Welcome to the Checkpoint Learning 2016 preview catalog! This issue provides an overview of our extensive learning solutions that are available in virtually all delivery formats. Live events promoted in this catalog include week-long conferences, public seminars during the first two quarters of the year and webinars during the first quarter. Please be sure to visit us online for complete 2016 event schedules as they are published for the year.

Take a look at pages 4 – 6 for our line-up of Checkpoint Learning Certificate Programs, now including Forensic Accounting, Tax Fundamentals, Tax Research and Health Care Reform.

If you’re not a current subscriber, I encourage you to take a look at the Checkpoint Learning Premier Plus CPE Package — we are delighted with the customer response to this annual subscription package. Premier Plus is an all-in-one CPE content and workflow option that provides a ton of learning choices and saves time and money — there is no better continuing education option in the market (page 28 – 29).

Thank you for giving us the opportunity to be part of your continuing education needs this year! We are excited about our 2016 lineup and are confident that we have the seminars, courses and online platform to provide the most cost-effective, useful and enjoyable CPE for you this season.

Sincerely,

Kenneth Koskay
Senior Vice President
Learning Solutions
WHAT’S NEW...

TAX FUNDAMENTALS CERTIFICATE PROGRAM
Our Tax Fundamentals Certificate Program ensures your team knows what’s behind the forms. Make sure your team is as efficient as possible with a foundational understanding of individual, partnership, C Corporation and S Corporation taxation concepts and current issues.
See page 5.

UPDATED LIVE EVENT SCHEDULES
Go ahead and plan your learning year!
Gear Up conferences and seminars through June 2016
See pages 8 – 14.
AuditWatch public seminars through June 2016
See page 19.
Webinars through April 2016:
See pages 36 – 39.

Q2 VIRTUAL CONFERENCES
We’ve got events coming up in May and June from the Checkpoint Learning Virtual Conferences line; see upcoming dates (details on website).
See page 37.

LOOK FOR SUBSCRIPTION, EARLY BIRD DISCOUNTS AND QUANTITY SAVINGS OPPORTUNITIES THROUGHOUT THE CATALOG!

PREMIER AND PREMIER PLUS
Look for the green icon for information on what products are included with the Premier Plus and Premier CPE Packages or what discounts apply to select product lines for subscribers. Applies at various levels to Gear Up, AuditWatch, Checkpoint Learning webinars, online courses and downloadable self-study courses. Details: page 29.

EARLY BIRD DISCOUNT
Look for this orange icon for information on what Early Bird offers apply to select product lines. Gear Up and AuditWatch both have a variety of Early Bird offers available. Gear Up details: pages 7 – 14. AuditWatch details: pages 16 – 19.

QUANTITY DISCOUNT
Look for the blue icon for information on what quantity discount offers apply to select product lines. Checkpoint Learning webinars and print-based self-study based on PPC Guides both have quantity discount offers available. Details: pages 35 – 39, 41 – 42.

CONTACT US
General Information and Sales:
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YouTube: youtube.com/trainingcpe

Catalog publication December 2015. CPE accreditation information, including NASBA, QAS Self Study, IRS, CFP and CTEC, can be found by product line inside this catalog and in more detail at cl.thomsonreuters.com.
CERTIFICATE PROGRAMS
A new level of assurance in practical skills training

■ **New! Tax Fundamentals Certificate Program**
  Develop a stronger, smarter tax team that understands the concepts behind tax form completion.
  Page 5

■ **Forensic Accounting Certificate Program**
  Increase your practice development and career opportunities related to fraud and forensic accounting.
  Page 5

■ **Tax Research Certificate Program**
  Develop and enhance foundational tax research knowledge to ensure consistency and accuracy every time.
  Page 6

■ **Health Care Reform Certificate Program**
  Increase your client consulting and revenue opportunities related to health care reform legislation.
  Page 6

Tax and accounting professionals are required to be knowledgeable about a wide range of very technical topics. If they aren’t, it can cost time, money and client confidence. That’s why we developed Checkpoint Learning Certificate Programs. Offered in online and webinar blended learning formats, these programs can be completed in three months to a year and are a great way to earn CPE and gain specialized technical expertise in key subject areas. Checkpoint Learning Certificate Programs deliver much more than specialized knowledge — they also deliver the peace of mind that comes with knowing that you and your staff have what it takes to handle the complex practice areas.
TAX FUNDAMENTALS CERTIFICATE PROGRAM
Basics to Big Picture: Federal Tax Concepts

Learn what’s behind the forms for a stronger, smarter team. A firm grasp on the fundamentals makes for more efficient, effective tax professionals. Recent years have seen last-minute tax legislation focused on new and extended benefits — knowing how these critical changes fit into the big picture is as critical as keeping current with new regulations. Tax practitioners are obligated to provide their clients with the most accurate information and advice in complying with tax reporting requirements — which means every member of your tax preparation team will benefit from having the general knowledge in a broad range of tax topics provided by the Checkpoint Learning Tax Fundamentals Certificate Program™.

Make sure your tax team is as efficient as possible with a foundational understanding of individual, partnership, C Corporation and S Corporation taxation concepts and current issues.

$499 | 40 CPE credits

FORENSIC ACCOUNTING CERTIFICATE PROGRAM
Take a Closer Look at What’s Behind the Numbers

In today’s business environment, fraud is pervasive — so much that no entity or individual is immune to the threat. The demand has never been higher for forensic accounting professionals with the combination of education, skills and experience needed to detect and deter fraud. We have designed the Checkpoint Learning Forensic Accounting Certificate Program™ to ensure that you are equipped with both education and skills that enable you to act with confidence, certainty and authority when it comes to identifying fraud, supporting litigation and resolving disputes.

Expand your skills and expertise, meet CPE, CFF and CFE continuing education requirements and increase practice development and career opportunities.

$499 | 32 CPE credits

Catalog code: CC016
TAX RESEARCH
CERTIFICATE PROGRAM
Build a Solid Foundation for Your Tax Research

You know it’s vital that your staff is competent in tax research. Unfortunately, tax research proficiency is too often underserved by formal education programs, leaving accountants missing key skills required to perform tax engagements effectively. This program is ideal for anyone wanting to improve their tax research skills and become more efficient, from senior and managing tax professionals to entry-level staff and those re-entering the workforce after an extended leave. The Checkpoint Learning Tax Research Certificate™ Program helps candidates develop foundational tax research knowledge while earning Continuing Professional Education credit.

Managers:
Increase your staff’s level of tax research proficiency and ensure consistency across your team.

Professionals:
Display your expertise to current and prospective employers when you add this certificate to your resume and LinkedIn profile.

$599 | 22 CPE credits

HEALTH CARE REFORM
CERTIFICATE PROGRAM
Your Blueprint to the Affordable Care Act

The implementation of the Affordable Care Act has left a lot of questions for tax practitioners.

It’s left a lot of questions for clients, too — only they expect you to have all the answers. We have designed the Checkpoint Learning Health Care Reform Certificate Program™ to ensure that you know the ins and outs of the new health care regulations. Candidates will gain a higher level of confidence when it comes to the employer and individual mandates of the Affordable Care Act. The completed certificate program represents competency with legislative updates, reporting requirements, forms and calculations, health insurance marketplaces, net investment income tax and client consulting on both tax and non-tax health care reform issues.

Increase your client consulting and revenue opportunities related to health care reform.

$499 | 27 CPE credits
**Gear Up** is an extensive education and information source that includes nationwide seminars, destination conferences and self-study courses. Our speakers and authors are leading tax and accounting practitioners who provide insightful application of tax and accounting information.

- More than 45 years experience
- IRS-approved continuing education provider for IRS PTIN holders and EAs
- Full-day seminar attendees receive continental breakfast, lunch, break refreshments, daily free parking (excludes valet) and comprehensive manual
- Week-long CPE conferences combine work and play, enabling attendees to earn 40 – 48 CPE credits in exciting locations
- Self-study courses are available in print format with optional video and audio presentations
- Manuals for our flagship 1040 and Business Entities courses are now available for free on ProView eReader with qualifying self-study purchase or Gear Up seminar registration at a Thomson Reuters-sponsored event

All Gear Up courses require a basic knowledge of federal tax laws, and provide the latest updates and comprehensive overviews of each course topic covered. Unless otherwise stated, there are no other prerequisites or advanced preparation required to take courses. Gear Up seminars and conferences are group-live delivery method. Please note: CPE credit amounts based on a 50-minute hour. For more CPE information including detailed course descriptions and learning objectives, visit cl.thomsonreuters.com/G.

Gear Up is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. Gear Up is approved for group live and QAS self-study delivery methods. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org.

Gear Up's National Registry of CPE Sponsor membership includes Gear Up seminars (hosted directly by Gear Up); Quickfinder/Gear Up standalone self-study courses, and Gear Up self-study programs only.

Gear Up is an approved California Tax Education Council (CTEC) continuing education provider and offers several courses that are eligible for credit for CRTPs. Visit cl.thomsonreuters.com/G for more CTEC specifics.

Gear Up is an IRS approved continuing education provider, and offers several courses that are eligible for credit for IRS PTIN holders (Including Enrolled Agents).

Gear Up is proud to offer courses accepted by the CFP board qualifying for CFP credit! Look for the CFP logo on the following pages. Please note, CFP credit applies only to self-sponsored seminars at the full CPE credit value; it applies to self-study products at half the CPE credit value. CFP®, CERTIFIED FINANCIAL PLANNER®, and the CFP® logo are certification marks owned by the Certified Financial Planner Board of Standards, Inc. These marks are awarded to individuals who successfully complete CFP® Board’s initial and ongoing certification requirements.
2016 GEAR UP CONFERENCES

JACKPOT IN LAS VEGAS

Save $50 with Early Bird up to $216 with Premier or up to $360 with Premier Plus! Details below. Early Bird expires May 2, 2016.

MAY 31 – JUNE 4, 2016 | LAS VEGAS, NV
40 CPE CREDITS | $899

Hear from top-notch speakers, network with your peers and earn up to 40 CPE credits while enjoying Las Vegas. Our springtime Jackpot event features a two-day accounting course and an array of sessions that provide time to focus on tax planning, technology, audits, fraud and more!

LAS VEGAS MIRAGE

The Mirage has transformed the modern Las Vegas experience, bringing you the best in entertainment, dining, hotel luxury and nightlife. From royal white tigers to a private oasis and an active volcano to The Beatles™ LOVE™, it’s all right here at the center of the Strip! Mirage luxury rooms provide AAA Four-Diamond luxury amenities, Sealy® Posturepedic pillow-top beds, LED TVs and iHome™ MP3 player docks to enjoy your own playlist. And our restaurants range from fine dining to casual, with a range of flavors and drinks to satisfy your appetite. Whether it’s a flame-grilled steak dinner in an intimate lounge or all-you-can-eat Brazilian BBQ set in a tropical rainforest, there is always accounting for taste. Special room block rates expire April 30, 2016.

