & Applications</i></p> <p> 1.5 CPE</p> <p>LEVEL: Overview NEW SESSION FOR 2022</p>	<p>In this panel discussion, you’ll hear from your peers about their experiences using Onvio Firm Management. Attending this session will help you learn how other firms have implemented Onvio Firm Management.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Walk away with steps on improving your document structure and setup • Determine how to utilize Onvio Firm Management in your day-to-day operations • Review and apply project management techniques within Onvio Firm Management <p>PREREQUISITES: Participants do not need to have a working knowledge of Onvio Firm Management.</p>	<p>IN-PERSON: 11/10 9:30 am - 10:45 am (75 min)</p>
<p>How healthy is your GoFileRoom and FirmFlow database – Is it Time for a Checkup?</p> <p>TAP22041-IP1, TAP22041-IP2 TAP22041-V1, TAP22041-V2</p> <p><i>CPE Field of Study: Computer Software & Applications</i></p> <p>  2 CPE</p> <p>LEVEL: Intermediate NEW SESSION FOR 2022</p>	<p>How healthy is your GoFileRoom and FirmFlow database? Are you confident you are performing the correct administrative procedures? Is it time for a checkup? Your workflow and document management database is at the center of your firm. In this session, we will explore the different administrative procedures you should be performing to ensure your documents are secure and workflows are maintained. Allowing you to discover your firm’s internal procedures.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Determine your firms procedural process to ensure a healthy GoFileRoom and FirmFlow database • Identify the frequency of your firms procedures • Develop and maintain your records management procedures • Examine the bulk update feature to know how and why to utilize the option <p>PREREQUISITES: Participants should have a working knowledge of GoFileRoom and FirmFlow.</p>	<p>IN-PERSON: 11/9 2:20 pm - 4:00 pm (100 min) 11/11 9:15 am - 10:55 am (100 min)</p> <p>VIRTUAL: 11/8 12:00 pm - 1:40 pm (100 min) 11/9 12:00 pm - 1:40 pm (100 min)</p>







FIRM & WORKFLOW MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES (EST)
<p>How to Customize Practice CS Using Custom Fields for Your Firm</p> <p>TAP22042-IP1, TAP22042-IP2 TAP22042-V1</p> <p><i>CPE Field of Study: Computer Software & Applications</i></p> <p>  1 CPE</p> <p>LEVEL: Intermediate</p>	<p>In this session, you'll see how other firms are taking advantage of the flexibility provided by custom fields in Practice CS. We'll discuss innovative ways to track and centralize information to share with your entire firm. By taking advantage of custom fields in Practice CS, your firm will gain efficiencies and new management capabilities.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Discover ways to use custom fields • Centralize information to easily share with others in the office • Identify reporting capabilities with custom fields <p>PREREQUISITES: Participants should be familiar with setup in Practice CS.</p>	<p>IN-PERSON: 11/9 1:00 pm - 1:50 pm (50 min) 11/11 8:00 am - 8:50 am (50 min)</p> <p>VIRTUAL: 11/10 11:00 am - 11:50 am (50 min)</p>
<p>Integrating Onvio with the CS Professional Suite</p> <p>TAP22043-IP1, TAP22043-IP2 TAP22043-V1</p> <p><i>CPE Field of Study: Computer Software & Applications</i></p> <p>  1 CPE</p> <p>LEVEL: Basic</p> <p>NEW SESSION FOR 2022</p>	<p>In this session, we will discuss how firms use multiple products and best practices to data share client information between programs. We will discuss which programs to use to add new clients, which programs to populate using Data Sharing, and which order of programs to enter additional information.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Feel confident about which program to start with to add new clients into • Understand the fields that will share data among clients • Enter clients in the correct order within the suite of products you own • Understand any nuances that may exist between different programs, which come into consideration when data sharing client information <p>PREREQUISITES: Participants should have a working knowledge of Onvio client setup.</p>	<p>IN-PERSON: 11/9 1:00 pm - 1:50 pm (50 min) 11/12 9:00 am - 9:50 am (50 min)</p> <p>VIRTUAL: 11/8 10:00 am - 10:50 am (50 min)</p>
<p>Integrating Practice CS with the CS Professional Suite</p> <p>TAP22044-IP1, TAP22044-IP2 TAP22044-V1</p> <p><i>CPE Field of Study: Computer Software & Applications</i></p> <p>  1.5 CPE</p> <p>LEVEL: Intermediate</p>	<p>In this session, you will learn how Practice CS integrates with other solutions to enhance the capabilities of both. We will discuss how these enhancements can increase the efficiency of staff who are working between programs.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Establish completion events in UltraTax CS • Send documents from Practice CS to Onvio or GoFileRoom • Share changes in client demographic information between solutions • Utilize NetClient CS to send invoices and statements to your client online <p>PREREQUISITES: Participants should have a working understanding of Practice CS and be familiar with other CS Professional Suite products.</p>	<p>IN-PERSON: 11/10 4:00 pm - 5:15 pm (75 min) 11/11 4:00 pm - 5:15 pm (75 min)</p> <p>VIRTUAL: 11/8 3:00 pm - 4:15 pm (75 min)</p>







FIRM & WORKFLOW MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES (EST)
<p>Leveraging Onvio to Enhance your Firm's Work Style</p> <p>TAP22045-IP1</p> <p><i>CPE Field of Study: Computer Software & Applications</i></p> <p> 1.5 CPE</p> <p>LEVEL: Advanced</p> <p>NEW SESSION FOR 2022</p>	<p>In this session, you will hear from a peer who is leveraging Onvio with their firm's work style. Attending this session will give you options on how to make Onvio Firm Management an integral part of your firm's workflow and work style.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Identify areas management can leverage Onvio Firm Management to oversee their firm's operations • Review your firm's work style to enhance workflow and administrative tasks using Onvio Firm Management • Integrating Onvio Firm Management into a staff member's workflow <p>PREREQUISITES: Participants should have a working knowledge of Onvio Firm Management.</p>	<p>IN-PERSON: 11/11 4:00 pm - 5:15 pm (75 min)</p>
<p>Maintaining Project Integrity in Practice CS</p> <p>TAP22046-IP1, TAP22046-IP2 TAP22046-V1</p> <p><i>CPE Field of Study: Computer Software & Applications</i></p> <p>  1.5 CPE</p> <p>LEVEL: Advanced</p> <p>NEW SESSION FOR 2022</p>	<p>In this session, you will discover ways to effectively manage projects throughout Practice CS while protecting project integrity. We will look at include how to handle staffing changes, how best to update workflow tasks, and the development of a strong understanding of the many project related screens.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Manage project adjustments based on staffing changes • Evaluate current process setup and how to manage adjustments to your firm's workflow • Understand generation options and their impact on projects moving forward • Manipulate Project Management related screens (Manage Projects, Staff Dashboard, Client Dashboard) to obtain a better top-down picture of your firm's projects and assorted assignments <p>PREREQUISITES: Participants should have a working understanding of the project management module in Practice CS.</p>	<p>IN-PERSON: 11/10 9:30 am - 10:45 am (75 min) 11/11 4:00 pm - 5:15 pm (75 min)</p> <p>VIRTUAL: 11/11 2:00 pm - 3:15 pm (75 min)</p>
<p>Making the Most out of FirmFlow Reports</p> <p>TAP22047-IP1, TAP22047-IP2 TAP22047-V1</p> <p><i>CPE Field of Study: Computer Software & Applications</i></p> <p>  1 CPE</p> <p>LEVEL: Basic</p>	<p>In this session, you will uncover what types of reports may be useful for each individual in your office. Looking at various report criteria to pinpoint exactly the workflow information needed. From work at a staff level, work-in-progress, due date and bottlenecks.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Identify what report to utilize to obtain information • Determine report criteria to choose • Explain the differences between Standard and Published reports <p>PREREQUISITES: Participants should be familiar with reporting in FirmFlow.</p>	<p>IN-PERSON: 11/10 11:10 am - 12:00 pm (50 min) 11/11 2:45 pm - 3:35 pm (50 min)</p> <p>VIRTUAL: 11/11 10:00 am - 10:50 am (50 min)</p>





FIRM & WORKFLOW MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES (EST)
<p>Onvio Document Management Best Practices</p> <p>TAP22048-IP1, TAP22048-IP2 TAP22048-V1</p> <p><i>CPE Field of Study: Computer Software & Applications</i></p> <p>  2 CPE</p> <p>LEVEL: Basic</p>	<p>In this session, participants will learn how to enhance your firm’s document management efficiencies in Onvio by learning best practices for document annotation and editing, document and folder management, and increasing client involvement through document requests and approvals.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Implement appropriate best practices for adding and sharing folders • Display folders in the way that they prefer • Utilize document annotation and editing capabilities • Gain efficiencies through client and contact document communication tools • Manage client source documents efficiently 	<p>IN-PERSON: 11/9 2:20 pm - 4:00 pm (100 min) 11/11 9:15 am - 10:55 am (100 min)</p> <p>VIRTUAL: 11/9 12:00 pm - 1:40 pm (100 min)</p>
<p>Onvio Project Workflow Best Practices</p> <p>TAP22049-IP1, TAP22049-IP2 TAP22049-V1</p> <p><i>CPE Field of Study: Computer Software & Applications</i></p> <p>  1.5 CPE</p> <p>LEVEL: Basic</p>	<p>This session will help you supercharge your project workflow in Onvio. Within the session, we will explore how to customize and manage projects being tracked within Onvio.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Increase customization in project template design • Explore how client-facing tasks can save time and efficiently organize project documentation • Use dashboard widgets to better organize and prioritize work • Efficiently clean up unused projects • Adjust clients, projects, and tasks utilizing edit multiple capabilities 	<p>IN-PERSON: 11/10 4:00 pm - 5:15 pm (75 min) 11/12 10:15 am - 11:30 am (75 min)</p> <p>VIRTUAL: 11/10 2:00 pm - 3:15 pm (75 min)</p>
<p>Reporting, Filtering and the Manage Screens in Practice CS</p> <p>TAP22050-IP1, TAP22050-IP2 TAP22050-V1</p> <p><i>CPE Field of Study: Computer Software & Applications</i></p> <p>  1 CPE</p> <p>LEVEL: Intermediate</p>	<p>In this session, you will learn when to use a report vs. real-time data on the manage screens in Practice CS. Dive deeper into filtering and nested filters, and uncover how to manipulate data real time.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Create customized nested filters • Manipulate data on screen efficiently • Create useful customized reporting for your firm by using filtering and grouping properties • Keep important reports easily at your fingertips with Report Profiles and Dashboard Custom Report Portlets <p>PREREQUISITES: Participants should have a working understanding of Practice CS.</p>	<p>IN-PERSON: 11/10 2:45 pm - 3:35 pm (50 min) 11/12 9:00 am - 9:50 am (50 min)</p> <p>VIRTUAL: 11/10 10:00 am - 10:50 am (50 min)</p>







