Partial List

2022

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CPA Courses (Partial List)

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Employee Retention Credit & PTE Tax	2
How to Run a Meeting	2
Accounts Receivable: Best Practices	2.5
Accounting for Investments	3
Business Valuation	3
Tools & Tips for CPAs Using Excel	3
Fraud Overview for Accountants	4
Financial Forcasting and Modeling	5
Effective Negotiation	5
Real Estate Accounting	9
New Audit Reporting Standards	10
Accounting Procedures Guidebook	11
Interpretation of Financial Statements	11
Health Care Accounting	12
Accounting Controls Guidebook	12
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Creating a Lean Acctg Department	14
Budgeting: Comprehensive Guide	14
Cost Accounting Fundamentals	14
Payroll Management	14
Corporate Cash Management	15
Invester Relations Guidebook	15
Bookkeeping Guidebook	15
Payroll Management	15
Treasurer's Guidebook	16
Auditing Developments	16
Business Ratios Guidebook	16
Current Dev. Acctg Fin Reporting	16
FASB Review	16
Current Devel. Acctg, Fin Report.	16
Cost Management Guidebook	17
Accounting for Managers	18
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Financial Analysis	19
Mergers and Acquisitions	19
Human Resources Guidebook	20
Compliation & Review Update	20
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IFRS Guidebook 2022	24
FASB, SSARS, SAS Update	24
GAAP Guidebook 2022	29
Accountants' Guidebook	30

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Course	CFP® CE
Succession Planning Strategies	4
Having the "Money Talk" with Clients (Client Communication)	5
Goals-Based Investing	5.5
What Advisors Should Know About I.D. Theft	5
Women and Divorce: Financial Aspects (+ CDFA)	Vol I: 3.5; Vol II:5.5
What Advisors Should Know/Psych. of Invest.	7
Advising Couples (Client Communication)	9
Advising Clients Divorcing After 50 (+ CDFA)	9
Child Custody and Support Course (+ CDFA)	9
What Advisors Should Know About Divorce (+ CDFA)	11.5
Executor's Guide	11
Elder Planning	12
Social Security, Medicare, & Government Pensions	13.5
Asset Allocation -Gibson	14
Essential Guide to Divorce for Advisors (+ CDFA)	14
Natalie Choate: Planning for Retirement Benefits	23.5
Private Wealth Management - Hallman/Rosenbloom	28

Short Financial Planning Courses

Course	CFP®	CPA
Health Savings Accounts	1	1.5
Business Valuation	2	3
Personal Life Insurance Planning	2.5	4
Individual Retirement Accounts	4	5.5
Long-Term Care Planning	4.5	5.5
Completre Divorce Guide (+ CDFA)	7	-
Principles of Wealth Management	7	9
Interpretation of Financial Statements	7.5	11

Long Financial Planning Courses

Course	CFP®	CPA
Facilitating Financial Health	11	-
Advisor's Guide to Estate Planning	21	29
Advisor's Guide to Investment Planning	28	36
Private Wealth Mgt - Hallman/Rosenbloom	28	

Short Tax Courses (Updated Annually)

Course	CFP®	CPA	IRS
199A Pass-Through Deduction	-	3	3
Auto Rules	-	2	2
Bankruptcy (Tax Guide)	-	2	2
Business Travel & Entertainment	-	2	2
Business Expenses (Tax Guide)	-	2	2
Compensation & Benefits (Tax Guide)	2	3.5	3
Coronavirus and CARES Tax Summary	1.5	3	3
Divorce Transfers & Settlemts (+ CDFA)	2	2	2
Earned Income Credit	-	4	4
Education Tax Benefits	3.5	5	5
Estate, Gift, Generation-Skipping Transf		8	8
Estate Planning (Tax Guide)	-	2	2
Estate Tax Planning	3	4	4
Family Tax Planning	2	2	2
Federal Income Tax Changes	4.5	6	6
Federal Income Tax Update	5.5	9	9
Gift Taxes	-	3	3
Home Office Deduction	2	3	3
Information Security: Basic Safeguards	4.5	6	6
Information Security: Networks		8	8
Information Security: Malware		6	6
Individual Retirement Plans-Tax	-	3	3
Keeping Taxpayer Data Secure	2	2.5	2
Passthrough Business Deduction	1	2	2
Retirement Planning (Tax Guide)		3	3
Retirement Plans, Pensions,Annuities	2	3	3
Tax Guide S-Corporations	-	3	3
Tax Treatment Individual Retirement Plans	-	2.5	2
Tax Treatment of Virtual Currency	1.5	1.5	1

Long Tax Courses (Updated Annually)

Course	CFP®	CPA	IRS
Annual Tax Season Update 2023	-	8	8
Asset Protection Tax Strategies	12	17.5	17
Comprehensive Family Tax Planning	-	24	24
Comprehensive Tax Course: Ret.Plan.	22	31.5	31
Corporate Tax Planning	-	21	21
Divorce Tax Planning (+ CDFA)	10	16	16
Estate Planning: Tax Strategies	12.5	20	20
Financial Planning:Tax Strategies	10	14.5	14
Guide to Federal Indiv & Corp. Tax.	24.5	35.5	35
Partnership Taxation	7.5	13.5	13
Passive Losses	-	10.5	10
Real Estate Tax Planning	7.5	11	11
Retirement Planning: Tax Strategies	12	17.5	17
Small Business Tax Planning	19	24.5	24
1040 Workshop	20	28	28

We report CFP® and IRS credits.

Q4

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