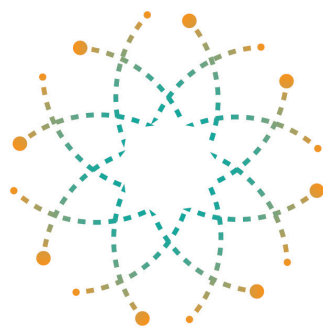




ascpa
Arizona Society of CPAs

2022-23 CPE Catalog

SEMINARS

Learn from the experts
with nearly 200 seminars
and three conferences.

ON-DEMAND

Access CPE your way
with virtual options,
available 24/7.

ETHICS

Stay up to date on
special certification
requirements.

ASCPA **CPE CATALOG** | 2022-2023

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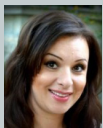
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Arizona State Board of Accountancy

..... (602) 364-0804
Website www.azaccountancy.gov

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E-Mail: ASCPACPE@ascpa.com

Website: www.ascpa.com

GROUP REGISTRATION FILLABLE FORM

CPE Group Registration Form |
ascpa.com/group_registration_form

See [Choosing Your CPE](#) for more ways to register!



Class Times

Full-day classes run from 8 a.m.-3:30 p.m. Half-day classes are from 8-11:30 a.m. or 12:30-4 p.m. and are noted in the calendar pages.

Webcasts & Webinars

This year, many of our seminars will be held as webcast only. These courses will be identified as '**WEBCAST ONLY**' throughout this catalog.

Email ascpacpe@ascpa.com if you experience technical difficulties during a webcast or webinar.

Course Materials & Print Manuals

You will receive a hard copy of course materials for in-person seminars or a PDF document for webcasts. Additional hard copies of course materials are available to order for a \$25 fee. Contact the CPE department at ascpacpe@ascpa.com two weeks prior to the course to order a hard copy.

Webcast materials will be emailed two days prior to the event.

Substitutions

You may substitute another individual if you are unable to attend the seminar at any time before the event. Please notify the Society via phone at (602) 252-4144, or at ascpacpe@ascpa.com as soon as possible.

Note: A nonmember substitute will be charged the nonmember fee(s), when substituting for a member.

Transfers

Transferring to another course may be requested via phone at (602) 252-4144, or at ascpacpe@ascpa.com prior to the date of the seminar.

Note: Transfers made after May 31 will pay the full registration fee. Any additional fees incurred will be due prior to attending the seminar. A refund will be made if the new course costs less than the one registered for previously.

Cancellations

ASCPA holds the right to cancel a seminar. When the Society cancels a seminar, you will receive a full refund. In the event the seminar is canceled, ASCPA is not responsible for penalties incurred by registrants who must cancel travel arrangements.

Cancellations requested by attendee will be assessed a \$25 cancellation fee when canceled less than two weeks prior to the seminar. Submit cancellations via phone at (602) 252-4144, by email to ascpacpe@ascpa.com.

Refunds

When a cancellation is submitted, event fees will be refunded in the original payment method or placed on account by request.

A full refund is offered if the cancellation is submitted at least two weeks prior to the course.

No refund is issued once webcast materials are distributed to participants.

For additional details, see the [ASCPA policies](#) and [frequently asked questions](#) pages on our website.

Instructor-led

Classroom – In-person seminars at specified locations involve participants in case studies and problem solving with the guidance of an experienced discussion leader. Seminars provide in-depth instruction on subjects with specialized content and often involve lectures, group discussion and opportunities for Q&A.

Webcast – Learn from the comfort of your home or office with the ASCPA's live, interactive seminars.

Webinar – As a member benefit, we offer 8 free webinars per year. These typically occur from Noon – 1 p.m. between May and January, however this schedule may vary as needed.

Conference/Webcast – Conferences consist of individual lectures and panel discussions by local and national authorities on specific topics offered. Choose how you wish to attend, either in person or on via webcast. All breakout sessions are webcasted!

Self-Paced

On-Demand Ethics – 24/7 access to a four-hour Ethics course guaranteed to meet Arizona requirements.

Quick Quiz – You've read it, now get credit! Your membership provides 24/7 access to AZ CPA magazine quizzes. Earn 1 CPE for each quiz completed.

Self-Study – CPEXpress offers a variety of self-study courses with 24/7 access, now with a new user-friendly portal! Your subscription gives you access to the full CPEXpress catalog for one year.

On-Site Training

Let us bring the learning to your whole team! We offer education programs tailored to meet the specific needs of your team using high-quality materials and presenters at your organization or via webcast.

- Train all of your staff at one time with a consistent message.
- Schedule customized programs specific to your industry.
- Save money with multiple attendees at the same location.
- Invite clients or alumni to join you.

Email ascpacpe@ascpa.com to learn more about our customized solutions for your organization.

Two Easy Ways to Register

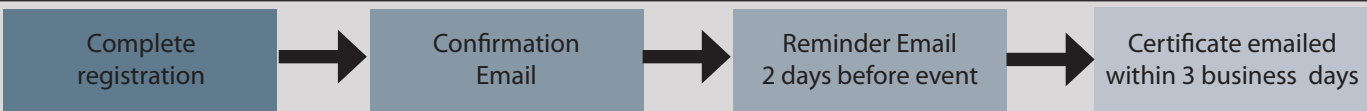
- 1 Secure Online Registrations:** Pay by credit card 24/7 Register instantly online – www.ascpa.com
- 2 Phone:** Call our offices and we will happily assist you over the phone: (602) 252-4144 ext. 215 or (in state toll free) 888-237-0700 ext. 215

ASCPA accepts MasterCard, Visa and American Express.

Fee Schedule

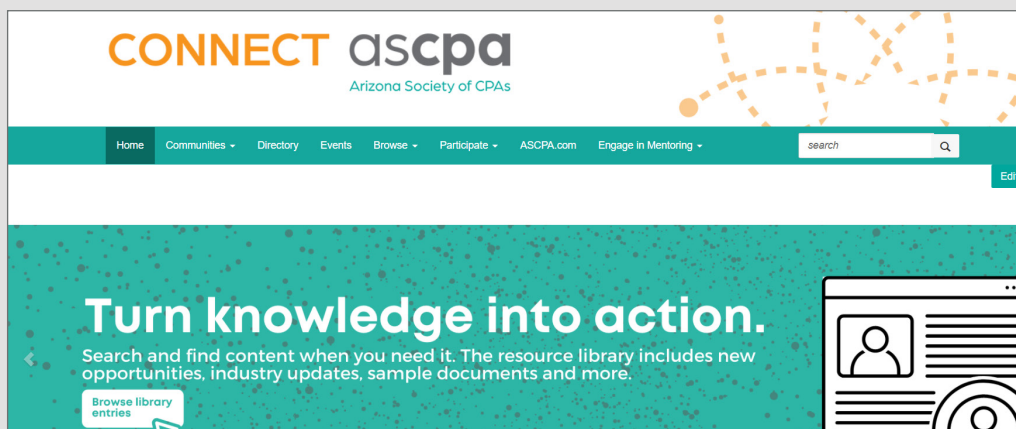
8 hour:	
Member and 100% Club Non-CPA staff:	\$300
Nonmember:	\$400
Early Registration.....	\$255
In order to receive the discount, all paid registrations must be received by May 31. The 15% discount applies only to select programs.	
4 hour:	
Member and 100% Club Non-CPA staff*	\$160
Nonmember	\$210
Early Registration.....	\$136
In order to receive the discount, all paid registrations must be received by May 31. The 15% discount applies only to select programs.	

What to Expect From Us After Registration



STAY CONNECTED

Engage in a dynamic community designed and built just for you. This is the place to share knowledge, ask questions, find new ideas and network professionally. Search, find and connect with your peers through browsing by locations, interest or expertise.



This valuable resource is available to members only! Login to your ASCPA online profile to join or renew your membership today. While you're there, click the Connect link at the top of the page and check out what's going on in your community.

LOCAL AND NATIONAL TAX EXPERTISE IN YOUR BACKYARD!

EDWARD K. ZOLLARS, CPA



Zollars is in public practice in Phoenix, Arizona as a partner with the firm of Thomas, Zollars & Lynch, Ltd. He has been in practice for more than 35 years, specializing in tax issues for closely held businesses and individuals. Zollars has been professionally involved with both tax and technology issues, combining the two disciplines in producing the Current Federal Tax Development Update Podcast and website, dealing with current tax issues, and is a

regular contributor in the CONNECT tax community.

Zollars facilitates courses in Phoenix, Tucson and via webcast through the year. Check out his titles – see page 9.

J. PATRICK GARVERICK, CPA



Garverick is a Certified Public Accountant (CPA) who began his career in public accounting in 1988 after obtaining his Bachelor of Science in Business Administration (BSBA) in Accounting from The Ohio State University. After receiving his Master of Taxation (MT) degree from Arizona State University in 1992, Garverick began operating his own tax and financial planning business. He also started writing, reviewing, and teaching tax and financial planning continuing professional education courses around the country.

Garverick facilitates courses in Phoenix, Yuma, Tucson, Flagstaff and via webcast through the year. Check out his titles – see page 11.

READY TO REGISTER?
Click here for available titles for Ed and Pat!

Phoenix Tax Workshop

The Phoenix Tax Workshop was established in 1961 to educate professionals in all areas of taxation; federal, state and local. We invite you to join this elite group of tax professionals at their Saturday sessions. Topics are drawn from current tax issues, court cases and current legislation on both federal and state arenas.

Recent topics include getting ready for schedules K-2 & K-3, annual sales and property tax update, M&A transactions, discussion of current developments and more!

These sessions are highly interactive to ensure you leave with a complete understanding of the material. Find out more on 31.

Learn more [about this series](#) and register today!

