



2021-22 CPE Catalog

SEMINARS

ASCPA ON-DEMAND

WEBCAST/WEBINARS

ASCPA **CPE CATALOG** | 2021-2022

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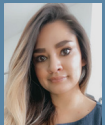
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Website www.ascpa.com

Arizona State Board of Accountancy

..... (602) 364-0804
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MEMBERSHIP & REGISTRATION FILLABLE FORMS

CPE Group Registration Form |
ascpa.com/group_registration_form

CPE Individual Registration Form |
ascpa.com/individual_registration_form

Membership Application Form |
ascpa.com/fillable_membership_application

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



Class Times

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

2021-22 Update

In addition to a newly designed catalog, we have also made some changes to this year's courses! You will find in-person offerings throughout the year as well as seminars that will be held as webcast only. Those courses are identified as 'WEBCAST ONLY' throughout this catalog.

Email ascpacpe@ascpa.com if you experience technical difficulties during a webcast or webinar. In order to observe physical distancing, max capacity for in-person learning is currently limited to 25 attendees.

Course Materials & Print Manuals

You will receive hard copy of course materials for all 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: Discounted registration fees will be honored for up to two transfers made after May 31. Any additional fee 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 request 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 – Gather in-person with your peers to explore case studies and problem solving in a classroom setting with the expert guidance of an experienced discussion leader. Receive in-depth instruction on topics with specialized content through lecture, group discussion and Q&A.

Webcast/Webinar – Experience all the benefits of classroom learning from the comfort of your home or office with the ASCPA's live, interactive seminars.

Conference/Webcast – Conferences consist of individual lectures and panel discussions by authorities on specific topics offered in person and via webcast.

Self-Paced

Easy and convenient, this CPE is designed to be completed on your own time and at your own pace.

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

Quick Quiz – 24/7 access to AZ CPA magazine quizzes.

Self-Study – CPExpress offers a variety of self-study courses with 24/7 access, now with a new user-friendly portal!

On-Site Training

- 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.

Contact us at (602) 324-4745 or ascpacpe@ascpa.com to learn more about our customized solutions for your organization.

Four Easy Ways to Register

- 1 Secure Online Registrations:** Pay by credit card 24/7 Register instantly online – www.ascpa.com
- 2 Mail:** Send your completed registration form with check (Payable to ASCPA) or credit card information to:
4801 E. Washington St., Suite 180, Phoenix, AZ 85034
- 3 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
- 4 Fax:** Register 24/7 by faxing your credit card information to (602) 252-1511.

ASCPA accepts MasterCard, Visa, American Express and Discover.

Fee Schedule

8 hour:

Member and 100% Club Non-CPA staff:	\$300
Nonmember:	\$400
Early Registration.....	\$255

In order to receive the discount, the registration form and fee must be received in the ASCPA office 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, the registration form and fee must be received in the ASCPA office by May 31. The 15% discount applies only to select programs.

What to Expect from Us after Registration



WHAT OUR **NATIONALLY RECOGNIZED LOCAL EXPERTS** ARE SAYING ABOUT THE UPCOMING TAX YEAR ...



“ The one thing we can always expect in taxes is the unexpected – be it law changes, revised regulations, key court decisions or other changes and 2021 should be no different in this regard. Advisers need to watch for these changes to determine how they impact clients in all areas of tax. At the same time, state tax will continue to be interesting, both as Arizona deals with Proposition 208 and multiple states enact passthrough tax rules to work around the individual state and local tax deduction limits. ”

~ Ed Zollars



“ 2021 income tax prediction: Fear and uncertainty! Odds are corporations and the highest individual income taxpayers (top 5%) will not see any tax cuts in 2021. The fear and uncertainty for those clients will be if their taxes go up, then by how much? They could see the corporate and individual tax rates increasing, reinstatement of the AMT, modifications to the long-term capital gain rates, limitations on itemized deductions and a complete phase-out of the qualified business income (QBI) deduction. With lower individual income taxpayers we could see significant changes to the child tax credit, earned income tax credit, child and dependent care credit, premium tax credit and additional recovery rebate credits. Whatever tax legislation does get passed in 2021, I guarantee our clients will need our help. ”

~ Pat Garverick

Find out more about their courses on pages 9 and 10

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. These sessions are highly interactive to ensure you leave with a complete understanding of the material. Find out more on page 30.

Top Tax Webcasts

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

8 CPE

- June 14 | This Year's Best Income Tax, Estate Tax and Financial Planning Ideas
- July 13 | Hot IRS Tax Examination Issues for Individuals and Business
- September 20 | How to Settle a Client's Estate
- September 21 | Buying and Selling a Business: Critical Tax and Structuring Issues
- April 22 | Employer's Handbook: Legal, Tax and Health Care Issues

4 CPE

- June 2 | Four Tiers of Loss Limitations: A Guide to the New Rules for Pass-through Entities (8-11:30)
- July 21 | Succession Planning for the Small Business Owner: Finding the Exit Ramp (12:30-4)
- November 5 | Reviewing Individual Tax Returns: What are you Missing? (8-11:30)
- November 17 | Webcast: Surgent's Individual Tax Planning Ideas (12:30-4)

ALL CONFERENCES AVAILABLE ON WEBCAST!

Not-for-Profit Virtual Conference

June 24, 2021

Recommended CPE: **8 hours**

Member fee: \$299

Nonmember fee: \$399

Location: Webcast Only

Get up to speed on the most pressing issues facing not-for-profit organizations today with a mix of topics including auditing, accounting, cybersecurity, investment, 990 updates and relevant changes in your industry, including the impact of COVID-19.

View the schedule and register online at ascpa.com/npc21 or by phone at (602) 252-4144.

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

ASCPA Annual Conference

November 9-10, 2021

Recommended CPE: **16 hours**

Two-day fee: \$550

One-day fee: \$299

Location: Desert Willow Conference Center and Webcast

Join us at the inaugural 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 conference includes specialty tracks for the following past conferences, and all specialty tracks will be webcast!

- Arizona Federal Tax Institute
- Financial Planning
- Leadership & Growth Alliance
- Technology for Accounting
- Business Valuation
- Corporate Finance
- Accounting & Assurance
- Forensic & Litigation Services
- 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/aac21 or by phone at (602) 252-4144.

Governmental Accounting Conference

February 4, 2022

Recommended CPE: **8 hours**

Member fee: \$275

Nonmember fee: \$375

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/gac21 or by phone at 602-252-4144.

ASCPA Annual Conference

Nov. 9-10, 2021



We are combining several conferences into a new annual conference event! You will benefit from a larger conference experience including more networking and webcasted breakouts, while still receiving the quality specialty content you have come to expect from us. Planning is happening now, more detail will be shared in the coming weeks.