Call 800.374.9000 and mention Gear Up for reservations.

ROYAL FLUSH IN LAS VEGAS

Save $50 with Early Bird up to $200 with Premier or up to $333 with Premier Plus! Details below. Early Bird expires July 1, 2016.

NOVEMBER 28 – DECEMBER 3, 2016 | MIRAGE HOTEL | 48 CPE CREDITS | $999

Welcome back to Las Vegas for a week of practical learning led by Gear Up speakers! Plan early and lock in your savings for this wintertime conference. Our flagship event for many years, Royal Flush never fails to draw a record crowd and sell out rooms. Whether you’re all about the Vegas getaway or hitting the books before the holidays, Royal Flush will deliver learning and fun.

MAGIC WEEK IN ORLANDO

Save $50 with Early Bird up to $223 with Premier or up to $372 with Premier Plus! Details below. Early Bird expires July 1, 2016.

DECEMBER 2016 | 40 CPE CREDITS | $929

Complete your CPE and enjoy some R&R — head to the Disney Yacht Club Resort in sunny Orlando! December is the perfect time to escape for a week of Florida sunshine. Plus, you’ll be sitting pretty for year-end CPE requirements while being fully prepared for the upcoming tax season with this week-long learning event.

PREMIER & PREMIER PLUS:
Subscription Packages include savings up to $372 when you apply your full annual live event discount to a Gear Up Conference! Details: page 29.

EARLY BIRD DISCOUNT:
Early Bird prices shown in orange on this page. See specific Early Bird expiration date under each conference header.
GEAR UP SEMINARS

ACCOUNTING | BASIC
16 CPE CREDITS | LIVE: 2 DAYS, $399* OR $359 EARLY BIRD
8 CPE CREDITS | LIVE: 1 DAY, PRICING: SEE WEBSITE

Not since 1978 when the AICPA promulgated the Statements on Standards for Accounting and Review Services (SSARS) has there occurred such a radical change to the way accountants prepare and present financial statements. The reason: SSARS No. 21. Released October 23, 2014. This new document obligates every accountant to become updated now.

The 2015 Gear Up Accounting course will cover the new engagement letters, totally revised management representation letters and the dramatically reconstructed versions of the accountant’s report. AND note this: There is a new level of accounting service entitled “The Preparation” which can be issued without the need of an accountant’s report!

Other topics include:
• Coverage of Special Purpose Financial Reporting Framework (formerly OCBOA)
• Note disclosures: How much detail should there be?
• Peer review: How should a firm prepare for it?
• Learn about how a peer reviewer evaluates your practice by examining for yourself the peer reviewers checklist
• Professional ethics: What constitutes “ethical” conduct in a tax and write-up practice?
• Practice management: Value billing versus hourly billing
• GAAP update:
  – Will Fair Value Accounting replace historical cost?
  – When do variable interest entities require financial statement consolidation?
  – What are the new leasing standards, changes in revenue recognition concepts, tests for impairment and how does each impact disclosure on OCBOA statements?

This course is also available in a one-day version that addresses many of the two-day topics but in lesser depth.

Two-Day:
NV Las Vegas: June 1 – 2
MN Bloomington: TBA
NJ Monroe: TBA

Technology 3.0
COMPUTER SCIENCE | BASIC
8 CPE CREDITS | LIVE | $239 OR $209 EARLY BIRD

We all face technology issues practicing tax and accounting. This course helps the busy practitioner use the best in new technology in their practice. We demonstrate practical real-world solutions to solve practice issues.

• Windows 10: What you need to know and when to make the switch!
• Using the cloud to multiply your efficiency and effectiveness
• The mobile accountant: Using smart phones, tablets and ultra-books in your practice
• Optimizing electronic documents and workpapers in the modern accounting and tax practice
• Work smarter, not harder! Great utility software that can make life easier in the office
• Security, remote access and backing up data: How to properly set up and maintain your systems
• Floware: Managing daily office activities from your computer

NV Las Vegas: May 31

*Pricing shown for Gear Up-sponsored states (in blue) only. Some seminars’ prices vary by state; see exact pricing on website. Check website for all association-sponsored events (in black); pricing set by associations. All Gear Up self-sponsored seminars begin at 8:00 a.m. unless otherwise noted. Note, CFP credits for self-study are half the amount listed for each title.
GEAR UP

ETHICS FOR THE TAX PROFESSIONAL

2 CPE CREDITS | REGULATORY ETHICS | BASIC | LIVE: $79* OR $69 EARLY BIRD
CREDITS ONLY APPLY FOR: EA, CTEC

The Office of Professional Responsibility (OPR), headed by Karen Hawkins, has been very busy, ensuring that Circular 230 Practitioners follow rules that prescribe and proscribe our behavior. We will discuss what we can — and must — do to assist our clients while maintaining ethical integrity and complying fully with Circular 230 rules. Learn how to be a zealous advocate while playing by the rules. Join us for a highly interactive discussion on the topic of our professional responsibilities before the IRS. CTEC approved.

In many states, this course qualifies for CPA ethics. Please determine with your local licensing agency if this qualifies in your state. Not applicable in California for CPA requirements.

NV Las Vegas: June 2, 4:45 p.m.

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REGULATORY ETHICS | BASIC | FOR: CPA, CTEC

4 CPE CREDITS

In the fast-paced Gear Up course, we cover the ethical guidance provided by the AICPA and we cover the recently revised Treasury Department Circular 230. We discuss the rules, illustrate with enforcement actions and pepper the class with stimulating discussions and class interaction. Qualifies for CTEC ethics requirement.

The statute states: A licensee renewing a license in an active status shall complete four hours of the 80 hours of continuing education required pursuant to subsection (a) in an ethics course. The course subject matter shall consist of one or more of the following areas: a review of nationally recognized codes of conduct emphasizing how the codes relate to professional responsibilities, case-based instruction focusing on real-life situational learning, ethical dilemmas facing the accounting profession or business ethics, ethical sensitivity and consumer expectations.

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1040 TAX UPDATE

TAXATION | UPDATE | FOR: CPA, EA, CTEC, CFP*, ALL TAX PROS
4 CPE CREDITS

All seminars begin at 1:05 p.m.

This course is for the busy tax professional who needs to know the essentials of important changes from the previous year, including recent tax law changes, court cases and IRS rulings.

This course combines with the California Tax Update in the morning to grant nine CPE credits.

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<th>1040 Tax Update</th>
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1040 INDIVIDUAL TAX

TAXATION | BASIC | FOR: CPA, EA, CTEC, CFP*, ALL TAX PROS
16 CPE CREDITS | LIVE: 2 DAYS, $399* OR $359 EARLY BIRD*

This comprehensive course covers key tax issues for completing complicated individual returns. All topics include coverage of new legislation, revenue rulings and procedures, as well as case law to help the busy practitioner keep current. Speakers are all practicing preparers who share practical tips and insights to help you get ready for this tax season. Some of the specific topics for the 1040 seminar include:

- Reporting health care coverage in 2015
- Permanent and temporary extensions
- Using safe harbors in Repair and Capitalization regulations
- Individual and energy extenders
- Updates from late 2014 through 2015

CA Long Beach: Jan 14 – 15

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PREMIER & PREMIER PLUS:

Subscription packages include 40% off regular price of self-sponsored Gear Up events (cities/dates in blue)! Combined Gear Up/AuditWatch annual max: 24 hrs Premier, 40 hrs Premier Plus. No expiration. Details: page 29.

EARLY BIRD DISCOUNT:

Save 15% on public seminars! Early Bird prices shown in orange. Expires: July 1, 2016.
1040 AND BUSINESS ENTITIES PROVIEW EBOOK MANUALS

Now available free with seminar* or self-study purchase! Travel light with this electronic format, accessible on your tablet, smart phone or computer. You can take notes and make highlights as you would with a printed manual, and they will be saved no matter where you next access your ProView manual. Internet service required only to download — after that, use your ProView manual anytime, anywhere. Please call 800.231.1860 to order your copy.

*Thomson Reuters-sponsored seminars only; does not apply to society-sponsored events. See listings in blue throughout the following pages.

BUSINESS ENTITIES

The two-day Business Entities course will consist of four four-hour sections:

Business Tax Update: Covering New Business Tax Law Changes and Trends

- The latest breaking news in tax law, whether from Congress, Treasury or the courts
- Review of extenders and current-year indexed amounts
- Review of changes in law from 2014 to 2015 and beyond
- Capitalization revisited: Capitalization and related change in accounting methods now that the smoke has cleared, including the latest revenue procedures
- ACA provisions that affect both large and small employers, including Medical Reimbursement pickles
- New reporting forms for health care coverage: reporting requirements for Forms 1095-B and 1095-C
- Employee/independent contractor update: responsibilities and reporting requirements
- Employee health coverage: what is reported and what is taxed on the W-2
- Other hot topics

S Corporation Review

- Strengths and weaknesses
- New law including final regulations on shareholder basis in debt
- Elections and late-election penalty relief
- IRS audit issues
- In-depth discussion of shareholder basis, at-risk basis and distributions
- In-depth discussion of the four components of S corp retained earnings
- Qualified S subsidiaries (QSubs) and disregarded entities
- LLCs electing S corp
- Disregarded entities in an S corp

Partnership/LLC Review

- Planning opportunities
- Dividends
- Transactions with partners
- Built-in gains
- Capital accounts vs. tax accounts
- Earnings and profits vs. retained earnings
- Disguised sale rules
- Special allocations: when they may be used and how they are done
- In-depth discussion of partner basis, at-risk basis and distributions
- When to use a partnership rather than an S corp

C Corporation Review

- Strengths and weaknesses with an emphasis on closely-held C corps
- Personal service, holding company and other tax traps
- Consolidated returns
- Passive loss rules in closely held C corps
- Earnings and profits vs. retained earnings
- Dividends
- Planning opportunities

The one-day seminars in Redding, San Diego and Orlando and the one-day self-study course will consist of the Business Tax Update and S Corporation sections. For all society-sponsored one day seminars, please contact the sponsoring organization for specific details.

The half-day Business Tax Update courses listed below may be combined with the Special Purpose Financial Reporting Framework course (formerly known as OCBOA) to provide eight CPE credits (four Tax and four Accounting).