ATTEND YOUR WAY – ALL BREAKOUT SESSIONS NOW AVAILABLE ON WEBCAST!**Not-for-Profit Conference****June 24, 2022**Recommended CPE: **8 hours**

Member fee: \$335

Nonmember fee: \$435

Location: Desert Willow Conference Center and Webcast

Get up to speed on the most pressing issues facing not-for-profit organizations today. Plan your perfect day with a mix of auditing, accounting, technology, leadership, strategic planning and tax topics relevant to the changes in your industry, including the impact of COVID-19.

Register online at ascpa.com/npc or by phone at (602) 252-4144.

CLICK ON **COURSE TITLE** FOR FURTHER INFORMATION OR TO REGISTER**ASCPA Annual Conference****November 8-9, 2022**Recommended CPE: **16 hours**

Two-day fee: \$585

One-day fee: \$335

Location: Desert Willow Conference Center and Webcast

Join us at the ASCPA Annual Conference where you can attend general sessions relevant to all CPAs and specialty tracks in your practice area. Enjoy the benefits of a larger conference experience, while still having access to the specialized content you have come to expect. General sessions will include important updates on the economy, fraud, technology, ethics, accounting and more from some of your favorite local and national speakers.

This year's specialty tracks include:

- Tax including Cannabis
- Technology for Accounting
- Accounting & Assurance
- Financial Planning
- Business Valuation
- Forensic & Litigation Services
- Leadership & Growth
- Corporate Finance
- Construction

Attend for one day and focus on a specialty track or attend for two days and earn a total of 16 CPE credits in a variety of subjects. Enjoy opportunities for growth and networking within your own practice areas and with CPAs in other practice areas.

View the schedule and register online at ascpa.com/aac22 or by phone at (602) 252-4144.

Governmental Accounting Conference**February 3, 2023**

Recommended CPE: 8 hours

Member fee: \$300

Nonmember fee: \$400

Location: Desert Willow Conference Center and Webcast

Hear the latest on GASB, fraud, cybersecurity and more from your favorite local and national experts who will assist you in discovering insights and understanding on new developments in governmental accounting and auditing.

View the schedule and register on-line at ascpa.com/gac23 or by phone at 602-252-4144.

**SEE YOURSELF SPEAKING AT A CONFERENCE?**

Submit your presentation idea today! www.ascpa.com/speakers

WEBCASTS TO FIT ANY SCHEDULE

ADVOCACY SERIES – ASCPA LEGISLATIVE SCOOP

The **Legislative Scoop** webinar series provides inside access to Arizona's policymaking process. Hosted by the ASCPA advocacy team, the Legislative Scoop gives you the latest on the legislative session, politics and capitol insider information. In each Legislative Scoop, one of Arizona's legislators joins the ASCPA to talk politics and give insights on what is happening at the State Capitol and give real-time updates on legislative topics. The 30-minute webinar is your access to the state capitol, with a Q&A at the end of each episode.

The Legislative Scoop series is a live webcast update occurring every other week during the legislative session. Each session runs 10-10:30 a.m. and provides 0.5 hours of CPE, for a total of 5 hours of CPE.

Register for this webinar series or for a single Legislative Scoop episode. www.ascpa.com/scoop

SERIES DATES

- Jan. 20
- Feb. 3
- Feb. 17
- Mar. 3
- Mar. 17
- Mar. 31
- Apr. 21
- May 5
- May 19
- Jun. 2

LOOKING FOR A **SHORT REFRESHER?** CHECK OUT THESE NEW **TWO-HOUR WEBCASTS!**

July 21

Comparing and Contrasting Retirement Plans for Small- and Medium-Sized Businesses | 8 – 9:50 a.m.

Reducing a Business Owner Client's Exposure to Social Security and Self-Employment Taxes | 10 – 11:50 a.m.

August 23

Current and Upcoming FASB Issues | 8 – 9:50 a.m.

Current Audit Environment and ASB Activity | 10 – 11:50 a.m.

October 31

Revenue Recognition: Identifying the Contract and Performance Obligations | 8 – 9:50 a.m.

Lessee and Lessor Accounting | 10 – 11:50 a.m.

Contract Accounting and Lease Accounting and Their Impact on Construction Contractors | 1 – 2:50 p.m.

January 9

Section 754 Step-Up in Basis: Understanding the Tax Issues for Partnerships and LLCs | 8 – 9:50 a.m.

Guide to Understanding the At-Risk Basis Rules and Form 6198 | 10 – 11:50 a.m.

February 10

Lessons Learned from Successful Companies | Noon – 1:50 p.m.

Starting a Small Business: What Every Trusted Advisor and Entrepreneur Needs to Know | 2 – 3:50 p.m.

1000+ WEBCASTS AT YOUR FINGERTIPS

In addition to seminars simulcasted from the Learning Center, we offer a full catalog of webcast only titles available throughout the year. Topics include:

- Deception, Embezzlement and Fraud
- Accounting & Non-Profit Board Members
- Asset Tracing
- Blockchain Essentials
- Data Analysis & Visualization
- Family Law
- Software including Quickbooks and Microsoft Office
- Staff Tax Training
- ... and more!

Find the course that fits your schedule at ascpa.com/webcast!

| TUCSON |

2022

June 8

Advanced Tax Update for Experienced Practitioners

Edward K. Zollars

8 Hours **Taxation**

\$255 / 300 / 400

August 23

Walter Haig's Personal Financial Health Checkup

Walter J. Haig II

8 Hours

Accounting & Auditing

\$255 / 300 / 400

August 24

Walter Haig's Prep, Comp & Review Standards Update

Walter J. Haig II

8 Hours

Accounting & Auditing

\$255 / 300 / 400

August 25

Walter Haig's GAAP For SMEs, Tax & Cash Frameworks Update

Walter J. Haig II

8 Hours

Accounting & Auditing

\$255 / 300 / 400

August 26

Walter Haig's Arizona Ethics Update (8-11:30)

Walter J. Haig II

4 Hours

Ethics (meets Arizona's R4-1-453(C)(4))

\$136 / 160 / 210

September 22

Basis Calculations & Distributions for Pass-Thru Entity Owners Schedule K-1 Analysis

J. Patrick Garverick

8 Hours

Taxation

\$255 / 300 / 400

September 23

Passive Activities & Rental Real Estate Income Tax Issues

J. Patrick Garverick

8 Hours

Taxation

\$255 / 300 / 400

November 14

Arizona Income Taxation: Update and Overview (8-11:30)

Edward K. Zollars

4 Hours **Taxation**

\$136 / 160 / 210

November 14

Arizona Accounting Ethics w/Emphasis on Tax Practice Issues (12:30-4)

Edward K. Zollars

4 Hours

Ethics (meets Arizona's R4-1-453(C)(4))

\$136 / 160 / 210

November 15

Current Federal Tax Developments

Edward K. Zollars

8 Hours

Taxation

\$255 / 300 / 400

2023

January 5

Federal Tax Update – Individuals (Form 1040)

J. Patrick Garverick

8 Hours

Taxation

\$255 / 300 / 400

January 6

Federal Tax Update – C&S Corporations, Partnerships & LLCs (Forms 1120, 1120S & 1065)

J. Patrick Garverick

8 Hours

Taxation

\$255 / 300 / 400

| FLAGSTAFF |

2022

July 15

Federal Tax Update – Individual & Business Current Developments

J. Patrick Garverick

8 Hours

Taxation

\$255 / 300 / 400

August 16

Walter Haig's Prep, Comp & Review Standards Update

Walter J. Haig II

8 Hours

Accounting & Auditing

\$255 / 300 / 400

August 17

Walter Haig's GAAP For SMEs, Tax & Cash Frameworks Update

Walter J. Haig II

8 Hours

Accounting & Auditing

\$255 / 300 / 400

August 18

Walter Haig's Arizona Ethics Update (8-11:30)

Walter J. Haig II

4 Hours

Ethics (meets Arizona's R4-1-453(C)(4))

\$136 / 160 / 210

| YUMA |

2022

November 17

Federal Tax Update – Individuals (Form 1040)

J. Patrick Garverick

8 Hours

Taxation

\$255 / 300 / 400

November 18

Federal Tax Update – C&S Corporations, Partnerships & LLCs (Forms 1120, 1120S & 1065)

J. Patrick Garverick

8 Hours

Taxation

\$255 / 300 / 400

VOLUNTEERING OPPORTUNITIES

You are the Future – Volunteer Today!

Special Interest Groups & Conference Committees

ASCPA conferences are designed with you in mind! Joining a committee puts you at the forefront of crafting the conference experience. As a committee member, you'll have a direct impact on the most important part of the day - the agenda. You will provide input on speakers, topics and to encourage others to attend the event.

Special interest groups provide guidance on educational topics and events specific to their specialty areas. These groups meet as needed throughout the year, usually no more than quarterly.

You must be a member to serve on a committee. Not a member? [Join today!](#)

ASCPA Annual Conference Committees :

- Arizona and Federal Taxation
- Business Valuation
- Corporate Finance
- Construction Industry
- Financial Planning
- Forensic & Litigation
- Technology for Accounting

Conference Committees & Special Interest Groups:

- Cannabis & Hemp
- Governmental Accounting Conference Committee
- Leadership & Growth Alliance
- Not-for-Profit Conference Committee

Frequently Asked Questions

Who can join a committee?

Committee service is open to all ASCPA members. No prior committee experience is required.

How many hours am I dedicating to a committee?

Committees often meet three to four times a year virtually, via conference call or in-person (when permitted). Committee meeting schedules vary based on their activities.

How long am I part of a committee?

Committee appointments are for one to two-year terms.

How do I get started?

Complete the [Become a Volunteer](#) form and a member of the ASCPA team will reach out.

Become a Volunteer

Must be an ASCPA member. Not a member? [Join today!](#)

NAME *

YOUR EMAIL *

YOUR PHONE

Please check all categories of volunteer interest:

ASCPA Annual Conference Committees:



UNLESS OTHERWISE NOTED, CLASS IS AVAILABLE IN PHOENIX AND VIA WEBCAST

CLICK ON **COURSE TITLE** FOR FURTHER INFORMATION OR TO REGISTER**Ed Zollars****Testimonials:**

"Ed always does a wonderful job presenting and preparing materials. Thank you, Ed."