Specialty Tracks:

Arizona Federal Tax Institute

Technology for Accounting, Accounting &
Assurance, Financial Planning, Business
Valuation and Forensic & Litigation
Services, Leadership & Growth Alliance,
Corporate Finance, Construction

www.ascpa.com/aac21

| TUCSON |

2021

July 12

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

J. Patrick Garverick
8 Hours **Taxation**
\$255 / 300 / 400

July 13

Passive Activities & Rental Real Estate Income Tax Issues

J. Patrick Garverick
8 Hours **Taxation**
\$255 / 300 / 400

August 24

The Business Financial Health Checkup

Walter J. Haig II
8 Hours **Accounting & Auditing**
\$255 / 300 / 400

August 25

SSARS STANDARDS: The Best Annual Update and Review of the Preparation, Compilation and Review Standards

Walter J. Haig II
8 Hours **Accounting & Auditing**
\$255 / 300 / 400

August 26

Financial Statement Preparation Standards for Small- and Medium-Sized Entities

Walter J. Haig II
8 Hours **Accounting & Auditing**
\$255 / 300 / 400

August 27

Ethics Standards Update and Review for Arizona CPAs in Public Practice

(8-11:30)
Walter J. Haig II
4 Hours
Ethics (meets Arizona's R4-1-453-5)
\$136 / 160 / 210

November 15

Arizona Accounting Ethics with Emphasis on Tax Practice Issues

(8-11:30)
Edward K. Zollars
4 Hours
Ethics (meets Arizona's R4-1-453-5)
\$136 / 160 / 210

November 15

Arizona Income Taxation: Update and Overview (12:30-4)

Edward K. Zollars
4 Hours **Taxation**
\$136 / 160 / 210

November 16

Current Federal Tax Developments with Ed Zollars

Edward K. Zollars
8 Hours **Taxation**
\$255 / 300 / 400

2022

January 6

Federal Tax Update – Individuals (Form 1040)

J. Patrick Garverick
8 Hours **Taxation**
\$255 / 300 / 400

January 7

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

J. Patrick Garverick
8 Hours **Taxation**
\$255 / 300 / 400

| FLAGSTAFF |

2021

August 17

SSARS STANDARDS: The Best Annual Update and Review of the Preparation, Compilation and Review Standards

Walter J. Haig II
8 Hours **Accounting & Auditing**
\$255 / 300 / 400

August 18

Financial Statement Preparation Standards for Small- and Medium-Sized Entities

Walter J. Haig II
8 Hours **Accounting & Auditing**
\$255 / 300 / 400

August 19

Ethics Standards Update and Review for Arizona CPAs in Public Practice

(8-11:30)
Walter J. Haig II
4 Hours
Ethics (meets Arizona's R4-1-453-5)
\$136 / 160 / 210

September 17

Federal Tax Update - Individual & Business Current Developments

J. Patrick Garverick
8 Hours **Taxation**
\$255 / 300 / 400

| YUMA |

2021

November 18

Federal Tax Update – Individuals (Form 1040)

J. Patrick Garverick
8 Hours **Taxation**
\$255 / 300 / 400

November 19

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

J. Patrick Garverick
8 Hours **Taxation**
\$255 / 300 / 400
Yuma

VOLUNTEERING OPPORTUNITIES

At the Intersection of Maximizing Growth & Connecting with Your Community is You!

Build connections with your professional community. As an ASCPA volunteer, you can help shape meaningful programs and activities, create valuable resources and experiences and expand your connections with colleagues. Volunteering is a great way to maximize growth and have fun supporting your ASCPA!

OPPORTUNITIES INCLUDE:

Communities and Planning Committees

Special Interest Committees:

- Arizona Federal Tax Institute
- Accounting & Assurance
- Business Valuation
- Cannabis & Hemp
- Corporate Finance
- Construction Industry
- Financial Planning
- Forensic & Litigation Services
- Governmental Accounting
- Leadership & Growth Alliance
- Not-for-Profit
- Taxation
- Tax Legislation
- Technology for Accounting

Conference Planning Committees:

- ASCPA Annual Conference
- Not-for-Profit Conference
- Governmental Accounting Conference

Chapter Volunteers

If you live outside of Phoenix, four chapters are available for you to meet with your peers.

Locations include: Flagstaff, Prescott, Tucson and Yuma. This year, each chapter will meet virtually between August – January to explore current topics and earn CPE.

We're always in search of CPAs looking to support their local communities. Complete the Volunteer form online: [Volunteer](#)



Gain more exposure for your organization – become a speaker!

Let us pair you with a speaking opportunity!

We receive requests for speakers throughout the year from local and national organizations. If you are interested in speaking to the CPA community, we have opportunities to speak at chapter meetings, webinars and conferences.

Have an idea for a topic?

Let us know what you are interested in presenting and who is your target audience. We will let you know if we receive a request that matches your expertise and interests.

We are currently seeking speakers for our new ASCPA Annual Conference scheduled for November 9 & 10, 2021.

Are you experienced in tax, technology, accounting, auditing, corporate finance, construction accounting, financial planning, business valuation, forensic accounting or leadership? We are also always looking for new speakers for our Governmental Accounting and Not-for-Profit Conferences.

Complete the [Become a Speaker Form](#) to submit your topic idea today!

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:**June 7**

WEBCAST ONLY: Nexus After Wayfair – Multi-State Sales and Income Taxation in Business

8 CPE

June 8

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

WEBCAST ONLY: Arizona Accounting Ethics with Emphasis on Tax Practice Issues (12:30-4)

4 CPE

June 9

WEBCAST ONLY: Preparing Complex 1040s

8 CPE

August 19

Income Taxation of Trusts and Estates – Planning and Compliance

8 CPE

August 20

Assisting the Survivors – CPA's Role in the Decedents' Estate

8 CPE

August 23

Partnership and LLC Taxation – Advanced Issues

8 CPE

November 11

Expense vs. Capitalize – Getting it Right for Taxes

8 CPE

November 12

Construction Contractors – Special Tax and Accounting Considerations

8 CPE

November 15 – Tucson

Arizona Accounting Ethics with Emphasis on Tax Practice Issues (8-11:30)

Arizona Income Taxation: Update and Overview (12:30-4)

4 CPE

November 16 – Tucson

Current Federal Tax Developments with Ed Zollars

8 CPE

December 13

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

Estate Planning for the 99% – Portability and More

4 CPE

December 14

Current Federal Tax Developments with Ed Zollars

8 CPE

2022**January 24**

Debt Related Tax Issues

8 CPE

January 25

Preparing Complex 1040s

8 CPE

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

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

Pat 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:

July 12 – Tucson

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

8 CPE

July 13 – Tucson

Passive Activities & Rental Real Estate Income Tax Issues

8 CPE

August 16

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

8 CPE

August 17

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

8 CPE

August 18

Federal Tax Update – Individual & Business Current Developments

8 CPE

September 17 – Flagstaff

Federal Tax Update – Individual & Business Current Developments

8 CPE

September 23

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

8 CPE

September 24

Passive Activities & Rental Real Estate Income Tax Issues

8 CPE

November 18 – Yuma

Federal Tax Update – Individuals (Form 1040)

8 CPE

November 19 – Yuma

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

8 CPE

November 22

Federal Tax Update – Individuals (Form 1040)

8 CPE

November 23

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

2022

January 6 – Tucson

Federal Tax Update – Individuals (Form 1040)

8 CPE

January 7 – Tucson

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:

Jun. 11, Aug. 13, Sep. 16, Oct. 7

WEBCAST ONLY: Professional Ethics Update for Arizona CPAs – Including Revised AICPA Code
4 CPE

Nov. 8, Dec. 6

Professional Ethics Update for Arizona CPAs – Including Revised AICPA Code
4 CPE

May 13, Jul. 23

WEBCAST ONLY: Professional Ethics Update for CPAs in Business – Including Revised AICPA Code
4 CPE

2022

Jan. 11, Feb. 16, Apr. 25

Professional Ethics Update for Arizona CPAs – Including Revised AICPA Code
4 CPE

Mar. 7

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

SEE WHAT'S NEW IN 2021-22 CPE

NEW RULES, APPROACHES, REVISIONS, FORMS AND GUIDES

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

2021

June 9

WEBCAST ONLY: Developing Your Alternative Workforce (GIG) Strategy (8-11:30)

WEBCAST ONLY: Critical Business Risks – Identifying Your Blind Spots (12:30-4)
4 CPE

June 10

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

WEBCAST ONLY: Business Resilience: Protecting the Finance Function (12:30-4)
4 CPE

July 15

WEBCAST ONLY: Forensic Accounting: Fraud Investigations
8 CPE

July 16

WEBCAST ONLY: What Fraud Schemes Exist in Your Organization
8 CPE

August 24

WEBCAST ONLY: Finance Business Partnering: Influence to Impact
8 CPE

August 25

WEBCAST ONLY: Controller's Update: Today's Latest Trends (8-11:30)
4 CPE

September 1

WEBCAST ONLY: Real Estate Taxation (8-11:30)
4 CPE

September 2

WEBCAST ONLY: Introduction to Business Acquisitions (8-11:30)
4 CPE

December 15

WEBCAST ONLY: The New Auditors' Reporting Standards
8 CPE

December 16

WEBCAST ONLY: Conducting a Remote Audit (12:30-4)
4 CPE

2022

January 24

Debt Related Tax Issues
8 CPE

April 26

ASC 740: Accounting for Income Taxes
8 CPE

April 27

Accounting, Audit and Attest Update for Practitioners with Small-Business Clients
8 CPE



WEBCAST SUPPORT TIPS

- Verify you have your login and password for ASCPA.com.
- 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.
- Google Chrome is the recommended browser.
- To confirm your computer meets webcast requirements complete a Webcast System Check.

If you need further assistance, please reach out to a member of the CPE team at

NEW

SAVE ON **BUNDLES**

Bundles are a convenient one-stop way to attend multiple webinars of CPE with a single decision. When you register for a bundle, you will be enrolled in multiple webinars on the same topic.

Each bundle features high-quality presentations and opportunities to explore with case studies, group discussions and team exercises.

MASTERING MICROSOFT – 8 CPE (\$225 member, \$400 non-member)

Take your Microsoft skills to the next level in just 6 weeks.

- August 17 | If You Only Knew What Microsoft® Word Could Do – 2 CPE
- August 31 | Shortcuts Excel® Users Love – 2 CPE
- September 14 | Making Excel® Formulas Work for You – 4 CPE

SECURING YOUR BUSINESS IN A DIGITAL WORLD – 12 CPE (\$335 member, \$600 non-member)

Keep your business safe now and in the future. Get ahead of the curve with forward thinking and preparation.

- August 24 | Operations Level Internal Control – 4 CPE
- September 14 | How Internal Control Will Transform During the Next Five Years – 4 CPE
- October 5 | The Importance of Security for Digital Information – 4 CPE

INTERNAL CONTROLS DEEP DIVE – 16 CPE (\$450 member, \$720 non-member)

The world looks very different today than it did in the spring of 2020. This has a big impact on internal controls. Prepare yourself and your organization to navigate this brave, new world.

- October 12 | Operations Level Internal Control – 4 CPE
- November 2 | How Post Pandemic Attitudes Will Change Internal Control Development – 8 CPE
- November 23 | Internal Control Changes for Telecommuting Workers – 2 CPE
- December 14 | Defining Where and Why Internal Controls are Needed – 2 CPE

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

MAY | 2021

13

WEBCAST ONLY: Professional Ethics Update for CPAs in Business – Including Revised AICPA Code (8-11:30)

Gilbert B. Blumenthal

4 Hours

Ethics (meets Arizona's R4-1-453-5)

\$116 / \$136 / 186

17

WEBCAST ONLY: Advanced Audits of 401(k) Plans: Best Practices and Current Developments

Daryl G. Krause

8 Hours

Accounting & Auditing

\$255 / 300 / 400

18

WEBCAST ONLY: Financial Reporting Implications of the COVID-19 Pandemic (12:30-4)

Daryl G. Krause

4 Hours

Accounting & Auditing

\$136 / 160 / 210

24

WEBCAST ONLY: Hot Topics in the Financial Reporting Standards

Walter J. Haig II

8 Hours

Accounting & Auditing

\$255 / 300 / 400

25

WEBCAST ONLY: SSARS Standards: The Best Annual Update and Review of the Preparation, Compilation and Review Standards

Walter J. Haig II

8 Hours

Accounting & Auditing

\$255 / 300 / 400

26

WEBCAST ONLY: Financial Statement Preparation Standards for Small- and Medium-Sized Entities

Walter J. Haig II

8 Hours

Accounting & Auditing

\$255 / 300 / 400

26

WEBCAST ONLY: Key Partnership and S Corporation Tax Planning Strategies (12:30-4)

Don P. Cochran

4 Hours

Taxation

\$136 / 160 / 210

26

WEBCAST ONLY: Succession Planning for the Small Business Owner: Finding the Exit Ramp (8-11:30)