FIRM & WORKFLOW MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES (EST)
<p>Strategic Planning: Generating Revenue and Capacity Projections using Practice CS</p> <p>TAP22051-IP1, TAP22051-IP2 TAP22051-V1</p> <p><i>CPE Field of Study: Computer Software & Applications</i></p> <p>  2 CPE</p> <p>LEVEL: Advanced</p>	<p>In this session, we will take the information from Practice CS Staff Management, Project Management, and Reporting and translate it to powerful data. This data will be utilized in an excel spreadsheet, which will be provided to participants, to help make strategic decisions regarding staffing and project revenue.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Set up and utilize the Practice CS modules for capacity planning • Run the provided custom Practice CS report along with setup to pull revenue projection numbers • Determine if you have enough staff, too many, or too few resources and determine a course of action <p>PREREQUISITES: Participants should have a working understanding of the setup of Practice CS.</p>	<p>IN-PERSON: 11/9 2:20 pm - 4:00 pm (100 min) 11/11 9:15 am - 10:55 am (100 min)</p> <p>VIRTUAL: 11/11 12:00 pm - 1:40 pm (100 min)</p>
<p>Tips for Increased Billing Efficiency in Practice CS</p> <p>TAP22052-IP1, TAP22052-IP2 TAP22052-V1</p> <p><i>CPE Field of Study: Computer Software & Applications</i></p> <p>  1 CPE</p> <p>LEVEL: Intermediate</p> <p>NEW SESSION FOR 2022</p>	<p>In this session, we will review features available in Practice CS to speed up your billing processes. We will look at user preference settings and filters to focus billing data on relevant WIP. We will discuss Quick Billing as a method to increase invoice throughout for simple billing scenarios, examine summarization options in detail billing that can ease application of billing decisions, and how to use standard text to speed up the compose process.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Set user preferences that best match your common billing scenarios • Create custom filters to focus billing data on need information only • Utilized Quick Billing to create multiple invoices at once • Make use of summarization options to apply billing decisions • Setup standard text options for use on the compose tab of detail billing <p>PREREQUISITES: Participants should have a working understanding of billing processes in Practice CS.</p>	<p>IN-PERSON: 11/9 4:25 pm - 5:15 pm (50 min) 11/11 11:20 am - 12:10 pm (50 min)</p> <p>VIRTUAL: 11/9 10:00 am - 10:50 am (50 min)</p>
<p>What's New in Onvio?</p> <p>TAP22053-IP1, TAP22053-IP2 TAP22053-V1, TAP22053-V2</p> <p><i>CPE Field of Study: Computer Software & Applications</i></p> <p>  1 CPE</p> <p>LEVEL: Update</p> <p>NEW SESSION FOR 2022</p>	<p>Check out the features that have been added to Onvio over the last year. In this session, we will focus on recent firm management, client collaboration, document management, and trial balance enhancements.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Understand the new firm management, client collaboration, document management, and trial balance capabilities and how they can save time in your workflow • Understand how to enable new functionality for your staff 	<p>IN-PERSON: 11/10 2:45 pm - 3:35 pm (50 min) 11/11 11:20 am - 12:10 pm (50 min)</p> <p>VIRTUAL: 11/9 2:00 pm - 2:50 pm (50 min) 11/11 11:00 am - 11:50 am (50 min)</p>







FIRM & WORKFLOW MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES (EST)
<p>Working with Power BI: FirmFlow and Practice Management Edition</p> <p>TAP22054-IP1, TAP22054-IP2 TAP22054-V1</p> <p><i>CPE Field of Study: Computer Software & Applications</i></p> <p>  1.5 CPE</p> <p>LEVEL: Intermediate</p>	<p>In this session, attendees will become familiar with how Power BI can be utilized with FirmFlow or other Practice Management programs. We will discuss what Power BI is, what it is used for and how firms can use it in their office.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Identify ways they can connect Power BI to FirmFlow or their Practice Management program • Explain what Power BI is and how it can be used to help extrapolate their firm's information <p>PREREQUISITES: Participants should be curious about Power B.I. and current user of FirmFlow or a Practice Management program.</p>	<p>IN-PERSON: 11/10 9:30 am - 10:45 am (75 min) 11/12 10:15 am - 11:30 am (75 min)</p> <p>VIRTUAL: 11/9 3:00 pm - 4:15 pm (75 min)</p>
PAYROLL SESSIONS	DESCRIPTION	DATES/TIMES (EST)
<p>Client-Facing Tools to Better Serve Your Payroll Clients</p> <p>TAP22055-IP1, TAP22055-IP2 TAP22055-V1</p> <p><i>CPE Field of Study: Computer Software & Applications</i></p> <p>  1 CPE</p> <p>LEVEL: Intermediate</p>	<p>In this session, you will learn how to utilize tools available to your payroll clients for direct integration with Accounting CS.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Set up and use the Remote Payroll feature for clients to input their employees' payroll check hours and amounts • Update employee W-4 information and review check stubs and payroll tax forms through Employee Self-Service • Enable employees to enter time via the Employee Time Entry process • Use Client Access to allow clients direct access to payroll entry and payroll data in the Accounting CS application <p>PREREQUISITES: Participants should be familiar with how to process payroll in Accounting CS.</p>	<p>IN-PERSON: 11/10 11:10 am - 12:00 pm (50 min) 11/11 2:45 pm - 3:35 pm (50 min)</p> <p>VIRTUAL: 11/8 11:00 am - 11:50 am (50 min)</p>
<p>E-File Best Practices in Accounting CS</p> <p>TAP22056-IP1, TAP22056-IP2 TAP22056-V1</p> <p><i>CPE Field of Study: Taxes – Technical</i></p> <p>  1 CPE</p> <p>LEVEL: Overview</p> <p>NEW SESSION FOR 2022</p>	<p>In this session, you will learn about filing payroll tax forms in Accounting CS.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Understand pre-processing resources • Distinguish between electronic vs. internet/magnetic filing • Leverage batch filing vs. single client processing • Handle corrected tax forms <p>PREREQUISITES: Participants should have a basic understanding of payroll processing in Accounting CS.</p>	<p>IN-PERSON: 11/9 4:25 pm - 5:15 pm (50 min) 11/12 9:00 am - 9:50 am (50 min)</p> <p>VIRTUAL: 11/9 10:00 am - 10:50 am (50 min)</p>







PAYROLL SESSIONS	DESCRIPTION	DATES/TIMES (EST)
<p>Payroll 2023: Federal and State Legislative Update</p> <p>TAP22057-IP1, TAP22057-IP2 TAP22057-V1</p> <p><i>CPE Field of Study: Taxes – Technical</i> <i>CE Type: Update</i></p> <p>  1 CPE 1 CE</p> <p>LEVEL: Update NEW SESSION FOR 2022</p>	<p>In this session, we will discuss upcoming payroll changes in 2023, from Federal law and regulations to highlights of major state changes and other trends. If you perform or advise on payroll services, you won't want to miss this session.</p> <p>This session will prepare tax advisors and payroll professionals for compliance with upcoming legislative and regulatory changes, including:</p> <ul style="list-style-type: none"> • Treasury Department and DOL regulatory plans • On-Demand Pay and Early Wage Access regulations • Treasury Taxpayer First Act-related changes • DOL initiative on overtime • New 1099 requirements for GIG economy • State cybersecurity laws on breach notification and biometrics • Remote worker considerations • New State paid family leave insurance programs • Changes in 2023 for withholding and income tax, minimum wage, and unemployment tax including the status of deficit states 	<p>IN-PERSON: 11/10 2:45 pm - 3:35 pm (50 min) 11/11 11:20 am - 12:10 pm (50 min)</p> <p>VIRTUAL: 11/9 11:00 am - 11:50 am (50 min)</p>
<p>Time-Saving Tips and Tricks with Onboarding New Payroll Clients in Accounting CS</p> <p>TAP22058-IP1, TAP22058-IP2 TAP22058-V1</p> <p><i>CPE Field of Study: Computer Software & Applications</i></p> <p>  1.5 CPE</p> <p>LEVEL: Intermediate</p>	<p>In this session, you'll learn about different features available in Accounting CS Payroll to allow you to efficiently set up and onboard new clients into the application to start processing payroll.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Utilize client templates and the Transfer Client Information feature to standardize setup of your payroll clients • Use spreadsheet imports to save time when setting up employees and vendors • Configure employee templates to increase the efficiency of setting up employees • Prenote direct deposit information • Complete new hire reporting <p>PREREQUISITES: Participants should be familiar with navigation in Accounting CS and setting up a payroll client.</p>	<p>IN-PERSON: 11/10 9:30 am - 10:45 am (75 min) 11/11 4:00 pm - 5:15 pm (75 min)</p> <p>VIRTUAL: 11/9 3:00 pm - 4:15 pm (75 min)</p>
<p>Unemployment Issues & Solutions: How Thinking Smarter about Unemployment Can Help a Business Save</p> <p>TAP22059-IP1, TAP22059-IP2 TAP22059-V1</p> <p><i>CPE Field of Study: Taxes – Technical</i></p> <p>  1 CPE</p> <p>LEVEL: Intermediate NEW SESSION FOR 2022</p>	<p>The unemployment rate may be low but so is job participation. Inflation is high and talk of a recession continues to buzz. The ripple effects of high unemployment due to the pandemic are still being felt. In this session, we'll discuss how a business can help its bottom line by thinking smarter regarding unemployment issues with solutions during uncertain times.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Prepare for potential FUTA tax credit reductions • Properly report remote workers for unemployment purposes • Avoid the costly impact of worker misclassification • Take advantage of the WOTC tax credit in a tight job market and possible expansion • Identify how work sharing programs have become more popular in helping employers save • Utilize E-reporting unemployment information to save money and time • Explain buying down your unemployment tax rate • Be aware of the latest unemployment legislation updates 	<p>IN-PERSON: 11/9 1:00 pm - 1:50 pm (50 min) 11/11 8:00 am - 8:50 am (50 min)</p> <p>VIRTUAL: 11/10 11:00 am - 11:50 am (50 min)</p>






TAX & ASSET MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES (EST)
<p>Accrued Income Recognition: It's All About Timing</p> <p>TAP22060-IP1, TAP22060-IP2 TAP22060-V1</p> <p><i>CPE Field of Study: Taxes – Technical</i> <i>CE Type: Federal Tax Law</i></p> <p>  1.5 CPE 1 CE</p> <p>LEVEL: Intermediate NEW SESSION FOR 2022</p>	<p>The general tax rules for income recognition under an accrual method of accounting were changed in the Tax Cuts and Jobs Act (TCJA). Prior to the TCJA, Sec. 451 required accrual-method taxpayers to include amounts in gross income when all the events occurred that fix the right to receive the income and the amount of income can be determined with reasonable accuracy (the all-events test). This session will uncover the various aspects of accrual income recognition, potential deferral opportunities, and special method of income recognition.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Identify the applicable rules and regulations regarding accrual income recognition. • Discuss the “all-events” test of Section 451; • Describe potential accrue income deferral and exclusions planning opportunities (including method changes). 	<p>IN-PERSON: 11/10 9:30 am - 10:45 am (75 min) 11/11 4:00 pm - 5:15 pm (75 min)</p> <p>VIRTUAL: 11/9 3:00 pm - 4:15 pm (75 min)</p>
<p>AdvanceFlow Options for Tax Engagements</p> <p>TAP22061-IP1, TAP22061-IP2 TAP22061-V1</p> <p><i>CPE Field of Study: Computer Software & Applications</i></p> <p>  1.5 CPE</p> <p>LEVEL: Intermediate</p>	<p>In this session, you will see three ways to efficiently set up and manage tax engagements.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Set up a tax folder inside of an audit engagement • Utilize the Trial Balance Compare feature • Use the consolidated approach to accommodate your tax engagements 	<p>IN-PERSON: 11/10 9:30 am - 10:45 am (75 min) 11/12 10:15 am - 11:30 am (75 min)</p> <p>VIRTUAL: 11/8 3:00 pm - 4:15 pm (75 min)</p>
<p>Are You Taking Advantage of all the Features of Fixed Assets CS?</p> <p>TAP22062-IP1, TAP22062-IP2 TAP22062-V1, TAP22062-V2</p> <p><i>CPE Field of Study: Computer Software & Applications</i></p> <p>  1.5 CPE</p> <p>LEVEL: Intermediate</p>	<p>Fixed Assets CS is a robust system for tracking depreciation, but what else can it do? This session will teach you how to use Fixed Assets CS in other ways, as well as additional features the application has to offer.</p> <p>Upon completing this session, participants will be able to apply underutilized features of Fixed Assets CS to boost workflow efficiency.</p> <p>PREREQUISITES: Participants should have a working knowledge of Fixed Assets CS</p>	<p>IN-PERSON: 11/10 9:30 am - 10:45 am (75 min) 11/11 4:00 pm - 5:15 pm (75 min)</p> <p>VIRTUAL: 11/8 3:00 pm - 4:15 pm (75 min) 11/9 3:00 pm - 4:15 pm (75 min)</p>