"Ethics update by Mr. Zollars is always time well spent. Illustrations and stories are very effective."

"Ed Zollars is second to none. Accessible, great asset to our profession; provides such a great source to practitioners."

"Ed Zollars is very informative and proves great examples of issues from his work experience. He keeps the discussion lively even though the topic is not."

"Great presenter with so much knowledge to share."

Schedule:**2022****June 6****Partnership and S Corporation – Basis and Distribution Issues**

8 CPE

June 7**Arizona Income Taxation: Update and Overview (8-11:30)****Arizona Accounting Ethics With Emphasis on Tax Practice Issues (12:30-4)**

4 CPE

June 8 – Tucson**Advanced Tax Update for Experience Practitioners**

8 CPE

August 18**Key Tax Planning Concepts & Issues**

8 CPE

August 19**Income Taxation of Trusts and Estates – Planning & Compliance**

8 CPE

August 22**Taxation of Real Estate Partnerships**

8 CPE

November 11**New Businesses – Advising Clients on Related Tax Issues (8-11:30)****Key Issues for Trusts and Estates (12:30-4)**

4 CPE

November 14 – Tucson**Arizona Income Taxation: Update and Overview (8-11:30)****Arizona Accounting Ethics With Emphasis on Tax Practice Issues (12:30-4)**

4 CPE

November 15 – Tucson**Current Federal Tax Developments**

8 CPE

December 12**Arizona Income Taxation: Update and Overview (8-11:30)****Estate Planning for the 99% – Portability and More (12:30-4)**

4 CPE

December 13**Current Federal Tax Developments**

8 CPE

2023**January 30****Streamlined Tax Staff Training – Business**

8 CPE

January 31**Streamlined Tax Staff Training – Complex Return Issues**

8 CPE

UNLESS OTHERWISE NOTED, CLASS IS AVAILABLE IN PHOENIX AND VIA WEBCAST

CLICK ON **COURSE TITLE** FOR FURTHER INFORMATION OR TO REGISTER

J. Patrick Garverick



Testimonials:

"Pat's presentation skills are outstanding. He keeps us engaged and hits on all the important ideas for the day."

"Pat does a great job covering so much in so little time!"

"Pat Garverick is an outstanding presenter. His materials are easy to follow. I have attended his classes for at least 15 - 20 years."

"Pat's production quality was superior."

"Pat is a great instructor. He is always well prepared and his manual is very helpful."

Schedule:

2022

July 11

Basis Calculations & Distributions for Pass-Thru Entity Owners Schedule K-1 Analysis

8 CPE

July 12

Passive Activities & Rental Real Estate Income Tax Issues

8 CPE

July 13

IRAs – Contributions & Distributions for Traditional, Roth, SEP & SIMPLE IRAs

8 CPE

July 15 – Flagstaff & Webcast

Federal Tax Update – Individual & Business Current Developments

8 CPE

August 15

S Corporation Preparation, Basis Calculations & Distributions – Form 1120S Schedule K & K-1 Analysis

8 CPE

August 16

Partnership Preparation, Basis Calculations & Distributions – Form 1065 Schedule K & K-1 Analysis

8 CPE

August 17

Federal Tax Update – Individual & Business Current Developments

8 CPE

September 22 – Tucson & Webcast

Basis Calculations & Distributions for Pass-Through Entity Owners – Schedule K-1 Analysis

8 CPE

September 23 – Tucson & Webcast

Passive Activities & Rental Real Estate Income Tax Issues

8 CPE

November 17 – Yuma & Webcast

Federal Tax Update – Individuals (Form 1040)

8 CPE

November 18 – Yuma & Webcast

Federal Tax Update – C&S Corporations, Partnerships & LLCs (Forms 1120, 1120S & 1065)

8 CPE

November 21

Federal Tax Update – Individuals (Form 1040)

8 CPE

November 22

Federal Tax Update – C&S Corporations, Partnerships & LLCs (Forms 1120, 1120S & 1065)

8 CPE

December 28-29

Federal & Arizona Tax Update – Individuals (Forms 1040 & 140) (Two Day Course)

16 CPE

2023

January 5 – Tucson & Webcast

Federal Tax Update – Individuals (Form 1040)

8 CPE

January 6 – Tucson & Webcast

Federal Tax Update – C&S Corporations, Partnerships & LLCs (Forms 1120, 1120S & 1065)

8 CPE

UNLESS OTHERWISE NOTED, **CLASS IS AVAILABLE IN PHOENIX AND VIA WEBCAST**CLICK ON **COURSE TITLE** FOR FURTHER INFORMATION OR TO REGISTER**Gil Blumenthal****Testimonials:**

"Gil always does a wonderful job presenting the information. His mix of humorous cartoons and personal experiences as a CPA bring added interest to the subject matter."

"Gil knows Ethics!"

"Gil can make this topic interesting and informative. I look forward to taking this course with him. I always learn something new. Thank you to Gil."

"I've taken lots of courses from Gil – he's easy to listen to and makes great use of valuable time."

"Always enjoy Gil's Ethics update course. Keeps it interesting."

Schedule:**2022**

Jun. 17, Aug. 12, Sep. 20, Oct. 20, Nov. 14, Dec. 5

**Professional Ethics Update for Arizona CPAs –
Including Revised AICPA Code**

4 CPE

May 19, Jul. 22

**Professional Ethics Update for CPAs in Business –
Including Revised AICPA Code**

4 CPE

2023

Jan. 17, Feb. 15, Apr. 24

Professional Ethics Update for Arizona CPAs

4 CPE

Mar. 6

Professional Ethics Update for CPAs in Business

4 CPE

SEE WHAT'S NEW IN 2022-23 CPE

CHECK OUT THESE NEW TITLES! A MIX OF 8, 4 AND 2 CPE TO FIT ANY SCHEDULE.

CLICK ON **COURSE TITLE** FOR FURTHER INFORMATION OR TO REGISTER

2022

May 16

WEBCAST ONLY: Applying the CECL Credit Loss Standard to Non-Banking Situations (8-11:30)

WEBCAST ONLY: Internal Controls, COSO and COVID-19 (12:30-4)
4 CPE

May 17

WEBCAST ONLY: Technology and Ethics: Applying CPAs' Ethical Standards to our Changing Technology Environment (12:30-4)

Note: This course does NOT meet Arizona Ethics requirements (Arizona R4-1-453-5)
4 CPE

May 31

WEBCAST ONLY: Real Estate Taxation: Critical Considerations (12:30-4)
4 CPE

June 1

WEBCAST ONLY: Critical Issues Involving Taxation of Construction Contractors (12:30-4)
4 CPE

June 8

WEBCAST ONLY: Finance Business Partnering: Successful Business Models and Strategic Choices (8-11:30)

WEBCAST ONLY: Finance Business Partnering: Communicating and Influencing for Optimum Engagement (12:30-4)
4 CPE

June 9

WEBCAST ONLY: Finance Business Partnering: The Changing Finance Function and Technology Impacts (8-11:30)

WEBCAST ONLY: Finance Business Partnering: Techniques for Effective and Impactful Communication (12:30-4)
4 CPE

June 20 – In-Person & Webcast

You have SOC 1 Report – Now What? (8-11:30)
Auditing Financial Statements of 401(k) Plans (12:30-4)
4 CPE

July 20 – In-Person & Webcast

Fiduciary Accounting and Tax Issues of Estates and Trusts
8 CPE

July 21

WEBCAST ONLY: Comparing and Contrasting Retirement Plans for Small- and Medium-Sized Businesses (8-9:50)

WEBCAST ONLY: Reducing a Business Owner Client's Exposure to Social Security and Self-Employment Taxes (10-11:50)
2 CPE

August 9 – In-Person & Webcast

U.S. GAAP: Review of New Guidance and Hot Topics
8 CPE

August 11 – In-Person & Webcast

Surgent's Individual and Financial-Planning Tax Camp
8 CPE

August 23

WEBCAST ONLY: Current and Upcoming FASB Issues (8-9:50)

WEBCAST ONLY: Current Audit Environment and ASB Activity (10-11:50)
2 CPE

WEBCAST ONLY: Forecasting for Improved Profits, Working Capital and Decision Analysis (12:30-4)
4 CPE

September 1

WEBCAST ONLY: Choice and Formation of Entity (12:30-4)
4 CPE

September 19

WEBCAST ONLY: The Top Five Tax Issues Dealing with LLCs and Partnerships (12:30-4)
4 CPE

September 28

Best Practices in Not-for-Profit Accounting and Reporting (8-11:30)
4 CPE

October 31

WEBCAST ONLY: Revenue Recognition: Identifying the Contract and Performance Obligations (8-9:50)

WEBCAST ONLY: Lessee and Lessor Accounting (10-11:50)

WEBCAST ONLY: Contract Accounting and Lease Accounting and Their Impact on Construction Contractors (1-2:50)
2 CPE

November 1

WEBCAST ONLY: Construction Contractors: Non-Revenue and Non-Lease Accounting Considerations (8-11:30)

2023

January 9

WEBCAST ONLY: Section 754 Step-Up in Basis: Understanding the Tax Issues for Partnerships and LLCs (8-9:50)

WEBCAST ONLY: Guide to Understanding the At-Risk Basis Rules and Form 6198 (10-11:50)
2 CPE

WEBCAST ONLY: Getting Ready for Busy Season: Key Changes Every Tax Practitioner Should Know (12:30-4)
4 CPE

February 10

WEBCAST ONLY: Achieving High Levels of Compliance and Customer Service in Your Organization (8-11:30)
4 CPE

WEBCAST ONLY: Lessons Learned From Successful Companies (12-1:50)

WEBCAST ONLY: Starting a Small Business: What Every Trusted Advisor and Entrepreneur Needs to Know (2-3:50)
2 CPE

HELP US HELP YOU!



WEBCAST SUPPORT TIPS

• Verify you have your login and password for ASCPA.com.