Don P. Cochran

4 Hours

Taxation

\$136 / 160 / 210

27

WEBCAST ONLY: Ethics Standards Update and Review for Arizona CPAs in Public Practice (8-11:30)

Walter J. Haig II

4 Hours

Ethics (meets Arizona's R4-1-453-5)

\$136 / 160 / 210

27

WEBCAST ONLY: Employer's Handbook: Legal, Tax and Health Care Issues

Don P. Cochran

8 Hours

Business Law, Taxation

\$255 / 300 / 400

JUNE | 2021

1

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

John N. Sherrick

4 Hours

Taxation

\$136 / 160 / 210

1

WEBCAST ONLY: Surgent's S Corporation, Partnership and LLC Tax Update (12:30-4)

John N. Sherrick

4 Hours

Taxation

\$136 / 160 / 210

2

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

John N. Sherrick

4 Hours

Taxation

\$136 / 160 / 210

2

WEBCAST ONLY: Limited Liability Companies: Losses, Liquidations, Terminations, Continuances and Sales (12:30-4)

John N. Sherrick

4 Hours

Taxation

\$136 / 160 / 210

7

WEBCAST ONLY: Nexus After Wayfair - Multi-State Sales and Income Taxation in Business

Edward K. Zollars

8 Hours

Taxation

\$255 / 300 / 400

8

WEBCAST ONLY: Arizona Accounting Ethics with Emphasis on Tax Practice Issues (12:30-4)

Edward K. Zollars

4 Hours

Ethics (meets Arizona's R4-1-453-5)

\$136 / 160 / 210

8

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

Edward K. Zollars

4 Hours

Taxation

\$136 / 160 / 210

9

WEBCAST ONLY: Developing Your Alternative Workforce (GIG) Strategy (8-11:30)

4 Hours

Management

\$136 / 160 / 210

9

WEBCAST ONLY: Critical Business Risks – Identifying Your Blind Spots (12:30-4)

4 Hours

Management

\$136 / 160 / 210

9

WEBCAST ONLY: Preparing Complex 1040s

Edward K. Zollars

8 Hours

Taxation

\$255 / 300 / 400

10

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

4 Hours

Management

\$136 / 160 / 210

10

WEBCAST ONLY: Business Resilience: Protecting the Finance Function (12:30-4)

4 Hours

Management

\$136 / 160 / 210

14

WEBCAST ONLY: This Year's Best Income Tax, Estate Tax and Financial Planning Ideas

Don P. Cochran

8 Hours

Taxation

\$255 / 300 / 400

15

WEBCAST ONLY: Surgent's Annual Tax Planning Guide for S Corporations, Partnerships and LLCs

Don P. Cochran

8 Hours

Taxation

\$255 / 300 / 400

18

WEBCAST ONLY: Professional Ethics Update for Arizona CPAs - Including Revised AICPA Code (8-11:30)

Gilbert B. Blumenthal

4 Hours

Ethics (meets Arizona's R4-1-453-5)

\$116 / \$136 / 186

22

WEBCAST ONLY: Interpreting the New Revenue Recognition Standard: What All CPA's Need to Know (8-11:30)

Summer M. Taylor

4 Hours

Accounting & Auditing

\$136 / 160 / 210

JUNE | 2021

22

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

Summer M. Taylor

4 Hours

Accounting & Auditing

\$136 / 160 / 210

23

WEBCAST ONLY: Accounting and Auditing Update for Small Businesses

Summer M. Taylor

8 Hours

Accounting & Auditing

\$255 / 300 / 400

28

WEBCAST ONLY: Compilations, Reviews and Preparations: Engagement Performance and Annual Update

Curtis J. Quickel

8 Hours

Accounting & Auditing

\$255 / 300 / 400

29

WEBCAST ONLY: Annual Accounting and Auditing Update

Curtis J. Quickel

8 Hours

Accounting & Auditing

\$255 / 300 / 400

30

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

Curtis J. Quickel

4 Hours

Accounting & Auditing, Information Technology

\$136 / 160 / 210

30

WEBCAST ONLY: Topic 606: Tackling the Year Two Post-Implementation Issues (12:30-4)

Curtis J. Quickel

4 Hours

Accounting & Auditing

\$136 / 160 / 210



JULY | 2021

7

WEBCAST ONLY: Not-for-Profit Accounting and Auditing Update

Roger Cusworth

8 Hours

Accounting & Auditing

\$255 / 300 / 400

8

WEBCAST ONLY: Financial Reporting for Not-for-Profit Entities (8-11:30)

Roger Cusworth

4 Hours

Accounting & Auditing

\$136 / 160 / 210

8

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

Roger Cusworth

4 Hours

Accounting & Auditing

\$136 / 160 / 210

12

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

J. Patrick Garverick

8 Hours

Taxation

\$255 / 300 / 400

Tucson

13

WEBCAST ONLY: Hot IRS Tax Examination Issues for Individuals and Business

Charles A. Borek

8 Hours

Taxation

\$255 / 300 / 400

13

Passive Activities & Rental Real Estate Income Tax Issues

J. Patrick Garverick

8 Hours

Taxation

\$255 / 300 / 400

Tucson

14

WEBCAST ONLY: Social Security and Medicare: Planning for You and Your Clients

Charles A. Borek

8 Hours

Taxation

\$255 / 300 / 400

15

WEBCAST ONLY: Forensic Accounting: Fraud Investigations

Lynn Fountain

8 Hours

Accounting & Auditing

\$255 / 300 / 400

16

WEBCAST ONLY: What Fraud Schemes Exist in Your Organization

Lynn Fountain

8 Hours

Accounting & Auditing

\$255 / 300 / 400

21

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

William F. Taylor

4 Hours

Taxation

\$136 / 160 / 210

21

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

William F. Taylor

4 Hours

Taxation

\$136 / 160 / 210

22

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

Robert P. Bedwell

4 Hours

Accounting & Auditing

\$136 / 160 / 210

23

WEBCAST ONLY: Professional Ethics Update for CPAs in Business – Including Revised AICPA Code (8-11:30)

Gilbert B. Blumenthal

4 Hours

Ethics (meets Arizona's R4-1-453-5)

\$116 / \$136 / 186

27

WEBCAST ONLY: SSARS Standards: The Best Annual Update and Review of the Preparation, Compilation and Review Standards

Walter J. Haig II

8 Hours

Accounting & Auditing

\$255 / 300 / 400

28

WEBCAST ONLY: Financial Statement Preparation Standards for Small- and Medium-Sized Entities

