SYNERGY
for Tax and Accounting Professionals

Session Catalog

November 8-11 | Denver, CO

THOMSON REUTERS®

Session information subject to change without notice.

WEDNESDAY 11/8	
12:00 pm - 8:00 pm	Registration Desk Open
3:00 pm - 3:50 pm	Session A (50-mins)
3:50 pm - 4:05 pm	Break
4:05 pm - 4:55 pm	Session B (50-mins)
4:55 pm - 5:10 pm	Break
5:10 pm - 6:00 pm	Session C (50-mins)
6:00 pm - 8:00 pm	Welcome Reception

THURSDAY 11/9	
6:30 am - 8:00 am	Breakfast
7:00 am - 5:30 pm	Registration Desk Open
7:00 am - 7:50 am	Optional Early Bird Session – Session D (50-mins)
8:00 am - 9:00 am	General Session 1
9:00 am - 9:45 am	SYNERGY Village Break
9:45 am - 11:00 am	Session E (75-mins)
11:00 am - 11:15 am	Break
11:15 am - 12:05 pm	Session F (50-mins)
12:05 pm - 1:30 pm	Lunch
1:30 pm - 2:45 pm	Session G (75-mins)
1:30 pm - 5:30 pm	Advisory Bootcamp: Building a More Progressive Firm (extended afternoon session)
1:30 pm - 7:30 pm	Practice Forward Connect & Dinner (Practice Forward Members Only)
2:45 pm - 3:00 pm	Break
3:00 pm - 3:50 pm	Session H (50-mins)
3:50 pm - 4:35 pm	SYNERGY Village Break
4:35 pm - 5:25 pm	Session I (50-mins)
7:00 pm - 7:30 pm	Pre-Roundtables Reception
7:30 pm - 9:30 pm	Roundtables

*all times local

FRIDAY 11/10	
6:30 am - 8:00 am	Breakfast
7:00 am - 5:30 pm	Registration Desk Open
7:00 am - 7:50 am	Optional Early Bird Session – Session J (50-mins)
8:00 am - 9:00 am	General Session 2
9:00 am - 9:45 am	SYNERGY Village Break
9:45 am - 11:00 am	Session K (75-mins)
11:00 am - 11:15 am	Break
11:15 am - 12:05 pm	Session L (50-mins)
12:05 pm - 1:30 pm	Lunch
1:30 pm - 2:30 pm	General Session 3
2:30 pm - 3:00 pm	SYNERGY Village Break
3:00 pm - 4:15 pm	Session M (75-mins)
4:15 pm - 4:30 pm	Break
4:30 pm - 5:20 pm	Session N (50-mins)
7:00 pm - 11:00 pm	Onsite Friday Night Event & Concert

SATURDAY 11/11	
6:30 am - 8:00 am	Breakfast
7:00 am - 11:30 am	Registration Desk Open
7:00 am - 7:50 am	Optional Early Bird Session – Session O (50-mins)
8:00 am - 8:50 am	Session P (50-mins)
8:50 am - 9:05 am	Break
9:05 am - 9:55 am	Session Q (50-mins)
9:55 am - 10:10 am	Break
10:10 am -11:00 am	Session R (50-mins)
11:00 am - 11:30 am	Closing Send-Off

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WEDNESDAY 11/8

Session A
3:00 pm - 3:50 pm | 50 min

- Effectively Onboarding Advisory Clients
- Implementing SAS 145 - What You Need to Know
- Introduction to AdvanceFlow - How to Manage Workpapers in AdvanceFlow
- Moving Your Audit & Assurance Practice From the Desktop to the Cloud
- Understanding the Basics of API
- Billing Workflow in Practice CS
- Empower Your Paraprofessionals using GoFileRoom
- Understanding the Complete TaxCaddy Experience
- Crucial Soft Skills in a Modern Accounting Firm
- Back to the Basics of Marketing and Business Development
- Accounting CS Report Designer for Payroll Reports
- Microsoft Excel Top 10 Tips for Accounting Professionals
- Best of UltraTax CS: Review Tools
- Taxation of Cryptocurrency and Digital Assets - What's New?
- The New R&D Tax Credit Regime - Things Are Not the Same for 2022
- UltraTax CS Partnership Return Basics
- I Took The Bait, Now What?

Session B
4:05 pm - 4:55 pm | 50 min

- Implementing Practice Forward in Large Firms
- A & A Update - New and Upcoming Audit and Accounting Standards
- Best Practices for Reviewing Workpapers and Audit Documentation
- Effective and Efficient Audits of Employee Benefit Plans
- GoSystem Tax RS API Essentials
- Execute a Successful Move to GoFileRoom From FileCabinet CS or Other Document Management Systems
- Firm Administration Management in Practice CS: A Checklist Approach
- FirmFlow Reports - The Power of Consistent Reporting
- Migrating and Integrating Onvio With the CS Professional Suite
- Grow Your Firm: From Six Figures to Seven
- Client-Facing Tools to Better Serve Your Payroll Clients
- Winning The Great Resignation Game
- Different Types of Trusts for Estate Planning
- Hot Topics for Business Federal Tax - Plus Updates
- Maximizing Economic and Tax Benefits through Direct Oil and Gas Ownership
- State and Local Taxes in the Global Economy
- Tax Research With UltraTax CS
- Six Post-Merger Best Practices for Accelerating Multiples
- Turbocharge Your Niche Specialty With Benchmarking

Session C
5:10 pm - 6:00 pm | 50 min

- Leveraging Bank Feeds in Accounting CS
- Must-See Tax Planning and Advisory Resources on Checkpoint Edge
- Introduction to AdvanceFlow - How to Manage Your Trial Balance in AdvanceFlow
- Sharpening the Saw - Finding Efficiencies for Your Next Audit
- Introduction to Alteryx
- 1040 Workflow With GoFileRoom & FirmFlow
- Using UltraTax CS and Onvio for Your Firm's End-to-End Tax Workflow
- The Mindful CPA
- Microsoft Teams Essential Tips and Tricks
- Attracting and Retaining Talent in a Talent Strapped Economy
- Generosity Through Charitable Trusts
- GoSystem Tax RS Admin Refresher
- UltraTax CS Corporate Return Basics
- Your Tax Client's Favorite Game Show - "Can I Take That Loss?"
- Agile Methodology in a CPA Firm

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THURSDAY 11/9 *(continued on page 6)*

Session D (Optional Early Bird Session)
7:00 am - 7:50 am | 50 min

- Developing a Change-Ready Mindset
- Back to the Basics of Marketing and Business Development
- Managing Your Firm's Internal Projects Using Microsoft Planner
- Remote or In-Office - Blending your Workforce to be One No Matter Where They Work
- UltraTax CS Individual Return Basics

Session E
9:45 am - 11:00 am | 75 min

- Best of Accounting CS: Time-Saving Tips and Tricks With General Ledger
- Tax Workflow Using Trial Balance Tools in Accounting CS and Workpapers CS
- Best of UltraTax CS: Advisory Options
- Capitalize on Advisory Opportunities With Your 1040s
- Practice Forward: The Business of Advisory
- Plan & Execute Audit Engagements Using the Thomson Reuters Cloud Audit Suite
- PPC - the Methodology and the Myths
- Revenue and Leases retrospective - Best Practices for Understanding and Auditing
- Increase Your Efficiency With Automation
- A Deep Dive Into SurePrep Review Wizards
- Leveraging Onvio to Enhance Your Firm's Work Style
- Strategic Planning: Generating Revenue and Capacity Projections using Practice CS
- Using Practice CS for the Practice Forward Practitioner
- Guiding Technology Centered Change in Your Firm
- The Power of Authenticity and How it Drives High Performance
- Strategic Positioning for the Firm: Tools for Leverage
- Best of Accounting CS: Time-Saving Tips and Tricks With Onboarding New Payroll Clients
- Microsoft Excel Pivot Tables
- Planning for Exit: Selling to a Firm, Selling to Staff, or Deciding to Hold. How Do I Set Myself Up for Success?
- Agriculture Taxation and Implementation in UltraTax CS
- Basics of 280E - Marijuana Tax Law
- Best of UltraTax CS: Pass-Through Entities
- Calculating and Reconstructing the Partner's Outside Basis
- GoSystem Tax RS Letters and Filing Instructions: Do You Know the Power?
- UltraTax CS Carryforwards
- Technology & Change Management - Systems for Success

Session F
11:15 am - 12:05 pm | 50 min

- Accounting for Income Taxes: What's Hard About the Provision?
- Crossing the Finish Line (Working With Your Retired or Someday Retired Clients)
- Implementing Practice Forward in Large Firms
- ESG is Transforming the Ways Companies Operate
- Introduction to AdvanceFlow - How to Manage Workpapers in AdvanceFlow
- Plan & Execute Preparation, Compilation and Review Engagements Using the Thomson Reuters Cloud Audit Suite
- Introduction to Power BI/Power Platform
- 1040 Workflow With GoFileRoom & FirmFlow
- Configuring Your Dashboards in Practice CS
- Leveraging Technology to Manage Capacity Limitations
- Onvio Document Management Best Practices
- Beyond Burnout: Moving From Immediacy to Intentionality to Create an Improved Business Culture
- The Science of Marketing for Accountants by Accountants
- Best of Accounting CS Payroll Processing
- How to Schedule Fewer and Lead More Effective Meetings
- Microsoft Bookings: Automate Your Meeting Availability and Communications
- Best of UltraTax CS: Data Entry and Efficiency
- Checkpoint Edge Beyond the Basics
- Crypto Crash Course
- Federal Tax Research
- GoSystem Tax RS What's New
- Hot Topics for Individual Federal Tax - Plus Updates
- UltraTax CS Partnership Return Basics
- Putting the Locks on Your Client Data
- Ensuring a Successful Software Merge After an Acquisition

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THURSDAY 11/9 *(continued from page 5)*

Session G
1:30 pm - 2:45 pm | 75 min

- Advanced Financial Statement Formatting Using the Accounting CS Report Designer
- Financial Reporting for Clients - A Discipline

- Advisory Bootcamp: Building a More Progressive Firm (1:30 pm - 5:25 pm | 4 hours)
- Practice Forward Connect (Practice Forward Members Only) (1:30 pm - 5:25 pm | 4 hours)

- Audits - Addressing Common and Pervasive Peer Review Deficiencies
- Uncover the Full Functionality of Checkpoint Engage
- What Went Wrong 2.0 - Recent Fraud Cases and Best Practices for Better Brainstorming
- Power BI for the Everyday Accountant
- GoFileRoom Health Check
- Maintaining Project Integrity in Practice CS
- What's New in Onvio?
- Utilizing Time and Billing Features Within Onvio Firm Management
- Achieving Success Through Daily Leadership
- Payroll 2024: Federal and State Legislative Update
- Microsoft Outlook Top 10 Tips for Accounting Professionals
- Adult Learners and Learning Styles
- Train the Trainer
- ACA Reporting - 2023 Updates, Basics, and Best Practices
- Calculating and Reconstructing Subchapter S Shareholder Basis
- Creating and Communicating Tax Plans With Planner CS
- Criminal Tax Investigations: The IRS Does Put Accountants in Jail
- Customize Client Documents in UltraTax CS
- Foreign Data Entry for Individual Returns in UltraTax CS
- GoSystem Tax RS Review Tools and Diagnostics
- Firm Buy and Sell Transactions - Design a Plan for your Success
- New Rules for Success in a Multi-Generational Workforce

Session H
3:00 pm - 3:50 pm | 50 min

- Preparing for CECL [Financial Instruments - Credit Losses (Topic 326): Measurement of Credit Losses on Financial Instruments] - What You Need to Know for Non-Financial Institutions

- Fund Accounting in AdvanceFlow - Which to Choose - Fund or Divisional Account Structures?
- Implementing SAS 145 - What you need to know
- Reviews and Compilations - Addressing Common and Pervasive Peer Review Deficiencies
- Automation Opportunities in the Workplace
- Driving Successful Workflow as the Onvio Firm Administrator
- Merger & Acquisitions Considerations With GoFileRoom & FirmFlow
- Optimizing Your Report Strategy in Practice CS
- Understanding the Complete TaxCaddy Experience
- Microsoft Excel Functions You Should Know
- Attracting and Retaining Talent in a Talent Strapped Economy
- GoSystem Tax RS Help Resources vs. Case Management Dashboard and When to Use Them
- Hot Topics for Business Federal Tax - Plus Updates
- The Remote Workforce: Tax Considerations for Employers Who Have Remote Employees
- The Secure Act 2.0 (RMDs, EDBs, and Roths, Oh My!)
- UltraTax CS Individual Return Basics
- What's New in UltraTax CS
- I Took The Bait, Now What?
- Agile Methodology in a CPA Firm
- The Power of Data: Using Analytics to Run Your Firm

Session I
4:35 pm - 5:25 pm | 50 min

- Consolidations - Methodology, Organization and Flowthrough to Tax
- How Being a Volunteer Firefighter Made Me a Better Auditor (and Vice Versa)
- What's New in Checkpoint Engage Single Audit
- GoFileRoom API Essentials
- The Automated Tax Journey from a Thomson Reuters Firm's Point of View
- Manipulating Data: Utilizing Filtering on the Manage Screens in Practice CS
- Onvio Project Management Best Practices
- Support Your Evolving Firm With GoFileRoom & FirmFlow
- SurePrep SPbinder Best Practices
- 10 Trends Impacting Leadership and Marketing
- Developing a Change-Ready Mindset
- Accounting CS Report Designer for Payroll Reports
- E-File Best Practices in Accounting CS
- Microsoft Teams Essential Tips and Tricks
- GoSystem Tax RS Consolidations
- The Nasty World of NOLs
- UltraTax CS Working With Oil and Gas
- Your Tax Client's Favorite Game Show - "Can I Take That Loss?"
- Developing a Tax Technology Strategy

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FRIDAY 11/10 *(continued on page 8)*

Session J (Optional Early Bird Session)
7:00 am - 7:50 am | 50 min

- Grading and Evaluating Clients
- Understanding the Basics of API
- The Mindful CPA
- Microsoft Excel Top 10 Tips for Accounting Professionals
- What's New in UltraTax CS

Session K
9:45 am - 11:00 am | 75 min

- Best of Accounting CS: Time-Saving Tips and Tricks With General Ledger
- Financial Reporting for Clients - A Discipline
- Best of UltraTax CS: Advisory Options
- Hear From Sole Practitioners and Owners of Small Firms who Were Successful in Implementing the Advisory Firm Business Model
- Practice Forward: The Business of Advisory
- Audits - Addressing Common and Pervasive Peer Review Deficiencies
- Uncover the Full Functionality of Checkpoint Engage
- What Went Wrong 2.0 - Recent Fraud Cases and Best Practices for Better Brainstorming
- Power BI for the Everyday Accountant
- GoFileRoom Health Check
- Hearing From Your Onvio Firm Management Peers
- Maintaining Project Integrity in Practice CS
- Achieving Success Through Daily Leadership
- Payroll 2024: Federal and State Legislative Update
- Microsoft Outlook Top 10 Tips for Accounting Professionals
- Planning for Exit: Selling to a Firm, Selling to Staff, or Deciding to Hold. How Do I Set Myself Up for Success?
- Retaining Top Talent Using Stay Interviews and Incentive Plans
- Train the Trainer
- ACA Reporting - 2023 Updates, Basics, and Best Practices
- Agriculture Taxation and Implementation in UltraTax CS
- Calculating and Reconstructing Subchapter S Shareholder Basis
- Creating and Communicating Tax Plans With Planner CS
- Criminal Tax Investigations: The IRS Does Put Accountants in Jail
- Foreign Data Entry for Individual Returns in UltraTax CS
- GoSystem Tax RS & SurePrep Integration
- Firm Buy and Sell Transactions - Design a Plan for your Success
- New Rules for Success in a Multi-Generational Workforce

Session L
11:15 am - 12:05 pm | 50 min

- Preparing for CECL [Financial Instruments - Credit Losses (Topic 326): Measurement of Credit Losses on Financial Instruments] - What You Need to Know for Non-Financial Institutions
- Effectively Onboarding Advisory Clients
- Effective and Efficient Audits of Employee Benefit Plans
- Introduction to AdvanceFlow - How to Manage Your Trial Balance in AdvanceFlow
- SAS 143 and Best Practices for Auditing Estimates
- Introduction to Power BI/Power Platform
- Firm Administration Management in Practice CS: A Checklist Approach
- Manipulating Data: Utilizing Filtering on the Manage Screens in Practice CS
- Merger & Acquisitions Considerations With GoFileRoom & FirmFlow
- Onvio Project Management Best Practices
- Crucial Soft Skills in a Modern Accounting Firm
- The Science of Marketing for Accountants by Accountants
- Client-Facing Tools to Better Serve Your Payroll Clients
- Microsoft Excel Functions You Should Know
- Advanced Disposals Using Fixed Assets CS and/or UltraTax CS
- Best of UltraTax CS: Data Entry and Efficiency
- Checkpoint Edge Beyond the Basics
- Different Types of Trusts for Estate Planning
- GoSystem Tax RS Tax Return Import/Export tool
- Hot Topics for Individual Federal Tax - Plus Updates
- State and Local Taxes in the Global Economy
- The New R&D Tax Credit Regime - Things Are Not the Same for 2022
- What's New in UltraTax CS
- Today's Cyberthreats and What to Do to Protect Your Firm
- The Power of Data: Using Analytics to Run Your Firm

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FRIDAY 11/10 *(continued from page 7)*

Session M
3:00 pm - 4:15 pm | 75 min

- Advanced Financial Statement Formatting Using the Accounting CS Report Designer
- Tax Workflow Using Trial Balance Tools in Accounting CS and Workpapers CS
- Capitalize on Advisory Opportunities With Your 1040s
- Hear How your Peers Redefined Their Practice and Had Exponential Growth
- Plan & Execute Audit Engagements Using the Thomson Reuters Cloud Audit Suite
- PPC - the Methodology and the Myths
- Revenue and Leases retrospective - Best Practices for Understanding and Auditing
- Increase Your Efficiency With Automation
- A Deep Dive Into SurePrep Review Wizards
- Strategic Planning: Generating Revenue and Capacity Projections using Practice CS
- Using Practice CS for the Practice Forward Practitioner
- Utilizing Time and Billing Features Within Onvio Firm Management
- What's New in Onvio?
- Guiding Technology Centered Change in Your Firm
- The Power of Authenticity and How it Drives High Performance
- Strategic Positioning for the Firm: Tools for Leverage
- Best of Accounting CS: Time-Saving Tips and Tricks With Onboarding New Payroll Clients
- Microsoft Excel Pivot Tables
- Basics of 280E - Marijuana Tax Law
- Best of UltraTax CS: Pass-Through Entities
- Calculating and Reconstructing the Partner's Outside Basis
- Customize Client Documents in UltraTax CS
- GoSystem Tax RS State Tips & Tricks
- UltraTax CS Carryforwards
- Technology & Change Management - Systems for Success