- Google Chrome is the recommended browser.
- Login 15 minutes early in case of any issues.
- Ensure your device is properly equipped with speakers. Desktops often don't have external speakers.
- Headphones or a mobile device can work as substitutes.
- To confirm your computer meets webcast requirements complete a [Webcast System Check](#).

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2. Navigate to My Account and select Update My Profile.
3. Complete the form with your current information.

If you need further assistance, please reach out to a member of the CPE team at ascpacpe@ascpa.com

MAY | 2022

16

WEBCAST ONLY: Applying the CECL Credit Loss Standard to Non-Banking Situations (8-11:30)

Thomas E. Newell

4 Hours

Accounting & Auditing

\$136 / 160 / 210

16

WEBCAST ONLY: Internal Controls, COSO and COVID-19 (12:30-4)

Thomas E. Newell

4 Hours

Accounting & Auditing

\$136 / 160 / 210

17

WEBCAST ONLY: Financial Reporting Implications of the COVID-19 Pandemic (8-11:30)

Thomas E. Newell

4 Hours

Accounting & Auditing

\$136 / 160 / 210

17

WEBCAST ONLY: Technology and Ethics: Applying CPAs' Ethical Standards to Our Changing Technology Environment (12:30-4)

Thomas E. Newell

4 Hours

Specialized Knowledge (*Does NOT meet Arizona's ethics requirement*)

\$136 / 160 / 210

19

Professional Ethics Update for Arizona CPAs in Business (8-11:30)

Gilbert B. Blumenthal

4 Hours

Ethics (meets Arizona's R4-1-453(C)(4))

116 / 136 / 186

Phoenix / Webcast

24

Walter Haig's Prep, Comp & Review Standards Update

Walter J. Haig II

8 Hours

Accounting & Auditing

\$255 / 300 / 400

Phoenix / Webcast

25

Walter Haig's GAAP For SMEs, Tax & Cash Frameworks Update

Walter J. Haig II

8 Hours

Accounting & Auditing

\$255 / 300 / 400

Phoenix / Webcast

26

Walter Haig's Personal Financial Health Checkup

Walter J. Haig II

8 Hours

Accounting & Auditing

\$255 / 300 / 400

Phoenix / Webcast

27

Walter Haig's Arizona Ethics Update (8-11:30)

Walter J. Haig II

4 Hours

Ethics (meets Arizona's R4-1-453(C)(4))

\$136 / 160 / 210

Phoenix / Webcast

31

WEBCAST ONLY: Surgent's Individual Income Tax Update (8-11:30)

David R. Peters

4 Hours

Taxation

\$136 / 160 / 210

31

WEBCAST ONLY: Real Estate Taxation: Critical Considerations (12:30-4)

David R. Peters

4 Hours

Taxation

\$136 / 160 / 210

JUNE | 2022

1

WEBCAST ONLY: Four Tiers of Loss Limitations: A Guide to the Rules for Pass-Through Entities (8-11:30)

David R. Peters

4 Hours

[Taxation](#)

\$136 / 160 / 210

1

WEBCAST ONLY: Critical Issues Involving Taxation of Construction Contractors (12:30-4)

David R. Peters

4 Hours

[Taxation](#)

\$136 / 160 / 210

6

Partnership and S Corporation – Basis and Distribution Issues

Edward K. Zollars

8 Hours

[Taxation](#)

\$255 / 300 / 400

Phoenix / Webcast

7

Arizona Income Taxation: Update and Overview (8-11:30)

Edward K. Zollars

4 Hours

[Taxation](#)

\$136 / 160 / 210

Phoenix / Webcast

7

Arizona Accounting Ethics w/Emphasis on Tax Practice Issues (12:30-4)

Edward K. Zollars

4 Hours

[Ethics](#) (meets Arizona's R4-1-453(C)(4))

\$136 / 160 / 210

Phoenix / Webcast

8

WEBCAST ONLY: Finance Business Partnering: Successful Business Models and Strategic Choices (8-11:30)

Lance Radziej

4 Hours

[Management](#)

\$136 / 160 / 210

8

WEBCAST ONLY: Finance Business Partnering: Communicating and Influencing for Optimum Engagement (12:30-4)

Lance Radziej

4 Hours

[Management](#)

\$136 / 160 / 210

8

Advanced Tax Update for Experienced Practitioners

Edward K. Zollars

8 Hours

[Taxation](#)

\$255 / 300 / 400

Tucson

9

WEBCAST ONLY: Finance Business Partnering: The Changing Finance Function and Technology Impacts (8-11:30)

Lance Radziej

4 Hours

[Management](#)

\$136 / 160 / 210

9

WEBCAST ONLY: Finance Business Partnering: Techniques for Effective and Impactful Communication (12:30-4)

Lance Radziej

4 Hours

[Management](#)

\$136 / 160 / 210

13

This Year's Best Income Tax, Estate Tax and Financial-Planning Ideas

John M. Kilroy

8 Hours

[Taxation](#)

\$255 / 300 / 400

Phoenix / Webcast

14

Surgent's Annual Tax-Planning Guide for S Corporations, Partnerships and LLCs

John M. Kilroy

8 Hours

[Taxation](#)

\$255 / 300 / 400

Phoenix / Webcast

15

Surgent's Comprehensive Guide to Tax Depreciation, Expensing and Property Transactions

John M. Kilroy

8 Hours

[Taxation](#)

\$255 / 300 / 400

Phoenix / Webcast

17

Professional Ethics Update for All Arizona CPAs (8-11:30)

Gilbert B. Blumenthal

4 Hours

[Ethics](#) (meets Arizona's R4-1-453(C)(4))

116 / 136 / 186

Phoenix / Webcast

20

You Have a SOC 1® Report — Now What? (8-11:30)

Bruce Shepard

4 Hours

[Accounting & Auditing](#)

\$136 / 160 / 210

Phoenix / Webcast

JUNE | 2022

20

Auditing Financial Statements of 401(k) Plans (12:30-4)

Bruce Shepard

4 Hours

Accounting & Auditing

\$136 / 160 / 210

Phoenix / Webcast

21

Interpreting the New Revenue Recognition Standard: What All CPAs Need to Know (8-11:30)

Summer Taylor

4 Hours

Accounting & Auditing

\$136 / 160 / 210

Phoenix / Webcast

21

The Bottom Line on the New Lease Accounting Requirements (12:30-4)

Summer Taylor

4 Hours

Accounting & Auditing

\$136 / 160 / 210

Phoenix / Webcast

22

Accounting and Auditing Update for Small Businesses

Summer Taylor

8 Hours

Accounting & Auditing

\$255 / 300 / 400

Phoenix / Webcast

27

Compilations, Reviews and Preparations: Engagement Performance and Annual Update

Curtis J. Quickel

8 Hours

Accounting & Auditing

\$255 / 300 / 400

Phoenix / Webcast

28

Annual Accounting and Auditing Update

Curtis J. Quickel

8 Hours

Accounting & Auditing

\$255 / 300 / 400

Phoenix / Webcast

29

Technology Trends and Hot Topics Impacting the Accounting Profession (8-11:30)

Curtis J. Quickel

4 Hours

Accounting & Auditing

\$136 / 160 / 210

Phoenix / Webcast

29

Statement of Cash Flows: Preparation Guidance and Presentation Illustrations (12:30-4)

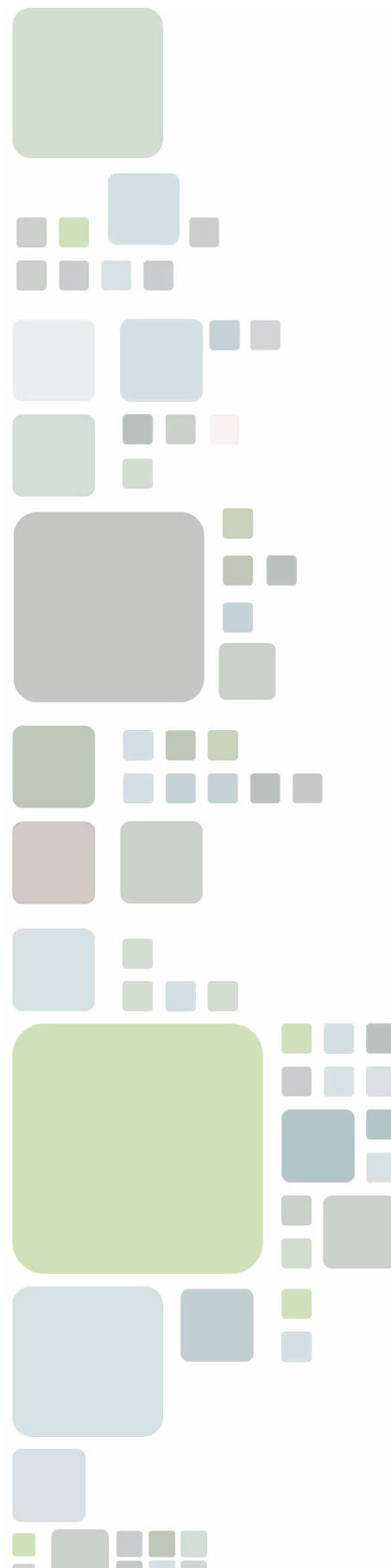
Curtis J. Quickel

4 Hours

Accounting & Auditing

\$136 / 160 / 210

Phoenix / Webcast



JULY | 2022

6

Applying the Uniform Guidance in Your Single Audits

Roger Cusworth

8 Hours

Accounting & Auditing

\$255 / 300 / 400

Phoenix / Webcast

7

Accounting for Revenues and Expenses in a Not-for-Profit (8-11:30)

Roger Cusworth

4 Hours

Accounting & Auditing

\$136 / 160 / 210

Phoenix / Webcast

7

Real-World Frauds Found in Not-for-Profits (12:30-4)

Roger Cusworth

4 Hours

Accounting & Auditing

\$136 / 160 / 210

Phoenix / Webcast

8

WEBCAST ONLY: Surgent's Individual Tax Planning Ideas (8-11:30)

