



CPE Catalog Summer 2021

GROW
your knowledge



kycpa.org

Summer conferences

Group discount: Register four or more from the same firm or company at the same time for the same conference and save \$25 per person.

Real Estate Workshop

June 10 (4 CPE hours)

Early Bird Fee: Register by May 27

KyCPA member: \$199 Nonmember: \$249

Regular Fee: After May 27

KyCPA member: \$224 Nonmember: \$274

Highlights include:

- Trends in practice management and construction
- Tax-centric management of your real estate assets: From acquisition to disposition
- Real life case studies: Overcoming myths, planning strategies
- Incentives for architects, engineers and contractors
- Kentucky economic outlook: Panel discussion

Estate Planning

June 17 (9.5 CPE hours)

Early Bird Fee: Register by June 3

KyCPA member: \$324 Nonmember: \$324

Regular Fee: After June 3

KyCPA member: \$374 Nonmember: \$374

Hosted by KyCPA and the Louisville Bar Association

Topics include:

- Recent developments under the Biden administration impacting estate planning
- Business valuations for estate planning
- Ethics: Issues in elder and special needs law
- Trust officer panel
- Tax update for estates and trusts
- Estate planning strategies: Hedging, charitable giving, roth conversations
- Ethics: Mental health and wellness in the workplace

Forensic Accounting and Litigation

August 19 (8 CPE hours)

Early Bird Fee: Register by August 5

KyCPA member: \$324 Nonmember: \$424

Regular Fee: After August 5

KyCPA member: \$374 Nonmember: \$474

Who should attend: CPAs and financial professionals who want to explore commonly accepted approaches and methodologies used by forensic accountants, investigators and financial managers.

2 conference special

Forensic Accounting and Business Valuation
August 19-20 (16 CPE hours)

Early Bird Fee: Register by August 5

KyCPA member: \$449 Nonmember: \$649

Regular Fee: After August 5

KyCPA member: \$499 Nonmember: \$699

Business Valuation and Litigation

August 20 (8 CPE hours)

Early Bird Fee: Register by August 6

KyCPA member: \$324 Nonmember: \$424

Regular Fee: After August 6

KyCPA member: \$374 Nonmember: \$474

Who should attend: Valuation analysts who have to deal with business valuation issues for a variety of uses

Community Bank Update July 16 (7 CPE hours)

Early Bird Fee: Register by July 2 KyCPA member: \$299 Nonmember: \$399

Regular Fee: After July 2 KyCPA member: \$349 Nonmember: \$449

Who should attend: Financial professionals working in credit unions and small banks and CPAs serving them as clients

CPE requirements changed January 2021

CPAs in public accounting firms who perform attest services (defined in KRS 325.220) or compilation or preparation of financial statement engagements subject to SSARS **must complete eight hours of CPE in auditing or accounting courses each calendar year** for a total of sixteen hours per reporting period.

KyCPA is offering 37 live broadcast courses, ranging from 2 to 24 hours in Accounting and/or Auditing, in addition to A&A sessions in most conferences this year. There are also hundreds of partner webinars and on-demand courses in our online catalog at kycpa.org/cpe/catalog. Use Accounting and Auditing in the credit search field or contact cpe@kycpa.org for assistance.

Need more information about the new CPE requirements? Check our website at <http://bit.ly/2021CPEFAQs> for FAQs and a video.

Audit Staff Training

Basic - Level 1

August 31-September 2 (24 CPE hours)

Early Bird Fee: Register by August 17
KyCPA member: \$789 Nonmember: \$889

To improve inexperienced staff members' knowledge, skills and attitude to enable them to be more productive and profitable on audits, reviews and compilations.

Semi-senior - Level 2

September 27-29 (24 CPE hours)

Early Bird Fee: Register by September 13
KyCPA member: \$789 Nonmember: \$889

To enable more experienced staff to complete smaller audits, reviews and compilations with minimum supervision and maximum profitability.

CFO Series

The Virtual CFO Series features a weekly two-hour webinar for senior level financial managers and executives, CFOs and those who aspire to be CFOs. Each Friday, participants will tackle a different topic to support their roles and responsibilities as a CFO.