Session N
4:30 pm - 5:20 pm | 50 min

- Accounting for Income Taxes: What's Hard About the Provision?
- Must-See Tax Planning and Advisory Resources on Checkpoint Edge
- ESG is Transforming the Ways Companies Operate
- Sharpening the Saw - Finding Efficiencies for Your Next Audit
- Automation Opportunities in the Workplace
- Configuring Your Dashboards in Practice CS
- Empower Your Paraprofessionals using GoFileRoom
- FirmFlow Reports - The Power of Consistent Reporting
- SurePrep SPbinder Best Practices
- Using UltraTax CS and Onvio for Your Firm's End-to-End Tax Workflow
- Beyond Burnout: Moving From Immediacy to Intentionality to Create an Improved Business Culture
- Grow Your Firm: From Six Figures to Seven
- Back to the Basics of Marketing and Business Development
- How to Schedule Fewer and Lead More Effective Meetings
- Microsoft Bookings: Automate Your Meeting Availability and Communications
- Best of UltraTax CS: Review Tools
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SATURDAY 11/11

Session O (Optional Early Bird Session) 7:00 am - 7:50 am | 50 min	Session P 8:00 am - 8:50 am | 50 min	Session Q 9:05 am - 9:55 am | 50 min	Session R 10:10 am - 11:00 am | 50 min
Crucial Soft Skills in a Modern Accounting Firm	How Being a Volunteer Firefighter Made Me a Better Auditor (and Vice Versa)	Grading and Evaluating Clients	Leveraging Bank Feeds in Accounting CS
SurePrep SPbinder Best Practices	Moving Your Audit & Assurance Practice From the Desktop to the Cloud	Best Practices for Reviewing Workpapers and Audit Documentation	Crossing the Finish Line (Working With Your Retired or Someday Retired Clients)
Your Tax Client's Favorite Game Show - "Can I Take That Loss?"	Plan & Execute Preparation, Compilation and Review Engagements Using the Thomson Reuters Cloud Audit Suite	Fund Accounting in AdvanceFlow - Which to Choose - Fund or Divisional Account Structures?	A & A Update - New and Upcoming Audit and Accounting Standards
	SAS 143 and Best Practices for Auditing Estimates	What's New in Checkpoint Engage Single Audit	Consolidations - Methodology, Organization and Flowthrough to Tax
	GoSystem Tax RS API Essentials	Introduction to Alteryx	Reviews and Compilations - Addressing Common and Pervasive Peer Review Deficiencies
	Billing Workflow in Practice CS	Migrating and Integrating Onvio With the CS Professional Suite	GoFileRoom API Essentials
	Onvio Document Management Best Practices	Optimizing Your Report Strategy in Practice CS	Execute a Successful Move to GoFileRoom From FileCabinet CS or Other Document Management Systems
	The Mindful CPA	Support Your Evolving Firm With GoFileRoom & FirmFlow	Understanding the Complete TaxCaddy Experience
	Managing Your Firm's Internal Projects Using Microsoft Planner	Best of Accounting CS Payroll Processing	Developing a Change-Ready Mindset
	Tax Research With UltraTax CS	Microsoft Excel Top 10 Tips for Accounting Professionals	E-File Best Practices in Accounting CS
	Taxation of Cryptocurrency and Digital Assets - What's New?	The Remote Workforce: Tax Considerations for Employers Who Have Remote Employees	Remote or In-Office - Blending your Workforce to be One No Matter Where They Work
	The Nasty World of NOLs	The Secure Act 2.0 (RMDs, EDBs, and Roths, Oh My!)	Advanced Disposals Using Fixed Assets CS and/or UltraTax CS
	Six Post-Merger Best Practices for Accelerating Multiples	UltraTax CS Working With Oil and Gas	
		Developing a Tax Technology Strategy	
		Turbocharge Your Niche Specialty With Benchmarking	

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ACCOUNTING SESSIONS	DESCRIPTION	DATES/TIMES
Accounting for Income Taxes: What's Hard About the Provision? TAP23001-1, TAP23001-2 *CPE Field of Study: Accounting – Technical* LEVEL: Intermediate 1 CPE *NEW SESSION FOR 2023*	Accounting for Income Taxes no longer has to be exhausting and complex. This interactive session uses easy-to-follow examples with detailed journal entries to help you understand and apply income tax accounting per FASB ASC 740. This session covers the current tax payable provision computation, temporary differences, the ASC 740 balance sheet method, deferred tax assets and liabilities and the process of journalizing the income tax provision. Upon completion of this session, participants will be able to define and apply basic concepts of Accounting Standard Codification No. 740, Income Taxes.	11/9 11:15 am - 12:05 pm (50 min) 11/10 4:30 pm - 5:20 pm (50 min)
Advanced Financial Statement Formatting Using the Accounting CS Report Designer TAP23002-1, TAP23002-2 *CPE Field of Study: Accounting – Technical* LEVEL: Advanced 1.50 CPE	In this session, you will learn about advanced features within the Accounting CS Report Designer to further customize your clients' financial statements. Upon completion of this session, participants will be able to: • 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 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.	11/9 1:30 pm - 2:45 pm (75 min) 11/10 3:00 pm - 4:15 pm (75 min)
Best of Accounting CS: Time-Saving Tips and Tricks With General Ledger TAP23003-1, TAP23003-2 *CPE Field of Study: Computer Software & Applications* LEVEL: Intermediate 1.50 CPE	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. Upon completion of this session, participants will be able to: • 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 PREREQUISITES: Participants should be familiar with setting up a client and understand basic accounting processing procedures in Accounting CS.	11/9 9:45 am - 11:00 am (75 min) 11/10 9:45 am - 11:00 am (75 min)

ACCOUNTING SESSIONS	DESCRIPTION	DATES/TIMES
Financial Reporting for Clients – A Discipline TAP23004-1, TAP23004-2 *CPE Field of Study: Accounting – Technical* LEVEL: Advanced 1.50 CPE *NEW SESSION FOR 2023*	CPAs and accountants involved in financial reporting on their client engagements need to follow a discipline that enables effectiveness and efficiency. In this session, we will discuss how to apply the 'Financial Reporting Landscape' of a client for seamless financial close with an understanding of how data flows and where there is potential for error. We will also discuss how to best handle the 'Open Landscape' environment present at most companies, and the 'ERP Methodology' to deliver financial reports on a timely basis. Upon completion of this session, participants will be able to: • Chart the 'Financial Reporting Landscape' for clients • Apply the discipline as explained on Preparation Services, Compilations, Reviews, and Financial Audits where practitioners are involved in financial reporting delivery • Deal with the 'Open Landscape' environment most companies are challenged with today • Apply the 'Enterprise Resource Planning Approach' to the close and reporting processes for small to midsize clients	11/9 1:30 pm - 2:45 pm (75 min) 11/10 9:45 am - 11:00 am (75 min)
Leveraging Bank Feeds in Accounting CS TAP23005-1, TAP23005-2 *CPE Field of Study: Computer Software & Applications* LEVEL: Overview 1 CPE *NEW SESSION FOR 2023*	In this session, you'll learn about the Bank Feeds feature within Accounting CS General Ledger to allow you to link to a client's bank account to import data more efficiently. Upon completion of this session, participants will be able to: • Set up bank feeds for clients • Understand Bank Feeds Dashboard • Utilize the Bank Feeds feature PREREQUISITES: Participants should be familiar with navigation in Accounting CS and understand basic accounting processing procedures in Accounting CS.	11/8 5:10 pm - 6:00 pm (50 min) 11/11 10:10 am - 11:00 am (50 min)
Preparing for CECL [Financial Instruments – Credit Losses (Topic 326): Measurement of Credit Losses on Financial Instruments] – What You Need to Know for Non-Financial Institutions TAP23006-1, TAP23006-2 *CPE Field of Study: Accounting – Technical* LEVEL: Intermediate 1 CPE *NEW SESSION FOR 2023*	While financial institutions have been the industry most impacted by the FASB's new credit impairment model for financial assets based on current expected credit loss (CECL), any entity that has a balance due (such as trade receivables) will be affected...that is most entities! This session will summarize the key aspects of this new standard for 2023 year-ends, and how to prepare. Upon completion of this session, participants will be able to: • Explain the basics of CECL, and how it differs from the existing impairment model • Understand the scope of CECL, and how it may impact your clients • Evaluate tools and techniques for implementing and auditing the new standard • Prepare new disclosures PREREQUISITES: Participants should have a working knowledge of accounting and auditing standards, and a basic understanding of revenue and an allowance for doubtful accounts.	11/9 3:00 pm - 3:50 pm (50 min) 11/10 11:15 am - 12:05 pm (50 min)

ACCOUNTING SESSIONS	DESCRIPTION	DATES/TIMES
Tax Workflow Using Trial Balance Tools in Accounting CS and Workpapers CS TAP23007-1, TAP23007-2 *CPE Field of Study: Taxes – Technical* LEVEL: Intermediate 1.50 CPE	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. Upon completion of this session, participants will be able to: • 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 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.	11/9 9:45 am - 11:00 am (75 min) 11/10 3:00 pm - 4:15 pm (75 min)

ADVISORY SESSIONS	DESCRIPTION	DATES/TIMES
Advisory Bootcamp: Building a More Progressive Firm TAP23009 *CPE Field of Study: Business Management & Organization* LEVEL: Basic 4 CPE *NEW SESSION FOR 2023*	Get ready to learn the steps you need to take to redefine your business model and distinguish between value-add advisory services and compliance services — and how you can monetize the value of that difference. Thomson Reuters speakers and guest practitioners will share the perspective they have gained over the years offering advisory services. Upon completion of this session, participants will be able to: • Understand the components of an advisory firm business model • Identify the elements needed to create a firm's standardized service menu • Define the scope of your client engagements • Develop a standardized advisory offering PREREQUISITES: Participants should be interested in implementing Advisory in their firm.	11/9 1:30 pm - 5:30 pm (4 hours)
Best of UltraTax CS: Advisory Options TAP23010-1, TAP23010-2 *CPE Field of Study: Taxes – Technical* LEVEL: Advanced 1.50 CPE *NEW SESSION FOR 2023*	UltraTax CS is an advanced compliance solution, but also has several advisory solutions built in. In this session, we will dive into tools that leverage compliance data you already have to provide basic advisory services and identify clients for more advanced offerings. Upon completion of this session, participants will be able to: • Execute data mining searches to identify clients with specific opportunities • Prepare simple tax projections • Leverage client analysis reports and diagnostics for 1040 clients PREREQUISITES: Participants should have a working knowledge of UltraTax CS.	11/9 9:45 am - 11:00 am (75 min) 11/10 9:45 am - 11:00 am (75 min)

ADVISORY SESSIONS	DESCRIPTION	DATES/TIMES
Capitalize on Advisory Opportunities With Your 1040s TAP23011-1, TAP23011-2 *CPE Field of Study: Business Management & Organization* LEVEL: Advanced 1.50 CPE	In this session, Brittany Lanphier will discuss the development and delivery of advisory services for individual tax clients. Whether you have a strong base of 1040 only clients or find yourself searching for the "missing piece" of tax planning for your business owner clients, Brittany will show you that there are many opportunities to add value in your relationships through effective tax planning at the individual level. 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. Upon completion of this session, participants will be able to identify the best individual advisory service opportunities for your firm based on your existing strengths and ideal clients and have a plan of action for developing those services within your firm.	11/9 9:45 am - 11:00 am (75 min) 11/10 3:00 pm - 4:15 pm (75 min)
Crossing the Finish Line – Working With Your Retired or Someday Retired Clients TAP23012-1, TAP23012-2 *CPE Field of Study: Taxes – Technical* LEVEL: Intermediate 1 CPE *NEW SESSION FOR 2023*	We're all going to get there someday. Retirement. For some clients, it could be something they are looking forward to with great anticipation. For other clients, they may not be financial prepared for retirement. In this session, we will discuss how to add value to your client interactions by educating them and preparing them for the tax, charitable, and estate planning of a prepared retirement. Upon completion of this session, participants will be able to advise clients on retirement topics including: • Income in retirement • Charitable giving in retirement • Estate planning	11/9 11:15 am - 12:05 pm (50 min) 11/11 10:10 am - 11:00 am (50 min)
Effectively Onboarding Advisory Clients TAP23013-1, TAP23013-2 *CPE Field of Study: Business Management & Organization* LEVEL: Intermediate 1 CPE *NEW SESSION FOR 2023*	A honeymoon is a time of focus and a celebration of union between newlyweds. The first couple of months of your client relationship is no different! It's a time of focus and a critical part of building a strong relationship — setting the proper expectations and the tone for your client's experience. Upon completion of this session, participants will walk away with an understanding of how to build an effective onboarding process. PREREQUISITES: It is highly recommended that you attend the Advisory Bootcamp: Building a More Progressive Firm session prior to this session, or are a current Practice Forward firm.	11/8 3:00 pm - 3:50 pm (50 min) 11/10 11:15 am - 12:05 pm (50 min)

ADVISORY SESSIONS	DESCRIPTION	DATES/TIMES
Grading and Evaluating Clients TAP23014-1, TAP23014-2 *CPE Field of Study:* *Business Management & Organization* LEVEL: Intermediate 1 CPE	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. 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. Upon completion of this session, you will be able to: • 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 PREREQUISITES: It is highly recommended that you attend the Advisory Bootcamp: Building a More Progressive Firm session, or are a current Practice Forward firm who has an existing client base and desire more time for developing the firm.	11/10 7:00 am - 7:50 am (50 min) 11/11 9:05 am - 9:55 am (50 min)
Hear From Sole Practitioners and Owners of Small Firms who Were Successful in Implementing the Advisory Firm Business Model TAP23015 *CPE Field of Study:* *Business Management & Organization* LEVEL: Overview 1.50 CPE *NEW SESSION FOR 2023*	In this panel discussion, join our Practice Forward Sole Practitioners and small firm owners who will share how implementing the Practice Forward methodology, by leading with an advisory first mindset, was implemented. Discussion will center around how actions taken by these smaller firms yielded impressive wins. PREREQUISITES: Participants should be a sole practitioner or a firm of 3 or less employees, and interested in implementing Advisory in their firm.	11/10 9:45 am - 11:00 am (75 min)
Hear How Your Peers Redefined Their Practice and Had Exponential Growth TAP23016 *CPE Field of Study:* *Business Management & Organization* LEVEL: Overview 1.50 CPE	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. Upon completion of this session, participants will be able to leverage the knowledge obtained during the hosted discussion. PREREQUISITES: Participants should be interested in implementing Advisory in their firm.	11/10 3:00 pm - 4:15 pm (75 min)

ADVISORY SESSIONS	DESCRIPTION	DATES/TIMES
Implementing Practice Forward in Large Firms TAP23017-1, TAP23017-2 *CPE Field of Study: Business Management & Organization* LEVEL: Basic 1 CPE *NEW SESSION FOR 2023*	Implementing change in larger firms requires extensive planning and education. In this session, we will talk with AnneMarie Dufault, from Doty Pruett Wilson, to review the process she and her team used to successfully implement Practice Forward and to begin selling Advisory within 60 days of beginning their implementation. Upon completion of this session, participants will be able to: • Identify and build your firm's Practice Forward Implementation team • Understand and begin to implement the recommended processes to effectively implement Practice Forward into your firm • Leverage best practices to begin selling Advisory services sooner rather than later	11/8 4:05 pm - 4:55 pm (50 min) 11/9 11:15 am - 12:05 pm (50 min)
Must-See Tax Planning and Advisory Resources on Checkpoint Edge TAP23018-1, TAP23018-2 *CPE Field of Study: Computer Software & Applications* LEVEL: Intermediate 1 CPE *NEW SESSION FOR 2023*	In this session, we'll explore the tax planning and advisory content available on Checkpoint Edge, powered by AI, that offers guidance and tools to support a new or growing Advisory practice. Upon completion of this session, participants will be able to: • Locate tax planning and advisory guidance • Use advisory maps and other planning tools • Use search features to find tax planning and advisory guidance with ease PREREQUISITES: Participants should have a basic understanding of Checkpoint Edge functionality.	11/8 5:10 pm - 6:00 pm (50 min) 11/10 4:30 pm - 5:20 pm (50 min)
Practice Forward Connect TAP23019 *CPE Field of Study: Business Management & Organization* LEVEL: Overview 4 CPE *NEW SESSION FOR 2023*	In this exclusive Practice Forward membership 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 other members! Upon completion of this session, participants will be able to: • Understand the impact of year-round planning with advisory clients • Identify benefits and strategies for upskilling staff • Leverage the knowledge obtained from peer discussions PREREQUISITES: Participants must be current members of Practice Forward to attend this session.	11/9 1:30 pm - 5:30 pm (4 hours)
Practice Forward: The Business of Advisory TAP23008-1, TAP23008-2 *CPE Field of Study: Business Management & Organization* LEVEL: Overview 1.50 CPE *NEW SESSION FOR 2023*	This session will discuss a next level Practice Forward offering that will share an innovative approach to gathering client data and guidance on how to use it to enhance client relationships, elevate staff knowledge and involvement, and discover new advisory opportunities. Upon completion of this session, participants will be able to: • Master sortable data to improve managing client relationships • Create communication scripts to manage client questions • Advance staff knowledge in advisory opportunities and improve utilization PREREQUISITES: Participants should offer or be interested in offering advisory services in their firm.	11/9 9:45 am - 11:00 am (75 min) 11/10 9:45 am - 11:00 am (75 min)