Don P. Cochran

4 Hours

Taxation

\$136 / 160 / 210

11

Basis Calculations & Distributions for Pass-Thru Entity Owners Schedule K-1 Analysis

J. Patrick Garverick

8 Hours

Taxation

\$255 / 300 / 400

Phoenix / Webcast

12

Passive Activities & Rental Real Estate Income Tax Issues

J. Patrick Garverick

8 Hours

Taxation

\$255 / 300 / 400

Phoenix / Webcast

13

IRAs – Contributions & Distributions for Traditional, Roth, SEP & SIMPLE IRAs

J. Patrick Garverick

8 Hours

Taxation

\$255 / 300 / 400

Phoenix / Webcast

14

WEBCAST ONLY: Select Estate and Life Planning Issues for the Middle-Income Client (8-11:30)

Michael A. Frost

4 Hours

Taxation

\$136 / 160 / 210

14

WEBCAST ONLY: Succession Planning for the Small Business Owner: Finding the Exit Ramp (12:30-4)

Michael A. Frost

4 Hours

Taxation

\$136 / 160 / 210

14

2022 Governmental and Not-for-Profit Annual Update

Bruce Shepard

8 Hours

Accounting & Auditing

\$255 / 300 / 400

Phoenix / Webcast

15

Federal Tax Update – Individual & Business Current Developments

Patrick Garverick

8 Hours

Taxation

\$255 / 300 / 400

Flagstaff / Webcast

15

Advanced Topics in a Single Audit

Bruce Shepard

8 Hours

Accounting & Auditing

\$255 / 300 / 400

Phoenix / Webcast

18

Hot IRS Tax Examination Issues for Individuals and Businesses

John N. Sherrick

8 Hours

Taxation

\$255 / 300 / 400

Phoenix / Webcast

19

Social Security and Medicare: Planning for You and Your Clients

John N. Sherrick

8 Hours

Taxation

\$255 / 300 / 400

Phoenix / Webcast

20

Fiduciary Accounting and Tax Issues of Estates and Trusts

John N. Sherrick

8 Hours

Accounting & Auditing

\$255 / 300 / 400

Phoenix / Webcast

JULY | 2022

21

WEBCAST ONLY: Comparing and Contrasting Retirement Plans for Small- and Medium-Sized Businesses (8-9:50)

Michael A. Frost

2 Hours

Taxation

\$75 / 101

21

WEBCAST ONLY: Reducing a Business Owner Client's Exposure to Social Security and Self-Employment Taxes (10-11:50)

Michael A. Frost

2 Hours

Taxation

\$75 / 101

21

WEBCAST ONLY: Mastering the Basics of Inventory Accounting (12:30-4)

Robert P. Bedwell

4 Hours

Accounting & Auditing

\$136 / 160 / 210

22

Professional Ethics Update for Arizona CPAs in Business (8-11:30)

Gilbert B. Blumenthal

4 Hours

Ethics (meets Arizona's R4-1-453(C)(4))

\$116 / 136 / 186

Phoenix / Webcast

26

Walter Haig's Prep, Comp & Review Standards Update

Walter J. Haig II

8 Hours

Accounting & Auditing

\$255 / 300 / 400

Phoenix / Webcast

27

Walter Haig's GAAP For SMEs, Tax & Cash Frameworks Update

Walter J. Haig II

8 Hours

Accounting & Auditing

\$255 / 300 / 400

Phoenix / Webcast

28

Walter Haig's Personal Financial Health Checkup

Walter J. Haig II

8 Hours

Accounting & Auditing

\$255 / 300 / 400

Phoenix / Webcast

29

Walter Haig's Arizona Ethics Update (8-11:30)

Walter J. Haig II

4 Hours

Ethics (meets Arizona's R4-1-453(C)(4))

\$136 / 160 / 210

Phoenix / Webcast



AUGUST | 2022

8

Forensic Accounting: Fraud Investigations

Lynn Fountain

8 Hours

Accounting & Auditing

\$255 / 300 / 400

Phoenix / Webcast

9

U.S. GAAP: Review of New Guidance and Hot Topics

Lynn Fountain

8 Hours

Accounting & Auditing

\$255 / 300 / 400

Phoenix / Webcast

10

Required Minimum Distributions: Compliance and Planning (8-11:30)

John M. Kilroy

4 Hours

Taxation

\$136 / 160 / 210

Phoenix / Webcast

10

Advanced Trust Issues: A Roadmap for Success in An Increasingly Complex Area (12:30-4)

John M. Kilroy

4 Hours

Taxation

\$136 / 160 / 210

Phoenix / Webcast

11

Surgent's Individual and Financial – Planning Tax Camp

John M. Kilroy

8 Hours

Taxation

\$255 / 300 / 400

Phoenix / Webcast

12

Professional Ethics Update for All Arizona CPAs (8-11:30)

Gilbert B. Blumenthal

4 Hours

Ethics (meets Arizona's R4-1-453(C)(4))

\$116 / 136 / 186

Phoenix / Webcast

15

S Corporation Preparation, Basis Calculations & Distributions – Form 1120S Schedule K & K-1 Analysis

J. Patrick Garverick

8 Hours

Taxation

\$255 / 300 / 400

Phoenix / Webcast

16

Walter Haig's Prep, Comp & Review Standards Update

Walter J. Haig II

8 Hours

Accounting & Auditing

\$255 / 300 / 400

Flagstaff

16

Partnership Preparation, Basis Calculations & Distributions – Form 1065 Schedule K & K-1 Analysis

J. Patrick Garverick

8 Hours

Taxation

\$255 / 300 / 400

Phoenix / Webcast

17

Walter Haig's GAAP For SMEs, Tax & Cash Frameworks Update

Walter J. Haig II

8 Hours

Accounting & Auditing

\$255 / 300 / 400

Flagstaff

17

Federal Tax Update – Individual & Business Current Developments

J. Patrick Garverick

8 Hours

Taxation

\$255 / 300 / 400

Phoenix / Webcast

18

Walter Haig's Arizona Ethics Update (8-11:30)

Walter J. Haig II

4 Hours

Ethics (meets Arizona's R4-1-453(C)(4))

\$136 / 160 / 210

Flagstaff

18

Key Tax Planning Concepts and Issues

Edward K. Zollars

8 Hours

Taxation

\$255 / 300 / 400

Phoenix / Webcast

19

Income Taxation of Trusts and Estates – Planning and Compliance

Edward K. Zollars

8 Hours

Taxation

\$255 / 300 / 400

Phoenix / Webcast

22

Taxation of Real Estate Partnerships

Edward K. Zollars

8 Hours

Taxation

\$255 / 300 / 400

Phoenix / Webcast

AUGUST | 2022

23

WEBCAST ONLY: Current and Upcoming FASB Issues (8-9:50)

Michael Brand

2 Hours

Accounting & Auditing

\$75 / 101

23

WEBCAST ONLY: Current Audit Environment and ASB Activity (10-11:50)

Michael Brand

2 Hours

Accounting & Auditing

\$75 / 101

23

WEBCAST ONLY: Forecasting for Improved Profits, Working Capital and Decision Analysis (12:30-4)

Joselin Martin

4 Hours

Management

\$136 / 160 / 210

23

Walter Haig's Personal Financial Health Checkup

Walter J. Haig II

8 Hours

Accounting & Auditing

\$255 / 300 / 400

Tucson

24

WEBCAST ONLY: Advanced Financial Skills (8-11:30)

Joselin Martin

4 Hours

Management

\$136 / 160 / 210

24

WEBCAST ONLY: Controller's Update: Today's Latest Trends (12:30-4)

Joselin Martin

4 Hours

Management

\$136 / 160 / 210

24

Walter Haig's Prep, Comp & Review Standards Update

Walter J. Haig II

8 Hours

Accounting & Auditing

\$255 / 300 / 400

Tucson

25

Walter Haig's GAAP For SMEs, Tax & Cash Frameworks Update

Walter J. Haig II

8 Hours

Accounting & Auditing

\$255 / 300 / 400

Tucson

26

Walter Haig's Arizona Ethics Update (8-11:30)

Walter J. Haig II

4 Hours

Ethics (meets Arizona's R4-1-453(C)(4))

\$136 / 160 / 210

Tucson

31

WEBCAST ONLY: Real Estate Taxation – Tax Staff Essentials (8-11:30)

David Peters

4 Hours

Taxation

\$136 / 160 / 210

31

WEBCAST ONLY: IRS Disputes – Tax Staff Essentials (12:30-4)

David Peters

4 Hours

Taxation

\$136 / 160 / 210



SEPTEMBER | 2022

1

WEBCAST ONLY: Estate & Trust Primer – Tax Staff Essentials (8-11:30)

David Peters

4 Hours

Taxation

\$136 / 160 / 210

1

WEBCAST ONLY: Choice and Formation of Entity (12:30-4)

David Peters

4 Hours

Taxation

\$136 / 160 / 210

19

WEBCAST ONLY: The Top Five Tax Issues in Dealing with LLCs and Partnerships (12:30-4)

Michael E. Reilly

4 Hours

Taxation

\$136 / 160 / 210

20

Professional Ethics Update for All Arizona CPAs (12:30-4)

Gilbert B. Blumenthal

4 Hours

Ethics (meets Arizona's R4-1-453(C)(4))

\$116 / 136 / 186

Phoenix / Webcast

21

WEBCAST ONLY: Introduction to Forensic Accounting (8-11:30)

William I. Eskin

4 Hours

Accounting & Auditing

\$136 / 160 / 210

21

WEBCAST ONLY: Financial Statement Disclosures: A Guide for Small and Medium-Sized Businesses (12:30-4)

William I. Eskin

4 Hours

Accounting & Auditing

\$136 / 160 / 210

22

Basis Calculations & Distributions for Pass-Thru Entity Owners Schedule K-1 Analysis

J. Patrick Garverick

8 Hours

Taxation

\$255 / 300 / 400

Tucson / Webcast

23

Passive Activities & Rental Real Estate Income Tax Issues

J. Patrick Garverick

8 Hours

Taxation

\$255 / 300 / 400

Tucson / Webcast

26

Real Estate Tax Boot Camp

Joseph P. Nicola

8 Hours

Taxation

\$255 / 300 / 400

Phoenix / Webcast

27

Buying and Selling a Business: Critical Tax and Structuring Issues

Joseph P. Nicola

8 Hours

Taxation

\$255 / 300 / 400

Phoenix / Webcast

28

Best Practices in Not-for-Profit Accounting and Reporting (8-11:30)

Robert P. Bedwell

4 Hours

Accounting & Auditing

\$136 / 160 / 210

Phoenix / Webcast

28

Government and Nonprofit Frauds and Controls to Stop Them (12:30-4)

Robert P. Bedwell

4 Hours

Accounting & Auditing

\$136 / 160 / 210

Phoenix / Webcast

29

Latest Developments in Government and Nonprofit Accounting and Auditing

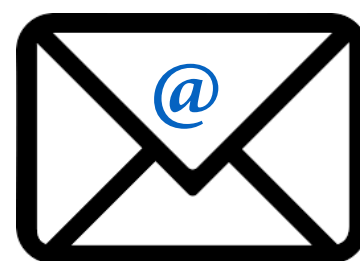
Robert P. Bedwell

8 Hours

Accounting & Auditing

\$255 / 300 / 400

Phoenix / Webcast



Unable to find the topic you need?