Walter J. Haig II

8 Hours

Accounting & Auditing

\$255 / 300 / 400

29

WEBCAST ONLY: The Business Financial Health Checkup

Walter J. Haig II

8 Hours

Accounting & Auditing

\$255 / 300 / 400

30

WEBCAST ONLY: Ethics Standards Update and Review for Arizona CPAs in Public Practice (8-11:30)

Walter J. Haig II

4 Hours

Ethics (meets Arizona's R4-1-453-5)

\$136 / 160 / 210

AUGUST | 2021

11

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

John M. Kilroy

4 Hours

[Taxation](#)

\$136 / 160 / 210

11

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

John M. Kilroy

4 Hours

[Taxation](#)

\$136 / 160 / 210

12

WEBCAST ONLY: Securing a Comfortable Retirement in the Age of Spending

John M. Kilroy

8 Hours

Specialized Knowledge, [Taxation](#)

\$136 / 160 / 210

13

WEBCAST ONLY: Professional Ethics Update for Arizona CPAs - Including Revised AICPA Code (8-11:30)

Gilbert B. Blumenthal

4 Hours

[Ethics](#) (meets Arizona's R4-1-453-5)

\$116 / \$136 / 186

16

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

J. Patrick Garverick

8 Hours

[Taxation](#)

\$255 / 300 / 400

Phoenix/Webcast

17

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

J. Patrick Garverick

8 Hours

[Taxation](#)

\$255 / 300 / 400

Phoenix/Webcast

17

SSARS STANDARDS: The Best Annual Update and Review of the Preparation, Compilation and Review Standards

Walter J. Haig II

8 Hours

[Accounting & Auditing](#)

\$255 / 300 / 400

Flagstaff

18

Federal Tax Update - Individual & Business Current Developments

J. Patrick Garverick

8 Hours

[Taxation](#)

\$255 / 300 / 400

Phoenix/Webcast

18

Financial Statement Preparation Standards for Small- and Medium-Sized Entities

Walter J. Haig II

8 Hours

[Accounting & Auditing](#)

\$255 / 300 / 400

Flagstaff

19

Ethics Standards Update and Review for Arizona CPAs in Public Practice (8-11:30)

Walter J. Haig II

4 Hours

[Ethics](#) (meets Arizona's R4-1-453-5)

\$136 / 160 / 210

Flagstaff

19

Income Taxation of Trusts and Estates – Planning and Compliance

Edward K. Zollars

8 Hours

[Taxation](#)

\$255 / 300 / 400

Phoenix/Webcast

20

Assisting the Survivors – CPA's Role in the Decedent's Estate

Edward K. Zollars

8 Hours

[Taxation](#)

\$255 / 300 / 400

Phoenix/Webcast

23

Partnership and LLC Taxation-Advanced Issues

Edward K. Zollars

8 Hours

[Taxation](#)

\$255 / 300 / 400

Phoenix/Webcast

24

The Business Financial Health Checkup

Walter J. Haig II

8 Hours

[Accounting & Auditing](#)

\$255 / 300 / 400

Tucson

24

WEBCAST ONLY: Finance Business Partnering: Influence to Impact

Bruce Shepard

8 Hours

[Management](#)

\$255 / 300 / 400

AUGUST | 2021

25

WEBCAST ONLY: Controller's Update: Today's Latest Trends (8-11:30)

Bruce Shepard

4 Hours

Accounting & Auditing

\$136 / 160 / 210

25

WEBCAST ONLY: Risk, Cost and Cash Management for Controllers and Financial Managers (12:30-4)

Bruce Shepard

4 Hours

Consulting Services

\$136 / 160 / 210

25

SSARS STANDARDS: The Best Annual Update and Review of the Preparation, Compilation and Review Standards

Walter J. Haig II

8 Hours

Accounting & Auditing

\$255 / 300 / 400

Tucson

26

Financial Statement Preparation Standards for Small- and Medium-Sized Entities

Walter J. Haig II

8 Hours

Accounting & Auditing

\$255 / 300 / 400

Tucson

27

Ethics Standards Update and Review for Arizona CPAs in Public Practice (8-11:30)

Walter J. Haig II

4 Hours

Ethics (meets Arizona's R4-1-453-5)

\$136 / 160 / 210

Tucson



SEPTEMBER | 2021

1

WEBCAST ONLY: The Most Critical Challenges in Not-for-Profit Accounting Today (8-11:30)

Michael J. Morgan

4 Hours

Accounting & Auditing

\$136 / 160 / 210

1

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

Michael J. Morgan

4 Hours

Accounting & Auditing

\$136 / 160 / 210

1

WEBCAST ONLY: IRS Disputes (12:30-4)

Dennis Riley

4 Hours

Taxation

\$136 / 160 / 210

1

WEBCAST ONLY: Real Estate Taxation (8-11:30)

Dennis Riley

4 Hours

Taxation

\$136 / 160 / 210

2

WEBCAST ONLY: Introduction to Business Acquisitions (8-11:30)

Dennis Riley

4 Hours

Taxation

\$136 / 160 / 210

17

Federal Tax Update - Individual & Business Current Developments

J. Patrick Garverick

8 Hours

Taxation

\$255 / 300 / 400

Flagstaff

20

WEBCAST ONLY: How to Settle a Client's Estate

John M. Kilroy

8 Hours

Taxation

\$255 / 300 / 400

21

WEBCAST ONLY: Professional Ethics Update for Arizona CPAs - Including Revised AICPA Code (12:30-4)

Gilbert B. Blumenthal

4 Hours

Ethics (meets Arizona's R4-1-453-5)

\$116 / \$136 / 186

21

WEBCAST ONLY: Buying and Selling a Business: Critical Tax and Structuring Issues

John M. Kilroy

8 Hours

Taxation

\$255 / 300 / 400

22

WEBCAST ONLY: Fiduciary Income Tax Returns - Form 1041 Workshop with Filled-in Forms

John M. Kilroy

8 Hours

Taxation

\$255 / 300 / 400

22

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

Jeffrey Lieman

4 Hours

Accounting & Auditing

\$136 / 160 / 210

22

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

Jeffrey Lieman

4 Hours

Accounting & Auditing

\$136 / 160 / 210

23

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

J. Patrick Garverick

8 Hours

Taxation

\$255 / 300 / 400

Phoenix/Webcast

24

Passive Activities & Rental Real Estate Income Tax Issues

J. Patrick Garverick

8 Hours

Taxation

\$255 / 300 / 400

Phoenix/Webcast

OCTOBER | 2021

7

WEBCAST ONLY: Professional Ethics Update for Arizona CPAs – Including Revised AICPA Code (12:30-4)

Gilbert B. Blumenthal

4 Hours

Ethics (meets Arizona's R4-1-453-5)

\$116 / \$136 / 186

18

AICPA's Annual Federal Tax Update

David Peters

8 Hours

Taxation

\$255 / 300 / 400

Phoenix/Webcast

19

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

David Peters

4 Hours

Taxation

\$136 / 160 / 210

Phoenix/Webcast

19

Taxation of Property Transactions (12:30-4)

David Peters

4 Hours

Taxation

\$136 / 160 / 210

Phoenix/Webcast

20

Reviewing Pass-Through Tax Returns: What are you Missing?