Business Entities — One-Day

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Business Entities — Two-Day

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EARLY BIRD DISCOUNT:

Save 15% on public seminars! Early Bird prices shown in orange. Expires: July 1, 2016.
CALIFORNIA TAX UPDATE

TAXATION | UPDATE | FOR: CALIFORNIA CPA, CTEC
5 CPE CREDITS

We review how the many changes in federal tax law have major impact on California tax returns. In addition, we fully expect California to have several changes of its own. We will cover all changes including the following:

• The impact on taxpayers in California when California law does or does not conform to federal law
• The impact of the court’s decision on Proposition 8 and the preparation of tax returns for same-sex marriages and registered domestic partners
• Still more changes on reporting use tax on out of state purchases
• The impact of failing to extend mortgage forgiveness debt relief and repercussions of late conformity
• A review of the tax rates that apply to high-income taxpayers
• California property tax issues:
  – Update on California law with regard to deducting property tax
  – Resident or nonresident
• Should you move out of state prior to selling a business? With an in-depth analysis of timing of income
• The ever-important issue of “Nexus” — where is business actually being conducted
• Proposition 30 — allocating income to California: planning techniques
• State health exchanges and other impacts of health care reform on California tax returns

FEDERAL TAX UPDATE

TAXATION | BASIC | FOR: CPA, EA, CTEC, CFP®, ALL TAX PROS
8 CPE CREDITS

The Federal Tax Update is a one-day, fast-paced seminar that covers the latest developments affecting individuals, corporations, pass-through entities and estates and trusts. Written and taught by practitioners for practitioners, it is designed to provide you with practical, working knowledge of the latest tax law changes. Learn how to apply the newest code, regulations and tax court cases in your practice. This highly popular seminar will enable you to work more effectively and efficiently and a step-by-step reference manual.

California Tax Update

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Federal Tax Update

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**Price does not include optional grading fee of $89 if you require CPE credit.

PRACTICE DEVELOPMENT AND MANAGEMENT

8 CPE CREDITS | BUSINESS MANAGEMENT & ORGANIZATION | BASIC | LIVE: 1 DAY, $239 OR $209 EARLY BIRD*

Make more, work less and have fun doing it! We’ll teach you the 10 secrets to a successful tax and accounting practice. Learn how to develop relationships with clients and your team so that you can build a firm that has value whether you decide to work or sell it.

Also available: Interactive forms CD that will help your office work more effectively and efficiently and a step-by-step reference manual.

NV Las Vegas: May 31

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ESTATES AND TRUSTS

TAXATION | BASIC | FOR: CPA, EA, CTEC, CFP®, ALL TAX PROS
8 CPE CREDITS | LIVE: 1 DAY, $239 OR $209 EARLY BIRD*

This course can get you started in estate and fiduciary work as well as serving as a refresher for those who already practice in this area. Feel more comfortable when dealing with clients’ deaths, from the decedent’s final return to preparing Forms 1041 and 706. Fiduciary accounting, deductions, income in respect of a decedent and income distribution deduction are all covered. Become more familiar with the special terminology relating to estates and trusts. Changes to estate tax are reviewed and the Form 706 is examined in detail with particular attention focused on portability and new cases. The advantages and disadvantages of portability vs. the use of A-B trusts is covered. Post-mortem elections including alternative valuation and disclaimers are discussed as these are areas of particular interest to the tax preparer.

NV Las Vegas: June 4

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*Pricing shown for Gear Up-sponsored states (in blue) only. Some seminars’ prices vary by state; see exact pricing on website. Check website for all association-sponsored events (in black); pricing set by associations. All Gear Up self-sponsored seminars begin at 8:00 a.m. unless otherwise noted. Note, CFP credits for self-study are half the amount listed for each title.

**Premier & Premier Plus:** Subscription packages include 40% off regular price of self-sponsored Gear Up events (cities/dates in blue)! Combined Gear Up/AuditWatch annual max: 24 hrs Premier, 40 hrs Premier Plus. No expiration. Details: page 29.

**Early Bird Discount:** Save 15% on public seminars! Early Bird prices shown in orange. Expires: July 1, 2016.
FRAUD DETECTION
4 CPE CREDITS | AUDITING | BASIC

This fast-paced course is a forum for the discussion and implementation of techniques for the detection of fraud, the control of fraud and the implementation of fraud prevention tools for the Main Street client. The subject matter provides practical guidance to help the accountant help “Mom and Pop”-sized clients and midsized clients prevent the misclassification of financial statement transactions and/or the misappropriation of assets by outsiders, by employees — and, perhaps, by management itself. Fraud exists in both the financial and tax worlds, and this course discusses both areas to help the practitioner help the client. The course also discusses current and past consumer and financial frauds and fraud schemes, giving guidance and tips for the accountants to pass on to clients. We are practicing accounting in a different world. Learn to what extent the accountant is held responsible for failure to assist the client in the prevention and detection of fraud. In this modern age of technology, the course also focuses on the challenging and evolving potential of fraud committed using information technology via the internet and devices we use.

Meets 4-CPE fraud requirement for California CPA re-certification.

Fraud Detection

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IRS AUDITS, APPEALS AND COLLECTIONS:
SUCCESSFUL STRATEGIES
TAXATION | BASIC | FOR: CPA, EA, CTEC, ALL TAX PROS
8 CPE CREDITS

Understanding how to navigate the IRS can save the practitioner time, meaning a more effective and profitable representation of your client before the IRS. Notices are at an all-time high as the IRS tries to encourage compliance from taxpayers. Knowing how to effectively communicate with the IRS, presenting your response in a manner that the IRS expects and understanding IRS timelines have increased in importance.

Do you know what to do when you find your client faced with the inability to pay the amount the IRS is demanding? Walk through the pathway of the notice response and what to do about that levy and resolution with the IRS, delayed payment plans, installments or the Offer in Compromise. The IRS has become faceless and nameless. This course will work through proven strategies to help your client find confidence and comfort in the process.

Presented by speakers with decades of practical experience in dealing with the IRS in audits and collections, this course is invaluable to both the new or seasoned tax professional. Course discussions include:

- How to work to limit the scope of an audit
- When and how to take a case to Appeals
- Penalty abatement
- Analysis of real-life audit cases

IRS Audits, Appeals and Collections

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PREMIER & PREMIER PLUS:
Subscription packages include 40% off regular price of self-sponsored Gear Up events (cities/dates in blue)! Combined Gear Up/AuditWatch annual max: 24 hrs Premier, 40 hrs Premier Plus. No expiration. Details: page 29.

EARLY BIRD DISCOUNT:
Save 15% on public seminars! Early Bird prices shown in orange. Expires: July 1, 2016.
**Health Care Reform**

This course provides comprehensive coverage of Health Care Reform issues that affect individuals, small businesses and large businesses. This practical class includes many examples, reporting requirements, planning strategies and a review of actual forms. Topics include:

- Latest 2015 changes
- Small employer insurance issues
- Avoiding the $100 per day fine
- 2% S shareholder insurance
- Exchanges
- Individual Mandate
- Exemptions from Mandate
- Premium Assistance Credit
- Employer Mandate
- Reporting Requirements
- Insurance Discrimination
- Key Net Investment Income Tax tips

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**Farm and Ranch Tax Update**

Farm taxation has a multitude of unique tax issues that create a particular level of difficulty for practitioners who tackle Schedule F. This course reviews the newest tax issues impacting farmers and ranchers, including the newest tax legislation, ACA, recent court cases and new IRS interpretations. Keep your firm up to date to help ensure the accurate completion of your farm tax engagements. We also cover those annual pesky problems that farmers and ranchers present such as safe harbor vehicle usage, farm depreciation and line-by-line coverage in the manual of Schedule F.

Prereq: Experience in farm and ranch taxation.

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**IRAs, Pensions and Other Retirement Resources**

This course will cover the detailed and unique requirements of various types of retirement savings and other resources that are used in retirement planning. Coverage includes funding requirements to avoid disqualification during the working years and distribution options and opportunities during the retirement years. Know the best options for saving and distributing from retirement resources including social security.

NV Las Vegas: June 3

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AuditWatch serves the audit and accounting profession by providing leading experts to train and consult with firms that offer auditing services.

AuditWatch Training for tax, audit and yellow book staff is available in three delivery options: public live seminars, in-house seminars and customized training.

Plus, AuditWatch offers consulting, data services, customized course development and more.

- The recognized leader in audit productivity
- Integrated curriculum for audit professionals and CPA firms, audit process consulting and audit technology services
- Public live seminars offer open enrollment in major cities across the country while firm-specific seminars are conducted at your facility and customized training is tailored to meet your staff development needs
- Also available: materials only and customized webinar options
AUDITWATCH UNIVERSITY

KNOWLEDGE AND SKILLS

AuditWatch University (AWU) is an integrated development curriculum that provides your firm with the knowledge and skills to advance your professional staff. Starting with Basic Staff Training and culminating with management-level courses, AuditWatch University offers seven progressive levels of training. Seminars are offered in over 15 locations nationwide and are also available on an in-house basis.

LEVEL 1: BASIC STAFF TRAINING

| 32 CPE CREDITS | AUDITING, ACCOUNTING, COMMUNICATION | BASIC |

**Experience:** 0 – 4 months

This session helps new auditors get off to a great start by introducing them to the auditing field, basic audit responsibilities and keys to becoming a successful professional in public accounting. The course includes case studies in common audit areas typically completed by staff accountants and provides an overview of how each area fits into the big picture.

LEVEL 2: EXPERIENCED STAFF TRAINING

| 24 CPE CREDITS | AUDITING, ACCOUNTING | INTERMEDIATE |

**Experience:** 5 – 21 months

This session introduces auditors to the complete audit process and plan. It focuses on ways for staff and senior accountants to significantly participate in the risk assessment procedures, including efforts surrounding internal controls. In addition, significant time is spent on performance of further audit procedures including tests of details such as sampling, auditing estimates and analytical procedures. Finally, the course includes discussions of select technical accounting, auditing, documentation and business skills.

LEVEL 3: BEGINNING IN-CHARGE TRAINING

| 24 CPE CREDITS | AUDITING, COMMUNICATION | INTERMEDIATE |

**Experience:** 21 – 36 months

This session prepares auditors to take in-field responsibility for an audit engagement. It mixes discussion with case studies to provide an in-depth look at designing and completing the key steps in an audit, including completing the risk assessment procedures and making appropriate risk assessments. We include case study work on understanding, evaluating and verifying a client’s activity level controls within key business cycles. This session also includes modules on key business skills, including managing an engagement, supervising individuals and reviewing files.

LEVEL 4: EXPERIENCED IN-CHARGE TRAINING

| 24 CPE CREDITS | AUDITING, ACCOUNTING | INTERMEDIATE |

**Experience:** 3 – 4 years

This course moves experienced auditors beyond the basics, building upon experiences with leading engagements and providing insights and best practices on supervising, motivating and evaluating team members. The course challenges experienced auditors to improve the effectiveness and efficiency of their audit engagements through exercises and case studies on common audit scenarios. It also provides an in-depth look at higher-level audit tasks, such as entity-level controls, identifying and designing tailored responses to fraud risks and designing tests of controls.