Email our team at

ascpacpe@ascpa.com.

OCTOBER | 2022

17

AICPA's Annual Federal Tax Update

Dennis Riley

8 Hours

Taxation

\$255 / 300 / 400

Phoenix / Webcast

18

Social Security and Medicare: Maximizing Retirement Benefits (8-11:30)

Dennis Riley

4 Hours

Taxation

\$136 / 160 / 210

Phoenix / Webcast

18

Taxation of Property Transactions – Tax Staff Essentials (12:30-4)

Dennis Riley

4 Hours

Taxation

\$136 / 160 / 210

Phoenix / Webcast

20

Professional Ethics Update for All Arizona CPAs (12:30-4)

Gilbert B. Blumenthal

4 Hours

Ethics (meets Arizona's R4-1-453(C)(4))

\$116 / 136 / 186

Phoenix / Webcast

21

Form 990: Best Practices for Accurate Preparation

Brenda A. Blunt

8 Hours

Taxation

\$255 / 300 / 400

Phoenix / Webcast

24

Walter Haig's Prep, Comp & Review Standards Update

Walter J. Haig II

8 Hours

Accounting & Auditing

\$255 / 300 / 400

Phoenix / Webcast

25

Walter Haig's GAAP For SMEs, Tax & Cash Frameworks Update

Walter J. Haig II

8 Hours

Accounting & Auditing

\$255 / 300 / 400

Phoenix / Webcast

26

Walter Haig's Business Financial Health Checkup

Walter J. Haig II

8 Hours

Accounting & Auditing

\$255 / 300 / 400

Phoenix / Webcast

28

Don Farmer's Tax Update

Don Farmer

8 Hours

Taxation

\$255 / 300 / 400

Phoenix / Webcast

31

WEBCAST ONLY: Revenue Recognition: Identifying the Contract and Performance Obligations (8-9:50)

William I. Eskin

2 Hours

Accounting & Auditing

\$75 / 101

31

WEBCAST ONLY: Lessee and Lessor Accounting (10-11:50)

William I. Eskin

2 Hours

Accounting & Auditing

\$75 / 101

31

WEBCAST ONLY: Contract Accounting and Lease Accounting and Their Impact on Construction Contractors (1-2:50)

William I. Eskin

2 Hours

Accounting & Auditing

\$75 / 101



Unable to find the topic you need?

Email our team at

ascpacpe@ascpa.com.

NOVEMBER | 2022

1

WEBCAST ONLY: Construction Contractors: Non-Revenue and Non-Lease Accounting Considerations (8-11:30)

Thomas M. Sheets

4 Hours

Accounting & Auditing

\$136 / 160 / 210

1

WEBCAST ONLY: Construction Contractors: Auditing Considerations (12:30-4)

Thomas M. Sheets

4 Hours

Accounting & Auditing

\$136 / 160 / 210

3

Hottest Tax Topics for 2022

William F. Taylor

8 Hours

Taxation

\$255 / 300 / 400

Phoenix / Webcast

4

Reviewing Partnership Tax Returns: What Are You Missing? (8-11:30)

William F. Taylor

4 Hours

Taxation

\$136 / 160 / 210

Phoenix / Webcast

4

Reviewing S Corporation Tax Returns: What Are You Missing? (12:30-4)

William F. Taylor

4 Hours

Taxation

\$136 / 160 / 210

Phoenix / Webcast

11

New Businesses – Advising Clients on Related Tax Issues (8-11:30)

Edward K. Zollars

4 Hours

Taxation

\$136 / 160 / 210

Phoenix / Webcast

11

Key Issues for Trusts and Estates (12:30-4)

Edward K. Zollars

4 Hours

Taxation

\$136 / 160 / 210

Phoenix / Webcast

14

Arizona Income Taxation: Update and Overview (8-11:30)

Edward K. Zollars

4 Hours

Taxation

\$136 / 160 / 210

Tucson

14

Professional Ethics Update for All Arizona CPAs (12:30-4)

Gilbert B. Blumenthal

4 Hours

Ethics (meets Arizona's R4-1-453(C)(4))

\$116 / 136 / 186

Phoenix / Webcast

14

Arizona Accounting Ethics w/Emphasis on Tax Practice Issues (12:30-4)

Edward K. Zollars

4 Hours

Ethics (meets Arizona's R4-1-453(C)(4))

\$136 / 160 / 210

Tucson

15

Current Federal Tax Developments

Edward K. Zollars

8 Hours

Taxation

\$255 / 300 / 400

Tucson

16

This Year's Top Tax and Financial-Planning Ideas (8-11:30)

Edgar H. Gee

4 Hours

Taxation

\$136 / 160 / 210

Phoenix / Webcast

16

Guide to Payroll Taxes and 1099 Issues (12:30-4)

Edgar H. Gee

4 Hours

Taxation

\$136 / 160 / 210

Phoenix / Webcast

17

Surgent's Top 10 Tax Topics This Year

Edgar H. Gee

8 Hours

Taxation

\$255 / 300 / 400

Phoenix / Webcast

17

Federal Tax Update – Individuals (Form 1040)

J. Patrick Garverick

8 Hours

Taxation

\$255 / 300 / 400

Yuma / Webcast

NOVEMBER | 2022

18

Federal Tax Update – C & S Corporations, Partnerships & LLCs (Forms 1120, 1120S & 1065)

J. Patrick Garverick

8 Hours

Taxation

\$255 / 300 / 400

Yuma / Webcast

21

Federal Tax Update – Individuals (Form 1040)

J. Patrick Garverick

8 Hours

Taxation

\$255 / 300 / 400

Phoenix / Webcast

22

Federal Tax Update – C & S Corporations, Partnerships & LLCs (Forms 1120, 1120S & 1065)

J. Patrick Garverick

8 Hours

Taxation

\$255 / 300 / 400

Phoenix / Webcast

30

The Best S Corporation, Limited Liability and Partnership Update Course by Surgent

William F. Taylor

8 Hours

Taxation

\$255 / 300 / 400

Phoenix / Webcast

CONFERENCES

Not-for-Profit Conference

June 24, 2022

Recommended CPE: 8 hours

Don Farmer's Tax Update

October 28, 2022

Recommended CPE: 8 hours

ASCPA Annual Conference

November 8-9, 2022

Recommended CPE: 16 hours

Governmental Accounting Conference

February 3, 2023

Recommended CPE: 8 hours

ATTEND YOUR WAY –
SESSIONS ALSO AVAILABLE ON WEBCAST!

DECEMBER | 2022

1 The Best Individual Income Tax Update Course by Surgent

William F. Taylor
8 Hours
[Taxation](#)
\$255 / 300 / 400
Phoenix / Webcast

2 Social Security and Medicare: Planning for You and Your Clients

William F. Taylor
8 Hours
[Taxation](#)
\$255 / 300 / 400
Phoenix / Webcast

5 Professional Ethics Update for All Arizona CPAs (8-11:30)

Gilbert B. Blumenthal
4 Hours
[Ethics](#) (meets Arizona's R4-1-453(C)(4))
\$116 / 136 / 186
Phoenix / Webcast

6 Breaking Down the Auditor's Report for non-ERISA Plan Private Entities

Jeanette Bax-Kurtz
8 Hours
[Accounting & Auditing](#)
\$255 / 300 / 400
Phoenix / Webcast

7 Breaking Down the New Auditor's Report for ERISA Plans (8-11:30)

Jeanette Bax-Kurtz
4 Hours
[Accounting & Auditing](#)
\$136 / 160 / 210
Phoenix / Webcast

7 Conducting a Remote Audit (12:30-4)

Jeanette Bax-Kurtz
4 Hours
[Accounting & Auditing](#)
\$136 / 160 / 210
Phoenix / Webcast

8 Annual Update for Accountants and Auditors

Jeanette Bax-Kurtz
8 Hours
[Accounting & Auditing](#)
\$255 / 300 / 400
Phoenix / Webcast

12 Arizona Income Taxation: Update and Overview (8-11:30)

Edward K. Zollars
4 Hours
[Taxation](#)
\$136 / 160 / 210
Phoenix / Webcast

12 Estate Planning for the 99% – Portability and More (12:30-4)

Edward K. Zollars
4 Hours
[Taxation](#)
\$136 / 160 / 210
Phoenix / Webcast

12 [WEBCAST ONLY: Walter Haig's Arizona Ethics Update \(8-11:30\)](#)

Walter J. Haig II
4 Hours
[Ethics](#) (meets Arizona's R4-1-453(C)(4))
\$136 / 160 / 210