AUDITING SESSIONS	DESCRIPTION	DATES/TIMES
A & A Update – New and Upcoming Audit and Accounting Standards TAP23020-1, TAP23020-2 *CPE Field of Study: Auditing – Technical* LEVEL: Update 1 CPE *NEW SESSION FOR 2023*	In this session, you will learn new and newly adopted and effective accounting and auditing standards. Upon completion of this session, participants will be able to: • Describe recently issued accounting and auditing standards • Evaluate the applicability of recently effective standards **This session will only cover highlights of CECL, SAS 143 and 145. Separate sessions have been created for an in-depth look at these significant new standards.* PREREQUISITES: Participants should have a working knowledge of accounting and auditing standards.	11/8 4:05 pm - 4:55 pm (50 min) 11/11 10:10 am - 11:00 am (50 min)
Audits – Addressing Common and Pervasive Peer Review Deficiencies TAP23021-1, TAP23021-2 *CPE Field of Study: Auditing – Technical* LEVEL: Intermediate 1.50 CPE *NEW SESSION FOR 2023*	This session will introduce and discuss the current environment of audit peer review and how to avoid common deficiencies. Upon completion of this session, participants will be able to: • List common audit peer review deficiencies • Gain insight into comments that may arise from recently issued standards • Identify best practices to avoid common deficiencies • Apply the information on your engagements and share takeaways with your teams PREREQUISITES: Participants should have an understanding of, or interest in, peer review for audits.	11/9 1:30 pm - 2:45 pm (75 min) 11/10 9:45 am - 11:00 am (75 min)
Best Practices for Reviewing Workpapers and Audit Documentation TAP23022-1, TAP23022-2 *CPE Field of Study: Auditing – Technical* LEVEL: Intermediate 1 CPE *NEW SESSION FOR 2023*	With staffing shortages and the need to keep audit teams learning and moving forward with other engagements, it is more important than ever to write timely and effective workpaper notes. This session will help you focus on reviewing requirements, effective reviewing techniques, and other strategies to help you leave the field finished. Upon completion of this session, participants will be able to: • List the requirements of AU-C 230, Audit Documentation • Understand the purpose of a detailed review (Minimum requirements and why we do it) • Provide tips to your team to make electronic workpapers easily reviewable • Describe best practices for electronic workpaper review • Write productive review notes to help your team succeed	11/8 4:05 pm - 4:55 pm (50 min) 11/11 9:05 am - 9:55 am (50 min)
Consolidations – Methodology, Organization and Flowthrough to Tax TAP23023-1, TAP23023-2 *CPE Field of Study: Auditing – Technical* LEVEL: Intermediate 1 CPE *NEW SESSION FOR 2023*	In this session, we will share how to effectively plan and organize your consolidation engagement structure for performing audits, reviews, or compilations, including integration with your tax software. Upon completion of this session, participants will be able to: • Set up consolidation groups • Organize engagements including where to place workpapers and Checkpoint Engage files • Create consolidated financials, leadsheets, and reports • Export Trial Balance data to tax software PREREQUISITES: Participants should be familiar with navigating the Trial Balance area of AdvanceFlow.	11/9 4:35 pm - 5:25 pm (50 min) 11/11 10:10 am - 11:00 am (50 min)

AUDITING SESSIONS	DESCRIPTION	DATES/TIMES
Effective and Efficient Audits of Employee Benefit Plans TAP23024-1, TAP23024-2 *CPE Field of Study: Auditing – Technical* LEVEL: Intermediate 1 CPE *NEW SESSION FOR 2023*	A must have session for any practitioners who do employee benefit plan audits: we will discuss the most common deficiencies in performing these audits along with how to get them done faster and more productively. Upon completion of this session, participants will be able to: • List differences between financial statement and employee benefit plan audits • Understand the risks in employee benefit plan audits and develop appropriate audit procedures to address those risks • Identify unique compliance auditing requirements for employee benefit plans • Describe additional compliance procedures for an employee benefit plan audit in addition to the traditional financial statement procedures • Apply this information and share with other members of your team PREREQUISITES: Participants should have a working knowledge of audits.	11/8 4:05 pm - 4:55 pm (50 min) 11/10 11:15 am - 12:05 pm (50 min)
ESG is Transforming the Ways Companies Operate TAP23025-1, TAP23025-2 *CPE Field of Study: Specialized Knowledge – Technical* LEVEL: Basic 1 CPE *NEW SESSION FOR 2023*	While large companies have largely shaped the way we think about "S" and "G" (as any supplier to Bix Box retailer can attest), the "E" is quickly becoming a hot topic. 71% of job applicants screen for sustainability when choosing employers, and companies with strong environmental, social, and governance (ESG) scores yield higher-than-average market returns, profitability, and dividends. In this program, we'll explore how mid-market companies are handling emerging needs for ESG reporting with the larger entities with whom they interact. Upon completion of this session, participants will be able to: • Outline a broad overview of ESG • Develop an awareness of the benefits of implementing an ESG program in your organization • Identify the ways that mid-market companies may be impacted by ESG reporting for larger, publicly traded companies • Walk away with potential strategies to address ESG reporting for mid-market companies in responding to compliance requests from larger publicly traded entities	11/9 11:15 am - 12:05 pm (50 min) 11/10 4:30 pm - 5:20 pm (50 min)
Fund Accounting in AdvanceFlow – Which to Choose – Fund or Divisional Account Structures? TAP23026-1, TAP23026-2 *CPE Field of Study: Auditing – Technical* LEVEL: Advanced 1 CPE	In this session, we will demonstrate how to effectively create and utilize fund engagements in AdvanceFlow. Upon completion of this session, participants will be able to: • Set up fund engagements in AdvanceFlow • Utilize fund reports • Use funds in financial statements PREREQUISITES: Participants should be familiar with navigating the Trial Balance area of AdvanceFlow.	11/9 3:00 pm - 3:50 pm (50 min) 11/11 9:05 am - 9:55 am (50 min)

AUDITING SESSIONS	DESCRIPTION	DATES/TIMES
How Being a Volunteer Firefighter Made Me a Better Auditor (and Vice Versa) TAP23027-1, TAP23027-2 *CPE Field of Study: Personal Development* LEVEL: Basic 1 CPE *NEW SESSION FOR 2023*	For over 25 years, Shawn O'Brien has worked in the audit profession while serving his community as a volunteer firefighter. Hear how his two "jobs" intermingled into some common lessons. He'll share with you the wisdom he gained over the years that kept him out of trouble both on audits and in burning buildings. Upon completion of this session, participants will be able to: • Perform more effective audits • List best practices in the planning, fieldwork, and wrap-up phases of the audit • Share ideas with other members of your engagement teams PREREQUISITES: Participants should have a working knowledge of audits (and a basic knowledge of fire).	11/9 4:35 pm - 5:25 pm (50 min) 11/11 8:00 am - 8:50 am (50 min)
Implementing SAS 145 – What You Need to Know TAP23028-1, TAP23028-2 *CPE Field of Study: Auditing – Technical* LEVEL: Intermediate 1 CPE *NEW SESSION FOR 2023*	Risk Assessment has been listed as an one of the AICPA's Enhancing Audit Quality Initiative's area of concern for the last five years, and is a common peer review deficiency. SAS 145- Understanding the Entity and Its Environment and Assessing the Risks of Material Misstatement replaces the existing standard and adds clarity to the process with additional guidance and definitions. In this session, you'll learn the potential impact for your firm's engagements, and how to update your documentation to comply with the new standard. Upon completion of this session, participants will be able to: • Identify key issues in SAS 145 - Understanding the Entity and Its Environment and Assessing the Risks of Material Misstatement • Explain key differences between the current and existing standard • Describe the changes to audit programs and checklists, and the impact on your practice PREREQUISITES: Participants should have a working knowledge of audits.	11/8 3:00 pm - 3:50 pm (50 min) 11/9 3:00 pm - 3:50 pm (50 min)
Introduction to AdvanceFlow – How to Manage Workpapers in AdvanceFlow TAP23029-1, TAP23029-2 *CPE Field of Study: Auditing – Technical* LEVEL: Basic 1 CPE *NEW SESSION FOR 2023*	In this session, we will discuss the variations of workpapers in AdvanceFlow. You will see how to add workpapers in AdvanceFlow including: placeholders, leadsheets, reports, Checkpoint Tools documents, and more. You will also see the importance of workpaper roll forward treatment as you move your engagements from one year to the next. Upon completion of this session, participants will be able to: • Navigate in AdvanceFlow • Add workpapers to AdvanceFlow • Edit documents in AdvanceFlow • Set document roll forward treatment • Use annotating tools in Adobe	11/8 3:00 pm - 3:50 pm (50 min) 11/9 11:15 am - 12:05 pm (50 min)

AUDITING SESSIONS	DESCRIPTION	DATES/TIMES
Introduction to AdvanceFlow – How to Manage Your Trial Balance in AdvanceFlow TAP23030-1, TAP23030-2 *CPE Field of Study: Computer Software & Applications* LEVEL: Basic 1 CPE *NEW SESSION FOR 2023*	In this session, we will discuss the many facets of the Trial Balance in AdvanceFlow. This includes importing and manipulating trial balance data, utilizing the features of the trial balance function, managing trial balance views, and creating journal entries. Upon completion of this session, participants will be able to: • Navigate in AdvanceFlow • Import Trial Balance data • Manipulate Trial Balance data • Manage Trial Balance views • Enter journal entries	11/8 5:10 pm - 6:00 pm (50 min) 11/10 11:15 am - 12:05 pm (50 min)
Moving Your Audit & Assurance Practice From the Desktop to the Cloud TAP23031-1, TAP23031-2 *CPE Field of Study: Auditing – Technical* LEVEL: Intermediate 1 CPE	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. Upon completion of this session, participants will be able to: • Discuss the benefits of using Checkpoint Engage, the cloud-based audit solution from Thomson Reuters • Maximize integration between Checkpoint Engage whether using AdvanceFlow or another engagement management software • Demonstrate the migration process from SMART Practice Aids and Checkpoint Tools to Checkpoint Engage PREREQUISITES: While not required, use of SMART Practice Aids or Checkpoint Tools is preferred.	11/8 3:00 pm - 3:50 pm (50 min) 11/11 8:00 am - 8:50 am (50 min)
Plan & Execute Audit Engagements Using the Thomson Reuters Cloud Audit Suite TAP23032-1, TAP23032-2 *CPE Field of Study: Auditing – Technical* LEVEL: Intermediate 1.50 CPE	In this session, we will share how to maximize integration between AdvanceFlow and Checkpoint Engage for your audit engagements. Upon completion of this session, participants will be able to: • Set up new AdvanceFlow and Checkpoint Engage engagements • Import and filter trial balances • Create leadsheets and other custom reports • Describe how integration with Confirmation can be used to send and receive electronic confirmations • 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	11/9 9:45 am - 11:00 am (75 min) 11/10 3:00 pm - 4:15 pm (75 min)

AUDITING SESSIONS	DESCRIPTION	DATES/TIMES
Plan & Execute Preparation, Compilation and Review Engagements Using the Thomson Reuters Cloud Audit Suite TAP23033-1, TAP23033-2 *CPE Field of Study: Auditing – Technical* LEVEL: Intermediate 1 CPE	In this session, we will share how to maximize integration between AdvanceFlow and Checkpoint Engage for your compilation and review engagements. Upon completion of this session, participants will be able to: • 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 risks • Review/modify procedural forms • Generate documents • Perform procedural and document-level sign-offs • Create Workpaper Reference Links	11/9 11:15 am - 12:05 pm (50 min) 11/11 8:00 am - 8:50 am (50 min)
PPC – the Methodology and the Myths TAP23034-1, TAP23034-2 *CPE Field of Study: Auditing – Technical* LEVEL: Basic 1.50 CPE *NEW SESSION FOR 2023*	Are you using the PPC Methodology and ever wondered which forms do you have to complete? Have you ever asked if you have to complete all of the questions on all of the forms? This session will give you a deeper understanding of the PPC Methodology, including the various practices aids and forms. Upon completion of this session, participants will be able to: • Explain how to execute an audit using the PPC Methodology • Learn how to properly use the key PPC forms and practice aids • Identify best practices and share these with your engagement team	11/9 9:45 am - 11:00 am (75 min) 11/10 3:00 pm - 4:15 pm (75 min)
Revenue and Leases retrospective – Best Practices for Understanding and Auditing TAP23035-1, TAP23035-2 *CPE Field of Study: Auditing – Technical* LEVEL: Intermediate 1.50 CPE *NEW SESSION FOR 2023*	You and your clients have spent the last few years understanding the accounting of revenue and leases. In this session, we will take the opportunity to refine the audits of these complex areas. Upon completion of this session, participants will be able to: • Describe basic GAAP guidance around accounting for revenue and leases • Recognize risks of material misstatement related to revenue and leases • Apply professional standards in devising an audit strategy for revenue and lease transactions	11/9 9:45 am - 11:00 am (75 min) 11/10 3:00 pm - 4:15 pm (75 min)

AUDITING SESSIONS	DESCRIPTION	DATES/TIMES
Reviews and Compilations – Addressing Common and Pervasive Peer Review Deficiencies TAP23036-1, TAP23036-2 *CPE Field of Study: Auditing – Technical* LEVEL: Intermediate 1 CPE *NEW SESSION FOR 2023*	This session will introduce and discuss the current environment of review for reviews and compilations, and how to avoid common deficiencies. Upon completion of this session, participants will be able to: • List common peer review deficiencies for reviews and compilations • Gain insight into comments that may arise from recently issued standards • Identify best practices to avoid common deficiencies • Apply the information on your engagements and share takeaways with your teams PREREQUISITES: Participants should have an understanding of or interest in peer review for reviews and compilations.	11/9 3:00 pm - 3:50 pm (50 min) 11/11 10:10 am - 11:00 am (50 min)
SAS 143 and Best Practices for Auditing Estimates TAP23037-1, TAP23037-2 *CPE Field of Study: Auditing – Technical* LEVEL: Intermediate 1 CPE *NEW SESSION FOR 2023*	SAS 143, Auditing accounting Estimates and Related Disclosures is effective for audits of financial statements for periods ending on or after December 15, 2023 and supersedes all previous guidance. In this session, you'll learn what is new in the standard, and gain knowledge on updated best practices for understanding and auditing estimates. Upon completion of this session, participants will be able to: • Explain the key changes related to SAS - 143 - Auditing Accounting Estimates and Disclosures • Identify common estimates • Develop a strategy for understanding and auditing estimates	11/10 11:15 am - 12:05 pm (50 min) 11/11 8:00 am - 8:50 am (50 min)
Sharpening the Saw – Finding Efficiencies for Your Next Audit TAP23038-1, TAP23038-2 *CPE Field of Study: Auditing – Technical* LEVEL: Intermediate 1 CPE *NEW SESSION FOR 2023*	This session will discuss various audit efficiency topics, including workflow, client interactions, and being efficient in a virtual environment. Upon completion of this session, participants will be able to: • List ideas to improve overall efficiency in audits • Describe ways to improve efficiency in remote audits PREREQUISITES: Participants should have a working knowledge of audits.	11/8 5:10 pm - 6:00 pm (50 min) 11/10 4:30 pm - 5:20 pm (50 min)
Uncover the Full Functionality of Checkpoint Engage TAP23039-1, TAP23039-2 *CPE Field of Study: Auditing – Technical* LEVEL: Advanced 1.50 CPE	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. Upon completion of this session, participants will be able to: • Roll forward client engagements and templates to incorporate latest industry title content • Perform a master merge roll forward • Create templates • Copy Checkpoint Engage engagements from one engagement binder to another • Clear selected Audit Program procedures • Regenerate Audit Programs PREREQUISITES: Participants should be proficient with Checkpoint Engage.	11/9 1:30 pm - 2:45 pm (75 min) 11/10 9:45 am - 11:00 am (75 min)

AUDITING SESSIONS	DESCRIPTION	DATES/TIMES
What Went Wrong 2.0 – Recent Fraud Cases and Best Practices for Better Brainstorming TAP23040-1, TAP23040-2 *CPE Field of Study: Auditing – Technical* LEVEL: Basic 1.50 CPE *NEW SESSION FOR 2023*	An update to last year's "What went wrong," this session will cover several new fraud cases from the last year, what they have in common, and focus on better inquiry and brainstorming techniques to identify the potential for fraud risk. Upon completion of this session, participants will be able to: • Identify what went wrong in several current fraud case studies (within the last year) • Understand current trends in fraud, and how to go "beyond the checklist • Learn to brainstorm by understanding want went wrong to help identify what could go wrong	11/9 1:30 pm - 2:45 pm (75 min) 11/10 9:45 am - 11:00 am (75 min)
What's New in Checkpoint Engage Single Audit TAP23041-1, TAP23041-2 *CPE Field of Study: Auditing – Technical* LEVEL: Update 1 CPE *NEW SESSION FOR 2023*	Are you searching for a way to automate and streamline your single audit process and receive updates on any new developments in single audit requirements? In this session, we will discuss any new developments in single audit requirements. We will also demonstrate how to overcome and streamline the complex, error-prone, challenging, and ever-changing requirements of a single audit. Checkpoint Engage Single Audit is a cloud-based application that guides you through an automated process and is embedded with the OMB Uniform Guidance and Compliance requirements. Upon completion of this session, participants will be able to: • Access existing planning forms • Enter federal awards • Determine if an auditee is low-risk • Identify major programs • Review and modify compliance audit programs • Generate schedules, planning forms, and compliance audit programs	11/9 4:35 pm - 5:25 pm (50 min) 11/11 9:05 am - 9:55 am (50 min)

AUTOMATION SESSIONS	DESCRIPTION	DATES/TIMES
Automation Opportunities in the Workplace TAP23042-1, TAP23042-2 *CPE Field of Study: Information Technology – Technical* LEVEL: Advanced 1 CPE *NEW SESSION FOR 2023*	Are you looking to create automation for your firm, but don't know where to start? In this session, you will gain insights on emerging technology using Tax APIs as well as other automation tools. Upon completion of this session, participants will be able to: • Understand how VBA can be used to integrate APIs • Look at third party solutions like Chat GPT PREREQUISITES: Participants should have an advanced understanding of APIs, coding, and automation practices.	11/9 3:00 pm - 3:50 pm (50 min) 11/10 4:30 pm - 5:20 pm (50 min)

AUTOMATION SESSIONS	DESCRIPTION	DATES/TIMES
GoFileRoom API Essentials TAP23043-1, TAP23043-2 *CPE Field of Study:* *Information Technology – Technical* LEVEL: Intermediate 1 CPE *NEW SESSION FOR 2023*	Are you looking to optimize your tax processes within GoFileRoom? In this session, you will gain a better understanding of the technical knowledge needed to execute GoFileRoom APIs using the Thomson Reuters Developer Portal and Postman. Upon completion of this session, participants will be able to: • 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 GoFileRoom APIs in Postman PREREQUISITES: Users should have experience working with datasets and basic technical skillsets related to GoFileRoom. Users should also have a basic understanding of how to work with API calls.	11/9 4:35 pm - 5:25 pm (50 min) 11/11 10:10 am - 11:00 am (50 min)
GoSystem Tax RS API Essentials TAP23044-1, TAP23044-2 *CPE Field of Study:* *Information Technology – Technical* LEVEL: Intermediate 1 CPE *NEW SESSION FOR 2023*	Are you looking to optimize your tax processes within GoSystem Tax RS? In this session, you will gain a better understanding of the technical knowledge needed to execute GoSystem Tax RS APIs using the Thomson Reuters Developer Portal and Postman. Upon completion of this session, participants will be able to: • 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 GoSystem Tax RS APIs in Postman PREREQUISITES: Users should have experience working with datasets and basic technical skillsets related to GoSystem Tax RS. Users should also have a basic understanding of how to work with API calls.	11/8 4:05 pm - 4:55 pm (50 min) 11/11 8:00 am - 8:50 am (50 min)
Increase Your Efficiency With Automation TAP23045-1, TAP23045-2 *CPE Field of Study:* *Computer Software & Applications* LEVEL: Basic 1.50 CPE *NEW SESSION FOR 2023*	Save yourself time by turning processes and tasks into an afterthought. In this session, we will show how to use Power Automate to build automated processes with pre-defined triggers and actions. Upon completion of this session, participants will be able to: • Build a basic Power Automate cloud flow • Access templates from the Power Automate template library • Streamline workflows, get notifications & manage documents • Integrate Power Automate with Microsoft Office and Google applications	11/9 9:45 am - 11:00 am (75 min) 11/10 3:00 pm - 4:15 pm (75 min)
Introduction to Alteryx TAP23046-1, TAP23046-2 *CPE Field of Study:* *Computer Software & Applications* LEVEL: Intermediate 1 CPE	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.	11/8 5:10 pm - 6:00 pm (50 min) 11/11 9:05 am - 9:55 am (50 min)