David Peters

8 Hours

Taxation

\$255 / 300 / 400

Phoenix/Webcast

22

Form 990: Best Practices for Accurate Preparation

Brenda A. Blunt

8 Hours

Taxation

\$255 / 300 / 400

Webcast

25

SSARS STANDARDS: The Best Annual Update and Review of the Preparation, Compilation and Review Standards

Walter J. Haig II

8 Hours

Accounting & Auditing

\$255 / 300 / 400

Phoenix/Webcast

26

Financial Statement Preparation Standards for Small- and Medium-Sized Entities

Walter J. Haig II

8 Hours

Accounting & Auditing

\$255 / 300 / 400

Phoenix/Webcast

27

Ethics Standards Update and Review for Arizona CPAs in Public Practice (8-11:30)

Walter J. Haig II

4 Hours

Ethics (meets Arizona's R4-1-453-5)

\$136 / 160 / 210

Phoenix/Webcast

29

Don Farmer's Tax Update

Don Farmer

8 Hours

Taxation

\$255 / 300 / 400

Phoenix/Webcast



Unable to find the topic you need?

Email our team at

ascpacpe@ascpa.com.

NOVEMBER | 2021

1

WEBCAST ONLY: AICPA's Accounting and Auditing Update (8-11:30)

Robert W. Wells

4 Hours

Accounting & Auditing

\$136 / 160 / 210

1

WEBCAST ONLY: Preparation, Compilation and Review Engagements: Update and Review (12:30-4)

Robert W. Wells

4 Hours

Accounting & Auditing

\$136 / 160 / 210

2

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

Robert W. Wells

4 Hours

Accounting & Auditing

\$136 / 160 / 210

2

WEBCAST ONLY: Construction Contractors: Accounting Considerations (8-11:30)

Robert W. Wells

4 Hours

Accounting & Auditing

\$136 / 160 / 210

4

WEBCAST ONLY: AICPA's Hottest Tax Topics for 2021

William Murphy

8 Hours

Taxation

\$255 / 300 / 400

5

WEBCAST ONLY: Reviewing Individual Tax Returns: What are you Missing? (8-11:30)

William Murphy

4 Hours

Taxation

\$136 / 160 / 210

5

WEBCAST ONLY: Estate and Trust Primer (12:30-4)

William Murphy

4 Hours

Taxation

\$136 / 160 / 210

8

Professional Ethics Update for Arizona CPAs - Including Revised AICPA Code (12:30-4)

Gilbert B. Blumenthal

4 Hours

Ethics (meets Arizona's R4-1-453-5)

\$116 / \$136 / 186

Phoenix/Webcast

11

Expense vs. Capitalize-Getting it Right for Taxes

Edward K. Zollars

8 Hours

Taxation

\$255 / 300 / 400

Phoenix/Webcast

12

Construction Contractors-Special Tax and Accounting Considerations

Edward K. Zollars

8 Hours

Taxation, Accounting & Auditing

\$255 / 300 / 400

Phoenix/Webcast

15

Arizona Accounting Ethics with Emphasis on Tax Practice Issues (8-11:30)

Edward K. Zollars

4 Hours

Ethics (meets Arizona's R4-1-453-5)

\$136 / 160 / 210

Tucson

15

Arizona Income Taxation: Update and Overview (12:30-4)

Edward K. Zollars

4 Hours

Taxation

\$136 / 160 / 210

Tucson

16

Current Federal Tax Developments with Ed Zollars

Edward K. Zollars

8 Hours

Taxation

\$255 / 300 / 400

Tucson

17

WEBCAST ONLY: Surgent's Individual Tax Planning Ideas (12:30-4)

David Peters

4 Hours

Taxation

\$136 / 160 / 210

18

WEBCAST ONLY: The Complete Guide to Payroll Taxes

David Peters

8 Hours

Taxation

\$255 / 300 / 400

NOVEMBER | 2021

18

Federal Tax Update – Individuals (Form 1040)

J. Patrick Garverick

8 Hours

Taxation

\$255 / 300 / 400

Yuma

19

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

J. Patrick Garverick

8 Hours

Taxation

\$255 / 300 / 400

Yuma

22

Federal Tax Update – Individuals (Form 1040)