13 Current Federal Tax Developments

Edward K. Zollars
8 Hours
[Taxation](#)
\$255 / 300 / 400
Phoenix / Webcast

14 Walter Haig's Prep, Comp & Review Standards Update

Walter J. Haig II
8 Hours
[Accounting & Auditing](#)
\$255 / 300 / 400
Phoenix / Webcast

15 Walter Haig's GAAP For SMEs, Tax & Cash Frameworks Update

Walter J. Haig II
8 Hours
[Accounting & Auditing](#)
\$255 / 300 / 400
Phoenix / Webcast

16 Walter Haig's AICPA Auditing Standards Update

Walter J. Haig II
8 Hours
[Accounting & Auditing](#)
\$255 / 300 / 400
Phoenix / Webcast

28 & 29 Federal & Arizona Tax Update – Individuals (Forms 1040 & 140) (Two Day Course)

J. Patrick Garverick
16 Hours
[Taxation](#)
\$485 / 570 / 670
Phoenix / Webcast

JANUARY | 2023

5

Federal Tax Update – Individuals (Form 1040)

J. Patrick Garverick

8 Hours

Taxation

\$255 / 300 / 400

Tucson / Webcast

6

Federal Tax Update – C & S Corporations, Partnerships & LLCs (Forms 1120, 1120S & 1065)

J. Patrick Garverick

8 Hours

Taxation

\$255 / 300 / 400

Tucson / Webcast

9

WEBCAST ONLY: Section 754 Step-Up in Basis: Understanding the Tax Issues for Partnerships and LLCs (8-9:50)

John M. Kilroy

2 Hours

Taxation

\$75 / 101

9

WEBCAST ONLY: Guide to Understanding the At-Risk Basis Rules and Form 6198 (10-11:50)

John M. Kilroy

2 Hours

Taxation

\$75 / 101

9

WEBCAST ONLY: Getting Ready for Busy Season: Key Changes Every Tax Practitioner Should Know (12:30-4)

John M. Kilroy

4 Hours

Taxation

\$136 / 160 / 210

10

WEBCAST ONLY: The Best Federal Tax Update Course by Surgent

John M. Kilroy

8 Hours

Taxation

\$255 / 300 / 400

11

Income Tax Accounting – Tax Staff Essentials

Cecil Nazareth

8 Hours

Taxation

\$255 / 300 / 400

Phoenix / Webcast

12

Annual Tax Update: Individuals and Sole Proprietors

Cecil Nazareth

8 Hours

Taxation

\$255 / 300 / 400

Phoenix / Webcast

17

Professional Ethics Update for All Arizona CPAs (8-11:30)

Gilbert B. Blumenthal

4 Hours

Ethics (meets Arizona's R4-1-453(C)(4))

\$116 / 136 / 186

Phoenix / Webcast

18

Walter Haig's Prep, Comp & Review Standards Update

Walter J. Haig II

8 Hours

Accounting & Auditing

\$255 / 300 / 400

Phoenix / Webcast

19

Walter Haig's GAAP For SMEs, Tax & Cash Frameworks Update

Walter J. Haig II

8 Hours

Accounting & Auditing

\$255 / 300 / 400

Phoenix / Webcast

20

Walter Haig's Personal Financial Health Checkup

Walter J. Haig II

8 Hours

Accounting & Auditing

\$255 / 300 / 400

Phoenix / Webcast

30

Streamlined Tax Staff Training – Business

Edward K. Zollars

8 Hours

Taxation

\$255 / 300 / 400

Phoenix / Webcast

31

Streamlined Tax Staff Training – Complex Return Issues

Edward K. Zollars

8 Hours

Taxation

\$255 / 300 / 400

Phoenix / Webcast

31

WEBCAST ONLY: Walter Haig's Arizona Ethics Update (8-11:30)

Walter J. Haig II

4 Hours

Ethics (meets Arizona's R4-1-453(C)(4))

\$136 / 160 / 210

FEBRUARY | 2023

9

WEBCAST ONLY: Critical Issues That CPAs in Industry Will Need to Face This Year (8-11:30)

Jason W. Carney

4 Hours

Accounting & Auditing

\$136 / 160 / 210

9

WEBCAST ONLY: Evaluating Fraud Risk in a Financial Statement Audit (12:30-4)

Jason W. Carney

4 Hours

Accounting & Auditing

\$136 / 160 / 210

10

WEBCAST ONLY: Achieving High Levels of Compliance and Customer Service in Your Organization (8-11:30)

Jason W. Carney

4 Hours

Management

\$136 / 160 / 210

10

WEBCAST ONLY: Starting a Small Business: What Every Trusted Advisor and Entrepreneur Needs to Know (2-3:50)

Jason W. Carney

2 Hours

Management

\$75 / 101

10

WEBCAST ONLY: Lessons Learned From Successful Companies (12-1:50)

Jason W. Carney

2 Hours

Management

\$75 / 101

13

Advanced Controller and CFO Skills

James Lindell

8 Hours

Management

\$255 / 300 / 400

Phoenix / Webcast

14

Annual Update for Controllers

James Lindell

8 Hours

Management

\$255 / 300 / 400

Phoenix / Webcast

15

Professional Ethics Update for All Arizona CPAs (8-11:30)

Gilbert B. Blumenthal

4 Hours

Ethics (meets Arizona's R4-1-453(C)(4))

\$116 / 136 / 186

Phoenix / Webcast

6

Professional Ethics Update for Arizona CPAs in Business (12:30-4)

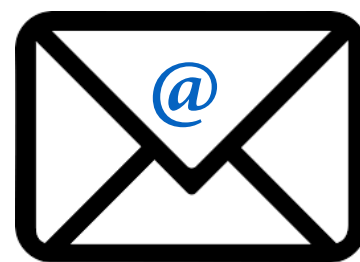
Gilbert B. Blumenthal

4 Hours

Ethics (meets Arizona's R4-1-453(C)(4))

\$116 / 136 / 186

Phoenix / Webcast



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you need?**

Email our team at

ascpacpe@ascpa.com.

APRIL | 2023

17

Proven Controls to Steer You Clear of Fraud (8-11:30)

Curtis J. Quickel

4 Hours

[Accounting & Auditing](#)

\$136 / 160 / 210

Phoenix / Webcast

17

Project Management: Tips, Tricks and Traps (12:30-4)

Curtis J. Quickel

4 Hours

[Management](#)

\$136 / 160 / 210

Phoenix / Webcast

18

Current Issues in Accounting and Auditing: An Annual Update (8-11:30)

Curtis J. Quickel

4 Hours

[Accounting & Auditing](#)

\$136 / 160 / 210

Phoenix / Webcast

18

Statement of Cash Flows: Preparation Guidance and Presentation Illustrations (12:30-4)

Curtis J. Quickel

4 Hours

[Accounting & Auditing](#)

\$136 / 160 / 210

Phoenix / Webcast

20

WEBCAST ONLY: Enterprise Risk Management Concepts and Strategy for Small and Medium-Sized Companies (8-11:30)

Arthur G. Pulis

4 Hours

[Management](#)

\$136 / 160 / 210

21

WEBCAST ONLY: Current Developments and Best Practices for Today's CFOs and Controllers

Arthur G. Pulis

8 Hours

[Management](#)

\$255 / 300 / 400

24

Professional Ethics Update for All Arizona CPAs (8-11:30)

Gilbert B. Blumenthal

4 Hours

[Ethics](#) (meets Arizona's R4-1-453(C)(4))

\$116 / 136 / 186

Phoenix / Webcast

27

WEBCAST ONLY: Construction Contractors: Critical Accounting, Auditing and Tax Issues

William I. Eskin

8 Hours

[Accounting & Auditing](#)

\$255 / 300 / 400

28

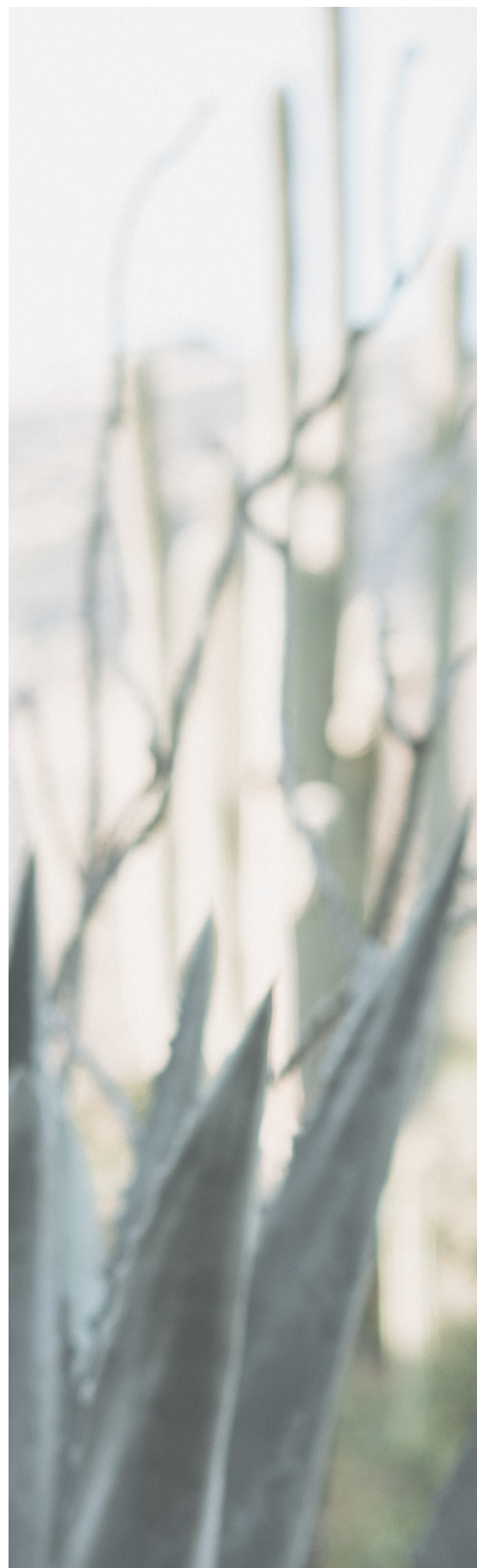
WEBCAST ONLY: Business Law Essentials for Practitioners and Controllers

Charles A. Borek

8 Hours

[Business Law](#)

\$255 / 300 / 400



ARIZONA STATE BOARD CPE REQUIREMENTS

R4-1-453. Continuing Professional Education

A. Measurement Standards. The Board shall use the following standards to measure the hours of credit given for CPE programs completed by an individual registrant.