TAX & ASSET MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES (EST)
<p>Automation & Public Accounting: How Tax Preparation is Evolving Through AI</p> <p>TAP22063-IP1</p> <p><i>CPE Field of Study: Computer Software & Applications</i></p> <p> 1 CPE</p> <p>LEVEL: Overview</p> <p>NEW SESSION FOR 2022</p>	<p>In this session we will discuss how artificial intelligence (AI) is transforming the tax and accounting industry at a rapid pace. This emerging technology reduces or eliminates the redundant, manual, and transactional work required to prepare 1040 tax returns.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Identify how improved scanning technology is expanding the universe of documents that can be auto-recognized and auto-processed for tax preparation • Outline how AI algorithms can check the correctness of values with a precision that rivals or beats human verification • Determine how AI initiatives can be cautiously adopted to embrace a “do no harm” philosophy to minimize disruption in the accounting process • Summarize how continuous feedback systems allow software to learn throughout the tax season to adapt to new forms, tax code changes, and taxpayer specific situations 	<p>IN-PERSON: 11/11 2:45 pm - 3:35 pm (50 min)</p>
<p>Communicating Results with Planner CS</p> <p>TAP22065-IP1</p> <p><i>CPE Field of Study: Taxes – Technical</i></p> <p> 1 CPE</p> <p>LEVEL: Intermediate</p>	<p>Planner CS is an invaluable tool for tax professionals who build individual tax plans for their clients. It stays current with new legislation in ways that homemade Excel spreadsheets and other solutions do not. Use the Result Finder to guide your clients to a desired result. Then quickly produce impressive deliverables to reinforce the plan to your clients.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Leverage the power of result finder • Prepare plans that project multiple years and contrast different scenarios • Create customized reports and report sets so you can efficiently produce client deliverables <p>PREREQUISITES: Participants should have a working knowledge of building plans in Planner CS</p>	<p>IN-PERSON: 11/11 8:00 am - 8:50 am (50 min)</p>
<p>Data Mining within UltraTax CS for Advisory Opportunities</p> <p>TAP22066-IP1, TAP22066-IP2 TAP22066-V1</p> <p><i>CPE Field of Study: Computer Software & Applications</i></p> <p>  1.5 CPE</p> <p>LEVEL: Intermediate</p>	<p>In this session, you will learn how to leverage data that you already have from clients’ tax returns to identify opportunities to provide advisory services to your clients.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Create data mining searches targeting specific client criteria • Design reports to list client information, and letters to send directly to clients • Leverage existing data to create consulting sessions or ongoing advisory relationships <p>PREREQUISITES: Participants should have a working knowledge of UltraTax CS.</p>	<p>IN-PERSON: 11/10 9:30 am - 10:45 am (75 min) 11/11 4:00 pm - 5:15 pm (75 min)</p> <p>VIRTUAL: 11/11 2:00 pm - 3:15 pm (75 min)</p>







TAX & ASSET MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES (EST)
<p>Demystifying the Cryptic Tax Issues of Crypto and Virtual Currency</p> <p>TAP22067-IP1, TAP22067-IP2 TAP22067-V1</p> <p><i>CPE Field of Study: Taxes – Technical</i> <i>CE Type: Federal Tax Law</i></p> <p>  1.5 CPE 1 CE</p> <p>LEVEL: Intermediate</p>	<p>Since 2014, the IRS has maintained that cryptocurrency is property for federal tax purposes. However, as the digital world continues to evolve, certain questions remain unanswered. This session examines the complex tax issues surrounding cryptocurrency, from the taxation of hard forks and airdrops to the challenge of tracing basis and fair market value. This session also discusses the many ways the IRS is enforcing the proper reporting of crypto transactions. It is recommended that participants complete Introduction To Crypto before attending this session.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Describe the federal income tax treatment of cryptocurrency transactions. • Properly report crypto gains and losses on federal tax returns. • Identify special tax situations involving cryptocurrency and other digital assets. • Discuss IRS enforcement activities. 	<p>IN-PERSON: 11/10 4:00 pm - 5:15 pm (75 min) 11/12 10:15 am - 11:30 am (75 min)</p> <p>VIRTUAL: 11/11 2:00 pm - 3:15 pm (75 min)</p>
<p>Federal Tax Business Update</p> <p>TAP22068-IP1, TAP22068-IP2 TAP22068-V1, TAP22068-V2</p> <p><i>CPE Field of Study: Taxes – Technical</i> <i>CE Type: Update</i></p> <p>  2 CPE 2 CE</p> <p>LEVEL: Update</p> <p>NEW SESSION FOR 2022</p>	<p>Back by popular demand, Doug Van Der Aa provides his Federal Tax Business Update. This session will address the important 2021-22 tax provisions and concepts related to business tax returns, including depreciation; travel, meals & entertainment expense reporting; partnership and S corporation developments; and other business tax issues.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Gain the knowledge of the latest tax developments, rules and regulations impacting various business entity clients. • Define and discuss planning tools for the upcoming tax season. <p>PREREQUISITES: Participants should have a basic working knowledge of business taxation.</p>	<p>IN-PERSON: 11/9 2:20 pm - 4:00 pm (100 min) 11/11 9:15 am - 10:55 am (100 min)</p> <p>VIRTUAL: 11/9 12:00 pm - 1:40 pm (100 min) 11/11 12:00 pm - 1:40 pm (100 min)</p>
<p>Federal Tax Individual Update</p> <p>TAP22069-IP1, TAP22069-IP2 TAP22069-V1, TAP22069-V2</p> <p><i>CPE Field of Study: Taxes – Technical</i> <i>CE Type: Update</i></p> <p>  1.5 CPE 1 CE</p> <p>LEVEL: Update</p> <p>NEW SESSION FOR 2022</p>	<p>Back by popular demand, Doug Van Der Aa provides his Federal Tax Individual Update. This session will address 2021-22 federal tax legislation, rulings and developments affecting individual taxpayers and provide practitioners with a comprehensive update for the upcoming tax season.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Gain the knowledge of the latest tax developments, rules and regulations impacting individual taxpayers. • Define and discuss planning tools for the upcoming tax season. <p>PREREQUISITES: Participants should have a basic working knowledge of individual taxation.</p>	<p>IN-PERSON: 11/10 4:00 pm - 5:15 pm (75 min) 11/11 4:00 pm - 5:15 pm (75 min)</p> <p>VIRTUAL: 11/10 2:00 pm - 3:15 pm (75 min) 11/11 2:00 pm - 3:15 pm (75 min)</p>






TAX & ASSET MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES (EST)
<p>Federal Tax Research on Checkpoint Edge</p> <p>TAP22070-IP1, TAP22070-IP2 TAP22070-V1</p> <p><i>CPE Field of Study: Taxes – Technical</i></p> <p>  1.5 CPE</p> <p>LEVEL: Intermediate</p>	<p>In this session, you will learn how to find answers to your federal tax questions faster than ever before. You will see how to use predictive technology and concept markers to improve the quality and precision of your query even when you aren't sure what keywords to use or related topics you might need to consider. This class is designed for Checkpoint Edge customers only and will not feature the Checkpoint Classic platform.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Explain the user-friendly layout of the main screen • Describe the benefits of predictive queries • Explain different ways to view and filter search results • Describe how to view results from trusted public sites • Describe how to use Document Compare • Explain how to share Folders with other Checkpoint users at your firm 	<p>IN-PERSON: 11/10 9:30 am - 10:45 am (75 min)</p> <p>11/12 10:15 am - 11:30 am (75 min)</p> <p>VIRTUAL: 11/10 2:00 pm - 3:15 pm (75 min)</p>
<p>GoSystem Tax RS 1040 Specialty Tax</p> <p>TAP22071-IP1 TAP22071-V1</p> <p><i>CPE Field of Study: Taxes – Technical</i> <i>CE Type: Federal Tax Law</i></p> <p>  2 CPE 2 CE</p> <p>LEVEL: Advanced</p> <p><i>NEW SESSION FOR 2022</i></p>	<p>During this session learn about additional 1040 processing options like Amended returns, SRJD, Non-resident Alien and data entry for NOL.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Identify step to process 1040X • Create Separate Returns from Joint Data (SRJD) • Process Non-Resident Alien returns • Enter Federal & State NOL <p>PREREQUISITES: Participants should have an understanding of processing 1040 returns</p>	<p>IN-PERSON: 11/9 2:20 pm - 4:00 pm (100 min)</p> <p>VIRTUAL: 11/8 12:00 pm - 1:40 pm (100 min)</p>
<p>GoSystem Tax RS Diagnostics and Review</p> <p>TAP22072-IP1 TAP22072-V1</p> <p><i>CPE Field of Study: Taxes – Technical</i></p> <p>  1 CPE</p> <p>LEVEL: Advanced</p> <p><i>NEW SESSION FOR 2022</i></p>	<p>In this session, join us as we talk about diagnostics and reviewing returns in GoSystem Tax RS.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Discuss the different categories of diagnostic Clearing diagnostics • Complete On and Offscreen review of tax returns 	<p>IN-PERSON: 11/11 8:00 am - 8:50 am (50 min)</p> <p>VIRTUAL: 11/11 11:00 am - 11:50 am (50 min)</p>