J. Patrick Garverick

8 Hours

Taxation

\$255 / 300 / 400

Phoenix/Webcast

23

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

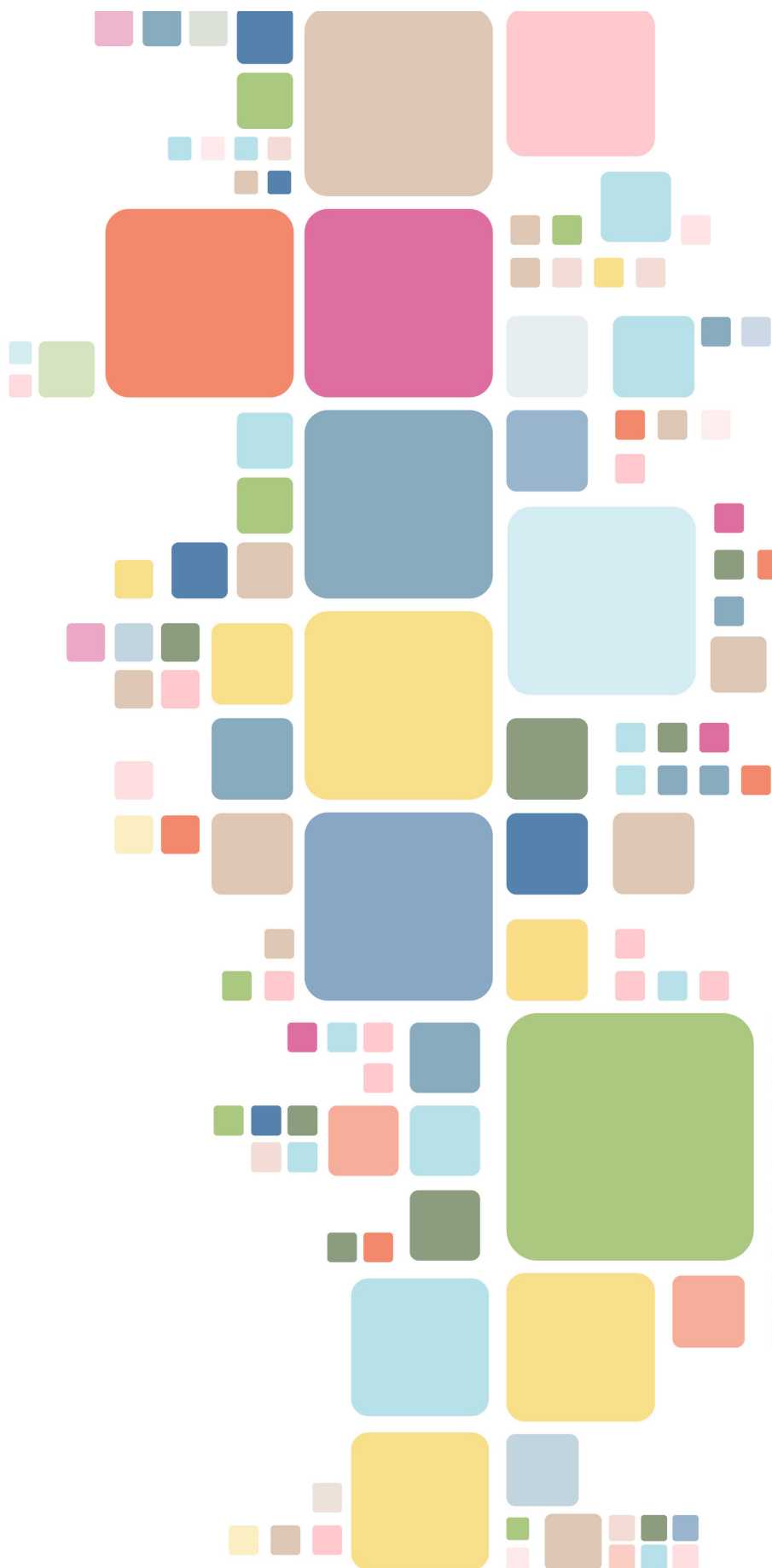
J. Patrick Garverick

8 Hours

Taxation

\$255 / 300 / 400

Phoenix/Webcast



DECEMBER | 2021

1

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

Robert R. Thelen

8 Hours

[Taxation](#)

\$255 / 300 / 400

Phoenix/Webcast

2

The Best Individual Income Tax Update Course by Surgent

Robert R. Thelen

8 Hours

[Taxation](#)

\$255 / 300 / 400

Phoenix/Webcast

3

Social Security and Medicare: Planning for You and Your Clients

Robert R. Thelen

8 Hours

[Taxation](#)

\$255 / 300 / 400

Phoenix/Webcast

6

Professional Ethics Update for Arizona CPAs - Including Revised AICPA Code (8-11:30)

Gilbert B. Blumenthal

4 Hours

[Ethics](#) (meets Arizona's R4-1-453-5)

\$116 / \$136 / 186

Phoenix/Webcast

7

SSARS STANDARDS: The Best Annual Update and Review of the Preparation, Compilation and Review Standards

Walter J. Haig II

8 Hours

[Accounting & Auditing](#)

\$255 / 300 / 400

Phoenix/Webcast

8

Financial Statement Preparation Standards for Small- and Medium-Sized Entities

Walter J. Haig II

8 Hours

[Accounting & Auditing](#)

\$255 / 300 / 400

Phoenix/Webcast

9

AUDITING STANDARDS: The Best Annual Update and Review of the AICPA Auditing Standards

Walter J. Haig II

8 Hours

[Accounting & Auditing](#)

\$255 / 300 / 400

Phoenix/Webcast

10

Ethics Standards Update and Review for Arizona CPAs in Public Practice (8-11:30)

Walter J. Haig II

4 Hours

[Ethics](#) (meets Arizona's R4-1-453-5)

\$136 / 160 / 210

Phoenix/Webcast

13

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

Edward K. Zollars

4 Hours

[Taxation](#)

\$136 / 160 / 210

Phoenix/Webcast

13

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

Edward K. Zollars

4 Hours

[Taxation](#)

\$136 / 160 / 210

Phoenix/Webcast

14

Current Federal Tax Developments with Ed Zollars

Edward K. Zollars

8 Hours

[Taxation](#)

\$255 / 300 / 400

Phoenix/Webcast

14

WEBCAST ONLY: Current Federal Tax Developments with Ed Zollars

Edward K. Zollars

8 Hours

[Taxation](#)

\$255 / 300 / 400

15

WEBCAST ONLY: The New Auditors' Reporting Standards

Thomas E. Newell Jr

8 Hours

[Accounting & Auditing](#)

\$255 / 300 / 400

16

WEBCAST ONLY: Conducting a Remote Audit (12:30-4)

Thomas E. Newell Jr

4 Hours

[Accounting & Auditing](#)

\$136 / 160 / 210

28

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

J. Patrick Garverick

16 Hours

[Taxation](#)

485 / 570 / 670

Phoenix/Webcast

JANUARY | 2022

6

Federal Tax Update – Individuals (Form 1040)

J. Patrick Garverick
8 Hours
Taxation
\$255 / 300 / 400
Tucson

7

WEBCAST ONLY: Best Federal Tax Update by Surgent

Randy C. Newton
8 Hours
Taxation
\$255 / 300 / 400

7

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

J. Patrick Garverick
8 Hours
Taxation
\$255 / 300 / 400
Tucson

11

Professional Ethics Update for Arizona CPAs - Including Revised AICPA Code (8-11:30)

Gilbert B. Blumenthal
4 Hours
Ethics (meets Arizona's R4-1-453-5)
\$116 / \$136 / 186
Phoenix/Webcast

18

Individual Tax Fundamentals

William F. Taylor
8 Hours
Taxation
\$255 / 300 / 400
Phoenix/Webcast

19

Reviewing Partnership Tax Returns: What are you Missing? (8-11:30)

William F. Taylor
4 Hours
Taxation
\$136 / 160 / 210
Phoenix/Webcast

19

WEBCAST ONLY: Reviewing Partnership Tax Returns: What are you Missing? (8-11:30)

William F. Taylor
4 Hours
Taxation
\$136 / 160 / 210

19

Reviewing S Corporation Tax Returns: What are you Missing? (12:30-4)