1. CPE credit shall be given in one-fifth or one-half increments for periods of not less than one class hour except as noted in paragraph 8. The computation of CPE credit shall be measured as follows:

- a. A class hour shall consist of a minimum of 50 continuous minutes of instruction
- b. A half-class hour shall consist of a minimum of 25 continuous minutes of instruction
- c. A one-fifth class hour shall consist of a minimum of 10 continuous minutes of instruction.

2. Courses taken at colleges and universities apply toward the CPE requirement as follows:

- a. Each semester – system credit hour is worth 15 CPE credit hours,
- b. Each quarter – system credit hour is worth 10 CPE credit hours, and
- c. Each noncredit class hour is worth one CPE credit hour.

3. Each correspondence program hour is worth one CPE credit hour.

4. Acting as a lecturer or discussion leader in a CPE program, including college courses, may be counted as CPE credit. The Board shall determine the amount of credit on the basis of actual presentation hours, and shall allow CPE credit for preparation time that is less than or equal to the presentation hours. A registrant may only claim as much preparation time as is actually spent for a presentation. Total credit earned under this subsection for service as a lecturer or discussion leader, including preparation time may not exceed 40 credit hours of the renewal period's requirement. Credit is limited to only one presentation of any seminar or course with no credit for repeat teaching of that course.

5. Writing and publishing articles or books that contribute to the accounting profession may be counted for a maximum of 20 hours of CPE credit during each renewal period.

a. Credit may be earned for writing accounting material not used in conjunction with a seminar if the material addresses an audience of certified public accountants, is at least 3,000 words in length, and is published by a recognized third-party publisher of accounting material or a sponsor.

b. For each 3,000 words of original material written, the author may earn two credit hours. Multiple authors may share credit for material written.

6. A registrant may earn a combined maximum of 40 hours of CPE credit under subsections (A)(4) and (5) above during each renewal period.

7. A registrant may earn a maximum of 20 hours of CPE during each renewal period by completing introductory computer-

related courses. Computer-related courses may qualify as consulting services pursuant to subsection (C).

8. A registrant may earn a maximum of 4 hours of CPE during each renewal period by completing nano-learning courses. A nano-learning program is a tutorial program designed to permit a participant to learn a given subject in a ten-minute time-frame through the use of electronic media and without interaction with a real time instructor.

9. CPE credit shall be given in one-fifth or one-half hour increments if the CPE is a segment of a continuing series related to a specific subject as long as the segments are connected by an overarching course that is a minimum of one hour and taken within the same CPE reporting period.

10. Credit shall not be allowed for repeat participation in any seminar or course during the registration period.

B. Programs that Qualify. CPE credit may be given for a program that provides a formal course of learning at a professional level and contributes directly to the professional competence of participants.

1. The Board shall accept a CPE course as qualified if it:

- a. Is developed by persons knowledgeable and experienced in the subject matter,
- b. Provides written outlines or full text,
- c. Is administered by an instructor or organization knowledgeable in the program, and
- d. Uses teaching methods consistent with the study program.

2. The Board shall accept a correspondence program which includes online or computer based programs if the sponsors maintain written records of each student's participation and records of the program outline for three years following the conclusion of the program.

3. An ethics program taught or developed by an employer or co-worker of a registrant does not qualify for the ethics requirements of subsection (C)(4).

C. Hour Requirement. As a prerequisite to registration pursuant to A.R.S. § 32-730(C) or to reactivate from inactive status pursuant to A.R.S. § 32-730.01, a registrant shall complete the CPE requirements during the two-year period immediately before registration as specified under subsections (C)(1) through (C)(5). For registration periods of less than two years CPE may be prorated, with the exception of ethics.

1. A registrant whose last registration period was for two years shall complete 80 hours of CPE.

2. A registrant shall complete a minimum of 50 percent of the required hours in the subject areas of accounting, auditing, taxation, business law, or consulting services with a minimum of 16 hours in the subject areas of accounting, auditing, or taxation.

3. A registrant shall complete a minimum of 16 of the required hours:

- a. In a classroom setting,

ARIZONA STATE BOARD CPE REQUIREMENTS

- b. Through an interactive live webinar, or
- c. By acting as a lecturer or discussion leader in a CPE program, including college courses
- 4. A registrant shall complete four hours of CPE in the subject area of ethics. The four hours required by this subsection shall include a minimum of one hour of each of the following subjects:
 - a. Ethics related to the practice of accounting including the Code of Professional Conduct of the American Institute of Certified Public Accountants, and
 - b. Board statutes and administrative rules.
- 5. A registrant shall report, at a minimum, the CPE hours required for the registration period.
- 6. Hours that exceed the number required for the current registration period may not be carried forward to a subsequent registration period.
- 7. Any CPE hours completed to vacate a suspension for nonregistration or for noncompliance with CPE requirements may not be used to meet CPE requirements for the registration period.
- 8. As a prerequisite to reactivate from retired status or reinstate from cancelled, expired, relinquished or revoked status, a registrant or an applicant shall complete up to 160 hours of CPE during the four-year period immediately before application to reactivate or reinstate. For periods of less than four years CPE may be prorated by quarter, with the exception of ethics.
 - a. A registrant or an applicant shall complete a minimum of 50 percent of the required hours in the subject areas of accounting, auditing, taxation, business law, or consulting services with a minimum of 32 hours in the subject areas of accounting, auditing or taxation.
 - b. A registrant or an applicant shall complete a minimum of 32 hours of the required hours:
 - i. In a classroom setting,
 - ii. Through an interactive live webinar, or
 - iii. By acting as a lecturer or discussion leader in a CPE program, including college courses.
 - c. A registrant or an applicant shall complete CPE in the subject area of ethics. Four hours of ethics CPE shall be required if 1 – 24 months have passed since the last registration due date for which CPE was completed. Eight hours of ethics CPE shall be required if 25 – 48 months have passed since the last registration due date for which CPE was completed. The hours required by this subsection shall include a minimum of one hour of each of the following subjects. The following subjects shall be completed during the two-year period immediately preceding application for reactivation or reinstatement:
 - i. Ethics related to the practice of accounting including the Code of Professional Conduct of the American Institute of Certified Public Accountants; and
 - ii. Board statutes and administrative rules.

D. Reporting: A registrant or an applicant for reactivation or reinstatement, a registrant who is subject to an audit, or a registrant completing their registration must report the following details about their completed CPE:

- 1. Sponsoring organization;
- 2. Number of CPE credit hours;
- 3. Title of program or description of content; and
- 4. Dates attended.

E. In addition to the information required under subsection (D), a registrant or an applicant for reactivation or reinstatement from cancelled, expired, relinquished or revoked status, or a registrant subject to a CPE audit pursuant to subsection (G) shall provide the Board the following CPE records at its request: copies of transcripts, course outlines, and certificates of completion that include registrant's name, course provider or sponsor, course title, credit hours, and date of completion.

F. CPE Record Retention: A registrant shall maintain CPE records for three years from the date the registration was dated as received by the Board the following documents for all CPE completed for the registration period, even if not reported on the registration: transcripts, course outlines, and certificates of completion that include registrant's name, course provider or sponsor, course title, credit hours, and date of completion.

G. CPE audits: The Board, at its discretion, may conduct audits of a registrant's CPE and require that the registrant provide the CPE records that the registrant is required to maintain under subsection (F) to verify compliance with CPE requirements.

H. The Board may grant a full or partial exemption from CPE requirements on demonstration of good cause for a disability for only one registration period.

I. A non-resident registrant seeking renewal of a certificate in this state shall be determined to have met the CPE requirements of this rule by meeting the CPE requirements for renewal of a certificate in the jurisdiction in which the registrant's principal place of business is located.

1. Non-resident applicants for renewal shall demonstrate compliance with the CPE renewal requirements of the jurisdiction in which the registrant's principal place of business is located by signing a statement to that effect on the renewal application of this state.

2. If a non-resident registrant's principal place of business jurisdiction has no CPE requirements for renewal of a certificate or license, the non-resident registrant must comply with all CPE requirements for renewal of a certificate in this state.



24 Hours of Live CPE for \$375 • Eight Sessions Yearly Phoenix Tax Workshop Series



Established in 1961, the Phoenix Tax Workshop educates professionals in all areas of taxation – federal, state and local. We invite you to join this elite group of tax professionals at their Saturday CPE/CLE sessions. This series is also offered as a webcast.

The Agenda

Topics can include current tax issues, court cases and legislation in both federal and state arenas. Take part in the question and answer sessions to ensure you leave with a complete understanding. Updated agendas are sent prior to each meeting and are available in the CPE catalog.

The Speakers

The Advisory Committee, members of the Legislature and Arizona government are selected to present based on their topical expertise. The Advisory Committee is comprised of volunteer legal and tax accounting professionals from the Valley.

The Cost

The annual fee of \$375 (due by the first meeting in May) includes the opportunity to earn 24 hours of CPE/CLE credit per year by attending eight, three-hour meetings. You may attend individual meetings for \$70. Payment can be applied toward annual fee if you decide to enroll in the series.

Mark Your Calendar

The following Saturday meetings are held at the ASCPA offices in Phoenix from 9 a.m. to noon. You may participate by webcast from your home or office. Some meetings may be webcast only.

- May 21, 2022
- June 18, 2022
- September 24, 2022
- October 22, 2022
- November 1, 2022
- January 21, 2023
- February 18, 2023
- April 22, 2023



Register Online: www.ascpa.com/ptw23