LEVEL 4.5: BEYOND IN-CHARGE — TAKING THE NEXT STEP

| 2 DAYS | 16 CPE CREDITS | AUDITING, COMMUNICATION, PERSONAL DEVELOPMENT, ACCOUNTING | INTERMEDIATE |

**Experience:** 4 – 5 years

This course prepares experienced auditors to take the next step in their development as engagement and firm leaders. Building on the concepts introduced in Level 4: Experienced In-Charge Training, the course challenges auditors to champion the audit process by developing efficient audit plans, managing the audit process, working with clients, dealing with complex accounting and audit issues and wrapping up engagements. Course material also addresses key issues in performing review and compilation engagements, using special purpose frameworks and recognizing advanced financial reporting issues.

LEVEL 5: TAKING THE LEAD

| 24 CPE CREDITS | PERSONAL DEVELOPMENT, COMMUNICATION, ACCOUNTING, AUDITING | ADVANCED |

**Experience:** 5 – 6 years

In this course, participants reach beyond technical expertise to develop critical managerial skills to further their firm’s success. Participants learn results oriented leadership skills to better manage multiple engagements and teams and leave with specific individual professional development goals that may be integrated with their firm’s performance management model. The course also includes presentation skills, advanced communication and negotiation, business development and career success strategies.

LEVEL 6: DEVELOPING THE EXECUTIVE WITHIN

| 16 CPE CREDITS | PERSONAL DEVELOPMENT, ACCOUNTING, AUDITING | ADVANCED |

**Experience:** 6+ years

This course develops individuals who consistently interact and manage at the executive level. By learning and applying a variety of methods, participants enhance their effectiveness as emerging executives. Participants also explore how to increase their business development and managerial contributions to their firms through higher level performance. By analyzing the concept of executive presence, participants discover why it is such a critical component of business success and career advancement.

PREMIER & PREMIER PLUS:

Subscription packages include 25% off regular price of AuditWatch public seminars! Combined Gear Up/AuditWatch annual max: 24 hrs Premier, 40 hrs Premier Plus. No expiration. Details: page 29.

EARLY BIRD DISCOUNT:

Save 15% on AuditWatch, TaxWatch and Yellow Book University public seminars! Early Bird prices shown in orange. Expires: May 15, 2016.
### TAXWATCH UNIVERSITY

**TAX STAFF TRAINING FROM AUDITWATCH AND PPC**

PPC In-House training and AuditWatch now offer multiple levels of core tax staff training to your firm. The progressive training begins with an entry-level course focused on common topics likely to be encountered in the first year. This is followed by courses that provide greater depth on corporate tax issues, partnerships, LLCs and other special entities. This integrated curriculum is available through public seminars or in-house training.

### TAXWATCH UNIVERSITY — LEVEL 1

**24 CPE CREDITS | TAXATION | BASIC**

**Experience: 0 – 1 year**

This practical, hands-on program is designed for tax professionals primarily in their first year. This course provides learning opportunities surrounding common individual and corporate tax topics that they may encounter. The course is designed to provide information on the tax rules and to challenge the participants to complete case studies and exercises where they apply the rules and complete actual tax forms.

### TAXWATCH UNIVERSITY — LEVEL 2

**24 CPE CREDITS | TAXATION | INTERMEDIATE**

**Experience: 1 – 2 years**

This practical, hands-on program is designed for tax professionals in their first or second year. This course provides learning opportunities on intermediate corporate, individual and other entity type tax topics. The course is designed both to provide information on the tax rules and to challenge the participants to complete case studies and exercises where they apply the rules and complete tax forms.

### TAXWATCH UNIVERSITY — LEVEL 3

**24 CPE CREDITS | TAXATION | INTERMEDIATE**

**Experience: 2 – 3 years**

This program is designed for tax professionals with multiple years’ experience. This course provides learning opportunities on intermediate to advanced issues dealing with pass thru entities including S corporations, partnerships and LLCs and individual topics. The course is designed to provide information on the tax rules and includes challenging case studies and exercises where they apply the rules and complete actual tax forms.

### TAXWATCH UNIVERSITY — LEVEL 4

**24 CPE CREDITS | TAXATION | ADVANCED**

**Experience: 3 – 4 years**

This program is designed to advance a tax professional into more complex taxation issues. The program includes sessions on tax planning and saving strategies related to individuals and corporations. It also continues to provide training on technical tax issues mainly related to pass-through entities including partnerships and LLCs and more advanced corporate and individual issues.

### TAXWATCH UNIVERSITY — LEVEL 5

**16 CPE CREDITS | TAXATION, PERSONAL DEVELOPMENT, COMMUNICATION | ADVANCED**

**Experience: 5+ years**

This program is designed for seasoned tax professionals who would like to develop skill sets beyond the technical arena. This program focuses on business skills critical for professionals, such as practice development, management and communication. In addition, the course contains timely technical tax topics and updates as appropriate.

### FOR MORE INFORMATION AND SCHEDULING

cl.thomsonreuters.com/a

800.231.1860 for public seminars

800.775.9866 for in-house and customized training

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**PREMIER & PREMIER PLUS:**

Subscription packages include 25% off regular price of AuditWatch public seminars! Combined Gear Up/AuditWatch annual max: 24 hrs Premier, 40 hrs Premier Plus. No expiration. Details: page 29.

**EARLY BIRD DISCOUNT:**

Save 15% on AuditWatch, TaxWatch and Yellow Book University public seminars! Early Bird prices shown in orange. Expires: May 15, 2016.
YELLOW BOOK UNIVERSITY

With this multi-day series, you can choose to attend just the sessions that are most important to you.

AUDITING NONPROFIT ORGANIZATIONS AND GOVERNMENTAL AGENCIES

8 CPE CREDITS | AUDITING (GOVERNMENTAL) | BASIC

This session focuses on the fundamentals of auditing nonprofit organizations and governmental entities, including their unique characteristics. This session is designed to provide practitioners that are new to this practice area an overview of the audit fundamentals and to provide the experienced auditor with a solid refresher.

PERFORMING EFFICIENT AND EFFECTIVE SINGLE AUDITS

8 CPE CREDITS | AUDITING (GOVERNMENTAL) | BASIC

In this session, you will learn the key responsibilities of the auditor including how to determine major programs. Special attention is given to common single audit deficiencies, best practices, efficient and effective methods to test internal controls and compliance requirements (including sampling techniques) and development of meaningful audit findings.

GOVERNMENTAL AND NONPROFIT UPDATE

8 CPE CREDITS | ACCOUNTING, ACCOUNTING (GOVERNMENTAL), AUDITING, AUDITING (GOVERNMENTAL) | UPDATE

In this session, we update you on recently issued and effective authoritative pronouncements affecting governmental and nonprofit entities — including accounting, auditing, ethics, regulatory and compliance issues. This session will also address the practical implementation and practice issues related to the most significant new standards.

AUDITING NONPROFIT ORGANIZATIONS AND GOVERNMENTAL ENTITIES — ADVANCED TOPICS

8 CPE CREDITS | ACCOUNTING, ACCOUNTING (GOVERNMENTAL), AUDITING, AUDITING (GOVERNMENTAL) | ADVANCED

This session focuses on advanced audit and accounting issues unique to performing audits of nonprofit organizations and governmental entities. Topics include common practice and implementation issues relating to recent standards and recent risk alerts.

WEB-BASED NEW HIRE TRAINING “BOOT CAMP” FOR AUDIT STAFF

16 CPE CREDITS | ACCOUNTING, AUDITING | BASIC

We have taken our popular AuditWatch University Level 1: Basic Staff Training course and redesigned it to be delivered via the web. In this course, we will use WebEx, a web-based interactive learning platform, to lead participants through the key information they need to succeed as new staff auditors. The course is led by an AuditWatch instructor and combines lecture, interactive exercises and discussion. Topics include role of the staff accountant and scope of services, workpaper documentation and audit procedures, introduction to the audit plan and an in-depth review of the most common audit areas assigned to new staff, such as cash, accounts receivable, accounts payable, inventory and more!

PUBLIC WEB SEMINAR:
November 10 – 11
9:00 a.m. – 5:00 p.m. CST | $379 per attendee
Call us at 800.231.1860 for more information.

IN-HOUSE:
$6,995 for first 10 participants, $295 per person for additional participants.
Call us at 800.775.9866 for more information.

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PUBLIC SEMINAR SCHEDULES
2016 AUDITWATCH PUBLIC SEMINAR SCHEDULE

AUDITWATCH UNIVERSITY PUBLIC SEMINAR SCHEDULE

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TAXWATCH UNIVERSITY PUBLIC SEMINAR SCHEDULE

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<td>Washington DC</td>
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<td>10/19-21</td>
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YELLOW BOOK UNIVERSITY PUBLIC SEMINAR SCHEDULE

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<th>Government/Nonprofit Update</th>
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This price per person cost includes course tuition, materials, lunch and snacks.

Visit cl.thomsonreuters.com/a or call 800.231.1860 for public seminars or 800.775.9866 for in-house and customized training

PREMIER & PREMIER PLUS:
Subscription packages include 25% off regular price of AuditWatch public seminars! Combined Gear Up/AuditWatch annual max: 24 hrs Premier, 40 hrs Premier Plus. No expiration. Details: page 29.

EARLY BIRD DISCOUNT:
Save 15% on AuditWatch, TaxWatch and Yellow Book University public seminars! Early Bird prices shown in orange. Expires: May 15, 2016.
AUDITWATCH CONSULTING

Why AuditWatch?

Our Reputation and Experience.
We are the premier training and productivity consulting organization for the audit profession, with a customer base built from satisfied customer referrals. We have worked with the majority of Top 100 CPA Firms and several state auditor offices. Our consultants are CPAs who have worked at national, regional and local firms. They have consulted with a diverse array of organizations and industries, reviewed hundreds of engagement files and are familiar with many different audit approaches and audit methodologies.

Our Approach.
We have experienced consultants who deliver the AuditWatch Experience: a focus on practical advice that applies in the real world, delivered through engaging sessions that promote interaction and participation. Our consulting services are tailored to each engagement, maximizing our time together and your return on investment.

Our Successes.
Our customers often see immediate positive improvements in quality and efficiency and increased consistency among their teams and offices.

Our Expertise.
Among efficiency programs, the AuditWatch Productivity Program stands out for its unique combination of productivity tools, professional experience and technical expertise, enabling us to effectively identify issues, make recommendations and work with you to implement solutions. We understand the auditing standards, current practices of today’s auditors and the practical application of current audit methodologies. We also employ tools and concepts such as value stream mapping, waste elimination, DMAIC (Define, Measure, Analyze, Improve and Control) and other quality tools from LEAN, Six Sigma and other approaches to productivity.