William F. Taylor
4 Hours
Taxation
\$136 / 160 / 210
Phoenix/Webcast

24

Debt Related Tax Issues

Edward K. Zollars
8 Hours
Taxation
\$255 / 300 / 400
Phoenix/Webcast

25

Preparing Complex 1040s

Edward K. Zollars
8 Hours
Taxation
\$255 / 300 / 400
Phoenix/Webcast

25

WEBCAST ONLY: SSARS STANDARDS: The Best Annual Update and Review of the Preparation, Compilation and Review Standards

Walter J. Haig II
8 Hours
Accounting & Auditing
\$255 / 300 / 400

26

WEBCAST ONLY: Financial Statement Preparation Standards for Small- and Medium-sized Entities

Walter J. Haig II
8 Hours
Accounting & Auditing
\$255 / 300 / 400

27

WEBCAST ONLY: Hot Topics in the Financial Reporting Standards

Walter J. Haig II
8 Hours
Accounting & Auditing
\$255 / 300 / 400

28

WEBCAST ONLY: Ethics Standards Update and Review for Arizona CPAs in Public Practice (8-11:30)

Walter J. Haig II
4 Hours
Ethics (meets Arizona's R4-1-453-5)
\$136 / 160 / 210

FEBRUARY | 2022

14

WEBCAST ONLY: Developing Your Digital Mindset (8-11:30)

James T. Lindell

4 Hours

[Management](#)

\$136 / 160 / 210

14

WEBCAST ONLY: Change the way you Work: Success as a Virtual CFO (12:30-4)

James T. Lindell

4 Hours

[Management](#)

\$136 / 160 / 210

15

WEBCAST ONLY: Annual FASB Update and Review (8-11:30)

4 Hours

[Accounting & Auditing](#)

\$136 / 160 / 210

15

WEBCAST ONLY: Gaining a Competitive Advantage: Critical Skills for CFOs and Controllers (12:30-4)

4 Hours

[Management](#)

\$136 / 160 / 210

15

WEBCAST ONLY: Annual Update for Controllers

James T. Lindell

8 Hours

[Management](#)

\$255 / 300 / 400

16

Professional Ethics Update for Arizona CPAs – Including Revised AICPA Code (8-11:30)

Gilbert B. Blumenthal

4 Hours

[Ethics](#) (meets Arizona's R4-1-453-5)

\$116 / \$136 / 186

Phoenix/Webcast

22

WEBCAST ONLY: Innovative Forecasting and Budgeting: Moving Beyond the Traditional Techniques (12:30-4)

4 Hours

[Management](#)

\$136 / 160 / 210

22

WEBCAST ONLY: Controller/CFO Update: Hot Topics Facing Today's Financial Professional (8-11:30)

4 Hours

[Management](#)

\$136 / 160 / 210

MARCH | 2022

7

Professional Ethics Update for CPAs in Business – Including Revised AICPA Code (12:30-4)

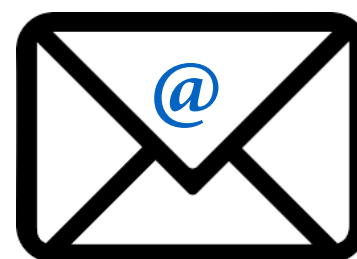
Gilbert B. Blumenthal

4 Hours

[Ethics](#) (meets Arizona's R4-1-453-5)

\$116 / \$136 / 186

Phoenix/Webcast



Unable to find the topic you need?

Email our team at
ascpacpe@ascpa.com.

APRIL | 2022

18

WEBCAST ONLY: Winning the Fraud Battle in the 21st Century: Prevention and Detection

Robert P. Bedwell

8 Hours

Accounting & Auditing

\$255 / 300 / 400

19

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

Robert P. Bedwell

4 Hours

Accounting & Auditing

\$136 / 160 / 210

19

WEBCAST ONLY: Examining the New Lease Accounting Standard: More Than Meets the Eye (12:30-4)

Robert P. Bedwell

4 Hours

Accounting & Auditing

\$136 / 160 / 210

20

WEBCAST ONLY: Latest Developments in Nonprofit Accounting and Auditing

Robert P. Bedwell

8 Hours

Accounting & Auditing

\$255 / 300 / 400

21

WEBCAST ONLY: Succession Planning for the Small Business Owner: Finding the Exit Ramp (8-11:30)

William F. Taylor

4 Hours

Taxation

\$136 / 160 / 210

21

WEBCAST ONLY: Key Partnership and S Corporation Tax Planning Strategies (12:30-4)

William F. Taylor

4 Hours

Taxation

\$136 / 160 / 210

22

WEBCAST ONLY: Employer's Handbook: Legal, Tax and Health Care Issues

William F. Taylor

8 Hours

Business Law

\$255 / 300 / 400

25

Professional Ethics Update for Arizona CPAs - Including Revised AICPA Code (8-11:30)

Gilbert B. Blumenthal

4 Hours

Ethics (meets Arizona's R4-1-453-5)

\$116 / \$136 / 186

Phoenix/Webcast

26

ASC 740: Accounting for Income Taxes

Thomas Sheets

8 Hours

Accounting & Auditing

\$255 / 300 / 400

Phoenix/Webcast

27

Accounting, Audit and Attest Update for Practitioners with Small-Business Clients

Thomas Sheets

8 Hours

Accounting & Auditing

\$255 / 300 / 400

Phoenix/Webcast

CALENDAR

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.



Phoenix Tax Workshop Series

24 Hours of Live CPE for \$375

* Added Bonus for purchasing 2021-22 Phoenix Tax Workshop Series! You will gain access to all 2021-22 recorded sessions for later viewing.

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 CPE/CLE sessions (eight times per year). This series is also offered as a webcast.

What does it 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). To enroll in the Phoenix Tax Workshop Series, complete the registration form below or register online at www.ascpa.com/ptw22.

What's on the agenda?

Topics are drawn from current tax issues, court cases and current legislation on both federal and state arenas. You will have the opportunity to take part in question and answer sessions to ensure you leave with a complete understanding of the material. Updated agendas will be sent prior to each meeting and will be available in the online CPE catalog. Check periodically for updated information.

Who's on the agenda?

Presentation topics are selected and then matched with the expertise of speakers drawn from the Advisory Committee, members of the Legislature and Arizona government.

What is the Advisory Committee?

The Advisory Committee is comprised of the Valley's top legal and tax accounting professionals who have agreed to volunteer their time.

Meeting dates and times

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

July 17, 2021	Jan. 15, 2022
Aug. 21, 2021	Feb. 19, 2022
Sept. 25, 2021	April 23, 2022
Oct. 23, 2021	
Nov. 20, 2021	

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