In partnership with the
Kentucky Society of CPAs

Convenient

2 CPE hours
Each Friday 11 a.m. – 1 p.m. EST

Cost-effective

Single registration: \$79
June bundle: \$229

Register at bit.ly/CFOseries

- **June 4:** Closing Best Practices—Shorten Month End (Accounting)
John L. Daly, MBA, CPA, CMA, CPIM
- **June 11:** Making Internal Audit an Asset for the CFO (Auditing)
Charles Silvey, CPA
- **June 18:** Exploring and Deploying the Microsoft 365 Apps (Information Technology)
John Higgins, CPA, CITP
- **June 25:** Controlling Management Continuity Risk (Auditing)
Don Minges, MBA

2021 CPE calendar

Date	Title	Start time	End time	CPE hours	Member early fee
6/9	K2's Next Generation Excel Reporting	9:30 a.m.	5 p.m.	8	299
6/10	K2's Technology Update	9:30 a.m.	1 p.m.	4	169
6/10	K2's Case Studies in Fraud and Technology Controls	2 p.m.	5:30 p.m.	4	169
6/11	K2's Securing Your Data – Practical Tools for Protecting Information	9:30 a.m.	1 p.m.	4	169
6/11	K2's Small Business Cloud Accounting Shootout	2 p.m.	5:30 p.m.	4	169
6/10	Real Estate Workshop	8:30 a.m.	12 p.m.	4	199
6/14	Audits of Employee Benefit Plans Subject to ERISA	8:30 a.m.	4 p.m.	8	299
6/17	Estate Planning Conference	8 a.m.	4:55 p.m.	9.5	324
7/12	Cryptocurrency and the Gig Economy	9 a.m.	11 a.m.	2	99
7/12	Debt Cancellation	1 p.m.	3 p.m.	2	99
7/12	Employee/Independent Contractor	4 p.m.	5 p.m.	1	59
7/12	K2's Advanced QuickBooks Tips and Techniques	9:30 a.m.	1 p.m.	4	169
7/12	K2's Improving Productivity With Office 365 Cloud Applications	2 p.m.	5:30 p.m.	4	169
7/13	K2's Business Intelligence, Featuring Microsoft's Power BI Tools	9:30 a.m.	5 p.m.	8	299
7/13	IRS Representation	9 a.m.	5 p.m.	8	299
7/14	K2's Excel Tips, Tricks, and Techniques for Accountants	9:30 a.m.	5 p.m.	8	299
7/14	Vacation Homes	9 a.m.	10 a.m.	1	59
7/14	Vehicle Deductions	11 a.m.	12 p.m.	1	59
7/14	Payroll-Hiring/Forms/Compliance	1 p.m.	3 p.m.	2	99
7/16	Community Bank Update	9 a.m.	4 p.m.	7	299
8/9	Preparations, Compilations and Reviews	9 a.m.	5 p.m.	8	299
8/10	A&A Update	9 a.m.	5 p.m.	8	299
8/11	1041 for Estates & Trusts	9 a.m.	5 p.m.	8	299
8/16	Conducting a Remote Audit	8:30 a.m.	12 p.m.	4	169
8/16	You Have a SOC 1® Report — Now What?	1 p.m.	4:30 p.m.	4	169
8/17	Form 990: Best Practices for Accurate Preparation	8:30 a.m.	4 p.m.	8	299
8/19	Forensic Accounting and Litigation Conference	8 a.m.	12:30 p.m.	8	324
8/19-8/20	Forensic Accounting and Business Valuation and Litigation Conferences	8 a.m.	12:30 p.m.	16	449
8/20	Business Valuation and Litigation Conference	8 a.m.	12:30 p.m.	8	324
8/25	Applying the Uniform Guidance in Your Single Audits	8:30 a.m.	4 p.m.	8	299
8/26	Professional Issues and Ethics Update	1 p.m.	4:45 p.m.	4	79
8/31	Understanding the High Stakes Mega Issues in A&A Today	8:30 a.m.	12 p.m.	4	169
8/31	Small-Business Accounting, Audit, and Attest Update	1 p.m.	4:30 p.m.	4	169
8/31-9/2	Basic Audit Staff Training - Level 1	8 a.m.	1:15 p.m.	24	789