PROCESS
Challenging the flow of the process at the firm-wide and engagement-team levels, including:
• Planning
• Review
• Client management
• Engagement wrap-up
• Production of deliverables
• Scheduling
Focus: Achieving a lean process and eliminating waste.

APPROACH
Making changes to the way an audit engagement team plans, executes and documents an audit, including:
• Aligning audit work to audit risk
• Choosing the most efficient mix of audit procedures
• Eliminating non-value-added procedures and documentation
• Reducing errors to minimize review points and rework
Focus: Challenging the way things have been done in the past.

CONTROL
Measuring and controlling audit productivity at the firm-wide and engagement-team levels, including:
• Using practical and effective budgets
• Identifying key engagement productivity metrics
• Analyzing and following up on results
• Establishing accountability
Focus: Establishing an ongoing process to measure, analyze and improve audit productivity.

“We not only experienced better realization and efficiency but created more opportunity for staff development. Our staff members were better prepared for fieldwork and more engaged with our clients.”
— Bryna Campbell Engel
AUDITWATCH CONSULTING

AuditWatch Productivity Program

The AuditWatch Productivity Program is a change driver designed to improve audit efficiency, quality and profitability. Our consultants work with you to reengineer the following critical aspects of the audit:

The AuditWatch Productivity Program

Through the highly customized AuditWatch Productivity Program, we work with you to determine the best way to identify and address your productivity issues, which may include:

- Reviewing audit engagement files, interviewing firm personnel, sending surveys and evaluating your audit methodology to diagnose specific productivity issues and opportunities
- Designing a productivity seminar to teach audit quality and efficiency principles, address obstacles and establish consensus about the path forward
- Conducting team reengineering workshops or facilitated planning sessions to guide team members in implementing changes to the engagement-level audit process, approach and control
- Organizing an audit productivity task force to establish the metrics, responsibilities and accountability for driving the initiative forward

AuditWatch Productivity QuickStart

The AuditWatch Productivity QuickStart is an affordable solution that provides valuable and practical information about how to prioritize your productivity efforts. Our consultants will review up to four of your audit engagements and provide feedback related to:

- Efficiency and quality improvement opportunities
- Execution of the audit methodology
- Performance of audit procedures
- Documentation
- Over- or under-auditing
- Your audit approach compared to other firms

This consulting engagement ends with a web-based meeting to discuss our observations, showing examples from your files and presenting you with a focused list of productivity opportunities and immediate action items.

AuditWatch Productivity QuickStart for Review Engagements

We will examine two of your review engagement files and look for opportunities to improve quality and efficiency. This program is conducted by experienced AuditWatch consultants and is designed to aid review practitioners and firm leadership in recognizing, framing and prioritizing opportunities for improvement in review engagements.

CURRICULUM CONSULTING SERVICES FROM AUDITWATCH

AuditWatch consultants will evaluate your firm's current learning and development program as well as the firm's approach to delivering continuing professional education (CPE). AuditWatch will conduct a full diagnostic including conducting firm surveys and interviews and reviewing firm training objectives and long term goals. We will provide recommendations for the continued improvement of your program to enable your team to develop professionally and receive more quality and timely continuing professional education (CPE). After we have gained an understanding of your firm's learning and development needs and objectives, we will make recommendations to your current program that are aligned with your firm's strategic business goals and industry standards.
In-House Training consists of over 50 on-site seminars offered on accounting and auditing, management, staff training, tax and Yellow Book topics.

Full day classes earn eight credits and cost as little as $2,999 (plus instructor’s travel costs) per day for the first 10 participants ($105 per additional person).

Build your own training day unique to your organization’s needs. Choose from our two- and four-hour course modules to custom design a CPE seminar.

- Choose from our highly rated instructors or provide your own with our “materials only” format
- Current, relevant course content is continually revised
- Also available: TaxWatch University presented by PPC and AuditWatch (see page 17 for details)
IN-HOUSE 2016 SEMINARS

1040 Individual Tax Update
Accounting and Auditing Update — All You Need to Know in 2016 **NEW!**
Analytical Procedures
Best Practices in Utilizing PPC’s SMART Practice Aids
Business Entities Tax Update
Compilation and Review Update
Estates and Trusts
Evaluating and Testing Internal Controls
Financial Reporting and Disclosures for Small Businesses
Fraud in Nonprofit Organizations and Governmental Units
Governmental and Nonprofit Accounting and Auditing Update — 2016
Key Issues in Auditing Nonprofit Organizations
Performing Efficient Single Audits
PPC’s Federal Tax Update **BEST SELLER!**
Performing Efficient Audits of Nonpublic Companies Using the PPC Audit Approach **BEST SELLER!**
Performing Efficient Audits of Employee Benefit Plans
Professional Ethics for Accountants
Sampling: Where, When and How

ALSO AVAILABLE FROM AUDITWATCH
AuditWatch University (Seven Levels of Audit Staff Training)
TaxWatch University (Five Levels of Tax Staff Training)
Yellow Book University (Four Days of Training)
Mastering the Basics of Data Extraction
Spotting Opportunities Using Data Extraction

ALSO AVAILABLE:
TaxWatch University, a core staff training program with levels from new hire through to experienced managers. See page 17 for details.
Group-study videos deliver timely news and in-depth analysis for better risk management, plus group-live credits.

CPE Network® — a news-style video subscription featuring in-depth, useful interviews with today’s foremost industry experts. You’ll receive a new issue 11 times per year or quarterly, depending on your choice of report(s). Subscriptions allow for up to 25 users (or call for large group pricing).

- Conduct an expert-led, in-house seminar for group live credit
- Satisfy up to 100% of your workforce’s CPE requirements
- Set a standard of excellence for your firm-wide training
- Build a company-wide reference library
- Keep your staff updated on the latest AICPA, FASB and SEC developments
- Provide weekly tax podcast updates
- Convenient DVD format allows you to pause to discuss the implications for your firms and clients
- Each program issue includes a DVD, full transcript, group discussion questions and suggested answers, supplemental reference material and a cumulative index and quiz

CPEasy is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org.
MONTHLY VIDEO SUBSCRIPTIONS

CPE NETWORK TAX REPORT

33 CPE CREDITS | TAXES | UPDATE | $929

Prepare your staff to meet the challenges of today’s rapidly changing tax laws and regulations. Each issue of this monthly report features top experts discussing today’s important taxation issues for individuals, estates and trusts, corporations and pass-through entities. Approved for CFP® continuing education (CE) credits!

Experts include: E. Lynn Nichols, CPA — nationally known tax author and an advisor to CPA firms across the country; Richard Bartholomew, JD, CPA, Director of Tax Services Girardot, Strauch & Co.; Don Paul Cochran, JD, CPA, CFP; Edward K. Zollars, CPA, Partner, Thomas, Zollars & Lynch, Ltd.; and Robert “Chris” Province, CPA.

CREDITS

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ONE-YEAR SUBSCRIPTION (11 ISSUES)

CPE NETWORK ACCOUNTING AND AUDITING REPORT

33 CPE CREDITS | ACCOUNTING & AUDITING | UPDATE | $929

Recent economic bubbles and crunches have caused regulators to scrutinize both financial statements and the standards used in preparing them. This popular subscription features high-quality group training that equips your entire team with the knowledge to handle any fiscal or financial crisis.

Experts include: J. Russell Madray, CPA, CIA, CMA, CFM/President of The Madray Group

CREDITS

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ONE-YEAR SUBSCRIPTION (11 ISSUES)

CPE NETWORK GOVERNMENTAL AND NONPROFIT ACCOUNTING REPORT

24 CPE CREDITS | ACCOUNTING & AUDITING (GOVERNMENTAL) | UPDATE | $729

A must-view for firms looking to stay ahead of the competition, this essential report will establish a quality standard for your company. Your subscription will keep your staff abreast of important GAO (Yellow Book), OMB, and other governmental and nonprofit issues relevant in the current financial operating environment.

Experts include: Betty A. Pendergrass, CPA, CGFM, Governmental Management Advisory Services

CREDITS

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ONE-YEAR SUBSCRIPTION (4 ISSUES)

CPE NETWORK COMBO PACKAGES

Get even more of the news your firm needs with a CPE Network combination report! These value-priced packages empower your staff with essential information, in-depth analysis and valuable CPE credits. Each multi-report collection creates a seamless relationship between firm-wide training and day-to-day business objectives.

CPE NETWORK ACCOUNTING AND AUDITING AND GOVERNMENTAL AND NONPROFIT ACCOUNTING REPORTS

SAVE $49

CREDITS

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CPE NETWORK TAX AND ACCOUNTING AND AUDITING REPORTS

SAVE $589 — MOST POPULAR PACKAGE

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CPE NETWORK TAX, ACCOUNTING AND AUDITING AND GOVERNMENTAL AND NONPROFIT ACCOUNTING REPORTS

SAVE $828

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GETTING STARTED IS EASY!

Call 855.300.9391 today.
Checkpoint Learning provides CPE compliance tracking, learning management, curriculum development and more.

- Purchase and complete courses individually or as part of a subscription package — CPE Subscription Packages provide outstanding offerings and flexibility at considerable savings (page 28)
- Optimized for tablet view on your iPad mobile device
- Personalized learning dashboard keeps all CPE records and courses in one place and provides CPE tracking and compliance monitoring while learning plans help meet individual goals
- Learning plans help meet individual employee training and career advancement goals
- ONESOURCE© integration allows dual users to search for CPE courses, view in-progress courses and status report manager
CHECKPOINT LEARNING MANAGEMENT

Checkpoint Learning integrates tools, features and content to manage all facets of learning for accounting and financial professionals.

- Compliance management, including complete tracking of state-to-state regulations and requirements
- Guidance for administering in-house learning
- Customizable, individual learning paths for employees and tools to measure course completion

Checkpoint Learning is the most comprehensive mandatory continuing education compliance management system available — and specifically designed for accounting and financial professionals.

COMPLETE CPE TRACKING AND COMPLIANCE MANAGEMENT

Checkpoint Learning manages continuing education compliance, including:

- Determining compliance periods and managing simultaneous compliance periods
- Tracking all credit categories, including prorated credit requirements
- Enforcing limits on CPE format types
- Calculating carryover credit
- Managing adjustments for reporting period extensions
- Tracking special requirements for new licensees

Our staff ensures the accuracy of Checkpoint Learning through monthly rule updates that are automatically integrated into the tracking system.

In addition to the jurisdictions shown in the box at right, your firm can create a custom CPE requirement to track minimum education requirements established by firm management or mandated by peer review standards. Checkpoint Learning also maintains complete and updated rule summaries for every regulator it tracks on its Resource page so that administrators can easily answer employees’ questions about continuing education compliance. Learning administrators are provided with an administrative view into all firm personnel records so that CPE compliance can be quickly confirmed. Checkpoint Learning can be configured to send employees regular email reminders informing them of their continuing education status.