AUTOMATION SESSIONS	DESCRIPTION	DATES/TIMES
Introduction to Power BI/Power Platform TAP23047-1, TAP23047-2 *CPE Field of Study: Information Technology – Technical* LEVEL: Basic 1 CPE	Have you found yourself spending too much time gathering data and reporting information out to your colleagues? In this session, we will explore the capabilities on enhanced reporting and on demand data that Power BI provides. Upon completion of this session, participants will be able to: • 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 PREREQUISITES: Participants should have a knowledge of GoFileRoom, GoSystem Tax RS, or OneSource data points.	11/9 11:15 am - 12:05 pm (50 min) 11/10 11:15 am - 12:05 pm (50 min)
Power BI for the Everyday Accountant TAP23048-1, TAP23048-2 *CPE Field of Study: Computer Software & Applications* LEVEL: Intermediate 1.50 CPE *NEW SESSION FOR 2023*	Turn data into opportunities! Power BI is a data visualization tool that can help you run a report from a Thomson Reuters product or a client document into an interactive and easy-to-read dashboard. In this session, you will learn how to create visualizations from simple spreadsheets and reports exported from various applications. Upon completion of this session, participants will be able to: • Create Power BI dashboards • Utilize Power Query to prepare your data for analysis • Manage database table relationships to link different reports together • Analyze a Power BI dashboard to make data-based decisions PREREQUISITES: Participants should have basic Power BI knowledge or have attended the Introduction to Power BI session.	11/9 1:30 pm - 2:45 pm (75 min) 11/10 9:45 am - 11:00 am (75 min)
The Automation Journey From a Thomson Reuters Firm's Point of View TAP23174 *CPE Field of Study: Computer Software & Applications* LEVEL: Basic 1 CPE *NEW SESSION FOR 2023*	The automated tax journey is finally here and making an impact on firm processes, staff satisfaction, and the client experience. In this session, join Andrew Hatfield, co-founder and Chief Growth Officer at SafeSend, as he leads a discussion with one successful firm using automation tools and APIs to reduce work — from getting clients tax ready all the way through finishing and filing the tax package. Hear real-life firm solutions to increase success through expanding functionality around the gathering of source documents, custom questionnaires, streamlined digital/fillable organizers, document request checklists, data flow directly into your UltraTax CS or GoSystem Tax RS software through integrations and APIs, assembling and delivering completed tax returns, collecting e-signatures, automating signature and payment reminders, distributing K-1s, requesting firm tax prep fees, and more. The SafeSend Suite makes an impact across all your tax workflow processes. Upon completion of this session, participants will be able to: • List the common points of frustration for firms and clients throughout the tax engagement • Recognize the new technological advances that are automating tax practices • Identify automation solutions that were built specifically for the tax and accounting profession • Evaluate how to develop a client-centric approach for tax engagements and improve client collaboration	11/9 4:35 pm - 5:25 pm (50 min)

AUTOMATION SESSIONS	DESCRIPTION	DATES/TIMES
Understanding the Basics of API TAP23049-1, TAP23049-2 *CPE Field of Study:* *Information Technology – Technical* LEVEL: Basic 1 CPE *NEW SESSION FOR 2023*	You have heard the buzzword API, but have you ever wondered what an API is? In this session, we will explore real world examples of using APIs in the Tax Profession and beyond. Upon completion of this session, participants will be able to: • Understand the basic terminology of what an API is • Comprehension of APIs in real-world use cases • Establish a vision of where APIs are going in the tax workplace	11/8 3:00 pm - 3:50 pm (50 min) 11/10 7:00 am - 7:50 am (50 min)

FIRM & WORKFLOW MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES
1040 Workflow With GoFileRoom & FirmFlow TAP23050-1, TAP23050-2 *CPE Field of Study:* *Computer Software & Applications* LEVEL: Basic 1 CPE *NEW SESSION FOR 2023*	Tired of wasting valuable time on your 1040 workflow process? Join us for an informative session where we'll review the powerful GoFileRoom tools and integrations available to streamline your processes and optimize efficiency. Our team of experts will guide you through best practice scenarios, giving you a comprehensive understanding of how to make the most of these powerful tools. Don't miss this opportunity to supercharge your 1040 workflow process and achieve new levels of productivity. Upon completion of this session, participants will be able to: • Know when to use TaxSort, ScanFlow, or SurePrep when preparing 1040 workpapers • Review the firm's current workflows against industry best practices • Simplify the receiving of 1040 source documents • Improve sending deliverables to clients PREREQUISITES: Participants should be GoFileRoom & FirmFlow users knowledgeable of their firm's current 1040 workflow processes.	11/8 5:10 pm - 6:00 pm (50 min) 11/9 11:15 am - 12:05 pm (50 min)
A Deep Dive Into SurePrep Review Wizards TAP23051-1, TAP23051-2 *CPE Field of Study:* *Computer Software & Applications* LEVEL: Overview 1.50 CPE *NEW SESSION FOR 2023*	This session will take a deep dive to understand the settings that affect how data is captured and where it is indexed. After looking over the settings we will cover all the potential Review Wizards and really understand why they appear, how to handle them, and what the impact is to the data when it is done being processed at SurePrep. Upon completion of this session, participants will be able to: • Complete setup of administrative settings with full understanding of the impact to any changes made • Identify which Review Wizards appeared and understand why they appeared and how to handle them correctly • Understand the impact of each Review Wizard to the data output from SurePrep	11/9 9:45 am - 11:00 am (75 min) 11/10 3:00 pm - 4:15 pm (75 min)

FIRM & WORKFLOW MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES
Billing Workflow in Practice CS TAP23052-1, TAP23052-2 *CPE Field of Study: Computer Software & Applications* LEVEL: Intermediate 1 CPE *NEW SESSION FOR 2023*	In this session, we will review best practices for billing in Practice CS under different scenarios and how user preference settings and summarization options increase efficiency. We will discuss the advantages of Quick Bill to create multiple invoices. Understanding the application of these options can make billing simpler. Upon completion of this session, participants will be able to: • Set user preferences that best match your common billing scenarios • Utilize Quick Billing to create multiple invoices at once • Make use of summarization options to apply billing decisions PREREQUISITES: Participants should have a working understanding of billing processes in Practice CS.	11/8 3:00 pm - 3:50 pm (50 min) 11/11 8:00 am - 8:50 am (50 min)
Configuring Your Dashboards in Practice CS TAP23053-1, TAP23053-2 *CPE Field of Study: Computer Software & Applications* LEVEL: Basic 1 CPE	In this session, you will learn about best practices for staff and client dashboard configuration, setting up custom portlets, and saving dashboard layouts. Upon Completion of this session, participants will be able to: • 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 PREREQUISITES: Participants should have a working understanding of Practice CS.	11/9 11:15 am - 12:05 pm (50 min) 11/10 4:30 pm - 5:20 pm (50 min)
Driving Successful Workflow as the Onvio Firm Administrator TAP23054 *CPE Field of Study: Computer Software & Applications* LEVEL: Basic 1 CPE *NEW SESSION FOR 2023*	Monitoring and being an Onvio administrator can seem like a task and a job. Within this session, we will review how to examine your firm's workflow from client and contact creation to office procedures to optimize your usage of Onvio Firm Management. Upon completion of this session, participants will be able to: • Examine your office procedures to optimize your experience within Onvio • Effectively create clients and contacts to streamline client onboarding	11/9 3:00 pm - 3:50 pm (50 min)

FIRM & WORKFLOW MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES
Empower Your Paraprofessionals using GoFileRoom TAP23055-1, TAP23055-2 *CPE Field of Study: Computer Software & Applications* LEVEL: Basic 1 CPE *NEW SESSION FOR 2023*	Do you want to unlock the full potential of your administrative team? Join us for an eye-opening session where we'll show you how to elevate their responsibilities and maximize their impact on your firm's processes. Our expert team will identify key areas of your workflow that can be batch-performed, automated, and managed by a strong and empowered team of skilled administrative professionals. With our guidance, you'll gain a deeper understanding of how to leverage your GoFileRoom platform to streamline your processes and achieve new levels of productivity. Don't miss this opportunity to unlock the full potential of your team by empowering your administrative team to run the show and drive success for your firm. Upon completion of this session, participants will be able to: • Identify time saving product features that may be overlooked • Identify tasks that can be done by specialized admin staff • Free up professional staff for billable work PREREQUISITES: Participants should be GoFileRoom & FirmFlow users ready to think outside the box.	11/8 3:00 pm - 3:50 pm (50 min) 11/10 4:30 pm - 5:20 pm (50 min)
Execute a Successful Move to GoFileRoom From FileCabinet CS or Other Document Management Systems TAP23056-1, TAP23056-2 *CPE Field of Study: Computer Software & Applications* LEVEL: Intermediate 1 CPE *NEW SESSION FOR 2023*	Is your firm ready to make the leap from FileCabinet CS to GoFileRoom? In this session, our expert team will help you navigate this transition with ease by uncovering the key considerations you need to know for a successful switch and helping you determine when the time is right to make the move. We'll also compare the two programs to uncover potential internal procedural changes, so you can ensure a seamless transition and minimize disruption to your workflow. By the end of the session, you'll have a complete understanding of what it takes to switch from FileCabinet CS to GoFileRoom and the benefits GoFileRoom can bring to your firm. Upon completion of this session, participants will be able to: • Determine when to make the transition to GoFileRoom • Recognize key differences between FileCabinet CS & GoFileRoom • Analyze current processes in FileCabinet CS to recognize procedural changes PREREQUISITES: Participants should use FileCabinet CS or other Document Management Systems.	11/8 4:05 pm - 4:55 pm (50 min) 11/11 10:10 am - 11:00 am (50 min)
Firm Administration Management in Practice CS: A Checklist Approach TAP23057-1, TAP23057-2 *CPE Field of Study: Computer Software & Applications* LEVEL: Advanced 1 CPE	In this session, we will look at workflows that focus on the administrator's role in maintaining data integrity of Practice CS. We will approach these workflows as checklists designed to take the guess work out areas like staff setup and termination within Practice CS, period reconciliation and advancement, client information updates, and year-end data clean up. Upon completion of this session, participants will be able to develop checklists for: • Staff New Hire Setup • Staff Termination • End-of-Period Advancement • Client Change • Year-end data clean up PREREQUISITES: Participants should have a working understanding of the setup of Practice CS.	11/8 4:05 pm - 4:55 pm (50 min) 11/10 11:15 am - 12:05 pm (50 min)

FIRM & WORKFLOW MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES
FirmFlow Reports – The Power of Consistent Reporting TAP23058-1, TAP23058-2 *CPE Field of Study: Computer Software & Applications* LEVEL: Basic 1 CPE *NEW SESSION FOR 2023*	In this session, you will uncover what types of reports may be useful for each individual in your office, how to set up Published reports to ensure that the firm is looking at the same data, and how users can ensure quick access to the information they want to know with specific user reports. You will see how looking at various report criteria can pinpoint exactly the workflow information needed, such as work at a staff level, work-in-progress, due dates, and bottlenecks. Upon completion of this session, participants will be able to: • Identify what report to utilize to obtain information • Determine report criteria to choose • Explain the differences between Standard and Published reports • Determine who can see the different types of reports available within FirmFlow Permissions PREREQUISITES: Participants should be familiar with reporting in FirmFlow.	11/8 4:05 pm - 4:55 pm (50 min) 11/10 4:30 pm - 5:20 pm (50 min)
GoFileRoom Health Check TAP23059-1, TAP23059-2 *CPE Field of Study: Computer Software & Applications* LEVEL: Intermediate 1.50 CPE *NEW SESSION FOR 2023*	Looking to optimize your workflow and document management database? Concerned you may have fallen out of best practices? GoFileRoom is at the epicenter of your operations, and it is crucial to ensure it is in tip-top shape. With our expert guidance, you'll gain the confidence you need to take on your next busy season with ease. In this session, we will cover a range of essential topics, from data organization to workflow optimization, ensuring you have a complete understanding of how to get the most out of your GoFileRoom platform. Upon completion of this session, participants will be able to: • Feel confident in their GoFileRoom setup • Run reports to optimize GoFileRoom & FirmFlow • Identify administration areas to review annually • Prepare for roll forwards • Create the internal processes for future maintenance PREREQUISITES: Participants should be GoFileRoom and/or FirmFlow administrators or have a good working knowledge of both products.	11/9 1:30 pm - 2:45 pm (75 min) 11/10 9:45 am - 11:00 am (75 min)
Hearing From Your Onvio Firm Management Peers TAP23060 *CPE Field of Study: Computer Software & Applications* LEVEL: Overview 1.50 CPE	In this panel discussion, you will hear from your peers about their experiences using Onvio Firm Management. Attending this session will help you learn how other firms implemented Onvio Firm Management. Upon completion of this session, participants will be able to: • Apply steps to improve 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	11/10 9:45 am - 11:00 am (75 min)

FIRM & WORKFLOW MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES
Leveraging Onvio to Enhance Your Firm's Work Style TAP23061 *CPE Field of Study: Computer Software & Applications* LEVEL: Advanced 1.50 CPE	In this session, you will hear from a peer who is leveraging Onvio with their firm's work style. Attending this session will provide insight on how to make Onvio Firm Management an integral part of your firm's workflow and work style. Upon completion of this session, participants will be able to: • Review your firm's work style to enhance workflow and administrative tasks using Onvio Firm Management • Integrate Onvio Firm Management into a staff member's workflow	11/9 9:45 am - 11:00 am (75 min)
Leveraging Technology to Manage Capacity Limitations TAP23143 *CPE Field of Study: Computer Software & Applications* LEVEL: Basic 1 CPE *NEW SESSION FOR 2023*	In this session, you'll hear from peers that are successfully leveraging SurePrep technologies to enhance the tax process internally and manage capacity limitations that most firms are dealing with each year. Upon completion of this session, users will be able to: • Identify areas where technology can streamline processes internally • Understand from peers how they are utilizing technology in the office	11/9 11:15 am - 12:05 pm (50 min)
Maintaining Project Integrity in Practice CS TAP23062-1, TAP23062-2 *CPE Field of Study: Computer Software & Applications* LEVEL: Intermediate 1.50 CPE	In this session, you will discover ways to effectively manage projects in Practice CS while protecting project integrity. Important approaches we will look at include how to handle staffing changes, updating workflow tasks, and developing a strong understanding of project related screens. Upon completion of this session, participants will be able to: • 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 PREREQUISITES: Participants should have a working understanding of Project Management in Practice CS.	11/9 1:30 pm - 2:45 pm (75 min) 11/10 9:45 am - 11:00 am (75 min)
Manipulating Data: Utilizing Filtering on the Manage Screens in Practice CS TAP23063-1, TAP23063-2 *CPE Field of Study: Computer Software & Applications* LEVEL: Intermediate 1 CPE *NEW SESSION FOR 2023*	In this session, we will examine when to use reporting vs. real-time data on the manage screens in Practice CS. We will dive deeper into grouping and filtering, and uncover how to manipulate data in real-time. Upon completion of this session, participants will be able to: • Utilize the grouping bar to gather information and branch information by specific parameters • Filter data to isolate certain information in screen • Create customized filter and nested filters • Manipulate data on screen efficiently PREREQUISITES: Participants should have a working understanding of Practice CS.	11/9 4:35 pm - 5:25 pm (50 min) 11/10 11:15 am - 12:05 pm (50 min)

**all times local*

CPE = NASBA CPE CREDITS **CE = IRS CE CREDITS**

FIRM & WORKFLOW MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES
Merger & Acquisitions Considerations With GoFileRoom & FirmFlow TAP23064-1, TAP23064-2 *CPE Field of Study:* *Computer Software & Applications* LEVEL: Advanced 1 CPE *NEW SESSION FOR 2023*	Are you acquiring a new firm, and worried about the potential technology roadblocks you might encounter during the process? Technology shouldn't be an afterthought when acquiring a new firm, and in this session our expert team will guide you through the most common challenges you're likely to face. We'll help you understand what you don't know and identify potential road bumps, so you can plan accordingly and ensure a smooth transition. From data migration to system integration, we'll cover all the essential topics you need to be aware of. By the end of the session, you'll be well-equipped to navigate the technology landscape of Mergers & Acquisitions and achieve a successful outcome. Don't let technology hold you back — join us for this essential session and stay ahead of the curve. Upon completion of this session, participants will be able to: • Understand the M&A technology road map • Identify what makes a firm the right technology fit for acquisition • Be proactive in preparing for a technology merger PREREQUISITES: This session is intended for those considering acquiring a firm in the near future.	11/9 3:00 pm - 3:50 pm (50 min) 11/10 11:15 am - 12:05 pm (50 min)
Migrating and Integrating Onvio With the CS Professional Suite TAP23065-1, TAP23065-2 *CPE Field of Study:* *Computer Software & Applications* LEVEL: Basic 1 CPE *NEW SESSION FOR 2023*	In this session, we will discuss how to properly migrate and integrate Onvio with the CS Professional Suite. Attendees will gain an understanding of migration and population processes from the CS Professional Suite into Onvio. In addition, what fields, data, and documentation will be added into Onvio after the migration and population is complete. Finally, attendees will discover what fields data share after the initial migration and population. Upon completion of this session, participants will be able to: • Identify which fields will share between programs • Recognize which information will migrate from FileCabinet CS and NetClient CS to Onvio Firm Management	11/8 4:05 pm - 4:55 pm (50 min) 11/11 9:05 am - 9:55 am (50 min)
Onvio Document Management Best Practices TAP23066-1, TAP23066-2 *CPE Field of Study:* *Computer Software & Applications* LEVEL: Advanced 1 CPE *NEW SESSION FOR 2023*	In this session, participants will learn how to enhance usage of documents within Onvio Firm Management. Through adding and managing documents, utilizing communication tools, and learning best practices, you will gain further understanding of using Onvio Documents to its fullest capabilities. Upon completion of this session, participants will be able to: • Configure request templates to various situations • Leverage document management tools to add, edit, and review documents within Onvio • Utilize and monitor communications to efficiently collaborate with clients and third parties	11/9 11:15 am - 12:05 pm (50 min) 11/11 8:00 am - 8:50 am (50 min)