Date	Title	Start time	End time	CPE hours	Member early fee
9/8	Current Issues in Accounting and Auditing: An Annual Update	8:30 a.m.	12 p.m.	4	169
9/8	Preparation and Compilation Engagements under the SSARS	1 p.m.	4:30 p.m.	4	169
9/9	Going Concern Accounting and Reporting Considerations in the COVID-19 Environment	8:30 a.m.	10:20 a.m.	2	99
9/9	Annual Update for Defined Contribution Plans	10:40 a.m.	12:30 p.m.	2	99
9/16-9/17	CPAs in Business and Industry Conference	8 a.m.	4:30 p.m.	16	449
9/20	Guide and Update to Compilations, Reviews, and Preparations	8:30 a.m.	12 p.m.	4	169
9/20	Financial Reporting Implications of the COVID-19 Pandemic	1 p.m.	4:30 p.m.	4	169
9/21	Professional Issues and Ethics Update	1 p.m.	4:45 p.m.	4	79
9/23	Revenue Recognition: Identifying the Contract and Performance Obligations	8:30 a.m.	10:20 a.m.	2	99
9/23	Lessee and Lessor Accounting	10:40 a.m.	12:30 p.m.	2	99
9/23	Revenue Recognition: Determining and Allocating the Transaction Price	1 p.m.	2:50 p.m.	2	99
9/27	Financial Institutions Conference	8:30 a.m.	4:30 p.m.	8	324
9/27	The Most Critical Challenges in Not-for-profit Accounting Today	8:30 a.m.	12 p.m.	4	169
9/27	Applying the New Yellow Book to a Financial Statement Audit	1 p.m.	4:30 p.m.	4	169
9/27-9/29	Semi-Senior Audit Staff Training - Level 2	8 a.m.	1:15 p.m.	24	789
10/18-10/20	Beginning In-Charge Staff Training - Level 3	8 a.m.	1:15 p.m.	24	789
10/18	Current Audit Environment and ASB Activity	8:30 a.m.	10:20 a.m.	2	99
10/18	Performing Preparation, Compilation, and Review Engagements	10:40 a.m.	12:30 p.m.	2	99
10/21	Ohio Valley Construction Conference	TBD	TBD	8	TBD
10/25-27	Supervisor Training: Management & Leadership - Level 4	8 a.m.	1:15 p.m.	24	789
10/26	Accounting for Exchange Transactions, Contributions and Gains and Losses	8:30 a.m.	10:20 a.m.	2	99
10/26	Accounting for Expenses in a NFP	10:40 a.m.	12:30 p.m.	2	99
10/27	IRS Liaison Meeting	12:30 p.m.	4 p.m.	4	29
10/28	Employee Benefits Plans Conference	8 a.m.	4 p.m.	8	324
10/29	Surgent's Best Federal Tax Update	8:30 a.m.	4 p.m.	8	299