CPE RULES TRACKING FOR:

- Every state in the United States (including Puerto Rico)
- Yellow Book
- IRS Enrolled Agents
- AICPA members
- CMA, CFP, CTEC and CIA
- More than a dozen additional tax and accounting affiliations

ADDITIONAL FEATURES

- **Managing your in-house seminars** — Employees will value the simplicity of searching, registering for and where applicable, launching classes through the intuitive learner interface. Administrators will value the time-saving tools for each aspect of in-house education.

- **Self-service course registration** — Learners can browse the university course calendar and register for courses or register for courses directly from email invitations. Registrants receive email confirmation with downloadable appointments that are ready for import into personal calendar software like Outlook and Lotus Notes.

- **Learning plan templates** — Design learning plans to match levels within your organization and/or competencies you want employees to achieve. You’ll be able to customize learning plans for individuals and generate firm-wide reports to measure the degree to which employees are meeting learning expectations.

- **Coaching feature** — Provides team leaders with direct access to their team members’ CPE information, learning plans and course registrations.

Professional development is more than counting CPE credits. Leading firms design targeted learning curricula to give employees the skills necessary for success in every phase of their careers.
Checkpoint Learning CPE Subscription Packages provide an opportunity to save money by bundling together the learning opportunities that matter most to you and your employees.

Choose from the Premier, Premier Plus, Compliance or Professional CPE Package — all of which provide a range of learning options at significant savings.

• One low subscription price covers all CPE for the year in a variety of formats
• Packages include online and download courses, webinars, live seminars and conferences and more
• CPE tracking and compliance monitoring included
• Select courses available with iPad-enabled mobile versions
CPE SUBSCRIPTION PACKAGES

If you haven’t subscribed to a Checkpoint Learning CPE Package, we invite you to take a look at how this industry-changing approach to learning can save you time and money and help keep you at the top of your game with the knowledge and skills you need to serve your clients.

PREMIER PACKAGE
Hundreds of online courses and webinars — all for $309*

The Premier CPE Package provides an unprecedented range of learning options at significant savings! Includes:

• ONLINE AND DOWNLOAD COURSES. Unlimited access to Checkpoint Learning interactive online/mobile courses and downloadable self-study courses with online grading. This includes more than 460 titles, totaling 2,500+ CPE credits!

• WEBINARS. Unlimited one- to four-hour webinars (approx. 360 annual events), plus discounts on select full-day webinars.

• LEARNING MANAGEMENT. Online CPE tracking and compliance monitoring for every state board of accountancy requirement and more than 20 professional designations, including IRS EA and CFP.

• LIVE SEMINARS AND CONFERENCES. Annual discounts on 24 hours total per subscription year: 40% off Gear Up self-sponsored seminars and conferences and 25% off AuditWatch!* 

PREMIER PLUS PACKAGE
Longer webinars, deeper discounts, more features for $449*

We’ve taken the popular Premier CPE Package and added even more in response to customer feedback! Choose Premier or Premier Plus and receive great value for the low annual subscription cost with either option. The Premier Plus CPE Package includes all of the learning options listed at left, PLUS:

• WEBINARS. Unlimited access to ALL webinars including popular full-day webinars!

• New! VIRTUAL CONFERENCES. Premier Plus Subscribers can attend any Checkpoint Learning virtual conference for only $199 — a 45% savings from the retail cost!

• COMPETENCY MODEL. A comprehensive model for assessing, improving and connecting your CPE to tax and accounting specialties, skills and career levels.

• LIVE SEMINARS AND CONFERENCES. Now save on up to 40 hours annually per subscription from our popular seminar and conference lines (save 40% on Gear Up self-sponsored, 25% on AuditWatch)*.

*Per-user annual pricing applies to firms with under 50 seats; contact us for a price quote if your firm has more than 50 users. Live event discount (Premier Plus and Premier) does not combine with Early Bird or other discount offers; call 800.231.1860 for details. States with Thomson Reuters-sponsored Gear Up seminars currently include AZ, CA, CO, FL, GA, IA, IL, IN, MA, MD, MO, NM, NV, NY, ND, OK, OR, TX, VT and VA. Discount does not apply to Gear Up seminars hosted by state societies (which manage their own pricing and registration).

ALSO AVAILABLE:
PROFESSIONAL CPE PACKAGE ($259*).

Selection plus affordability! This package was designed for those looking to meet CPE requirements cost-effectively but with a wide selection of online courses. The Professional CPE Package provides firms (and individual practitioners) with the essential Checkpoint Learning components plus CPE tracking and compliance monitoring and 310+ online courses (1,600+ CPE credits) including full library of ethics training.

PREMIER AND PREMIER PLUS PACKAGES:
Look for this icon throughout the catalog to identify the many webinars, courses and events that are included or available at a discount with your subscription!
The **Checkpoint Learning Online Course** library includes more than 375 interactive online courses and 1,875 credits of CPE training available exclusively on the Checkpoint Learning platform.

**Online Course Content** meets the CPE requirements for CPAs in all 50 states with more than 50 ethics courses to meet mandatory CPA ethics requirements and is approved CPE for Enrolled Agents. Plus nearly 40 courses fulfill the CE requirement for the CFP™ certification.

- Over 25 years of experience as a technology-based CPE provider
- Highly intuitive, easy-to-use course interface
- Courses available online or can be downloaded
- Courses are optimized for tablet view on your iPad mobile device
- Always remembers your place — courses don’t need to be completed in one sitting
- Automatic course grading and instant certificate of completion
ACCOUNTING
2015 FASB Update
Accounting and Auditing Real Estate Transactions
Accounting Changes and Error Corrections
Accounting for Derivatives and Hedging Activities
Accounting for Farms and Ranches
Accounting for Incomes Taxes
Accounting for Investments in Debt and Equity Securities
Accounting for Investments; Equity Method, Including Consolidations
Accounting for Leases
Accounting for Liabilities
Accounting for Pensions
Accounting for Share-Based Compensation
Accounting for Uncertainty in Income Taxes — FASB ASC: 740-10
Accounting Overview for Tax Professionals
Activity-Based Costing (ABC)
Analysis of the Corporate Annual Report
Balance Sheet and GAAP Reporting
Bar and Restaurant Financial Statement Presentation Including Measurement and Disclosure Issues
Business Combinations, Goodwill and Other Intangible Assets
Buybacks and Retirements of Stock — Coming Soon!
Cash Flows (FASB ASC 230)
Comprehensive Income
Current Developments — Accounting and Financial Reporting
Earnings per Share (Topic 260)
Employee Benefit Plans I: Accounting Principles
Fair Value Measurement: An Introduction to Fair Value Measurements and Disclosures (FASB ASC 820)
Financial Management: Budgeting and Forecasting
Financial Management Overview
Financial Statement Disclosure: Common Issues
GAAP Guide: Advanced Topics
GAAP Guide: Income Statement and Financial Analysis
GAAP Guide: The Balance Sheet
GAAP Reporting: Revenue and Expenses
IFRS and a Comparison with U.S. GAAP
IFRS for Non-CPAs
Impairment or Disposal of Long-Lived Assets (ASC 360-10)
International Financial Reporting Standards (IFRS) Update
Introduction to Bank Auditing and Accounting: I
Introduction to Bank Auditing and Accounting: II
Introduction to International Financial Reporting Standards
Introduction to SEC Reporting
Managing an Accounting Department
Non-GAAP Financial Measures — New!
Other Topics for the Equity Method and Consolidations and Joint Ventures
Preparing Personal Financial Statements
Real Estate Financing and Investment
Revenue Recognition: An Overview of Changes
Revenue Recognition: Fundamentals
Revenue Recognition: Rules and Standards
Review of Accounting for Certain Liabilities
SEC Initial Public Offerings (IPOs): An Introduction
SEC Reporting and Registration Requirements and Accountant Comfort Letters
SEC Reporting Updates
SEC Reporting: Preparing Management’s Discussion and Analysis
Segment Accounting and Reporting
SSARS 21: Comprehensive Analysis of the Compilation and Review Standards
Sustainability Accounting and Reporting
Uncommon Reporting Items, Statement of Cash Flows and Tax Basis Financial Statements
Understanding ACA Regulations and Form 1095-C — Coming Soon!
Understanding and Analyzing Financial Statements

SEC Reporting: Preparing Management’s Discussion and Analysis — New!
2 CPE Credits | Accounting and Auditing
$50 or FREE with Premier or Premier Plus
This course will provide you with in-depth knowledge of Regulation S-K Item 303, Management’s Discussion and Analysis, for both annual and interim periods, enabling you to draft or review an MD&A with confidence.

ACCOUNTING, GOVERNMENTAL
GASB 34: Basic Financial Statements for State and Local Governments
GASB Statement No. 54, Fund Balance Reporting and Governmental Fund Government Accounting Principles

ADMINISTRATIVE PRACTICE
A Complete Guide to Investing
Personal Financial Planning

AUDITING
Analytical Fraud Detection
Audit Sampling
Auditing Developments
Auditor’s Response to Fraud Risk Assessment
COSO 2013
Clarity Project: Significant Changes to Auditing Standards
Compilation and Review
Computer Fraud: Detection and Deterrence
Employee Benefit Plans II: Auditing Considerations
Forensic Accounting: An Overview
Fraud Auditing and Investigation
Fraud: Who Commits It and Why Does It Occur?
Fraud I: Prevention
Fraud Auditing and Investigation
Improving Analytical Procedures
Information Technology Auditing Internal Control and Fraud Detection
Internal Controls for Auditors and Managers: Evaluation
Introduction to Big Data — Coming Soon!
Introduction to Fraud Auditing
Introduction to Fraud Symptoms and Detection

PREMIER AND PREMIER PLUS PACKAGES:
Subscription Packages include UNLIMITED access to all online and mobile courses. No expiration. Details: page 29.

SEE BOTTOM OF PAGE FOR DETAILS.
ONLINE COURSES
SEE BOTTOM OF PAGE FOR DETAILS.

Subscription Packages include UNLIMITED access to all online and mobile courses. No expiration. Details: page 29.