FIRM & WORKFLOW MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES
Onvio Project Management Best Practices TAP23067-1, TAP23067-2 *CPE Field of Study:* *Computer Software & Applications* LEVEL: Advanced 1 CPE *NEW SESSION FOR 2023*	In this session, we will evaluate how to effectively utilize project management capabilities within Onvio. You will review the hierarchy within Onvio, learn how to customize project management screens to retrieve applicable information, and modify project templates to meet your firm's preferences. Upon completion of this session, participants will be able to: • Utilize filtering and grouping capabilities to customize project screens and reports • Set up project tasks to link to requests and additional applications • Quickly edit projects due to changes within the office • Review project templates to match your firm's workflow preferences	11/9 4:35 pm - 5:25 pm (50 min) 11/10 11:15 am - 12:05 pm (50 min)
Optimizing Your Report Strategy in Practice CS TAP23068-1, TAP23068-2 *CPE Field of Study:* *Computer Software & Applications* LEVEL: Intermediate 1 CPE *NEW SESSION FOR 2023*	In this session, we will examine ways to manipulate report data to best meet your needs. We will discuss how to create profiles of common reports with their associated filtering and grouping customizations. We will look at Custom Report Portlets for your dashboards, enabling you to turn static reports into real-time data centers. Upon completion of this session, participants will be able to: • Apply filtering and grouping options to any report to give you the data you need • Create report profiles for your most common report groups • Utilize static reports to create Custom Report Portlets for real-time data analysis PREREQUISITES: Participants should have a working understanding of reports in Practice CS.	11/9 3:00 pm - 3:50 pm (50 min) 11/11 9:05 am - 9:55 am (50 min)
Strategic Planning: Generating Revenue and Capacity Projections using Practice CS TAP23069-1, TAP23069-2 *CPE Field of Study:* *Business Management & Organization* LEVEL: Advanced 1.50 CPE	In this session, we will use 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. Upon completion of this session, participants will be able to: • Setup and utilize the Practice CS modules for capacity planning • Run the provided custom Practice CS report along with setup to pull revenue projection numbers • Determine if you have enough staff, too much or too little resources, and determine a course of action PREREQUISITES: Participants should have a working understanding of the setup of Practice CS.	11/9 9:45 am - 11:00 am (75 min) 11/10 3:00 pm - 4:15 pm (75 min)

FIRM & WORKFLOW MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES
Support Your Evolving Firm With GoFileRoom & FirmFlow TAP23070-1, TAP23070-2 *CPE Field of Study: Computer Software & Applications* LEVEL: Intermediate 1 CPE *NEW SESSION FOR 2023*	Do you have a nagging feeling that your document and workflow management program could be doing more for your firm? You're not alone. In this session, we will delve into the untapped potential of your program, exploring ways to expand GoFileRoom for additional services like consulting and advisory, as well as non-client services such as HR and firm management. Our expert team will guide you through best practices and strategies for maximizing the capabilities of your program, unlocking new levels of efficiency and productivity. Don't miss out on this opportunity to take your firm to the next level. Upon completion of this session, participants will be able to: • Identify internal and external areas to implement or evolve • Make changes to GoFileRoom and FirmFlow Administration to support their firm's growth PREREQUISITES: Participants should be GoFileRoom and/or FirmFlow administrators or have a good working knowledge of both products, and have a vision for the firm's future growth.	11/9 4:35 pm - 5:25 pm (50 min) 11/11 9:05 am - 9:55 am (50 min)
SurePrep SPbinder Best Practices TAP23071-1, TAP23071-2 , TAP23071-3 *CPE Field of Study: Computer Software & Applications* LEVEL: Overview 1 CPE *NEW SESSION FOR 2023*	In this session, we will explore the most commonly used features of the SPbinder and discuss preparer and reviewer best practices while inside the binder. We will also cover settings related to the SPbinder to ensure firms feel ready to employ the best practices discussed. Upon completion of this session, participants will be able to: • Understand which features and functionalities in the SPbinder will aid in preparation and review • Improve the tax return preparation and review process using best practices discussed • Identify the administrative settings that can aid in efficiencies throughout the preparation and review process	11/9 4:35 pm - 5:25 pm (50 min) 11/10 4:30 pm - 5:20 pm (50 min) 11/11 7:00 am - 7:50 am (50 min)
Understanding the Complete TaxCaddy Experience TAP23072-1, TAP23072-2, TAP23072-3 *CPE Field of Study: Computer Software & Applications* LEVEL: Overview 1 CPE *NEW SESSION FOR 2023*	In this session, we will demonstrate the TaxCaddy process as it relates to the taxpayer and tax professional. We will demonstrate the value add TaxCaddy brings to the tax professional and the taxpayer experience while highlighting key features and ease of use of the software. Upon completion of this session, participants will be able to: • Identify the benefits to the tax professional and taxpayers of using TaxCaddy • Understand the taxpayer experience • Understand the tax professional experience • Determine which features of TaxCaddy could alleviate tax season pressures internally and customer facing	11/8 3:00 pm - 3:50 pm (50 min) 11/9 3:00 pm - 3:50 pm (50 min) 11/11 10:10 am - 11:00 am (50 min)

FIRM & WORKFLOW MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES
Using Practice CS for the Practice Forward Practitioner TAP23073-1, TAP23073-2 *CPE Field of Study: Computer Software & Applications* LEVEL: Intermediate 1.50 CPE *NEW SESSION FOR 2023*	In this session, you will learn how you can apply the Practice Forward methodology in Practice CS. Upon completion of this session, participants will be able to apply Practice Forward methodology to Practice CS. PREREQUISITES: Participants should have a working understanding of Practice CS and be familiar with Practice Forward methodology.	11/9 9:45 am - 11:00 am (75 min) 11/10 3:00 pm - 4:15 pm (75 min)
Using UltraTax CS and Onvio for Your Firm's End-to-End Tax Workflow TAP23074-1, TAP23074-2 *CPE Field of Study: Computer Software & Applications* LEVEL: Basic 1 CPE *NEW SESSION FOR 2023*	In this session, we will share an overview of integration features between Onvio Firm Management and UltraTax CS to save time within your workflow. Participants will gain an understanding how to send tax questionnaires and returns to Onvio from UltraTax CS. In addition, we will review Onvio's integration features within UltraTax CS. Upon completion of this session, participants will be able to: • Utilize Onvio Firm Management throughout your end-to-end tax workflow • Utilize Client Center features to streamline your client collaboration processes • Gain efficiencies through Onvio Trial Balance and Onvio Documents integration features within UltraTax CS	11/8 5:10 pm - 6:00 pm (50 min) 11/10 4:30 pm - 5:20 pm (50 min)
Utilizing Time and Billing Features Within Onvio Firm Management TAP23075-1, TAP23075-2 *CPE Field of Study: Computer Software & Applications* LEVEL: Intermediate 1.50 CPE *NEW SESSION FOR 2023*	In this session, learn how Onvio Firm Management can be used to track staff time and invoice your clients. You will gain an understanding how to invoice through recurring and non-recurring fees. We will also discuss features needing to be reviewed when setting up Onvio Firm Management to gain efficiency when entering time and invoicing clients. Upon completion of this session, participants will be able to: • Create recurring and non-recurring invoices • Review firm and client settings, as well as user preferences to efficiently track time and invoice clients • Customize reports to review time, billing, and accounts receivable data	11/9 1:30 pm - 2:45 pm (75 min) 11/10 3:00 pm - 4:15 pm (75 min)
What's New in Onvio? TAP23076-1, TAP23076-2 *CPE Field of Study: Computer Software & Applications* LEVEL: Update 1.50 CPE *NEW SESSION FOR 2023*	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, project management, and trial balance enhancements. Upon completion of this session, participants will be able to: • Understand the new firm management, client collaboration, document management, project management, and trial balance capabilities and how they can save time in your workflow • Apply the new functionality to your firm and staff	11/9 1:30 pm - 2:45 pm (75 min) 11/10 3:00 pm - 4:15 pm (75 min)

LEADERSHIP SESSIONS	DESCRIPTION	DATES/TIMES
10 Trends Impacting Leadership and Marketing TAP23077 *CPE Field of Study: Business Management & Organization* LEVEL: Advanced 1 CPE *NEW SESSION FOR 2023*	Leadership and marketing are essential to your firm's growth, and over the last year and a half, firms have started looking at each of these areas from a different perspective. In this session, you will learn about ten new trends impacting leadership marketing and action items you can implement in your firm. Upon completion of this session, participants will be able to: • List the 10 trends impacting leadership • List the 10 trends impacting marketing • Demonstrate how leadership and marketing tie together • Plan strategies to implement at your firm	11/9 4:35 pm - 5:25 pm (50 min)
Achieving Success Through Daily Leadership TAP23078-1, TAP23078-2 *CPE Field of Study: Personal Development* LEVEL: Basic 1.50 CPE	Through this engaging discussion, we will learn about and share ideas on daily leadership practices to achieve firm success. Upon completion of this session, participants will be able to: • 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	11/9 1:30 pm - 2:45 pm (75 min) 11/10 9:45 am - 11:00 am (75 min)
Beyond Burnout: Moving From Immediacy to Intentionality to Create an Improved Business Culture TAP23079-1, TAP23079-2 *CPE Field of Study: Business Management & Organization* LEVEL: Intermediate 1 CPE *NEW SESSION FOR 2023*	Join us for an insightful session on creating intention and calm in your business. Discover practical strategies to reduce urgency, embrace structure, and communicate boundaries, freeing yourself from the culture of overwhelm. Through relatable stories, data-driven insights, and actionable tips, you'll gain the tools and mindset to transform your work environment and cultivate healthier client relationships. Don't miss this opportunity to lead positive change and find balance in your professional journey. Upon completion of this session, participants will be able to: • Understand the importance of prioritizing intentionality over immediacy in business communication and its impact on productivity and well-being • Learn strategies to reduce urgency in their work environment by implementing effective time management techniques, setting realistic expectations, and establishing clear boundaries • Gain insights into the benefits of embracing structure in their business operations, including the reduction of overwhelm, improved workflow, and enhanced client relationships • Acquire practical skills and tools to communicate boundaries effectively, such as using assertive language, setting appropriate response times, and managing client expectations, leading to a more balanced and fulfilling professional life	11/9 11:15 am - 12:05 pm (50 min) 11/10 4:30 pm - 5:20 pm (50 min)

LEADERSHIP SESSIONS	DESCRIPTION	DATES/TIMES
Crucial Soft Skills in a Modern Accounting Firm TAP23080-1, TAP23080-2, TAP23080-3 *CPE Field of Study:* *Business Management & Organization* LEVEL: Basic 1 CPE *NEW SESSION FOR 2023*	In this session, you will learn the soft skills necessary to be successful in the accounting industry. You will learn how to communicate effectively, manage your time to meet deadlines and achieve goals, and how to approach problem solving in a structured and logical way. Upon completion of this session, participants will be able to: • Navigate communication successfully with clients and colleagues • Think critically about problems to make sound decisions • Solve complex problems in a structured way • Manage their time efficiently	11/8 3:00 pm - 3:50 pm (50 min) 11/10 11:15 am - 12:05 pm (50 min) 11/11 7:00 am - 7:50 am (50 min)
Developing a Change-Ready Mindset TAP23081-1, TAP23081-2, TAP23081-3 *CPE Field of Study: Personal Development* LEVEL: Basic 1 CPE *NEW SESSION FOR 2023*	In this session, we will explore the concept of developing a change-ready mindset and its significance in today's rapidly evolving world. Change is inevitable, both in our personal lives and professional careers, and having a change-ready mindset is crucial for navigating through these transitions successfully. Upon completion of this session, participants will be able to: • Define what it means to have a change-ready mindset and the benefits of embracing it • Identify ways to build resilience and discuss strategies to overcome resistance to change • Understand the importance of a growth mindset in cultivating and navigating change • Review 5 ways to lead in an ever changing world and foster a change-ready culture in your firm	11/9 7:00 am - 7:50 am (50 min) 11/9 4:35 pm - 5:25 pm (50 min) 11/11 10:10 am - 11:00 am (50 min)
Grow Your Firm: From Six Figures to Seven TAP23082-1, TAP23082-2 *CPE Field of Study:* *Business Management & Organization* LEVEL: Intermediate 1 CPE *NEW SESSION FOR 2023*	When your firm is poised for growth, your hard work and ambition may not be enough to take your CPA firm from six-figure to seven-figure revenues. Acquisition and expansion, traditionally, are a fast track to attract new business, offer stronger career paths, and enhance the firm's value. They can also be a fast track to destroy your culture and leave you with a firm you do not want to have. In this session, Ying Sa will share her journey of success with Community CPA. Focusing on Thomson Reuters system utilization and strong community involvement, Ying led her firm from one person and a single account to three branches, 40 employees and 10,000 accounts without mergers or acquisitions. Upon completion of this session, participants will be able to: • Fast-track growth without the capital outlay for an acquisition • Fully utilize your business information systems to grow your firm organically	11/8 4:05 pm - 4:55 pm (50 min) 11/10 4:30 pm - 5:20 pm (50 min)
Guiding Technology Centered Change in Your Firm TAP23083-1, TAP23083-2 *CPE Field of Study:* *Business Management & Organization* LEVEL: Basic 1.50 CPE	In this session, we will explore the key principles, strategies, and best practices for effectively leading technology change within your firm. We will share essential components of a change management framework and discuss how to cultivate your change management skills. Upon completion of this session, participants will be able to: • 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 includes milestones and clear deliverables • Understand how to create an environment for change that builds clarity, commitment, and urgency • Establish ways to mitigate risk, collect feedback, and evaluate change efforts	11/9 9:45 am - 11:00 am (75 min) 11/10 3:00 pm - 4:15 pm (75 min)

LEADERSHIP SESSIONS	DESCRIPTION	DATES/TIMES
The Mindful CPA TAP23085-1, TAP23085-2, TAP23085-3 *CPE Field of Study: Personal Development* LEVEL: Basic 1 CPE	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: • 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 Upon completion of this session, participants will be able to: • 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	11/8 5:10 pm - 6:00 pm (50 min) 11/10 7:00 am - 7:50 am (50 min) 11/11 8:00 am - 8:50 am (50 min)
The Power of Authenticity and How it Drives High Performance TAP23086-1, TAP23086-2 *CPE Field of Study: Personal Development* LEVEL: Basic 1.50 CPE	In this session, we will reveal how being real will enable you to increase your focus, energy, and influence while achieving your desired results professionally and personally. Upon completion of this session, participants will be able to: • 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	11/9 9:45 am - 11:00 am (75 min) 11/10 3:00 pm - 4:15 pm (75 min)
MARKETING SESSIONS	**DESCRIPTION**	**DATES/TIMES**
Back to the Basics of Marketing and Business Development TAP23087-1, TAP23087-2, TAP23087-3 *CPE Field of Study: Communications & Marketing* LEVEL: Basic 1 CPE	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. Upon completion of this session, participants will be able to: • List two marketing tools • Uncover your intended audience • Analyze your marketing plan for effectiveness	11/8 3:00 pm - 3:50 pm (50 min) 11/9 7:00 am - 7:50 am (50 min) 11/10 4:30 pm - 5:20 pm (50 min)

MARKETING SESSIONS	DESCRIPTION	DATES/TIMES
Strategic Positioning for the Firm: Tools for Leverage TAP23088-1, TAP23088-2 *CPE Field of Study: Business Management & Organization* LEVEL: Intermediate 1.50 CPE *NEW SESSION FOR 2023*	This session is packed with examples that illustrate how traditional Dutch windmills serve as a model for strategic planning. The windmill analysis has four cornerstones. (1) Wind represents opportunity, but wind is variable. It changes in strength and direction. (2) The windmill's wings and sails that capture the wind represent the firm's marketing mix, centered around ever-changing target clients (the axle or shaft). (3) The internal gears and mechanism transfer the torque of the axle into purpose and operations. (4) The windmill uses principles of leverage to turn (position) the mill toward the wind. These four cornerstones are integrally connected to forecasting, compliance, platform, competition, risk management, and state-of-the-art tools such as the Thomson Reuters CS Professional Suite. Hennie van Bulck has more than 35 years of experience with the Thomson Reuters CS Professional Suite as the owner of Van Bulck & Company CPAs, LLC. Currently he is the Interim Assistant Dean for Business and Administrative Management and Professor of Business Administration at USC Sumter. Participants will develop an understanding of strategic positioning in an ever-changing market; how to identify market opportunities; importance of marketing, platform and firm elevation, using leverage and choosing the right tools.	11/9 9:45 am - 11:00 am (75 min) 11/10 3:00 pm - 4:15 pm (75 min)
The Science of Marketing for Accountants by Accountants TAP23089-1, TAP23089-2 *CPE Field of Study: Communications & Marketing* LEVEL: Advanced 1 CPE *NEW SESSION FOR 2023*	In this session, attendees will learn to look at marketing through the lens of the science of statistics. Over the years (through much trial and error) we have learned what inputs our firm's marketing efforts require to create the desired new client outputs; number of new clients, quality of new clients, revenue growth, etc. Upon completion participants will be able to: • Determine what is your firm's sandbox • Generate team buy-in to create firm growth • Identify effective vs. non-effective marketing techniques • Develop a marketing playbook for firm growth	11/9 11:15 am - 12:05 pm (50 min) 11/10 11:15 am - 12:05 pm (50 min)

PAYROLL SESSIONS	DESCRIPTION	DATES/TIMES
Accounting CS Report Designer for Payroll Reports TAP23090-1, TAP23090-2 *CPE Field of Study: Computer Software & Applications* LEVEL: Intermediate 1 CPE *NEW SESSION FOR 2023*	In this session, we'll use Report Designer concepts to build a new payroll report from scratch to understand processes and various tools. Upon completion of this session, participants will be able to: • Understanding report options and the ACS Library • Use variables to add to an existing report • Demonstrate the importance of repeating levels • Formatting options to adjust the look of the report PREREQUISITES: Participants should have basic knowledge of data entry with Accounting CS Payroll and have some experience navigating the Report Designer.	11/8 3:00 pm - 3:50 pm (50 min) 11/9 4:35 pm - 5:25 pm (50 min)