Date	Title	Start time	End time	CPE hours	Member early fee
11/3	Select Estate and Life Planning Issues for the Middle-Income Client	8:30 a.m.	12 p.m.	4	169
11/3	Advanced Trust Issues: A Roadmap for Success in An Increasingly Complex Area	1 p.m.	4:30 p.m.	4	169
11/5	The New Auditors' Reporting Standards	8:30 a.m.	4 p.m.	8	299
11/8	Garverick Federal Tax Update- Individuals	8:30 a.m.	4 p.m.	8	299
11/9	Garverick Federal Tax Update- Business	8:30 a.m.	4 p.m.	8	299
11/10	Accounting and Auditing Update	8:30 a.m.	12 p.m.	4	169
11/10	Preparation, Compilation, & Review Engagements: Update & Review	1 p.m.	4:30 p.m.	4	169
11/11	Professional Issues and Ethics Update	1 p.m.	4:45 p.m.	4	79
11/12	Mastering Basis, Distributions & Loss Limitation Issues for S Corps, LLCs & Partnerships	8:30 a.m.	4 p.m.	8	299
11/15-11/16	Technology Conference	8 a.m.	4 p.m.	16	449
11/17	IRS Tax Examinations and Hot Issues	8:30 a.m.	12 p.m.	4	169
11/17	Commercial Real Estate Conference	8 a.m.	4:10 p.m.	8	324
11/18	Professional Issues and Ethics Update	1 p.m.	4:45 p.m.	4	79
11/18	FASB Activities Impact on NFP Financial Reporting	8:30 a.m.	10:20 a.m.	2	99
11/18	Not-for-Profit Financial Reporting	10:40 a.m.	12:30 p.m.	2	99
11/18	Real Frauds Found in Not-for-Profits	1 p.m.	2:50 p.m.	4	169
11/22	Buying and Selling a Business: Tax and Structuring Overview	8:30 a.m.	12 p.m.	4	169
11/22	Maximizing Your Social Security Benefits	1 p.m.	4:30 p.m.	4	169
11/23	Construction Contractors: Accounting Considerations	8:30 a.m.	12 p.m.	4	169
11/23	Construction Contractors: Auditing Considerations	1 p.m.	4:30 p.m.	4	169
11/29	Professional Issues and Ethics Update	1 p.m.	4:45 p.m.	4	79

CPE packages: Webinars and more

Surgent's Unlimited Webinar Package

40+ webinars offered every week, including weekends, airing at a variety of convenient times throughout the day and evening. Only \$425 for members.

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For \$595, members can enjoy 12 months of access to every Surgent CPE course in every online format--plus unlimited CPE credits. This includes premium courses, such as late-breaking tax updates, specialized courses, and the popular Futurecast series.

Date	Title	Start time	End time	CPE hours	Member early fee
12/1	Section 199A: Applications and Challenges	1 p.m.	4:30 p.m.	4	169
12/1	Section 199A: Schedule K-1 Reporting by Relevant Passthrough Entities	8:30 a.m.	12 p.m.	4	169
12/3	Advanced Auditing of HUD-Assisted Projects	8:30 a.m.	4 p.m.	8	299
12/6	After the SECURE Act: Comparing and Contrasting Retirement Plans for Small- and Medium-Sized Businesses	8:30 a.m.	10:20 a.m.	2	99
12/6	Strategies for Maximizing Social Security Benefits	10:40 a.m.	12:30 p.m.	2	99
12/9	Kentucky State Tax Conference	8 a.m.	4:30 p.m.	8	324
12/13-14	2-Day Federal Tax Update	8 a.m.	4 p.m.	16	499
12/13	IRS Tax Examinations and Hot Issues	1 p.m.	4:30 p.m.	4	169
12/13	Working Remotely: Best Practices, Challenges, and Opportunities	8:30 a.m.	10:20 a.m.	2	99
12/13	Work-Life Balance: Maximizing Productivity and Understanding Related Tax Issues	10:40 a.m.	12:30 p.m.	2	99
12/14	Limited Liability Companies: Losses, Liquidations, Terminations, Continuations, and Sales	1 p.m.	4:30 p.m.	4	169
12/14	Fraud Basics: Protecting the Company Till	1 p.m.	4:30 p.m.	4	169
12/14	Annual FASB Update and Review	8:30 a.m.	12 p.m.	4	169
12/14	Securing a Comfortable Retirement	8:30 a.m.	12 p.m.	4	169
12/15	Four Tiers of Loss Limitations: A Guide to the New Rules for Pass-through Entities	8:30 a.m.	12 p.m.	4	169
12/15	Employer's Handbook: Health Care, Retirement, and Fringe Benefit Tax Issues	1 p.m.	4:30 p.m.	4	169
12/16	S Corporation Taxation: Advanced Issues	8:30 a.m.	12 p.m.	4	169
12/21	Financial Statement Disclosures: A Guide for Small and Medium-Sized Businesses	8:30 a.m.	12 p.m.	4	169
1/6-1/7/22	2-Day Federal Tax Update	8 a.m.	4 p.m.	16	499

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**Kentucky Society
Certified Public Accountants**

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