TAX & ASSET MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES (EST)
<p>GoSystem Tax RS Estimates and Extension</p> <p>TAP22073-IP1 TAP22073-V1</p> <p><i>CPE Field of Study: Taxes – Technical</i></p> <p>  1 CPE</p> <p>LEVEL: Basic</p> <p><i>NEW SESSION FOR 2022</i></p>	<p>In this session, we will look at the best way to prepare estimates and extension information in GoSystem Tax RS and using API for processing.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Prepare estimates and extensions • Create and transmit estimate and extension e-files • Discuss how API can help with estimates and extensions <p>PREREQUISITES: Participants should be familiar with GoSystem Tax RS.</p>	<p>IN-PERSON: 11/11 2:45 pm - 3:35 pm (50 min)</p> <p>VIRTUAL: 11/10 10:00 am - 10:50 am (50 min)</p>
<p>GoSystem Tax RS Import/Export Capabilities</p> <p>TAP22074-IP1 TAP22074-V1</p> <p><i>CPE Field of Study: Taxes – Technical</i></p> <p>  1.5 CPE</p> <p>LEVEL: Advanced</p> <p><i>NEW SESSION FOR 2022</i></p>	<p>Discover what import/export capabilities are available to you in GoSystem Tax RS, and learn information about DIF/KAT.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Discuss Data Import templates • Utilize Data Connection • Utilize Excel Add In • Import information using DIF/KAT files <p>PREREQUISITES: Participants should have a working knowledge of data entry in GoSystem Tax RS.</p>	<p>IN-PERSON: 11/10 4:00 pm - 5:15 pm (75 min)</p> <p>VIRTUAL: 11/9 3:00 pm - 4:15 pm (75 min)</p>
<p>GoSystem Tax RS Processing Schedule K2/K3</p> <p>TAP22075-IP1 TAP22075-V1</p> <p><i>CPE Field of Study: Taxes – Technical</i> <i>CE Type: Federal Tax Law</i></p> <p>  1.5 CPE 1 CE</p> <p>LEVEL: Basic</p> <p><i>NEW SESSION FOR 2022</i></p>	<p>In this session, we will look at the Schedule K2 and K3 data entry in GoSystem Tax RS.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Properly complete Schedules K2 and K3 • Discuss common questions about Schedules K2 and K3 <p>PREREQUISITES: Participants should be familiar with processing foreign income.</p>	<p>IN-PERSON: 11/10 9:30 am - 10:45 am (75 min)</p> <p>VIRTUAL: 11/8 3:00 pm - 4:15 pm (75 min)</p>







TAX & ASSET MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES (EST)
<p>Inflation Reduction Act: Setting the Tax Landscape</p> <p>TAP22064-IP1, TAP22064-IP2 TAP22064-V1</p> <p><i>CPE Field of Study: Taxes – Technical</i></p> <p>  1 CPE 1 CE</p> <p>LEVEL: Intermediate</p> <p>NEW SESSION FOR 2022</p>	<p>Signed on August 16, 2022, the Inflation Reduction Act supports aspects of President Joe Biden’s Build Back Better Plan. Complementing the Infrastructure Investment and Jobs Act, this package includes provisions related to climate change and social policy. This session will discuss the provisions of the act pertaining to both individuals and corporations, and provide an overview of any additional proposals.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Analyze individual income tax provisions. • Explain significant aspects of corporate taxes. • Identify new proposals to the current system. • Discuss individual retirement accounts. • Recognize certain business tax deductions and planning opportunities. 	<p>IN-PERSON: 11/9 1:00 pm - 1:50 pm (50 min) 11/11 8:00 am - 8:50 am (50 min)</p> <p>VIRTUAL: 11/9 10:00 am - 10:50 am (50 min)</p>
<p>Introduction to Alteryx</p> <p>TAP22076-IP1</p> <p><i>CPE Field of Study: Computer Software & Applications</i></p> <p> 1 CPE</p> <p>LEVEL: Basic</p> <p>NEW SESSION FOR 2022</p>	<p>In this session we will provide an introduction to Alteryx including how to build workflows and Alteryx Designer basics. Upon completion of this session, participants will be able to recognize configurations and automation practices leveraging Alteryx workflows.</p>	<p>IN-PERSON: 11/12 9:00 am - 9:50 am (50 min)</p>
<p>Introduction To Crypto</p> <p>TAP22077-IP1, TAP22077-IP2 TAP22077-V1</p> <p><i>CPE Field of Study: Specialized Knowledge – Technical</i></p> <p>  1 CPE</p> <p>LEVEL: Basic</p> <p>NEW SESSION FOR 2022</p>	<p>Since 2009, crypto has transformed from a perceived fad to a mainstream way to invest and transact with others. This session covers the basics of cryptocurrency, from its reliance on blockchain technology to its use in everyday situations. This session also looks to the future of crypto as governments and legacy service providers struggle with the constant evolution of the digital world.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Trace the evolution of cryptocurrency and other digital assets from obscurity to mainstream adoption. • Identify common misconceptions of cryptocurrency. • Define basic crypto terminology. • Describe ways individuals and businesses use crypto. • Identify current crypto trends and the future of blockchain technology. 	<p>IN-PERSON: 11/9 4:25 pm - 5:15 pm (50 min) 11/11 2:45 pm - 3:35 pm (50 min)</p> <p>VIRTUAL: 11/8 11:00 am - 11:50 am (50 min)</p>







TAX & ASSET MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES (EST)
<p>Leveraging the Best Features and Functions of UltraTax CS</p> <p>TAP22078-IP1, TAP22078-IP2 TAP22078-V1, TAP22078-V2</p> <p><i>CPE Field of Study: Taxes – Technical</i> <i>CE Type: Federal Tax Law</i></p> <p>  2 CPE 2 CE</p> <p>LEVEL: Intermediate</p>	<p>Have you ever learned something new in UltraTax CS and thought, “Hmm, I wonder how long that’s been there?” Are you concerned that you may be missing other tools that can help you boost efficiency and accuracy? In this fast-paced session, we will review some of the most impactful preparation and workflow enhancements to UltraTax CS over the past several years, and review several features preparers may not be aware of.</p> <p>Upon completion of this session, participants will be able to implement time-saving features to boost productivity and assure accuracy at their firm.</p> <p>PREREQUISITES: Participants should have a strong working knowledge of UltraTax CS and be familiar with navigation.</p>	<p>IN-PERSON: 11/9 2:20 pm - 4:00 pm (100 min) 11/11 9:15 am - 10:55 am (100 min)</p> <p>VIRTUAL: 11/9 12:00 pm - 1:40 pm (100 min) 11/11 12:00 pm - 1:40 pm (100 min)</p>
<p>OneSource Income Tax Tips and Tricks</p> <p>TAP22079-IP1</p> <p><i>CPE Field of Study: Taxes – Technical</i></p> <p> 1 CPE</p> <p>LEVEL: Basic</p> <p>NEW SESSION FOR 2022</p>	<p>This session provides tips and tricks to ease your tax return preparation process.</p> <p>Upon completion of this session, participants will be able to utilize additional features within ONESOURCE Income Tax to improve tax preparation speed and accuracy.</p>	<p>IN-PERSON: 11/11 8:00 am - 8:50 am (50 min)</p>
<p>OneSource Tax Provision (Version 2016) Basics</p> <p>TAP22080-IP1</p> <p><i>CPE Field of Study: Taxes – Technical</i></p> <p> 1 CPE</p> <p>LEVEL: Basic</p> <p>NEW SESSION FOR 2022</p>	<p>This session will orient attendees to ONESOURCE Tax Provision (version 2016) by covering the navigation paradigms, data review functions, drill-down capabilities, and data entry and transfer functionality.</p> <p>Upon completion of this session, participants will be able to identify the navigational steps and processes associated with the 2016 version of ONESOURCE Tax Provision.</p>	<p>IN-PERSON: 11/11 11:20 am - 12:10 pm (50 min)</p>







TAX & ASSET MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES (EST)
<p>Partnership and Partner Reporting: K-1, K-2, K-3 – What’s Next?</p> <p>TAP22081-IP1, TAP22081-IP2 TAP22081-V1</p> <p><i>CPE Field of Study: Taxes – Technical</i> <i>CE Type: Federal Tax Law</i></p> <p>  1 CPE 1 CE</p> <p>LEVEL: Intermediate NEW SESSION FOR 2022</p>	<p>For the 2021 tax filing season, the IRS introduced new Schedules K-2 and K-3 to partnership and S corporation tax returns to standardize the reporting of foreign-related tax information. This session provides practitioners with an overview and introduction to Schedules K-2 and K-3, a highlight of filing requirements, a discussion of what information is required to be reported in different parts of the schedules, and tips on tackling the preparation of these forms. This session will discuss the IRS issued FAQs on the scope and application of the new rules and guidance.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Comprehend filing requirements for Schedules K-2 and K-3; • Identify and understand what information is required to be reported 	<p>IN-PERSON: 11/9 4:25 pm - 5:15 pm (50 min) 11/12 9:00 am - 9:50 am (50 min)</p> <p>VIRTUAL: 11/8 10:00 am - 10:50 am (50 min)</p>
<p>Processing Multi-State Returns in UltraTax CS</p> <p>TAP22083-IP1, TAP22083-IP2 TAP22083-V1</p> <p><i>CPE Field of Study: Taxes – Technical</i></p> <p>  2 CPE</p> <p>LEVEL: Intermediate</p>	<p>In this session, you will learn how to prepare multi-state returns efficiently using UltraTax CS. We will look at the allocation grid used for individual returns, as well as apportionment and adjustment screens used when working with businesses.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Understand the differences between AGI and Build Up states • Process multi-state returns using the allocation utility and apportionment grid • Prepare returns for individuals filing part-year or non-resident returns <p>PREREQUISITES: Participants should have a working knowledge of UltraTax CS or attended an entity preparation session.</p>	<p>IN-PERSON: 11/9 2:20 pm - 4:00 pm (100 min) 11/11 9:15 am - 10:55 am (100 min)</p> <p>VIRTUAL: 11/11 12:00 pm - 1:40 pm (100 min)</p>
<p>Reuters Next: Interview with Jim Robnett, former Deputy Chief of IRS Criminal Division</p> <p>TAP22082-IP1</p> <p><i>CPE Field of Study: Taxes - Technical</i></p> <p> 1 CPE 1 CE</p> <p>LEVEL: Overview NEW SESSION FOR 2022</p>	<p>Join us for an engaging Reuters interview with Jim Robnett, current Executive member with Madison Associates, LLC and former Deputy Chief of Criminal Investigation at the Internal Revenue Service. In this session, you’ll learn about Jim’s former role in IRS Criminal Investigation, where he oversaw worldwide operations involving criminal tax investigations, money laundering, public corruption, cyber, and ID theft. You’ll walk away with ideas to better protect your practice and advise your clients.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Identify how to protect your client’s identity • Advise your clients about potentially abusive arrangements • Protect your practice and advise your clients, learning enforcement and compliance priorities 	<p>IN-PERSON: 11/10 11:10 am - 12:00 pm (50 min)</p>
<p>Technology Creates Opportunity in SALT</p> <p>TAP22084-IP1</p> <p><i>CPE Field of Study: Taxes – Technical</i></p> <p> 1 CPE</p> <p>NEW SESSION FOR 2022</p>	<p>In this session, you will learn about creating opportunity within the SALT practice through the use of various technologies that drive efficiency, accuracy, and revenue.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Identify the uses of various automation and technology solutions • Identify internal and external opportunities to deploy technology within the practice <p>PREREQUISITES: Participants should have a basic knowledge of state and local tax.</p>	<p>IN-PERSON: 11/9 4:25 pm - 5:15 pm (50 min)</p>