PAYROLL SESSIONS	DESCRIPTION	DATES/TIMES
Best of Accounting CS Payroll Processing TAP23091-1, TAP23091-2 *CPE Field of Study: Computer Software & Applications* LEVEL: Intermediate 1 CPE *NEW SESSION FOR 2023*	In this session, you'll learn about the commonly overlooked efficiency features available when processing payroll in Accounting CS. Upon completion of this session, participants will be able to: • Leverage client & employee templates to prepopulate data fields • Understand payroll automation using Complete Payroll Output • Use dashboard to monitor payroll • Learn about various tips and tricks when entering and analyzing data PREREQUISITES: Participants should have a basic understanding of payroll processing in Accounting CS.	11/9 11:15 am - 12:05 pm (50 min) 11/11 9:05 am - 9:55 am (50 min)
Best of Accounting CS: Time-Saving Tips and Tricks With Onboarding New Payroll Clients TAP23092-1, TAP23092-2 *CPE Field of Study: Computer Software & Applications* LEVEL: Intermediate 1 CPE	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. Upon completion of this session, participants will be able to: • 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 PREREQUISITES: Participants should be familiar with navigation in Accounting CS and setting up a payroll client.	11/9 9:45 am - 11:00 am (75 min) 11/10 3:00 pm - 4:15 pm (75 min)
Client-Facing Tools to Better Serve Your Payroll Clients TAP23093-1, TAP23093-2 *CPE Field of Study: Computer Software & Applications* LEVEL: Intermediate 1 CPE	In this session, you will learn how to utilize tools available to your payroll clients for direct integration with Accounting CS. Upon completion of this session, participants will be able to: • 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 PREREQUISITES: Participants should be familiar with how to process payroll in Accounting CS.	11/8 4:05 pm - 4:55 pm (50 min) 11/10 11:15 am - 12:05 pm (50 min)
E-File Best Practices in Accounting CS TAP23094-1, TAP23094-2 *CPE Field of Study: Taxes – Technical* LEVEL: Basic 1 CPE	In this session, you will learn about filing payroll tax forms in Accounting CS electronically. Upon completion of this session, participants will be able to: • Understand pre-processing resources • Distinguish between electronic vs. internet/magnetic filing • Leverage batch filing vs. single client processing • Handle corrected tax forms PREREQUISITES: Participants should have a basic understanding of payroll processing in Accounting CS.	11/9 4:35 pm - 5:25 pm (50 min) 11/11 10:10 am - 11:00 am (50 min)

PAYROLL SESSIONS	DESCRIPTION	DATES/TIMES
Payroll 2024: Federal and State Legislative Update TAP23095-1, TAP23095-2 *CPE Field of Study: Taxes – Technical* LEVEL: Overview 1.50 CPE | 1 CE *NEW SESSION FOR 2023*	In this session, we will discuss upcoming payroll changes in 2024, 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. Upon completion of this session, tax advisors and payroll professionals will be prepared for compliance with upcoming legislative and regulatory changes, including: • Understand the latest federal and state tax initiatives, proposals and changes that affect payroll • Discover new IRS initiatives coming on the horizon • Discuss 2024 rates including minimum wage, UI bases, and others • Utilize tips to make year end processing more efficient and effective • Discuss Money Transmission Licensing and its effect on the payroll service industry	11/9 1:30 pm - 2:45 pm (75 min) 11/10 9:45 am - 11:00 am (75 min)

PRODUCTIVITY SESSIONS	DESCRIPTION	DATES/TIMES
How to Schedule Fewer and Lead More Effective Meetings TAP23096-1, TAP23096-2 *CPE Field of Study: Business Management & Organization* LEVEL: Basic 1 CPE	In this session, you will learn how to maximize your meeting time so your attendees are prepared and engaged. Unlock the key components of highly effective meetings and transform your time spent in meetings into increased value. Upon completion of this session, participants will be able to: • Apply meeting management skills for in-person and remote meetings • Improve meeting hygiene and cut down the number of meetings on your calendar • Achieve higher productivity through increased efficiency in meetings	11/9 11:15 am - 12:05 pm (50 min) 11/10 4:30 pm - 5:20 pm (50 min)
Managing Your Firm's Internal Projects Using Microsoft Planner TAP23097-1, TAP23097-2 *CPE Field of Study: Computer Software & Applications* LEVEL: Basic 1 CPE *NEW SESSION FOR 2023*	Do your firm's internal projects need a little help with project management and collaboration? Are you getting the most out of your Microsoft applications? Microsoft Planner offers great collaboration tools for you and your staff to keep your firm's internal projects moving. In this session, we will discuss how you can be more efficient with your firm's internal project workflow using Microsoft Planner as well as getting the most out of Microsoft Planner with useful tips and tricks. Upon completion of this session, participants will be able to: • Create, design, and develop Planner Board(s) • Customize and utilize functions efficiently in Microsoft Planner • Organize, prioritize, and schedule projects and/or tasks • Analyze and manage projects and/or tasks • Integrate with other applications	11/9 7:00 am - 7:50 am (50 min) 11/11 8:00 am - 8:50 am (50 min)

PRODUCTIVITY SESSIONS	DESCRIPTION	DATES/TIMES
Microsoft Bookings: Automate Your Meeting Availability and Communications TAP23098-1, TAP23098-2 *CPE Field of Study: Computer Software & Applications* LEVEL: Basic 1 CPE *NEW SESSION FOR 2023*	In this session we will show how Microsoft Bookings integrates with your Outlook calendar availability and Microsoft Teams to allow seamless virtual connections and curated communications with clients. Upon completion of this session, participants will be able to: • Start a new Bookings calendar • Curate invite email, reminders, and automatic follow up emails • Configure preferences and settings for various service types • Export booking data history to TSV file & convert to Excel PREREQUISITES: Participants should have a basic knowledge accessing and working with Microsoft applications in office 365, including using Outlook Calendar and Microsoft Teams meeting tools.	11/9 11:15 am - 12:05 pm (50 min) 11/10 4:30 pm - 5:20 pm (50 min)
Microsoft Excel Functions You Should Know TAP23099-1, TAP23099-2 *CPE Field of Study: Computer Software & Applications* LEVEL: Advanced 1 CPE *NEW SESSION FOR 2023*	In this session, we will discuss the common functions to help you automate processes, create efficiencies, and save time. Come learn how to work even faster in Excel! Upon completion of this session, participants will be able to: • Utilize common Excel functions in standard workflows • Apply time saving formulas • Make better informed decisions with the use of formulas and functions PREREQUISITES: Participants should be familiar with the Microsoft Office Suite to attend this session.	11/9 3:00 pm - 3:50 pm (50 min) 11/10 11:15 am - 12:05 pm (50 min)
Microsoft Excel Pivot Tables TAP23100-1, TAP23100-2 *CPE Field of Study: Computer Software & Applications* LEVEL: Advanced 1.50 CPE	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! Upon completion of this session, participants will be able to utilize Pivot Tables to: • Prepare raw data for analysis • Apply consistent formatting, sorting, and filtering • Display data in multiple ways • Insert customized formulas and visuals PREREQUISITES: Participants should be familiar with the Microsoft Office Suite to attend this session.	11/9 9:45 am - 11:00 am (75 min) 11/10 3:00 pm - 4:15 pm (75 min)
Microsoft Excel Top 10 Tips for Accounting Professionals TAP23101-1, TAP23101-2, TAP23101-3 *CPE Field of Study: Computer Software & Applications* LEVEL: Intermediate 1 CPE	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! Upon completion of this session, participants will be able to: • Apply 10 quick tips to bring greater efficiency to using Microsoft Excel • Identify how to easily navigate and utilize timesaving functions • Apply consistent formatting • Customize the status bar PREREQUISITES: Participants should be familiar with the Microsoft Office Suite to attend this session.	11/8 3:00 pm - 3:50 pm (50 min) 11/10 7:00 am - 7:50 am (50 min) 11/11 9:05 am - 9:55 am (50 min)

PRODUCTIVITY SESSIONS	DESCRIPTION	DATES/TIMES
Microsoft Outlook Top 10 Tips for Accounting Professionals TAP23102-1, TAP23102-2 *CPE Field of Study: Computer Software & Applications* LEVEL: Intermediate 1.50 CPE	In this session, we will explore more advanced features of Microsoft Outlook. Upon completion of this session, participants will be able to: • 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 PREREQUISITES: Participants should have a working knowledge of Microsoft Outlook.	11/9 1:30 pm - 2:45 pm (75 min) 11/10 9:45 am - 11:00 am (75 min)
Microsoft Teams Essential Tips and Tricks TAP23103-1, TAP23103-2 *CPE Field of Study: Computer Software & Applications* LEVEL: Intermediate 1 CPE	Attending this session will help you to embrace Microsoft Teams as a powerful collaboration tool for your firm. Upon completion of this session, participants will be able to: • 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 PREREQUISITES: Participants should have a basic knowledge accessing and working with Microsoft applications.	11/8 5:10 pm - 6:00 pm (50 min) 11/9 4:35 pm - 5:25 pm (50 min)

TALENT SESSIONS	DESCRIPTION	DATES/TIMES
Adult Learners and Learning Styles TAP23105 *CPE Field of Study: Communication & Marketing* LEVEL: Intermediate 1.50 CPE *NEW SESSION FOR 2023*	Adult learning occurs differently from children learning in school. It is important to understand how adults learn and account for varying learning styles. In this session, attendees will learn about the four learning styles and how to best engage and motivate adult learners. Upon completion of this session, participants will be able to: • Define andragogy • Distinguish between how adults and children learn • Identify the four primary learning styles • Formulate elements of workplace training based on each learning style	11/9 1:30 pm - 2:45 pm (75 min)
Attracting and Retaining Talent in a Talent Strapped Economy TAP23106-1, TAP23106-2 *CPE Field of Study: Personnel/Human Resources – Non–Technical* LEVEL: Intermediate 1 CPE	In this session, you will learn about talent trends happening in the industry. We will discuss innovative ways you can take immediate action tied to your recruitment and retention efforts. Upon completion of this session, participants will be able to: • 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 PREREQUISITES: Participants should be people leaders who are responsible for hiring and/or managing employees or in roles that support these activities.	11/8 5:10 pm - 6:00 pm (50 min) 11/9 3:00 pm - 3:50 pm (50 min)

TALENT SESSIONS	DESCRIPTION	DATES/TIMES
Planning for Exit: Selling to a Firm, Selling to Staff, or Deciding to Hold. How Do I Set Myself Up for Success? TAP23108-1, TAP23108-2 *CPE Field of Study: Business Management & Organization* LEVEL: Basic 1.50 CPE	In this session, you will learn how to look at your firm objectively as a product and evaluate different exit strategies. Upon completion of this session, participants will be able to: • 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	11/9 9:45 am - 11:00 am (75 min) 11/10 9:45 am - 11:00 am (75 min)
Remote or In-Office – Blending your Workforce to be One No Matter Where They Work TAP23109-1, TAP23109-2 *CPE Field of Study: Business Management & Organization* LEVEL: Basic 1 CPE *NEW SESSION FOR 2023*	New processes and methodologies will be key to help support this new blended workforce. Building this workforce will require a coordinated set of tools, including technology supported by a management culture and new protocols to keep a firm's business objectives on track. Firms will work through thinking about the various areas that will allow to have a successful blended workforce including, they will walk away with strategies on what skills may need to be developed to manage a virtual team, what they may need to look for in technology and security, and how to create and culture driving solutions to blend these groups as the firm grows together yet possibly far apart from each other.	11/9 7:00 am - 7:50 am (50 min) 11/11 10:10 am - 11:00 am (50 min)
Retaining Top Talent Using Stay Interviews and Incentive Plans TAP23110 *CPE Field of Study: Personnel/Human Resources* LEVEL: Overview 1.50 CPE	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." Upon completion of this session, participants will be able to: • 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	11/10 9:45 am - 11:00 am (75 min)
Train the Trainer TAP23111-1, TAP23111-2 *CPE Field of Study: Communications & Marketing* LEVEL: Basic 1.50 CPE	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. Upon completion of this session, participants will be able to: • Manage classroom dynamics • Engage an audience, whether in person or remote • Identify levels of learning, and how to meet an audience's expectations	11/9 1:30 pm - 2:45 pm (75 min) 11/10 9:45 am - 11:00 am (75 min)

TALENT SESSIONS	DESCRIPTION	DATES/TIMES
Winning The Great Resignation Game TAP23112 *CPE Field of Study: Personnel/Human Resources* LEVEL: Advanced 1 CPE *NEW SESSION FOR 2023*	Great change brings about new challenges, and many are saying that the Great Resignation is upon us. What is it? Why is it happening? What can firm leadership do to protect the potential loss of great team members? In this session, we will explore it all and give you actionable steps to take as soon as you get home. Upon completion of this session, participants will better understand: • The impact employee retention has on firms • The impacts recruitment is making at firms • The impacts culture management is making at firms • The impacts employee engagement is having on firms • Ideas and strategies to implement at your firm	11/8 4:05 pm - 4:55 pm (50 min)

TAX & ASSET MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES
ACA Reporting – 2023 Updates, Basics, and Best Practices TAP23113-1, TAP23113-2 *CPE Field of Study: Taxes – Technical* LEVEL: Intermediate 1.50 CPE | 1 CE *NEW SESSION FOR 2023*	With 2022 Affordable Care Act (ACA) reporting complete, businesses need to prepare for new challenges and changes for 2023's ACA reporting. In this session, we will review the complexities of complying with IRS ACA reporting rules and forms. We will also dive deep into recent changes impacting ACA reporting, including the reducing of the e-filing threshold to 10 returns and the expiration of good faith penalty relief with IRS Notice 2020-76. Additionally, we'll walk through ACA penalty and reporting best practices and explore common questions and examples. Upon completion of this session, participants will be able to: • List IRS updates related to Affordable Care Act information reporting • Discuss ACA reporting requirements and deadlines • Identify best practices for complying with reporting requirements and responding to IRS penalty assessments and notices • Recognize common reporting examples, strategies, and errors PREREQUISITES: While not required, it's helpful to have a basic understanding of the ACA prior to this session.	11/9 1:30 pm - 2:45 pm (75 min) 11/10 9:45 am - 11:00 am (75 min)
Advanced Disposals Using Fixed Assets CS and/or UltraTax CS TAP23114-1, TAP23114-2 *CPE Field of Study: Computer Software & Applications* LEVEL: Intermediate 1 CPE *NEW SESSION FOR 2023*	In this session, we will work in Fixed Assets CS to complete tricky disposal situations, and review the results on tax forms. While we will work within Fixed Assets CS for this session, this data entry applies to UltraTax CS and can also be exported to GoSystem Tax RS. Upon completion of this session, participants will be able to: • Enter installment sales and like-kind exchanges using the Asset Module • Complete a sale transaction that qualifies for state like-kind exchange treatment • Review tax forms related to disposals in UltraTax CS PREREQUISITES: Participants should be familiar with Fixed Assets CS or the asset module of UltraTax CS.	11/10 11:15 am - 12:05 pm (50 min) 11/11 10:10 am - 11:00 am (50 min)

TAX & ASSET MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES
Agriculture Taxation and Implementation in UltraTax CS TAP23115-1, TAP23115-2 *CPE Field of Study: Taxes – Technical* LEVEL: Intermediate 1.50 CPE | 1 CE *NEW SESSION FOR 2023*	This session will focus on some of the tax issues unique to agriculture and how to implement these within the functionality of UltraTax CS. It is an "UltraTax CS TAB-Based" approach which will provide the attendee with specific guidance on achieving the proper tax outcome based on responses and entries within a specified UltraTax TAB. Upon completion of this session, participants will be able to: • Summarize the latest developments in agriculture taxation • Achieve the proper outcomes for agriculture activities in Ultra Tax CS PREREQUISITES: Participants should have a working knowledge of UltraTax CS.	11/9 9:45 am - 11:00 am (75 min) 11/10 9:45 am - 11:00 am (75 min)
Basics of 280E – Marijuana Tax Law TAP23116-1, TAP23116-2 *CPE Field of Study: Taxes – Technical* LEVEL: Basic 1.50 CPE | 1 CE *NEW SESSION FOR 2023*	In this session, you will learn the basics about the 280E tax laws. Specifically, how the law came into place, how to navigate it, and strategies to mitigate a marijuana client's tax exposure. Upon completion of this session, participants will be able to: • Apply 280E tax laws to a marijuana client • Develop mitigation strategies to reduce a client's exposure to 280E tax laws PREREQUISITES: Participants should have a working knowledge of business tax laws.	11/9 9:45 am - 11:00 am (75 min) 11/10 3:00 pm - 4:15 pm (75 min)
Best of UltraTax CS: Data Entry and Efficiency TAP23117-1, TAP23117-2 *CPE Field of Study: Taxes – Technical* LEVEL: Intermediate 1 CPE | 1 CE *NEW SESSION FOR 2023*	Have you ever learned something new in UltraTax CS that saved you a lot of time? Are you concerned that you or your staff may be missing other tools to maximize data entry efficiency? In this fast-paced session, we will review some of the best data entry features to maximize efficiency within UltraTax CS. Upon completion of this session, participants will be able to implement time-saving features to boost productivity at their firm. PREREQUISITES: Participants should have a working knowledge of UltraTax CS.	11/9 11:15 am - 12:05 pm (50 min) 11/10 11:15 am - 12:05 pm (50 min)
Best of UltraTax CS: Pass-Through Entities TAP23118-1, TAP23118-2 *CPE Field of Study: Taxes – Technical* LEVEL: Intermediate 1.50 CPE | 1 CE *NEW SESSION FOR 2023*	In this session, we will take a detailed look at working with pass-through entities at the business and individual level. At the business level, we'll review 1065 special allocations and Shareholder or Partner imports. We will then data share the return to a 1040 to review business loss limitations, basis tracking, and state allocation. Upon completion of this session, participants will be able to: • Enter partnership special allocations • Import Shareholder, Partner, or Beneficiary information from a spreadsheet • Data share information to the partner's 1040 return • Demonstrate passive loss limitation and basis data entry	11/9 9:45 am - 11:00 am (75 min) 11/10 3:00 pm - 4:15 pm (75 min)