With PowerPoint 2007 with Lots of Tips and Tricks
Microsoft PowerPoint 2013: Getting Started with PowerPoint
Microsoft Word 2007: Getting Started with Word 2007 with Lots of Tips and Tricks
Microsoft Word 2010: Getting Started with Word with Lots of Tips and Tricks
Microsoft Word 2013: Getting Started with Word 2013
QuickBooks Pro 2012
QuickBooks Pro 2013
QuickBooks Pro 2014
QuickBooks Pro 2015: Setting Up

FINANCE
101 Financial Solutions: Diagnosis and Remedy
An Introduction to myRAs
Capital Budgeting
Capital Budgeting and Management Financing Options for Business

MANAGEMENT ADVISORY SERVICES
A Practical Guide to Mergers, Acquisitions and Divestitures
Cost Management: Accounting and Control

9 Must-Have Skills for Every CFO
New!
6 CPE Credits
Specialized Knowledge and Application $108 or FREE with Premier or Premier Plus

This course highlights and describes the basic topics and skills CFO’s need to gain an edge in order to manage and succeed in the 21st century, providing a refresher of all the basic skills and knowledge required of modern day CFOs. The topics covered range from organizational leadership to strategic planning. The essentials of enterprise risk management are presented in an easy-to-grasp fashion. Traditional topics include cash management and planning and analysis together with accounting and internal control. The course also includes a discussion of long- and short-term financing options. Other topics include capital structure, mergers and acquisitions, risk management and leadership.
How to Start a Business
Managing Your Clients and CPA Services
Coming Soon!
Total Cash Management

PERSONAL DEVELOPMENT
Bottom-Line Leadership
Delegating to Financial Employees
Effective Writing for Accountants
Essential Coaching Skills
Influencing People in Organizations: The Leadership Imperative Overview and Basic Concepts
Introverts and Extroverts at Work
Meetings that Matter
Moral Leadership and Character Development
Retirement Planning for Expatriates to Central Americans

PERSONNEL/HR
Managing a Virtual Team New!

REGULATORY ETHICS
2015 Ethics for Virginia CPAs New!
2015 Ethics for Washington CPAs
2015 Personal and Professional Ethics for North Carolina CPAs
California Rules and Regulations
Colorado Rules and Regulations
CPAs and Independence
Ethics for Alaska CPAs
Ethics for Arkansas CPAs
Ethics for Attest Firms
Ethics for Attest Firms and Tax Professionals
Ethics for California CPAs
Ethics for Certified Financial Planner™ Certificants
Ethics for Colorado CPAs
Ethics for Connecticut CPAs
Ethics for CPAs
Ethics for CPAs and Tax Professionals
Ethics for Delaware CPAs
Ethics for District of Columbia CPAs
Ethics for Enrolled Agents
Ethics for Georgia CPAs
Ethics for Guam CPAs
Ethics for Idaho CPAS
Ethics for Illinois CPAs
Ethics for Indiana CPAs
Ethics for Iowa CPAs
Ethics for Kansas CPAs
Ethics for Kentucky CPAs
Ethics for Maine CPAs
Ethics for Maryland CPAs
Ethics for Massachusetts CPAs
Ethics for Michigan CPAs — Part I
Ethics for Michigan CPAs — Part II
Ethics for Minnesota CPAs
Ethics for Mississippi CPAs
Ethics for Missouri CPAs — Part I
Ethics for Missouri CPAs — Part II
Ethics for Montana CPAs
Ethics for Nebraska CPAs
Ethics for Nevada CPAs
Ethics for New Hampshire CPAs
Ethics for New Mexico CPAs
Ethics for New York CPAs
Ethics for New York Tax Professionals
Ethics for Ohio CPAs
Ethics for Oklahoma CPAs
Ethics for Oregon CPAs
Ethics for Pennsylvania CPAs
Ethics for Puerto Rico CPAs New!
Ethics for Rhode Island CPAs
Ethics for South Carolina CPAs
Ethics for Tax Professionals
Ethics for Tennessee CPAs (2 hrs)
Ethics for Vermont CPAs
Ethics for West Virginia CPAs
Ethics for Wyoming CPAs
Independence — An Overview for Attest Firms
Independence and Attest Firms
Independence for CPAs — An Overview
Independence, Integrity and Objectivity
Oregon Rules and Regulations
Personal and Professional Ethics for Florida CPAs
Personal and Professional Ethics for Louisiana CPAs
Personal and Professional Ethics for Texas CPAs
Personal and Professional Ethics for Texas CPAs (Video)
Professional Ethics for Arizona CPAs
Professional Ethics for Arizona CPAs (2 hrs.)
Professional Ethics for Hawaii CPAs

SOCIAL ENVIRONMENT OF BUSINESS
Branding Yourself and Your Firm Using LinkedIn New!

SPECIALIZED KNOWLEDGE AND APPLICATIONS
9 Must-Have Skills for Every CFO New!
Accounting Apps for Your Business
Cloud Computing: Doing Business in the Cloud
CPAs’ Role in Mediation
Introduction to Business Valuation and Use of Comparables
Introduction to Investment Companies
Introduction to the Food and Beverage Industry
Introduction to Securities Broker/Dealers
Introduction to the Health Care Industry
Introduction to the Media Industry
Introduction to the Pharmaceutical Industry
Negotiating Skills for CPAs
Not-for-Profit Accounting
Social Media to Market Your Business
Spreadsheet Best Practices: Roadmap to Reduced Risk
Storage Strategy in the Cloud
Technology Add-Ons to Increase Productivity New!
Valuation Methods: Statement on Standards for Valuation Services No. 1
Valuation Methods: The Normalization of Earnings
Valuation Methods: The Income Approach
Valuation Methods: The Adjusted Net Assets Method
What Happens When Baby Boomers Retire

TAXES
49 Tax-Cutting Moves for Small Businesses and Their Owners New!
2015 Individual Tax Overview New!
2015 Individual Tax Update New!
2015 Specialized Tax Update New!
2015 Corporate Tax Update New!
49 Ways to Reduce Taxes for Individuals and Make Them Clients for Life
Alternative Minimum Tax
An Overview of Abusive Tax Trusts
Asset Protection — Tax and Financial Aspects
Benefits and Disadvantages of Health Savings Accounts
C Corporations: Income Tax Reporting
C Corporations: Overview of Corp. Income Tax
C Corporations: Tax Depreciation and Amortization
Capitalization of Tangible Assets Regulations
Capital Gains and Losses
Changing Accounting Methods
Choosing the Right Entity and Getting Cash Out of It
Claiming Medical Expenses for Baby Boomers
Commercial Bank Taxation and Regulatory Issues: Introduction
Community Property Taxation
Consolidated Tax Returns: Advanced Topics
Consolidated Tax Returns: Introduction
Consolidations for Large Clients: Net Operating Losses and Intercompany Transactions
Corporate Tax Update
Corporate Taxation

The ABLE Act: Achieving a Better Life Experience Act of 2014 New!
2 CPE Credits | Taxation | $42 or FREE with Premier or Premier Plus
This course presents and describes the elements of the Achieving a Better Life Experience Act of 2014 which created a special savings program for individuals with disabilities and their families. Like qualified tuition programs (QTPs) which are vehicles to save for advanced education for designated beneficiaries, this program has been developed with disabilities in mind. Accounts may be set up with special tax incentives to help support individuals with certain disabilities including blindness. The accounts, known as ABLE accounts, are not supposed to interfere with other safety net programs like Supplemental Security Income (SSI) and Medicaid.

Tax Issues for Divorced Individuals and Blended Families
Tax Strategies for Middle-Income Households New!
Tax Planning for Retirement Wealth
Tax Practice and Procedure: Fundamentals — Tax Resolution and Solving IRS Issues
Tax Refund Fraud Perpetrated by Identity Theft
Tax Research II: Court Interpretations and Citator
Tax Research: Case Analysis
Tax Research: Tax Law and Treasury Interpretations
Tax Research Using an Online Platform
Tax Strategies for Clients During their Golden Years
Tax Strategies for Nontraditional Couples
The ABLE Act: Achieving a Better Life Experience Act of 2014 New!
The Ultimate Guide to Retirement Planning Transfer Pricing Fundamentals
Travel, Entertainment, Gift and Transportation Expenses
Understanding Schedules M-1 and M-2 on Forms 1120 and 1120S
Uniform Capitalization Rules
Value Added Tax (VAT) A Global View

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Checkpoint Learning Webinars

Check the link for more CTEC specifics.

Check the link for more CTEC specifics.

Check the link for more CTEC specifics.

Check the link for more CTEC specifics.
**WEBINARS**

**SEE BOTTOM OF PAGE FOR DETAILS.**

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**JANUARY 2016 — SCHEDULED WEBINARS**

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<td>12 p.m.: Monthly Accounting Alert <strong>(1 hr)</strong>&lt;br&gt;1 p.m.: Monthly Corporate Tax Update <strong>(1 hr)</strong>&lt;br&gt;2 p.m.: Mastering the OID and Below-Market Loan Rules to Avoid Phantom Income Surprises <strong>(2 hrs)</strong></td>
<td>9 a.m.: Accounting and Auditing Update <strong>(8 hrs)</strong>&lt;br&gt;12 p.m.: Adjustments to Income: So Many of Them and Always Better than Itemized Deductions <strong>(2 hrs)</strong>&lt;br&gt;2 p.m.: Charitable Contributions: Not Nearly as Simple as it May Sound <strong>(2 hrs)</strong></td>
<td>10 a.m.: Divorce: Financial Planning and the Marital Settlement <strong>(2 hrs)</strong>&lt;br&gt;12 p.m.: Partnerships/LLCs: Sales and Liquidations <strong>(2 hrs)</strong>&lt;br&gt;2 p.m.: Budgeting and Forecasting for Financial Professionals <strong>(2 hrs)</strong></td>
<td>9 a.m.: Federal Tax Update <strong>(8 hrs)</strong>&lt;br&gt;12 p.m.: Revenue from Contracts with Customers: An Overview of the New Standard <strong>(2 hrs)</strong>&lt;br&gt;2 p.m.: Going Concern and Impairment Issues <strong>(2 hrs)</strong></td>
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<td>12 p.m.: Assisting with the Defined Contribution Retirement Plan Recommendation <strong>(2 hrs)</strong>&lt;br&gt;2 p.m.: Total Payroll Management <strong>(2 hrs)</strong></td>
<td>12 p.m.: Quarterly SEC and PCAOB Update Q1 2016 <strong>(1 hr)</strong>&lt;br&gt;2 p.m.: Common Practice Problems in Preparing Nonprofit Organization Financial Statements <strong>(2 hrs)</strong></td>
<td>9 a.m.: Business Entity Tax Update <strong>(8 hrs)</strong>&lt;br&gt;10 a.m.: Related Parties: Transactions Between Businesses and Their Owners (and Beyond) <strong>(2 hrs)</strong>&lt;br&gt;12 p.m.: Tax Credits for Personal and Business: Available by the Dozen <strong>(2 hrs)</strong>&lt;br&gt;2 p.m.: Travel, Entertainment and Auto Expense <strong>(2 hrs)</strong></td>
<td>9 a.m.: Understanding Health Care Reform: How the New Laws Impact Employers and Individual Taxpayers <strong>(8 hrs)</strong>&lt;br&gt;12 p.m.: Avoiding Common Peer Review and Other Issues <strong>(2 hrs)</strong></td>
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More information and up-to-date schedule: cl.thomsonreuters.com
FEBRUARY 2016 — SCHEDULED WEBINARS