TAX & ASSET MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES (EST)
<p>SECURE Act 2.0 – What’s New</p> <p>TAP22085-IP1, TAP22085-IP2 TAP22085-V1</p> <p><i>CPE Field of Study: Taxes – Technical</i> <i>CE Type: Update</i></p> <p>  1 CPE 1 CE</p> <p>LEVEL: Intermediate NEW SESSION FOR 2022</p>	<p>This webinar highlights the many provisions that will affect individual retirement tax planning. This provision entails a higher catch-up limit, an increase in the age for the required beginning date, treatment of student loan payments as elective deferrals for purposes of matching contributions, and other important retirement provisions.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Review the highlights of SECURE 2.0. • Analyze how the higher catch-up limits will apply. • Discuss how to prepare for the increased age for the required beginning date for mandatory distributions. • Explain the changes to SIMPLE and SEP IRAs. 	<p>IN-PERSON: 11/10 2:45 pm - 3:35 pm (50 min) 11/11 11:20 am - 12:10 pm (50 min)</p> <p>VIRTUAL: 11/11 10:00 am - 10:50 am (50 min)</p>
<p>SurePrep Individual Tax Workflow and Integration with UltraTax CS</p> <p>TAP22086-IP1, TAP22086-IP2 TAP22086-V1, TAP22086-V2</p> <p><i>CPE Field of Study: Computer Software & Applications</i></p> <p>  1 CPE</p> <p>LEVEL: Overview NEW SESSION FOR 2022</p>	<p>In this session, you’ll learn about automation of 1040 tax workflow through SurePrep to produce a return within UltraTax CS. This session demonstrates how you can leverage SurePrep to reduce review time by facilitating detailed workpaper preparation at the staff level.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Set up and create SPbinders • Understand the Review Wizards Process • Navigate and review source documents within an SP Binder • Export data to UltraTax CS 	<p>IN-PERSON: 11/10 2:45 pm - 3:35 pm (50 min) 11/11 8:00 am - 8:50 am (50 min)</p> <p>VIRTUAL: 11/10 10:00 am - 10:50 am (50 min) 11/11 10:00 am - 10:50 am (50 min)</p>
<p>Tax Automation Tools that Earn 5 Stars from Staff and Clients</p> <p>TAP22087-IP1</p> <p><i>CPE Field of Study: Computer Software & Applications</i></p> <p> 1 CPE</p> <p>LEVEL: Basic NEW SESSION FOR 2022</p>	<p>In this session, we’ll discuss how outdated processes filled with manual tasks can cause anxiety and burnout among staff, and how to solve it. We’ll explore a variety of options for automating client touchpoints across the tax engagement using one platform, the SafeSend Suite, for a consistent and intuitive experience for both staff and clients. We’ll go through gathering source documents, collecting digital organizers, assembling individual/entity tax returns, delivering completed returns without a user name or password, collecting e-signatures, sending reminders, and accepting tax prep fees, just to name a few, and hear from firms using integration from UltraTax CS and GoSystem Tax RS to the SafeSend Suite to make staff and clients smile.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Identify common points of frustration for firms and clients throughout the tax engagement • Understand the new technological advances that are automating tax practices • Develop a client-centric approach for tax engagements • Improve client collaboration 	<p>IN-PERSON: 11/10 2:45 pm - 3:35 pm (50 min)</p>







TAX & ASSET MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES (EST)
<p>Tax Research – Best Practices</p> <p>TAP22088-IP1, TAP22088-IP2 TAP22088-V1</p> <p><i>CPE Field of Study: Taxes – Technical</i> <i>CE Type: Federal Tax Law</i></p> <p>  1 CPE 1 CE</p> <p>LEVEL: Basic NEW SESSION FOR 2022</p>	<p>A beneficial tax return position can be developed and strengthened through successful research techniques. This session allows participants to brush up on effective tax research methods, including how to properly weigh the different authorities out there. This session also teaches participants how to properly document their research through tax memoranda.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Identify effective research techniques. • Understand the various types of tax authorities. • Write an effective tax memorandum. 	<p>IN-PERSON: 11/9 1:00 pm - 1:50 pm (50 min) 11/12 9:00 am - 9:50 am (50 min)</p> <p>VIRTUAL: 11/9 2:00 pm - 2:50 pm (50 min)</p>
<p>Tax Return Troubleshooting in UltraTax CS</p> <p>TAP22089-IP1, TAP22089-IP2 TAP22089-V1</p> <p><i>CPE Field of Study: Taxes – Technical</i></p> <p>  1.5 CPE</p> <p>LEVEL: Intermediate</p>	<p>Something not right on your tax return, but you are too busy to call support? In this session, learn how to navigate tax returns to determine what corrections may be needed to resolve calculation and electronic filing errors.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Troubleshoot calculation and electronic filing errors on tax returns • Utilize Quick Navigation links to quickly move between forms, related schedules, and worksheets • Decode electronic filing errors • Leverage review tools including Tickmarks and the Watch window to see calculation changes <p>PREREQUISITES: Participants should have a working knowledge of UltraTax CS.</p>	<p>IN-PERSON: 11/10 4:00 pm - 5:15 pm (75 min) 11/11 4:00 pm - 5:15 pm (75 min)</p> <p>VIRTUAL: 11/8 3:00 pm - 4:15 pm (75 min)</p>
<p>UltraTax CS 2022 Update</p> <p>TAP22090-IP1, TAP22090-IP2, TAP22090-IP3 TAP22090-V1, TAP22090-V2</p> <p><i>CPE Field of Study: Taxes – Technical</i> <i>CE Type: Update</i></p> <p>  1.5 CPE 1 CE</p> <p>LEVEL: Update NEW SESSION FOR 2022</p>	<p>This session will prepare you for the 2022 filing season by reviewing functionality enhancements and form changes implemented in UltraTax CS.</p> <p>Upon completion of this session, participants will be able use newly added features in 2022 UltraTax CS and prepare returns involving updated 2022 calculations.</p>	<p>IN-PERSON: 11/10 9:30 am - 10:45 am (75 min) 11/10 4:00 pm - 5:15 pm (75 min) 11/11 4:00 pm - 5:15 pm (75 min)</p> <p>VIRTUAL: 11/9 3:00 pm - 4:15 pm (75 min) 11/11 2:00 pm - 3:15 pm (75 min)</p>







TAX & ASSET MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES (EST)
<p>UltraTax CS Advanced Business Topics</p> <p>TAP22091-IP1, TAP22091-IP2 TAP22091-V1, TAP22091-V2</p> <p><i>CPE Field of Study: Taxes – Technical</i></p> <p>  1 CPE</p> <p>LEVEL: Advanced NEW SESSION FOR 2022</p>	<p>In this session, we will discuss advanced topics for Partnership and Corporate returns. This will include conversion between 1120S and 1065, completing Form 2553, and state Pass-Through Entity Tax (PTET) returns.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Complete an S-Corp Election • Apportion and allocate state income on Partnership returns • Complete a step-up in basis • Set up a consolidated 1120 or 1120S return <p>PREREQUISITES: Participants should have a strong working knowledge of business returns in UltraTax CS</p>	<p>IN-PERSON: 11/10 11:10 am - 12:00 pm (50 min) 11/11 2:45 pm - 3:35 pm (50 min)</p> <p>VIRTUAL: 11/8 2:00 pm - 2:50 pm (50 min) 11/10 10:00 am - 10:50 am (50 min)</p>
<p>UltraTax CS Advanced Individual Topics</p> <p>TAP22092-IP1, TAP22092-IP2 TAP22092-V1, TAP22092-V2</p> <p><i>CPE Field of Study: Taxes – Technical</i> <i>CE Type: Federal Tax Law</i></p> <p>  1 CPE 1 CE</p> <p>LEVEL: Advanced NEW SESSION FOR 2022</p>	<p>In this session, we will discuss advanced topics for individual tax return preparation including QBI, Basis Limitations, Carryovers and the Filing Status Optimization.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Track Qualified Business Income limitations on tax returns with multiple activities • Figure basis, at-risk, and passive activity loss limitations • Track a variety of carryovers • Perform a filing status optimization, including splitting returns for mixed residency status <p>PREREQUISITES: Participants should have a strong working knowledge of Individual returns in UltraTax CS.</p>	<p>IN-PERSON: 11/10 2:45 pm - 3:35 pm (50 min) 11/11 11:20 am - 12:10 pm (50 min)</p> <p>VIRTUAL: 11/10 11:00 am - 11:50 am (50 min) 11/11 11:00 am - 11:50 am (50 min)</p>
<p>UltraTax CS Corporate Return Preparation</p> <p>TAP22093-IP1, TAP22093-IP2 TAP22093-V1</p> <p><i>CPE Field of Study: Taxes – Technical</i> <i>CE Type: Federal Tax Law</i></p> <p>  1 CPE 1 CE</p> <p>LEVEL: Basic</p>	<p>In this session, you will learn how to prepare corporate returns – 1120 and 1120S – using UltraTax CS. We will discuss entering different activities, apportioning income to states, and entering shareholder information.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Navigate data entry across a variety of income sources • Populate state returns with apportionment • Prepare Schedule K-1 and track basis for pass-through entity owners • Manage fixed assets information <p>PREREQUISITES: Participants should be familiar with UltraTax CS or attend UltraTax CS Navigation and Individual Tax Preparation</p>	<p>IN-PERSON: 11/9 1:00 pm - 1:50 pm (50 min) 11/11 2:45 pm - 3:35 pm (50 min)</p> <p>VIRTUAL: 11/9 2:00 pm - 2:50 pm (50 min)</p>







TAX & ASSET MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES (EST)
<p>UltraTax CS Fiduciary Tax Return Preparation</p> <p>TAP22094-IP1, TAP22094-IP2 TAP22094-V1</p> <p><i>CPE Field of Study: Taxes – Technical</i> <i>CE Type: Federal Tax Law</i></p> <p>  1 CPE 1 CE</p> <p>LEVEL: Basic</p>	<p>In this session, learn how to prepare fiduciary returns in UltraTax CS, including simple, complex, and grantor trusts on form 1041, as well as charitable trusts on Form 5227.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Prepare form 1041 for simple, complex, and grantor trusts • Complete beneficiary data entry and allocations • Prepare Form 5227 for charitable trusts • Allocate income to state returns <p>PREREQUISITES: Participants should have a working knowledge of UltraTax CS.</p>	<p>IN-PERSON: 11/9 1:00 pm - 1:50 pm (50 min) 11/12 9:00 am - 9:50 am (50 min)</p> <p>VIRTUAL: 11/11 11:00 am - 11:50 am (50 min)</p>
<p>UltraTax CS Navigation and Individual Tax Return Preparation</p> <p>TAP22095-IP1 TAP22095-V1</p> <p><i>CPE Field of Study: Taxes – Technical</i> <i>CE Type: Federal Tax Law</i></p> <p>  2 CPE 2 CE</p> <p>LEVEL: Basic</p>	<p>In this session, learn how to navigate UltraTax CS and enter information in individual returns to reflect a variety of situations, from W-2 wages to sole proprietorships and retirement income.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Prepare 1040 Returns in UltraTax CS • Report income from a variety of sources including Forms W-2 and 1099 • Prepare Schedules C and E for business owners and track fixed asset information • Track passive activity and basis carryovers and limitations • Utilize data entry tools including Source Data Entry and Diagnostics 	<p>IN-PERSON: 11/9 2:20 pm - 4:00 pm (100 min)</p> <p>VIRTUAL: 11/8 12:00 pm - 1:40 pm (100 min)</p>
<p>UltraTax CS Other Returns</p> <p>TAP22096-IP1, TAP22096-IP2 TAP22096-V1</p> <p><i>CPE Field of Study: Taxes – Technical</i> <i>CE Type: Federal Tax Law</i></p> <p>  1.5 CPE 1 CE</p> <p>LEVEL: Intermediate</p> <p>NEW SESSION FOR 2022</p>	<p>In this session, we will discuss key data entry points for less-common entities: 706, 709, 990 and 5500. We will examine entity-specific data entry that differs from other entities in UltraTax CS and efficiency features to help you process these returns.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Process 706, 709, 990 and 5500 returns • Integrate with Microsoft Excel to efficiently import information • Split and generate 709 returns for married individuals • Differentiate e-file signature methods for Form 5500 <p>PREREQUISITES: Participants should be familiar with UltraTax CS</p>	<p>IN-PERSON: 11/10 4:00 pm - 5:15 pm (75 min) 11/12 10:15 am - 11:30 am (75 min)</p> <p>VIRTUAL: 11/10 2:00 pm - 3:15 pm (75 min)</p>