TAX & ASSET MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES
Best of UltraTax CS: Review Tools TAP23119-1, TAP23119-2 *CPE Field of Study: Taxes – Technical* LEVEL: Intermediate 1 CPE | 1 CE *NEW SESSION FOR 2023*	Have you ever learned something new in UltraTax CS that boosted your productivity as a reviewer? In this fast-paced session, learn about the tools UltraTax CS offers to complete a thorough on-screen review to maximize accuracy within UltraTax CS. Upon completion of this session, participants will be able to: • Utilize on-screen review tools including estimated values and tickmarks • Take advantage of UltraTax CS's robust diagnostic system • Use firm management tools to track returns PREREQUISITES: Participants should have a working knowledge of UltraTax CS.	11/8 3:00 pm - 3:50 pm (50 min) 11/10 4:30 pm - 5:20 pm (50 min)
Calculating and Reconstructing Subchapter S Shareholder Basis TAP23120-1, TAP23120-2 *CPE Field of Study: Taxes – Technical* LEVEL: Intermediate 1.50 CPE | 1 CE *NEW SESSION FOR 2023*	This session focuses on identifying and understanding the components included in the calculation of S Corporation shareholder stock and debt basis. Using interactive examples, participants will learn how to calculate stock and debt basis in a variety of circumstances. A general focus will be why we must calculate shareholder basis: To preserve the single layer of taxation that is the hallmark of Subchapter S. We will also focus on what gives rise to bona fide debt within the meaning of 2014 treasury regulations. Finally, we will discuss how to reconstruct a shareholder's stock basis (using the Cohan rule, accounting books and records, corporate minutes, and other court doctrines as well previously filed tax returns). Upon completion of this session, participants will be able to: • Define what stock basis and debt basis are and why they are important • Discuss how the S-corporation basis differs from the partnership basis • Identify whose responsibility it is to track basis — it's not the entity's responsibility • Analyze the steps in calculating or reconstructing the basis of an S-corporation • Differentiate types of loans from shareholders and identify which loans affect the basis • Gain an understating how to calculation data necessary for Form 7203	11/9 1:30 pm - 2:45 pm (75 min) 11/10 9:45 am - 11:00 am (75 min)
Calculating and Reconstructing the Partner's Outside Basis TAP23121-1, TAP23121-2 *CPE Field of Study: Taxes – Technical* LEVEL: Intermediate 1.50 CPE | 1 CE *NEW SESSION FOR 2023*	This session and its materials are critical for anyone who provides services to partners and partnerships. The Courts (and the IRS) take the position that a partner's outside basis is zero unless the partner can substantively prove otherwise. Using real-life examples, we will provide a comprehensive analysis of a partner's outside basis from the inception of the partnership including contributions of services, cash, and property and the assumption of liabilities, as well as distributions, sales and exchanges, liquidations and redemptions, and the partner's share of partnership liabilities. The session will culminate with a comprehensive example instructing participants on reconstructing a partner's outside basis. Upon completion of this session, participants will be able to: • State the difference between inside and outside basis, and articulate why outside basis is important • Calculate the outside basis upon the contribution of property or services including the assumption of liabilities • Determine the effect, if any, on outside basis for distributions, liquidations, and redemptions • Understand how a partner's outside basis is affected by the partnership's liability transactions • Discuss how to utilize IRS and judicial guidance to reconstruct a partner's outside basis • Evaluate planning opportunities to utilize basis maximally to avoid suspended losses	11/9 9:45 am - 11:00 am (75 min) 11/10 3:00 pm - 4:15 pm (75 min)

TAX & ASSET MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES
Checkpoint Edge Beyond the Basics TAP23122-1, TAP23122-2 *CPE Field of Study: Computer Software & Applications* LEVEL: Advanced 1 CPE *NEW SESSION FOR 2023*	In this session, we'll explore time-saving research tips and functionality in Checkpoint Edge. We will leverage Checkpoint Edge's AI-powered algorithm to increase your speed to finding answers and sharing them with your colleagues. Upon completion of this session, participants will be able to: • Use connector symbols to further refine their search query • Use citation templates for specialized searches • Create customized folders • Share folders with colleagues PREREQUISITES: Participants should have a basic understanding of Checkpoint Edge functionality.	11/9 11:15 am - 12:05 pm (50 min) 11/10 11:15 am - 12:05 pm (50 min)
Creating and Communicating Tax Plans With Planner CS TAP23123-1, TAP23123-2 *CPE Field of Study: Taxes – Technical* LEVEL: Intermediate 1.50 CPE *NEW SESSION FOR 2023*	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. In this session, we will review the end-to-end process of creating tax plans for your clients. Upon completion of this session, participants will be able to: • Create 1040 tax plans that project multiple years and alternatives • Leverage the power of result finder • Communicate plan information to clients	11/9 1:30 pm - 2:45 pm (75 min) 11/10 9:45 am - 11:00 am (75 min)
Criminal Tax Investigations: The IRS Does Put Accountants In Jail TAP23124-1, TAP23124-2 *CPE Field of Study: Taxes – Technical* LEVEL: Basic 1.50 CPE | 1 CE *NEW SESSION FOR 2023*	A civil tax audit can become a criminal tax investigation. When that happens, the accountant and the firm will be in the middle of a stressful and time-consuming process, which could result in their client going to prison or even the accountant as well. This session will discuss the criteria the IRS uses in evaluating potential for criminal prosecution for both the client and accountant. This session will also discuss the criminal tax process and criteria that judges consider when delivering sentences. Upon completion of this session, participants will be able to: • Define the criteria the IRS uses to evaluate and recommend a criminal tax prosecution • Identify violations of common criminal tax laws • Execute best practices to protect yourself and your firm against criminal tax prosecution • Determine what to expect when the IRS knocks on your door or your client's door PREREQUISITES: Participants should have a basic knowledge of financial and tax preparation.	11/9 1:30 pm - 2:45 pm (75 min) 11/10 9:45 am - 11:00 am (75 min)
Crypto Crash Course TAP23125-1, TAP23125-2 *CPE Field of Study: Taxes – Technical* LEVEL: Basic 1 CPE *NEW SESSION FOR 2023*	Join FORVIS and Ledgible to learn about crypto tax and accounting. Crypto continues to evolve and as more and more people use this new technology, it's important to understand how its taxed and how to account for all of the many nuances. This session will not focus on what cryptocurrency and blockchain are, but rather how to properly comply with the tax and accounting guidance in the U.S. Upon completion of this session, participants will be able to: • Explain how crypto is taxed including nuances and considerations for crypto tax and reporting • Apply appropriate financial reporting of crypto including FASB proposed update to fair value • Identify how software including Ledgible/FORVIS can help	11/9 11:15 am - 12:05 pm (50 min) 11/10 4:30 pm - 5:20 pm (50 min)

TAX & ASSET MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES
Customize Client Documents in UltraTax CS TAP23126-1, TAP23126-2 *CPE Field of Study: Computer Software & Applications* LEVEL: Intermediate 1.50 CPE	Back by popular demand! In this session, learn about how to tailor your UltraTax CS instructions and letters to suit your firm and client base. Learn how to add signatures and have UltraTax CS automatically update letters based on return data. Also see how to adjust letters on a client-by-client basis. Upon completion of this session, participants will be able to: • View and adjust formatting of client documents • Utilize custom paragraphs that update automatically based on return information • Add a signature to letters • Customize transmittal letters, engagement letters, and filing instructions	11/9 1:30 pm - 2:45 pm (75 min) 11/10 3:00 pm - 4:15 pm (75 min)
Different Types of Trusts for Estate Planning TAP23127-1, TAP23127-2 *CPE Field of Study: Taxes – Technical* LEVEL: Intermediate 1 CPE | 1 CE *NEW SESSION FOR 2023*	Can't see the forest for the trees when it comes to educating your clients on the realm of trusts used in estate planning? This session will provide an overview to help you navigate the different types of trusts that your clients may use to help with their day to day lives, their estate planning, and to minimize their future tax liabilities. You'll learn that QTIPs are more than just those things that you shouldn't stick too far in your ears as well as other types of trusts. Come explore! Upon completion of this session, participants will be able to: • Evaluate which trust types apply to clients • Recommend trusts appropriate for client financial goals • Use trusts to limit current and future tax liabilities PREREQUISITES: Participants should have a general knowledge of fiduciary trusts.	11/8 4:05 pm - 4:55 pm (50 min) 11/10 11:15 am - 12:05 pm (50 min)
Federal Tax Research TAP23128-1, TAP23128-2 *CPE Field of Study: Taxes – Technical* LEVEL: Intermediate 1 CPE | 1 CE *NEW SESSION FOR 2023*	CPAs encounter complex tax situations and knowing the proper way to research and what tools are available is very important. Also understanding the hierarchy of tax cases is important. Upon completion of this session, participants will be able to: • Outline steps and methodology involved in tax research including Constitutional and Legislative Sources, Judicial Interpretations, and Research tools • Communicate research results • Implement research tools	11/9 11:15 am - 12:05 pm (50 min) 11/10 4:30 pm - 5:20 pm (50 min)
Foreign Data Entry for Individual Returns in UltraTax CS TAP23129-1, TAP23129-2 *CPE Field of Study: Taxes – Technical* LEVEL: Advanced 1.50 CPE | 1 CE *NEW SESSION FOR 2023*	In this session, we will review data entry for individuals with foreign income and investments. We will prepare forms 1116, 2555, and 5471, and also review data entry and filing for reports of foreign assets. Upon completion of this session, you will be able to: • Prepare tax returns for individuals with foreign transactions • Complete forms 2555 and 1116 to exclude foreign income and claim the foreign tax credit • Document foreign accounts • Complete form 5471 for various categories of filer. PREREQUISITES: Participants should have a working knowledge of UltraTax CS.	11/9 1:30 pm - 2:45 pm (75 min) 11/10 9:45 am - 11:00 am (75 min)

TAX & ASSET MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES
Generosity Through Charitable Trusts TAP23130-1, TAP23130-2 *CPE Field of Study: Taxes – Technical* LEVEL: Advanced 1 CPE | 1 CE *NEW SESSION FOR 2023*	You know that client. They've done well for themselves and now they are looking at opportunities to philanthropically give back to others. In this session, we will discuss how to add value to your client interactions by educating them on the benefits and limitations of charitable trusts. Upon completion of this session, participants will be able to add value to their client interactions by exploring opportunities and educating their clients on leaving a legacy through charitable trusts. PREREQUISITES: Participants should have a general knowledge of fiduciary trusts.	11/8 5:10 pm - 6:00 pm (50 min) 11/10 4:30 pm - 5:20 pm (50 min)
GoSystem Tax RS & SurePrep Integration TAP23131 *CPE Field of Study: Computer Software & Applications* LEVEL: Intermediate 1.50 CPE *NEW SESSION FOR 2023*	Join us in this session to learn the benefits of using SurePrep with GoSystem Tax RS. Upon completion of this session, participants will be able to: • Walkthrough sending documents through SurePrep • Utilize Leadsheets to automate with LiveSync to GoSystem • See how SurePrep can eliminate data entry errors within locators	11/10 9:45 am - 11:00 am (75 min)
GoSystem Tax RS Admin Refresher TAP23132 *CPE Field of Study: Computer Software & Applications* LEVEL: Overview 1 CPE *NEW SESSION FOR 2023*	How long has it been since you reviewed your setup? In this session, we will review administrative setup in GoSystem Tax RS. Upon completion of this session, participants will be able to: • Review best configuration of groups and users • Understand the options under Security and E-File notifications • Utilize the different Tax Defaults for federal and state returns	11/8 5:10 pm - 6:00 pm (50 min)
GoSystem Tax RS Consolidations TAP23133 *CPE Field of Study: Taxes – Technical* LEVEL: Advanced 1 CPE | 1 CE *NEW SESSION FOR 2023*	During this session learn how to properly set up, review, and electronically file a consolidated return. Upon completion of this session, participants will be able to: • Identify steps of consolidation • Use subview • Prepare state consolidations • Create electronic files for consolidations	11/9 4:35 pm - 5:25 pm (50 min)

TAX & ASSET MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES
GoSystem Tax RS Help Resources vs. Case Management Dashboard and When to Use Them TAP23134 *CPE Field of Study: Computer Software & Applications* LEVEL: Basic 1 CPE *NEW SESSION FOR 2023*	In this session, we will discuss all of your help resources for GoSystem Tax RS and when to use each one. Upon completion of this session, participants will be able to leverage GoSystem Tax RS product assistance including: • Frequently Asked Questions • Release Notes • Help Resources • Case Management Dashboard • Electronic Filing Help	11/9 3:00 pm - 3:50 pm (50 min)
GoSystem Tax RS Letters and Filing Instructions: Do You Know the Power? TAP23135 *CPE Field of Study: Computer Software & Applications* LEVEL: Intermediate 1.50 CPE *NEW SESSION FOR 2023*	In this session, we will look at the features available for Letters and Filing Instructions. Learn how to make your firm's Letters and Filing Instructions stand out! Upon completion of this session, participants will be able to: • Insert Images • Insert Preparer Specific Paragraphs • Use Variables to set paragraphs to print for specific scenarios	11/9 9:45 am - 11:00 am (75 min)
GoSystem Tax RS Review Tools and Diagnostics TAP23136 *CPE Field of Study: Taxes – Technical* LEVEL: Basic 1.50 CPE *NEW SESSION FOR 2023*	In this session, join us as we talk about diagnostics and reviewing returns in GoSystem Tax RS. Upon completion of this session, participants will be able to: • Analyze and resolve electronic filing diagnostics • Use review tools • Complete on and offscreen review	11/9 1:30 pm - 2:45 pm (75 min)
GoSystem Tax RS State Tips & Tricks TAP23137 *CPE Field of Study: Taxes – Technical* LEVEL: Intermediate 1.50 CPE *NEW SESSION FOR 2023*	Struggling with State returns? Join us to learn tips and tricks for data entry of state information. In this session we will look at best practices and resources to assist with processing state returns. Upon completion of this session, participants will be able to: • Take advantage of entity specific Tips & Tricks • Enter state depreciation	11/10 3:00 pm - 4:15 pm (75 min)

TAX & ASSET MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES
GoSystem Tax RS Tax Return Import/ Export tool TAP23138 *CPE Field of Study: Taxes – Technical* LEVEL: Advanced 1 CPE *NEW SESSION FOR 2023*	In this session, you will discover the features and Functionality of the New Tax Return Import/Export Tool. Upon completion of this session, participants will be able to: • Create an Import File • Check for and resolve errors	11/10 11:15 am - 12:05 pm (50 min)
GoSystem Tax RS What's New TAP23139 *CPE Field of Study: Taxes – Technical* LEVEL: Update 1 CPE | 1 UPDATE *NEW SESSION FOR 2023*	In this session, we will look at the new features and functionality for 2023 GoSystem Tax RS. Upon completion of this session, participants will be able to: • Identify changes to GoSystem Tax RS for 2023 • Prepare returns using the latest software	11/9 11:15 am - 12:05 pm (50 min)
Hot Topics for Business Federal Tax – Plus Updates TAP23140-1, TAP23140-2 *CPE Field of Study: Taxes – Technical* LEVEL: Intermediate 1 CPE | 1 UPDATE *NEW SESSION FOR 2023*	In this session, we will describe tax updates for businesses, including credits brought about by the Inflation Reduction Act that businesses can take advantage of and provisions of TCJA that are set to expire, as well as any other hot topics in federal tax for the 2024 tax season. Upon completion of this session, participants will be aware of and prepared to apply any business tax updates that will impact the 2024 tax season.	11/8 4:05 pm - 4:55 pm (50 min) 11/9 3:00 pm - 3:50 pm (50 min)
Hot Topics for Individual Federal Tax – Plus Updates TAP23141-1, TAP23141-2 *CPE Field of Study: Taxes – Technical* LEVEL: Intermediate 1 CPE | 1 UPDATE *NEW SESSION FOR 2023*	In this session, we will describe tax updates for individuals and hot topics in individual taxation, including credits brought about by the Inflation Reduction Act and other tax law changes that will have an impact on the 2024 tax season. Upon completion of this session, participants will be aware of and prepared to apply any individual tax updates that will impact the 2024 tax season.	11/9 11:15 am - 12:05 pm (50 min) 11/10 11:15 am - 12:05 pm (50 min)

TAX & ASSET MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES
Maximizing Economic and Tax Benefits through Direct Oil and Gas Ownership TAP23173 *CPE Field of Study: Specialized Knowledge – Technical* LEVEL: Intermediate 1 CPE *NEW SESSION FOR 2023*	Attending this session will help you better understand Working Interest in the Oil and Gas Energy Sector. We will discuss the potential pitfalls, the structure, the tax advantages, and what kind of return it can generate when you are working with the right organization. Upon completion of this session, participants will be able to: • Understand the risks of working interest investments • Differentiate between a good or poor operator • Identify successful oil and gas projects • Navigate the process and flow of capital in the investment • Evaluate tax saving opportunities	11/8 4:05 pm - 4:55 pm (50 min)
State and Local Taxes in the Global Economy TAP23144-1, TAP23144-2 *CPE Field of Study: Taxes – Technical* LEVEL: Intermediate 1 CPE *NEW SESSION FOR 2023*	If you can send or deliver an item or service to someone outside your domicile, your tax profile is always impacted. We are five years out on the Wayfair decision, creating tax obligations in addition to reporting already in place for inbound and outbound taxes, depending on tax and legal status. These layers of issues create risk for the unwary, whether you are protected under treaty or not. We'll examine these issues, common pitfalls, and where state and local taxes intersect with how you do business. Upon completion of this session, participants will be able to: • Discuss how the internet removes boundaries for doing business • Identify how that impacts the tax issues that accounting, tax, finance, and legal need to be aware, jurisdiction by jurisdiction	11/8 4:05 pm - 4:55 pm (50 min) 11/10 11:15 am - 12:05 pm (50 min)
Tax Research With UltraTax CS TAP23145-1, TAP23145-2 *CPE Field of Study: Computer Software & Applications* LEVEL: Overview 1 CPE *NEW SESSION FOR 2023*	Do you have questions about recent law changes or less-used areas in UltraTax CS? In this session, we will review the research tools available from within UltraTax CS, including agency instructions and publications, Help and Support, and subscription-based resources from Checkpoint Edge. Upon completion of this session, participants will be able to: • Navigate to form instructions directly from Tax Forms View • Utilize shortcuts to access PPC Deskbooks and Checkpoint Edge/Checkpoint content • Configure UltraTax CS to access Checkpoint Edge/Checkpoint research content	11/8 4:05 pm - 4:55 pm (50 min) 11/11 8:00 am - 8:50 am (50 min)
Taxation of Cryptocurrency and Digital Assets – What's New? TAP23146-1, TAP23146-2 *CPE Field of Study: Taxes – Technical* LEVEL: Basic 1 CPE | 1 CE *NEW SESSION FOR 2023*	In this session, we'll provide a refresher of how the IRS views cryptocurrency and other digital assets, including the deductibility of cryptocurrency that has declined in value. We will also discuss updates to federal law, the Jarrett case, and some curious state law developments. Upon completion of this session, participants will be able to: • Understand federal and state tax developments for virtual currency and digital assets • Understand the deductibility of crypto that has declined in value • Understand the treatment of NFTs as collectibles • Become informed on the latest tax trends and updates for crypto and digital assets	11/8 3:00 pm - 3:50 pm (50 min) 11/11 8:00 am - 8:50 am (50 min)

TAX & ASSET MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES
The Nasty World of NOLs TAP23147-1, TAP23147-2 *CPE Field of Study: Taxes – Technical* LEVEL: Intermediate 1 CPE | 1 CE *NEW SESSION FOR 2023*	They're back...those nasty NOLs. There has been so much change [TCJA, CARES Act, and Excess Business Losses (EBLs)] in regards to how to apply the NOL rules, it can make a tax practitioner's head spin. Let our tag team of UltraTax and TaxWatch University relieve your headache in this area by revisiting the current NOL rules in tandem with a demonstration using UltraTax CS. Upon completion of this session, participants will be able to: • Review current NOL rules • Complete tax returns with NOLs in UltraTax CS	11/9 4:35 pm - 5:25 pm (50 min) 11/11 8:00 am - 8:50 am (50 min)
The New R&D Tax Credit Regime – Things Are Not the Same for 2022 TAP23148-1, TAP23148-2 *CPE Field of Study: Taxes – Technical* LEVEL: Intermediate 1 CPE | 1 CE *NEW SESSION FOR 2023*	Tax year 2022 ushered in new and significant developments to the historical treatment of the U.S. Research & Development (R&D) tax credit. Namely, tax professionals and taxpayers alike were confronted with new rules regarding the timing of deductions, reporting requirements for R&D carryback claims, and Form 6765 reporting modifications. Let's go forward in "time travel" to understand these new wave of rules and accompanying regulations. Upon completion of this session, participants will be able to: • Recognize the effect of the Tax Cuts and Jobs act on R&D expenses • Apply additional practice R&D credit considerations	11/8 3:00 pm - 3:50 pm (50 min) 11/10 11:15 am - 12:05 pm (50 min)
The Remote Workforce: Tax Considerations for Employers Who Have Remote Employees TAP23149-1, TAP23149-2 *CPE Field of Study: Taxes – Technical* LEVEL: Intermediate 1 CPE *NEW SESSION FOR 2023*	Prior to COVID-19, remote work had not caught on to a large extent because of various concerns about productivity and effectiveness. After COVID-19, it appears that remote work is here to stay. This session will outline the most critical tax issues to consider if you have a remote workforce or are considering adding remote work pieces. It will also be a refresher and a new lens for tax professionals who advise clients who have remote employees. Upon completion of this session, participants will be able to: • Advise employers and employees about remote work and the potential tax implications • Analyze sales and use, income tax, and various other taxes • Identify the most important tax considerations when either establishing or growing a remote workforce	11/9 3:00 pm - 3:50 pm (50 min) 11/11 9:05 am - 9:55 am (50 min)
The Secure Act 2.0 (RMDs, EDBs, and Roths, Oh My!) TAP23150-1, TAP23150-2 *CPE Field of Study: Taxes – Technical* LEVEL: Intermediate 1 CPE | 1 CE *NEW SESSION FOR 2023*	SECURE 2.0 Act was signed into law in late 2022, delivering dozens of new retirement-related provisions. These changes build on the original SECURE Act of 2019, which altered the rules around how you can save and withdraw money from your retirement accounts. The legislation provides a slate of changes that could help strengthen the retirement system. Upon completion of this session, participants will be able to: • Identify Secure Act 2.0's new provisions • Complete returns affected by Secure Act 2.0 • Apply provisions of Secure Act 2.0 to tax planning	11/9 3:00 pm - 3:50 pm (50 min) 11/11 9:05 am - 9:55 am (50 min)

TAX & ASSET MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES
UltraTax CS Carryforwards TAP23152-1, TAP23152-2 *CPE Field of Study: Taxes – Technical* LEVEL: Advanced 1.50 CPE | 1 CE *NEW SESSION FOR 2023*	In this session, we will review the general mechanics of carryforwards in UltraTax CS. We will explore Net Operating Loss, Capital loss, and Charitable Contribution carryovers for business and individual returns, as well as Basis, At-Risk, and Passive Activity Loss limitations on individual returns. Upon completion of this session, participants will be able to: • Accurately track net operating losses in UltraTax CS • Prepare returns incorporating a variety of year-specific and indefinite carryforwards • Demonstrate basis and passive loss limitations on individual returns PREREQUISITES: Participants should have a working knowledge of UltraTax CS.	11/9 9:45 am - 11:00 am (75 min) 11/10 3:00 pm - 4:15 pm (75 min)
UltraTax CS Corporate Return Basics TAP23153-1, TAP23153-2 *CPE Field of Study: Taxes – Technical* LEVEL: Basic 1 CPE | 1 CE	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. Upon completion of this session, participants will be able to: • 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 PREREQUISITES: Participants should have a basic understanding of UltraTax CS or view the UltraTax CS Navigation webinar or eLearning prior to attending.	11/8 5:10 pm - 6:00 pm (50 min) 11/10 4:30 pm - 5:20 pm (50 min)
UltraTax CS Individual Return Basics TAP23154-1, TAP23154-2 *CPE Field of Study: Taxes – Technical* LEVEL: Basic 1 CPE | 1 CE	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. Upon completion of this session, participants will be able to: • 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 PREREQUISITES: Participants should have a basic understanding of UltraTax CS or view the UltraTax CS Navigation webinar or eLearning prior to attending.	11/9 7:00 am - 7:50 am (50 min) 11/9 3:00 pm - 3:50 pm (50 min)
UltraTax CS Partnership Return Basics TAP23155-1, TAP23155-2 *CPE Field of Study: Taxes – Technical* LEVEL: Basic 1 CPE | 1 CE	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. Upon completion of this session, participants will be able to: • 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 PREREQUISITES: Participants should have a basic understanding of UltraTax CS or view the UltraTax CS Navigation webinar or eLearning prior to attending.	11/8 3:00 pm - 3:50 pm (50 min) 11/9 11:15 am - 12:05 pm (50 min)

TAX & ASSET MANAGEMENT SESSIONS	DESCRIPTION	DATES/TIMES
UltraTax CS Working With Oil and Gas TAP23156-1, TAP23156-2 *CPE Field of Study: Taxes – Technical* LEVEL: Intermediate 1 CPE | 1 CE *NEW SESSION FOR 2023*	We'll explore the ins and outs of processing oil and gas returns using the UltraTax CS Oil & Gas Module. Upon completion, participants will be able to: • Set up cost centers and wells • Enter oil and gas assets • Calculate percentage and cost depletion • Enter depletion information without using the Oil and Gas Module PREREQUISITES: Participants should have a working knowledge of UltraTax CS navigation.	11/9 4:35 pm - 5:25 pm (50 min) 11/11 9:05 am - 9:55 am (50 min)
What's New in UltraTax CS TAP23158-1, TAP23158-2, TAP23158-3 *CPE Field of Study: Taxes – Technical* LEVEL: Update 1 CPE | 1 CE *NEW SESSION FOR 2023*	This session will prepare you for the 2023 filing season by reviewing functionality enhancements and form changes implemented in UltraTax CS. Upon completion of this session, participants will be able use newly added features in 2023 UltraTax CS and prepare returns involving updated 2023 calculations.	11/9 3:00 pm - 3:50 pm (50 min) 11/10 7:00 am - 7:50 am (50 min) 11/10 11:15 am - 12:05 pm (50 min)
Your Tax Client's Favorite Game Show – "Can I Take That Loss?" TAP23159-1, TAP23159-2, TAP23159-3 *CPE Field of Study: Taxes – Technical* LEVEL: Intermediate 1 CPE | 1 CE *NEW SESSION FOR 2023*	It's your pass-through entity clients' favorite game show, "Can I Take That Loss?" The answer? Well, ...it depends. Every pass through entity taxpayer has to jump 4 hurdles in order to take their tax loss in full. Join us at the starting block as our speaker will "run" you through the four hurdles that every taxpayer must clear in order to fully deduct their loss. On your mark, get set, DEDUCT! Upon completion of this session, participants will be able to: • Determine pass-through entity loss limitations • Educate pass-through entity clients about how much loss can be deducted on their tax return	11/8 5:10 pm - 6:00 pm (50 min) 11/9 4:35 pm - 5:25 pm (50 min) 11/11 7:00 am - 7:50 am (50 min)

TECHNOLOGY SESSIONS	DESCRIPTION	DATES/TIMES
Developing a Tax Technology Strategy TAP23160-1, TAP23160-2 *CPE Field of Study:* *Information Technology – Technical* LEVEL: Basic 1 CPE *NEW SESSION FOR 2023*	In this session, you will participate in an interactive discussion around current trends in tax technology including generative AI to help you define a tax technology strategy. This session will help you develop an overall tax technology strategy for your firm or organization. This session encourages open discussion among participants. Upon completion, you will be able to: • Understand your data sources and develop key mapping between systems • Develop reporting-based goals • Understand build vs. buy • Identify roles and responsibilities • Consider risk management & independence • Navigate change management • Design overall roadmap in alignment with your firm/organization's goals in mind PREREQUISITES: Participants should have a general understanding of tax and tax technologies landscape.	11/9 4:35 pm - 5:25 pm (50 min) 11/11 9:05 am - 9:55 am (50 min)
I Took The Bait, Now What? TAP23161-1, TAP23161-2 *CPE Field of Study:* *Information Technology – Technical* LEVEL: Basic 1 CPE	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. Upon completion of this session, participants will be able to: • 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	11/8 3:00 pm - 3:50 pm (50 min) 11/9 3:00 pm - 3:50 pm (50 min)
Putting the Locks on Your Client Data TAP23162-1, TAP23162-2 *CPE Field of Study:* *Information Technology – Technical* LEVEL: Basic 1 CPE	Your client's information can be a virtual goldmine in the wrong hands. 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. There are several federal and state laws that require 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 to better protect your client data, and tips on how to design a written information security plan for your firm. Upon completion of this session, participants will be able to: • 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	11/9 11:15 am - 12:05 pm (50 min) 11/10 4:30 pm - 5:20 pm (50 min)

TECHNOLOGY SESSIONS	DESCRIPTION	DATES/TIMES
Technology & Change Management – Systems for Success TAP23163-1, TAP23163-2 *CPE Field of Study:* *Information Technology – Technical* LEVEL: Overview 1.50 CPE *NEW SESSION FOR 2023*	Attending this session will provide insights into how and when new technology decisions should be made to bring added success to a firm. In addition, after a technological decision is made, what can be expected during the change process to make the decision and implementation successful. Upon completion of this session, participants will be able to: • Identify examples of gained efficiencies and processes with technology (the WHY) • How to be prepared for both reactive and planned changes in business to avoid the Status Quo • Analyze the defined process to change management and the importance of each phase • Discuss examples of change management and the risks and pitfalls of being unprepared • Review and summarize the anticipated results of a planned success framework PREREQUISITES: While not required, a good understanding of business decision making and project implementation is recommended.	11/9 9:45 am - 11:00 am (75 min) 11/10 3:00 pm - 4:15 pm (75 min)
Today's Cyberthreats and What to Do to Protect Your Firm TAP23164 *CPE Field of Study:* *Information Technology – Technical* LEVEL: Intermediate 1 CPE *NEW SESSION FOR 2023*	Security reigns as one of the top concerns of all accounting firm owners regardless of firm size. This session will identify leading cyber threats that firms face today as well as proactive steps to minimize the firm's exposure in the future. You will gain a deeper understanding of how social engineering, phishing, and ransomware are all being driven by artificial intelligence to specifically compromise your firm and your greatest exposure: your personnel! Walk away with practical guidance and resources to further protect your firm from the cyberstalkers lurking on the fringe. Upon completion of this session, participants will be able to: • Understand the specific threats targeting accounting firms and your clients • Identify the cybersecurity requirements that accounting firms must adhere to along with the penalties for non-compliance • Walkthrough each component of a comprehensive cybersecurity checklist to optimize your firm's cyber protection	11/10 11:15 am - 12:05 pm (50 min)
TRENDS IN THE PROFESSION SESSIONS	**DESCRIPTION**	**DATES/TIMES**
Agile Methodology in a CPA Firm TAP23165-1, TAP23165-2 *CPE Field of Study:* *Business Management & Organization* LEVEL: Basic 1 CPE *NEW SESSION FOR 2023*	In this session, we will share how to implement the Agile Framework that applies Agile Methodology to your accounting practice. You will learn the mindset and techniques necessary to discover requirements for an Agile project. Upon completion of this session, participants will be able to: • Define Agile Methodology • Identify and discuss the agile manifesto • Examine the structure of a cross-functional team • Define team roles and responsibilities • Describe the six phases of Agile Methodology	11/8 5:10 pm - 6:00 pm (50 min) 11/9 3:00 pm - 3:50 pm (50 min)

TRENDS IN THE PROFESSION SESSIONS	DESCRIPTION	DATES/TIMES
Ensuring a Successful Software Merge After an Acquisition TAP23167-1, TAP23167-2 *CPE Field of Study: Information Technology – Technical* LEVEL: Overview 1 CPE *NEW SESSION FOR 2023*	In this session, we will help you understand the considerations your Firm needs to take in order to merge data into your Thomson Reuters suite of products after a merger or acquisition. We will discuss the preparation and planning you should take before merging data as well as and how to set realistic expectations for your firm's integration team. Upon completion of this session, participants will be able to: • Determine a realistic timeline for all data to be merged (integrated) • Understand the steps that should be taken to prepare the data before merging • Strategically select who should be on your integration team	11/9 11:15 am - 12:05 pm (50 min) 11/10 4:30 pm - 5:20 pm (50 min)
Firm Buy and Sell Transactions – Design a Plan for your Success TAP23168-1, TAP23168-2 *CPE Field of Study: Business Management & Organization* LEVEL: Overview 1.50 CPE *NEW SESSION FOR 2023*	In this session, we will highlight key details of buy and sell transactions for a firm. These details will be foundational to effectively plan and complete a transaction whether you are a seller or buyer. By attending you will have deeper knowledge and a competitive advantage for a successful outcome. Upon completion of this session, participants will have a clear understanding of what is required to execute a transaction, including: • Being mentally prepared and the timeline it might require for a transaction • How to initially engage in a transaction and navigate the due diligence process • What expectations are regarding documents needed and the possible financial options of the transaction • What to expect after the closing and specific transition details to consider PREREQUISITES: Participants should have an interest in understanding firm buy and sell transactions.	11/9 1:30 pm - 2:45 pm (75 min) 11/10 9:45 am - 11:00 am (75 min)
New Rules for Success in a Multi-Generational Workforce TAP23169-1, TAP23169-2 *CPE Field of Study: Business Management & Organization* LEVEL: Basic 1.50 CPE *NEW SESSION FOR 2023*	In this session, we will discuss the changing dynamics of generations that make up the current workforce, and highlight key techniques and strategies for effective interactions. Upon completion of this session, participants will be able to: • Describe the generations that make up the current workforce, and what will change in the next 3 to 5 years • Understand the key forces that influence how each generation works, leads (and wants to be led) and communicates • Explore key differences, characteristics, and behaviors of each generation • Learn techniques and strategies for effective interactions with multi-generational teams in the public accounting environment	11/9 1:30 pm - 2:45 pm (75 min) 11/10 9:45 am - 11:00 am (75 min)

TRENDS IN THE PROFESSION SESSIONS	DESCRIPTION	DATES/TIMES
Six Post-Merger Best Practices for Accelerating Multiples TAP23170-1, TAP23170-2 *CPE Field of Study: Business Management & Organization* LEVEL: Intermediate 1 CPE *NEW SESSION FOR 2023*	Are you resourced for an efficient and effective post-merger integration? Mid-sized companies are typically under-equipped with all the people, processes, and technology integral to achieving valuable post-close results, not to mention the ability to handle data, applications, and infrastructure to integrate the new company to drive the multiples you're expecting. Depending on the scope and scale of each transaction, Day 1 to Day 120 can vary greatly. Upon completion of this session, participants will be able to identify: • Six priorities as you're planning the days that follow the close to provide a smooth handoff from the deal team to the integration team • The keys for developing a communication plan to help avoid delays, unnecessary costs, and long-term unfavorable consequences	11/8 4:05 pm - 4:55 pm (50 min) 11/11 8:00 am - 8:50 am (50 min)
The Power of Data: Using Analytics to Run Your Firm TAP23171-1, TAP23171-2 *CPE Field of Study: Business Management & Organization* LEVEL: Advanced 1 CPE *NEW SESSION FOR 2023*	In this session, you'll learn how data analytics can help you run your firm more efficiently and effectively. We'll cover the basics of data analytics and discuss the key benefits it can bring to your firm, including improved decision-making, operational efficiencies, and cost savings. You'll also learn about advanced analytics and how they can be combined with technological tools like Power BI and APIs to speed up decision-making. Through examples and guidance, you'll leave with tips on how to get started with data analytics in your firm. Upon completion of this session, participants will be able to: • Understand the basics of data analytics and how they can benefit your firm • Identify opportunities for using data analytics to improve decision-making, operational efficiencies, and cost savings • Understand advanced analytics and how they can be combined with technological tools like Power BI and APIs to speed up decision-making • Gain practical tips on how to get started with data analytics in your firm • List examples of how data analytics can be applied in real-world scenarios	11/9 3:00 pm - 3:50 pm (50 min) 11/10 11:15 am - 12:05 pm (50 min)
Turbocharge Your Niche Specialty With Benchmarking TAP23172-1, TAP23172-2 *CPE Field of Study: Business Management & Organization* LEVEL: Basic 1 CPE *NEW SESSION FOR 2023*	In a profession where many CPAs and accountants operate as generalists, specializing within a niche can provide a huge competitive advantage. While this might sound counterintuitive, many firms have realized that the more focused their practices become, the more their practices grow. Clients and prospects will travel further, wait longer, and also pay higher fees to work with a specialist. In this session, Andrew Schwartz, CPA shares how he generates meaningful industry specific benchmarking information to help clients and prospects within his niche better understand how their businesses are doing. Attendees will leave the course with a new excitement to commit to a niche and will realize how easy it is to turbocharge their specialty by benchmarking and how effective sharing those results can be. Upon completion of this session, participants will be able to: • Recognize how specializing within a niche is preferable in today's competitive business environment • Discover easy and efficient ways to benchmark • Identify four categories of benchmarking data • Learn from real-life benchmarking examples created by Andrew for his niche client base	11/8 4:05 pm - 4:55 pm (50 min) 11/11 9:05 am - 9:55 am (50 min)