TAX & ASSET MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES (EST)
<p>UltraTax CS Partnership Return Preparation</p> <p>TAP22097-IP1, TAP22097-IP2 TAP22097-V1</p> <p><i>CPE Field of Study: Taxes – Technical</i> <i>CE Type: Federal Tax Law</i></p> <p>  1 CPE 1 CE</p> <p>LEVEL: Basic</p>	<p>In this session, you will learn how to prepare partnership returns using UltraTax CS. We will discuss entering different activities, apportioning income to states, and allocating income to partners.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Navigate data entry across a variety of income sources • Populate state returns with apportionment and allocation information • Prepare Schedule K-1 and track basis for pass-through entity owners • Manage fixed asset information <p>PREREQUISITES: Participants should be familiar with UltraTax CS or attend UltraTax CS Navigation and Individual Tax Preparation</p>	<p>IN-PERSON: 11/9 4:25 pm - 5:15 pm (50 min) 11/10 2:45 pm - 3:35 pm (50 min)</p> <p>VIRTUAL: 11/9 11:00 am - 11:50 am (50 min)</p>
<p>Unleash the Power of Checkpoint Edge</p> <p>TAP22098-IP1, TAP22098-IP2 TAP22098-V1</p> <p><i>CPE Field of Study: Computer Software & Applications</i></p> <p>  1 CPE</p> <p>LEVEL: Basic NEW SESSION FOR 2022</p>	<p>This session is recommended for anyone who has transitioned to Checkpoint Edge from Checkpoint Classic, or another research platform, or anyone who wants to learn about the exclusive benefits and features of using Checkpoint Edge. During this session, you will learn how to find answers to your tax questions using the state-of-the-art research platform, Checkpoint Edge.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Describe key advantages of using the Checkpoint Edge platform vs. other platforms • Explain answers to frequently asked questions from customers transitioning to Checkpoint Edge • Demonstrate where to find commonly used features, like Find by Citation • Explain the user-friendly layout of the main screen • Describe the exclusive benefits of predictive queries • Explain different ways to view and filter search results 	<p>IN-PERSON: 11/9 4:25 pm - 5:15 pm (50 min) 11/11 8:00 am - 8:50 am (50 min)</p> <p>VIRTUAL: 11/8 10:00 am - 10:50 am (50 min)</p>
<p>Unlocking the Puzzling World of Nonfungible Tokens (NFTs)</p> <p>TAP22099-IP1, TAP22099-IP2 TAP22099-V1</p> <p><i>Specialized Knowledge – Technical</i></p> <p>  1 CPE</p> <p>LEVEL: Basic NEW SESSION FOR 2022</p>	<p>From digitized art and music to articles and tweets, nonfungible tokens (NFTs) are becoming more and more popular. But why are they so valuable? This session answers that frequently asked question and explores what NFTs are, how they are taxed, and what is needed to buy or sell them.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Explain what an NFT is and from where it derives its value. • Identify four basic steps to investing in NFTs. • Describe the federal income tax treatment of buying and selling NFTs. 	<p>IN-PERSON: 11/10 11:10 am - 12:00 pm (50 min) 11/11 11:20 am - 12:10 pm (50 min)</p> <p>VIRTUAL: 11/8 2:00 pm - 2:50 pm (50 min)</p>




TECHNOLOGY SESSIONS	DESCRIPTION	DATES/TIMES (EST)
<p>Using UltraTax CS and Onvio for your Firm's End-to-End Tax Workflow</p> <p>TAP22100-IP1, TAP22100-IP2 TAP22100-V1, TAP22100-V2</p> <p><i>CPE Field of Study: Computer Software & Applications</i></p> <p>  2 CPE</p> <p>LEVEL: Basic</p>	<p>This session is designed to show you how Onvio Firm Management adds time-saving value to drive your end-to-end tax workflow.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Utilize Onvio Firm Management throughout your end-to-end tax workflow • Utilize Client Center to streamline your client collaboration processes • Gain efficiencies in the document collection process by utilizing document requests and approvals • Utilize integration with UltraTax CS to efficiently manage your tax return statuses, document requests, client portals, and invoice delivery • Take advantage of Onvio mobile applications for client and staff members 	<p>IN-PERSON: 11/9 2:20 pm - 4:00 pm (100 min) 11/11 9:15 am - 10:55 am (100 min)</p> <p>VIRTUAL: 11/8 12:00 pm - 1:40 pm (100 min) 11/11 12:00 pm - 1:40 pm (100 min)</p>
<p>What's New in GoSystem Tax RS</p> <p>TAP22101-IP1 TAP22101-V1</p> <p><i>CPE Field of Study: Taxes – Technical</i></p> <p>  1 CPE</p> <p>LEVEL: Update</p> <p><i>NEW SESSION FOR 2022</i></p>	<p>In this session, we will look at the new features and functionality in GoSystem Tax RS for 2022.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Understand data entry changes within GoSystem Tax RS • Utilize help resources to assist with understanding these changes 	<p>IN-PERSON: 11/11 11:20 am - 12:10 pm (50 min)</p> <p>VIRTUAL: 11/9 11:00 am - 11:50 am (50 min)</p>
<p>Risk Management: It's a Tech or Security Thing, Right?</p> <p>TAP22102-IP1, TAP22102-IP2</p> <p><i>CPE Field of Study: Information Technology – Technical</i></p> <p>  1.5 CPE</p> <p>LEVEL: Basic</p> <p><i>NEW SESSION FOR 2022</i></p>	<p>In this session we will discuss risk management: different risk types and how they apply to various roles at your firm.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Identify risk types • Identify stakeholders • Develop a risk management plan 	<p>IN-PERSON: 11/10 4:00 pm - 5:15 pm (75 min) 11/11 4:00 pm - 5:15 pm (75 min)</p>

TECHNOLOGY SESSIONS	DESCRIPTION	DATES/TIMES (EST)
<p>Getting Started with Thomson Reuters APIs</p> <p>TAP22103-IP1, TAP22103-IP2 TAP22103-V1</p> <p><i>CPE Field of Study: Computer Software & Applications</i></p> <p>  1 CPE</p> <p>LEVEL: Basic</p> <p>NEW SESSION FOR 2022</p>	<p>You've probably heard the buzzword "API" around the business, but you're not quite sure what APIs can do for your firm. Gain an introduction of the terminology behind APIs as well as see examples of how APIs can be used within Thomson Reuters tax products including GoFileRoom and GoSystem Tax.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Navigate and use the Thomson Reuters Developer Portal • Obtain your firm's API Keys • Run simple API calls • Have a basic understanding of how to use these APIs in Postman. <p>PREREQUISITES: Participants should have a basic understanding of APIs.</p>	<p>IN-PERSON: 11/9 1:00 pm - 1:50 pm (50 min) 11/11 8:00 am - 8:50 am (50 min)</p> <p>VIRTUAL: 11/9 10:00 am - 10:50 am (50 min)</p>
<p>I Took The Bait, Now What?</p> <p>TAP22104-IP1, TAP22104-IP2 TAP22104-V1</p> <p><i>CPE Field of Study: Information Technology – Technical</i></p> <p>  1.5 CPE</p> <p>LEVEL: Basic</p> <p>NEW SESSION FOR 2022</p>	<p>According to the IRS, phishing is the number one cause of data breaches in tax and accounting firms. Tax professionals are urged to step up their security and train employees as cybercriminals become more sophisticated in their phishing schemes resulting in a security breach that could go unrecognized for months. This session will provide a highlight of recent attacks and scams by cybercriminals against tax professionals, walk you through the steps of developing an incident response plan, help you recognize when a security breach has occurred and what you should do in the event of security breach.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Discuss recent attacks and scams by cybercriminals against tax professionals • Identify the components of an incident response plan • Monitor and detect when a data breach has occurred • Demonstrate what to do in the event of a data breach 	<p>IN-PERSON: 11/10 4:00 pm - 5:15 pm (75 min) 11/12 10:15 am - 11:30 am (75 min)</p> <p>VIRTUAL: 11/10 2:00 pm - 3:15 pm (75 min)</p>
<p>Introduction to Power BI / Power Platform</p> <p>TAP22105-IP1, TAP22105-IP2 TAP22105-V1</p> <p><i>CPE Field of Study: Computer Software & Applications</i></p> <p>  1 CPE</p> <p>LEVEL: Basic</p> <p>NEW SESSION FOR 2022</p>	<p>Have you found yourself spending too much time gathering data and reporting information out to your colleagues? Explore the capabilities on enhanced reporting and on demand data that Power BI provides.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Connect your firm's data to the Power BI environment to enhance your reporting • Utilize basic functionality of Power BI, including adding visualizations, manipulating data using Power Query, and publishing reports <p>PREREQUISITES: Participants should have a knowledge of GoFileRoom, GoSystem Tax RS, or OneSource data points.</p>	<p>IN-PERSON: 11/10 2:45 pm - 3:35 pm (50 min) 11/11 11:20 am - 12:10 pm (50 min)</p> <p>VIRTUAL: 11/9 11:00 am - 11:50 am (50 min)</p>





TECHNOLOGY SESSIONS	DESCRIPTION	DATES/TIMES (EST)
<p>Microsoft Excel Pivot Tables</p> <p>TAP22106-IP1, TAP22106-IP2 TAP22106-V1, TAP22106-V2</p> <p><i>CPE Field of Study: Computer Software & Applications</i></p> <p>  1 CPE</p> <p>LEVEL: Advanced</p> <p>NEW SESSION FOR 2022</p>	<p>In this session, we will discuss how you can be more efficient in Microsoft Excel utilizing Pivot Tables. This session will help anyone who analyzes data be more efficient and effective in their workflow. Come learn how to save valuable time!</p> <p>Upon completion of this session, participants will be able to utilize Pivot Tables to:</p> <ul style="list-style-type: none"> • Prepare raw data for analysis • Apply consistent formatting, sorting and filtering • Display data in multiple ways • Insert customized formulas and visuals <p>PREREQUISITES: Participants should have a basic, working knowledge of the Microsoft Office Suite to attend this session</p>	<p>IN-PERSON: 11/10 11:10 am - 12:00 pm (50 min) 11/11 2:45 pm - 3:35 pm (50 min)</p> <p>VIRTUAL: 11/8 10:00 am - 10:50 am (50 min) 11/11 10:00 am - 10:50 am (50 min)</p>
<p>Microsoft OneNote for Accounting Professionals</p> <p>TAP22107-IP1, TAP22107-IP2 TAP22107-V1</p> <p><i>CPE Field of Study: Computer Software & Applications</i></p> <p>  1 CPE</p> <p>LEVEL: Basic</p> <p>NEW SESSION FOR 2022</p>	<p>In this session, we'll explore the Microsoft OneNote Application and learn how using OneNote can help you stay organized.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Have a working knowledge of Microsoft OneNote • Differentiate between notebooks, sections and pages • Capture notes, tag notes, create lists, create tables, insert images and create page templates • Access notebooks on multiple devices and share notebooks with others <p>PREREQUISITES: Participants should have a basic knowledge accessing and working with Microsoft applications.</p>	<p>IN-PERSON: 11/9 1:00 pm - 1:50 pm (50 min) 11/11 11:20 am - 12:10 pm (50 min)</p> <p>VIRTUAL: 11/8 11:00 am - 11:50 am (50 min)</p>
<p>Microsoft Teams Essential Tips and Tricks</p> <p>TAP22108-IP1, TAP22108-IP2 TAP22108-V1</p> <p><i>CPE Field of Study: Computer Software & Applications</i></p> <p>  1 CPE</p> <p>LEVEL: Intermediate</p> <p>NEW SESSION FOR 2022</p>	<p>Attending this session will help you to embrace Microsoft Teams as a powerful collaboration tool for your firm.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Differentiate between group chats, channels and teams for better utilization • Navigate and utilize helpful functions • Schedule and manage meetings internally and externally • Execute calls, screen sharing and recording meetings • Configure preferences and settings • Integrate with other applications <p>PREREQUISITES: Participants should have a basic knowledge accessing and working with Microsoft applications.</p>	<p>IN-PERSON: 11/9 4:25 pm - 5:15 pm (50 min) 11/12 9:00 am - 9:50 am (50 min)</p> <p>VIRTUAL: 11/9 11:00 am - 11:50 am (50 min)</p>






TECHNOLOGY SESSIONS	DESCRIPTION	DATES/TIMES (EST)
<p>Putting the Locks on Your Client Data</p> <p>TAP22109-IP1, TAP22109-IP2 TAP22109-V1</p> <p><i>CPE Field of Study: Information Technology – Technical</i></p> <p>  2 CPE</p> <p>LEVEL: Basic</p> <p>NEW SESSION FOR 2022</p>	<p>Due to the sensitive client data held by tax professionals, cybercriminals increasingly are targeting the tax professional community to steal taxpayer data and file fraudulent tax returns. The IRS continues to warn tax professionals to secure their systems and protect their client data. The Federal Trade Commission (FTC) Safeguards Rule requires tax professionals that maintain, share, transmit, or store taxpayer data to have safeguards in place to protect taxpayer information and develop a written information security plan that describes their program to protect that information. This session will provide information on your legal requirements to safeguard your client data, provide tips and strategies on measures to put in place to better protect your client data, and walk you through the steps of designing a written information security plan for your firm.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Understand your legal requirements to safeguard taxpayer data • Learn tips and strategies to safeguard client data on-premise and in remote workplaces • Identify the components of a written information security plan • Discuss the consequences and impact of not having security measures in place 	<p>IN-PERSON: 11/9 2:20 pm - 4:00 pm (100 min) 11/11 9:15 am - 10:55 am (100 min)</p> <p>VIRTUAL: 11/11 12:00 pm - 1:40 pm (100 min)</p>
<p>Top 10 Microsoft Excel Tips for Accounting Professionals</p> <p>TAP22110-IP1, TAP22110-IP2 TAP22110-V1</p> <p><i>CPE Field of Study: Computer Software & Applications</i></p> <p>  1.5 CPE</p> <p>LEVEL: Intermediate</p>	<p>In this session, we will discuss how you can be more efficient with Microsoft Excel. Do you consider yourself proficient with Excel but not an expert? You won't want to miss this session!</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Apply 10 quick tips to bring greater efficiency to using Microsoft Excel • Identify how to easily navigate, utilize timesaving functions • Apply consistent formatting • Customize the status bar <p>PREREQUISITES: Participants should have a basic, working knowledge of the Microsoft Office Suite to attend this session</p>	<p>IN-PERSON: 11/10 4:00 pm - 5:15 pm (75 min) 11/12 10:15 am - 11:30 am (75 min)</p> <p>VIRTUAL: 11/10 2:00 pm - 3:15 pm (75 min)</p>
<p>Top 10 Microsoft Outlook Tips for Accounting Professionals</p> <p>TAP22111-IP1, TAP22111-IP2 TAP22111-V1</p> <p><i>CPE Field of Study: Computer Software & Applications</i></p> <p>  1.5 CPE</p> <p>LEVEL: Intermediate</p>	<p>In this session, we will explore more advanced features of Microsoft Outlook.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Better take advantage of Outlook's advanced email and calendar functions • Create and use templates to drastically reduce time • Gain knowledge on how to clean up your inbox by scheduling emails as calendar appointments or tasks • Walk away with several quick takeaways that will make you more efficient <p>PREREQUISITES: Participants should be to navigate Outlook and have a basic knowledge of functionality.</p>	<p>IN-PERSON: 11/10 9:30 am - 10:45 am (75 min) 11/11 4:00 pm - 5:15 pm (75 min)</p> <p>VIRTUAL: 11/11 2:00 pm - 3:15 pm (75 min)</p>







TRENDS IN THE PROFESSION SESSIONS	DESCRIPTION	DATES/TIMES (EST)
<p>Achieving Success Through Daily Leadership</p> <p>TAP22112-IP1, TAP22112-IP2 TAP22112-V1</p> <p><i>CPE Field of Study: Business Management & Organization</i></p> <p>  1.5 CPE</p> <p>LEVEL: Basic</p> <p><i>NEW SESSION FOR 2022</i></p>	<p>Through this engaging discussion, we will learn about and share ideas on daily leadership practices to achieve firm success.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Recognize their role as a leader • Self-assess their leadership style • Discuss ways to improve personal leadership skills • Identify ways to become a better mentor/coach 	<p>IN-PERSON: 11/10 9:30 am - 10:45 am (75 min) 11/11 4:00 pm - 5:15 pm (75 min)</p> <p>VIRTUAL: 11/8 3:00 pm - 4:15 pm (75 min)</p>
<p>Attracting and Retaining Talent in a Talent Strapped Economy</p> <p>TAP22113-IP1, TAP22113-IP2 TAP22113-V1</p> <p><i>CPE Field of Study: Personnel/Human Resources</i></p> <p>  1.5 CPE</p> <p>LEVEL: Intermediate</p> <p><i>NEW SESSION FOR 2022</i></p>	<p>In this session, you will learn about talent trends happening in the industry. We will discuss innovative way you can take immediate action tied to your recruitment and retention efforts. Participants should be people leaders who are responsible for hiring and/or managing employees or in roles that support these activities.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Understand industry trends related to talent • Set up additional attraction / hiring best practices to your recruiting efforts • Integrate retention and development approaches with your team 	<p>IN-PERSON: 11/10 4:00 pm - 5:15 pm (75 min) 11/12 10:15 am - 11:30 am (75 min)</p> <p>VIRTUAL: 11/11 2:00 pm - 3:15 pm (75 min)</p>
<p>Back to the Basics of Marketing and Business Development</p> <p>TAP22114-IP1, TAP22114-IP2 TAP22114-V1</p> <p><i>CPE Field of Study: Communications & Marketing</i></p> <p>  1 CPE</p> <p>LEVEL: Basic</p> <p><i>NEW SESSION FOR 2022</i></p>	<p>New digital marketing platforms and tools are constantly developed and we're all being preached this tool is the new and best way to market your firm and get in front of your target audience. Most accountants did not get into the profession with the desire to market themselves or their firm, and the plethora of social media outlets adds to the mounting pressure. Why can't it just be simple? In this session, we will revisit some of the steadfast ways of marketing and building business and talk about how we can easily leverage digital tools. You'll learn the importance of involvement, understanding and articulating what you do and who you want to do it for, and techniques that will make your job of marketing easier.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • List two marketing tools • Uncover your intended audience • Analyze your marketing plan for effectiveness 	<p>IN-PERSON: 11/10 2:45 pm - 3:35 pm (50 min) 11/12 9:00 am - 9:50 am (50 min)</p> <p>VIRTUAL: 11/9 10:00 am - 10:50 am (50 min)</p>



TRENDS IN THE PROFESSION SESSIONS	DESCRIPTION	DATES/TIMES (EST)
<p>Beyond Pay and Benefits – The Ideal Environment for Retaining Talent</p> <p>TAP22115-IP1</p> <p><i>CPE Field of Study: Personnel/Human Resources</i></p> <p> 1 CPE</p> <p>LEVEL: Intermediate</p>	<p>Set the vision for your firm so staff understand their role in the firm’s future. Creating a firm culture that balances non-financial components such as flexibility, scheduling, and technology is important to the retention of talent. In this session, you will learn strategies to strengthen your firms culture to become the employer of choice.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Implement strategies to strengthen your firm’s culture • Communicate your firm’s vision with staff 	<p>IN-PERSON: 11/11 8:00 am - 8:50 am (50 min)</p>
<p>Brain Break: Mindful Meditation</p> <p>TAP22116-IP1, TAP22116-IP2</p> <p><i>NEW SESSION FOR 2022</i></p>	<p>Apply the principles of mindfulness through meditation, guided by Sunish Mehta.</p> <p>Sunish Mehta, CPA has been a practitioner and instructor of Mindfulness for over 20 years and has worked with several Mindfulness Organizations to date. Having studied with some of the top Mindfulness Teachers in the world including His Holiness The Dalai Lama, Sunish has integrated mindfulness into his learning and consulting work with the focused goal to help conscious professionals bring focus, creativity, and balance to their professional and personal lives.</p> <p>This session does NOT offer CPE or CE credit.</p>	<p>IN-PERSON: 11/11 8:00 am - 8:50 am (50 min) 11/11 2:45 pm - 3:35 pm (50 min)</p>
<p>Brain Break: Trivia Time!</p> <p>TAP22117-IP1, TAP22117-IP2</p> <p><i>NEW SESSION FOR 2022</i></p>	<p>Join us for this fun-filled session and test your trivia knowledge against your fellow attendees. In the spirit of our host city, all questions will be centered around American history and Washington, D.C. Take a break, have some fun, and compete for prizes! Come prepared to have fun, answer questions, and take a brain break from SYNERGY sessions!</p> <p>This session does NOT offer CPE or CE credit.</p>	<p>IN-PERSON: 11/10 2:45 pm - 3:35 pm (50 min) 11/11 11:20 am - 12:10 pm (50 min)</p>
<p>Building Strong Remote or Hybrid Work Environments</p> <p>TAP22118-IP1, TAP22118-IP2 TAP22118-V1</p> <p><i>CPE Field of Study: Personnel/Human Resources</i></p> <p>  1.5 CPE</p> <p>LEVEL: Advanced</p> <p><i>NEW SESSION FOR 2022</i></p>	<p>With the growth of remote workforces, it is important for firms to thoroughly evaluate and establish an environment along with policies and procedures to ensure success. This not only includes ensuring remote or hybrid employees understand expectations but also that the firm is creating an environment and culture to grow and retain key talent. In addition, employees must have the right technology to effectively and efficiently complete the work necessary to support their clients.</p> <p>In this session, we will review best practices for establishing remote policies and procedures, address recommended technologies consideration, and share practical steps that firms can take to ensure success.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Identify key considerations when establishing remote and hybrid workforce policies • Describe best practices in developing a strong firm culture in an evolving remote environment • Evaluate technology considerations for working remotely 	<p>IN-PERSON: 11/10 9:30 am - 10:45 am (75 min) 11/11 4:00 pm - 5:15 pm (75 min)</p> <p>VIRTUAL: 11/9 3:00 pm - 4:15 pm (75 min)</p>

11/11 11:20 AM - 12:10 PM (50 minutes)

TRENDS IN THE PROFESSION SESSIONS	DESCRIPTION	DATES/TIMES (EST)
<p>Getting Out of your Own Way: The Secret to Executing Change in your Firm</p> <p>TAP22121</p> <p><i>CPE Field of Study: Business Management & Organization</i></p> <p> 1 CPE</p> <p>LEVEL: Basic</p> <p><i>NEW SESSION FOR 2022</i></p>	<p>Join this session and learn the secret to executing change and building your book of business. When you realize that you can accomplish anything by collaborating, delegating, and communicating, growth happens and positive culture builds. In this session you will learn about define your “why” and what needs to be done to empower a firm champion to lead this effort. You will also learn how to create a strategy for effective communication while identifying the steps and short cuts to make this important transformation.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Define your “why” and vision • Identify the steps you need to take to empower your firm champion to lead into change. • Create a strategy for effectively communicating to your team. • Identify action steps and short cuts to shift your firm culture from reactive to proactive. 	<p>IN-PERSON: 11/12 9:00 am - 9:50 am (50 min)</p>
<p>Guiding Technology Centered Change in Your Firm</p> <p>TAP22122-IP1, TAP22122-IP2 TAP22122-V1</p> <p><i>CPE Field of Study: Business Management & Organization</i></p> <p>  1.5 CPE</p> <p>LEVEL: Basic</p> <p><i>NEW SESSION FOR 2022</i></p>	<p>In this session, you will learn how to cultivate your change management skills and understand how to lead successful change efforts in your firm. We will discuss key change management challenges faced by firms and provide a roadmap for creating effective change management plans.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Define change management concepts and how to successfully manage change in your firm • Identify how to assess your firm’s current state and readiness for change • Review how to build a change management roadmap that combines both strategy & execution • Understand how to create an environment for change that builds clarity, commitment, and urgency • Establish ways to mitigated risk, collect feedback, and evaluate change efforts 	<p>IN-PERSON: 11/10 4:00 pm - 5:15 pm (75 min) 11/12 10:15 am - 11:30 am (75 min)</p> <p>VIRTUAL: 11/9 3:00 pm- 4:15 pm (75 min)</p>
<p>Hot Topics: An Editorial Panel Discussion</p> <p>TAP22123-IP1, TAP22123-IP2</p> <p><i>CPE Field of Study: Taxes – Technical</i> <i>CE Type: Federal Tax Law</i></p> <p> 1.5 CPE 1 CE</p> <p>LEVEL: Overview</p> <p><i>NEW SESSION FOR 2022</i></p>	<p>At this panel discussion, you’ll hear from subject matter experts on our Thomson Reuters editorial team while they discuss some of the hottest topics in the industry, including:</p> <ul style="list-style-type: none"> • Examining the complex tax issues surrounding cryptocurrency, including the many ways the IRS is enforcing the proper reporting of crypto transactions • Financial Reporting & Other Implications of Environmental, Social & Governance (ESG) Impacts • What the IRS is doing to combat tax-related identity theft for taxpayers & the legal requirements for tax professionals to safeguard taxpayer data • Gig economy workers - 1099-K’s are an opportunity for firms to tap into the self-employed market <p>This session will be hosted by one of our Reuters journalists.</p> <p>Upon completion of this panel session, participants will know the latest breaking changes and news regarding our selected hot topics.</p> <p>PREREQUISITES: This panel is appropriate for professionals at all organizational levels.</p>	<p>IN-PERSON: 11/10 9:30 am - 10:45 am (75 min) 11/11 4:00 pm - 5:15 pm (75 min)</p>

TRENDS IN THE PROFESSION SESSIONS	DESCRIPTION	DATES/TIMES (EST)
<p>How to Schedule Fewer and Lead More Effective Meetings</p> <p>TAP22124-IP1, TAP22124-IP2 TAP22124-V1, TAP22124-V2</p> <p><i>CPE Field of Study: Business Management & Organization</i></p> <p>  1 CPE</p> <p>LEVEL: Basic NEW SESSION FOR 2022</p>	<p>In this session, you will learn how to maximize your meeting time so both your clients and staff are prepared and engaged. We'll discuss key components of an effective meeting and how to make your time spent in meetings more valuable.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Apply meeting management skills for in-person and remote meetings • Design meeting agenda templates for client and internal meetings • Utilize tools for more effective client and internal meetings 	<p>IN-PERSON: 11/9 1:00 pm - 1:50 pm (50 min) 11/11 8:00 am - 8:50 am (50 min)</p> <p>VIRTUAL: 11/10 11:00 am - 11:50 am (50 min) 11/11 11:00 am - 11:50 am (50 min)</p>
<p>Planning for Exit: Selling to a Firm, Selling to Staff, or Deciding to Hold. How Do I Set Myself Up for Success?</p> <p>TAP22125-IP1</p> <p><i>CPE Field of Study: Business Management & Organization</i></p> <p> 2 CPE</p> <p>LEVEL: Basic NEW SESSION FOR 2022</p>	<p>In this session, you will learn how to look at your firm objectively as a product and evaluate different exit strategies.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Identify approaches to increase your firm's value • Evaluate the options of selling to a firm, selling to staff, or deciding to hold • Determine next steps 	<p>IN-PERSON: 11/11 9:15 am - 10:55 am (100 min)</p>
<p>Retaining Top Talent Using Stay Interviews and Incentive Plans</p> <p>TAP22126-IP1, TAP22126-IP2 TAP22126-V1</p> <p><i>CPE Field of Study: Personnel/Human Resources</i></p> <p>  1.5 CPE</p> <p>LEVEL: Overview</p>	<p>In this session, you will learn about using Stay Interviews and incentive plans as powerful retention tools. This session will highlight the benefits of Stay Interviews to help identify the goals and pain points from a staff perspective that will allow you to develop a stronger firm culture and retain talent. In addition, the session will focus on the benefits of incentive plans to build a stronger firm, stronger staff buy-in and reward behaviors that will "move the dial."</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Develop a strategy for using Stay Interviews in your firm • Establish an incentive program in your firm to reward staff for helping to move the firm forward 	<p>IN-PERSON: 11/10 9:30 am - 10:45 am (75 min) 11/11 4:00 pm - 5:15 pm (75 min)</p> <p>VIRTUAL: 11/10 2:00 pm - 3:15 pm (75 min)</p>

TRENDS IN THE PROFESSION SESSIONS	DESCRIPTION	DATES/TIMES (EST)
<p>The Great Resignation: Leveraging a Frantic Talent Market to Create Heightened Awareness for Action</p> <p>TAP22127-IP1</p> <p><i>CPE Field of Study: Personnel/Human Resources</i></p> <p>  1 CPE</p> <p>LEVEL: Intermediate</p> <p>NEW SESSION FOR 2022</p>	<p>In this session, you will learn how CohnReznick P&C Leadership leveraged the Great Resignation to create urgency and heightened awareness from Firm Leadership to take strategic action to counter a frantic talent market.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Uncover ways other firms are dealing with unprecedented turnover • Recognize the connection between total rewards and ability to retain talent • Identify key themes that led to the success of these initiatives 	<p>IN-PERSON: 11/11 11:20 am - 12:10 pm (50 min)</p>
<p>The Mindful CPA</p> <p>TAP22128-IP1 TAP22128-V1</p> <p><i>CPE Field of Study: Personal Development</i></p> <p>  1.5 CPE</p> <p>LEVEL: Basic</p> <p>NEW SESSION FOR 2022</p>	<p>In today's world of everchanging demands and dynamics of the workplace, it is imperative that we use a method to help us bring focus, creativity, and balance in all we do at work and at home. Mindfulness is an easy and effective tool to help us with this. The Mindful CPA program is designed specifically for Finance and Accounting Professionals. You will learn:</p> <ul style="list-style-type: none"> • The fundamental principles of Mindfulness • An 8-minute Mindfulness Practice to be done daily • Creative and fun ways to apply Mindfulness in our lives via work techniques and mental strategies <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Describe the fundamental principles of mindfulness • Demonstrate mindfulness practice that can be completed daily • Identify how to implement mindfulness strategies in and away from the office 	<p>IN-PERSON: 11/10 4:00 pm - 5:15 pm (75 min)</p> <p>VIRTUAL: 11/10 2:00 pm - 3:15 pm (75 min)</p>
<p>The Power of Authenticity and How it Drives High Performance</p> <p>TAP22129-IP1, TAP22129-IP2 TAP22129-V1</p> <p><i>CPE Field of Study: Personal Development</i></p> <p>  1 CPE</p> <p>LEVEL: Intermediate</p> <p>NEW SESSION FOR 2022</p>	<p>Discover how being real will enable you to increase your focus, energy, and influence while achieving your desired results professionally and personally.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Describe what authenticity is and how to practice it • Know when to say "No" to convey the value of your time • Know when to say "Yes" to achieve increased influence and trust • Describe methods to manage resistance to your authenticity 	<p>IN-PERSON: 11/10 2:45 pm - 3:35 pm (50 min)</p> <p>11/11 8:00 am - 8:50 am (50 min)</p> <p>VIRTUAL: 11/9 11:00 am - 11:50 am (50 min)</p>

TRENDS IN THE PROFESSION SESSIONS	DESCRIPTION	DATES/TIMES (EST)
<p>Train the Trainer – Improving Your Presentation Skills</p> <p>TAP22130-IP1, TAP22130-IP2 TAP22130-V1, TAP22130-V2</p> <p><i>CPE Field of Study: Communications & Marketing</i></p> <p>  1 CPE</p> <p>LEVEL: Basic</p>	<p>In this session, you'll learn how to improve your skills in delivering live presentations. Whether you instruct your own staff or deliver training or demonstrations for clients, you will learn tips and tricks for more effective presentations.</p> <p>Upon completion of this session, participants will be able to:</p> <ul style="list-style-type: none"> • Manage classroom dynamics • Engage an audience, whether in person or remote • Identify levels of learning, and how to meet an audience's expectations 	<p>IN-PERSON: 11/9 4:25 pm - 5:15 pm (50 min) 11/11 2:45 pm - 3:35 pm (50 min)</p> <p>VIRTUAL: 11/9 2:00 pm - 2:50 pm (50 min) 11/10 10:00 am - 10:50 am (50 min)</p>



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