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<tr>
<td>9 a.m.: Compilations, Reviews and Preparations: Comprehensive Guidance Including Implementation of the New SSARS 21 Standards (8 hrs) 12 p.m.: Health Care Reform: The Individual Mandate (2 hrs)</td>
<td>10 a.m.: Excel Best Practices (2 hrs) 12 p.m.: Monthly Accounting Alert (1 hr) 1 p.m.: Monthly Corporate Tax Update (1 hr) 2 p.m.: Debt Basis: Limits and Opportunities for 5 Corporations and Partnerships (2 hrs)</td>
<td>9 a.m.: Performing Efficient Audits of Employee Benefit Plans (8 hrs) 12 p.m.: Structuring Intellectual Property Transactions: How to Hold, Protect and Profit from Your IP (2 hrs) 2 p.m.: Total Cash Management (2 hrs)</td>
<td>10 a.m.: Auditors’ Reports: What You Need to Know about New Language in Standard and Modified Reports (2 hrs) 12 p.m.: Creating Engaging PowerPoint Presentations (2 hrs)</td>
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<td>9 a.m.: Fundamental Audit Strategies (8 hrs) 12 p.m.: Identifying and Correcting the Most Common Audit Inefficiencies (2 hrs)</td>
<td>9 a.m.: Federal Tax Update (8 hrs) 12 p.m.: Fair Value Accounting Rules (2 hrs)</td>
<td>9 a.m.: Government and Nonprofit Update (8 hrs) 12 p.m.: Miscellaneous Other Deductions: Not Exactly Insignificant (2 hrs)</td>
<td>10 a.m.: IRAs: The Complexities and Benefits (2 hrs) 12 p.m.: Understanding and Evaluating Internal Controls (2 hrs)</td>
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<td>10 a.m.: Auditors’ Reports: What You Need to Know about New Language in Standard and Modified Reports (2 hrs) 12 p.m.: Creating Engaging PowerPoint Presentations (2 hrs)</td>
<td>12 p.m.: How to Run an Efficient Tax Office (2 hrs) 2 p.m.: Implementing SSARS 21: The New Compilation, Review and Preparation Standards (2 hrs)</td>
<td>9 a.m.: Accounting and Auditing Update (8 hrs)</td>
<td>10 a.m.: Tax Planning for Cancellation of Debt (2 hrs) 12 p.m.: Quarterly SEC and PCAOB Update Q1 2016 (1 hr)</td>
<td>10 a.m.: Accounting for Income Taxes: Practice Issues and Common Pitfalls (2 hrs) 12 p.m.: Introduction to Business Combinations and Consolidations (2 hrs) 2 p.m.: A Single Audit Case Study (2 hrs)</td>
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<td>10 a.m.: AMT Update (2 hrs) 12 p.m.: Negotiating 101: Considerations for Daily Negotiations We Face in Business (2 hrs)</td>
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<td>10 a.m.: Spotting Opportunities to Use Data Extraction in an Audit (2 hrs) 12 p.m.: Monthly Tax Alert (2 hrs) 2 p.m.: Revenue from Contracts with Customers: An Overview of the New Standard (2 hrs)</td>
<td>9 a.m.: Understanding Health Care Reform: How the New Laws Impact Employers and Individual Taxpayers (8 hrs) 12 p.m.: IRS Examinations Issues: What’s Hot and Being Scrutinized (2 hrs)</td>
<td>9 a.m.: Business Entity Tax Update (8 hrs) 12 p.m.: Professional Ethics for Accountants: A Comprehensive Update (2 hrs)</td>
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## MARCH 2016 — SCHEDULED WEBINARS

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| 1     | 12 p.m.: Total Payroll Management (2 hrs)  
2 p.m.: Exceeding Expectations Every Time: Mastering the Exceptional Service Technique (2 hrs) | 2 p.m.: Estate and Gift Tax Update (2 hrs)  
12 p.m.: Advanced Topics in Financial Statement Preparation (2 hrs)  
2 p.m.: Adjustments to Income: So Many of Them and Always Better than Itemized Deductions (2 hrs) | 9 a.m.: Audit Sampling: A Comprehensive Guide to Effective and Efficient Sampling in Tests of Details and Tests of Controls (8 hrs) | 10 a.m.: Performing Efficient Audits of Employee Benefit Plans (2 hrs)  
12 p.m.: Wrapping Up Engagements: Efficiency Techniques That Work (2 hrs) (W292T)-staff  
2 p.m.: Communicating Effectively with the IRS (2 hrs) |
| 7     | 12 p.m.: Corporate Financial Reporting: Staying on Top of New Disclosures and Common Practice Issues (2 hrs)  
2 p.m.: Health Care Reform Issues for Employers (2 hrs) | 10 a.m.: Auditing Sampling Considerations in Single Audits (2 hrs)  
12 p.m.: Monthly Accounting Alert (1 hr)  
1 p.m.: Monthly Corporate Tax Update (1 hr) | 9 a.m.: Federal Tax Update (8 hrs) | 10 a.m.: Special Purpose Framework: Compilation and Review (2 hrs) |
| 14    | 10 a.m.: Internal Controls for Financial Professionals: Best Practice Basics (2 hrs)  
12 p.m.: Quarterly SEC and PCAOB Update Q1 2016 (1 hr)  
2 p.m.: Business Ethics in Corporate Accounting (2 hrs) | 9 a.m.: Performing Efficient Audits of Employee Benefit Plans (8 hrs) | 9 a.m.: Accounting and Auditing Update (8 hrs) | 10 a.m.: Revenue from Contracts with Customers: An Overview of the New Standard (2 hrs) |
| 21    | 12 p.m.: Fraud Risk and Detection in a Financial Statement Audit (2 hrs)  
2 p.m.: How Healthcare Reform Impacts Your Clients (2 hrs) | 9 a.m.: Business Entity Tax Update (8 hrs) | 10 a.m.: Retirement Planning including ROTH IRA Conversions (2 hrs)  
12 p.m.: LinkedIn for Accountants (2 hrs) | 25 |
| 28    | 10 a.m: Windows 10 Preview (2hrs)  
12 p.m.: Monthly Tax Alert (2hrs) | 10 a.m: Understanding and Preparing an Offer in Compromise (2hrs)  
12 p.m.: Independence: An Essential Review for CPAs in Public Practice (2hrs) | 9 a.m.: Performing Effective and Efficient Single Audits (8 hrs) | 31 |

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### WEBINARS

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WEBINARS

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APRIL 2016 — SCHEDULED WEBINARS

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<td>12 p.m.: Professional Ethics for Accountants: A Comprehensive Update (2 hrs)</td>
<td>9 a.m.: Financial Performance Measurement and Analysis (8 hrs)</td>
<td>12 p.m.: Inventory Observations: Requirements, Approaches and Practice Tips (2 hrs)</td>
<td>12 a.m.: Excel Best Practices (2 hrs)</td>
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<td>2 p.m.: Internet of Things for Accountants (2 hrs)</td>
<td>2 p.m.: Polish Your Presentation Skills: Best Practices of Dynamic Presenters (2 hrs)</td>
<td>2 p.m.: Leveraging Social Media to Increase Firm Profits (2 hrs)</td>
<td>12 p.m.: Monthly Accounting Alert (1 hr)</td>
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<td>12 p.m.: Common Practice Problems in Preparing Nonprofit Organization Financial Statements (2 hrs)</td>
<td>9 a.m.: Accounting and Auditing Update (8 hrs)</td>
<td>10 a.m.: Revenue from Contracts with Customers: An Overview of the New Standard (2 hrs)</td>
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Also available:

VIRTUAL CONFERENCES

Revenue from Contracts with Customers May 10 – 11
Key Issues in International Taxation May 24 – 25
Audit Productivity June 7 – 8
Small/Private Auditing and Financial Reporting June 28 – 29

Catalog code: CC016
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Self-Study Courses allow you to learn on your own time and at your own pace.

- Preview over 90 downloadable courses for free
- 24/7 access to online grading for most courses
- PPC Self-Study Courses relate directly to the guides you use every day and are available in both print and electronic forms.
- RIA® Self-Study Courses are presented in partnership with PPC and include RIA’s must-have Federal Tax Review 2016.
- Quickfinder Self-Study Courses include income tax training courses that are a great way to teach and test new tax preparers.
PPC® SELF-STUDY COURSES

CPE RELATED TO PPC GUIDE TOPICS AND AVAILABLE TO SUPPLEMENT GUIDE USE
What better way to meet your CPE requirements than to take courses related to the guidance you use every day? The following guides include related self-study CPE courses to optimize your use of the PPC approach and earn credit. Online grading is available through the Checkpoint Learning platform and provides real-time results! For more CPE information, visit cl.thomsonreuters.com or call 800.231.1860. Unless otherwise noted, all courses are available in both print and electronic formats.

- Audit Risk Assessment
- Auditor’s Reports
- Audits of Employee Benefit Plans
- Audits of Financial Institutions
- Audits of Local Governments*
- Audits of Nonprofit Organizations*
- Audits of Nonpublic Companies
- Business Valuations
- Cash, Tax and Other Bases of Accounting
- Compilation and Review Engagements
- Construction Contractors
- GAAP
- Homeowners’ Associations
- HUD Audits*
- Nonprofit GAAP*
- PPC’s 1040 Deskbook
- PPC’s 1041 Deskbook
- PPC’s 1065 Deskbook
- PPC’s 1120S Deskbook
- PPC’s 990 Deskbook
- Preparing Financial Statements
- Preparing Governmental Financial Statements*
- Preparing Nonprofit Financial Statements*
- Quality Control
- QuickBooks Solutions
- Tax Planning for S Corporations
- Single Audits*
- Tax Action Bulletins
- Tax Planning for High-Income Individuals
- Tax Planning for Partnerships
- Write-Up Services

* Eligible for Yellow Book CPE  † Electronic format only

PPC SPECIALTY SELF-STUDY COURSES
PPC brings you the following self-study courses dealing with recent developments in the industry!

- PPC’s Guide to 2015 Tax Developments. 16 CPE Credits. This course uses a key issue approach to teach you everything you need to know about the latest tax developments affecting you and your clients.

RIA® FEDERAL TAX REVIEW SELF-STUDY COURSE

RELY ON RIA’S MUST-HAVE FEDERAL TAX REVIEW
The RIA Federal Tax Review 2016 CPE course is comprised of three parts: Individual Taxes (8 credits), Business Taxes (10 credits) and Special Situations (9 credits). A general refresher in federal taxation, this course will reinforce basic tax law interpretations and keep you up-to-date on the most important changes for both the 2015 and 2016 tax years. Grading fee of $99 for each module with discounts available if you complete two or all three modules — see website for details.

QUICKFINDER SELF-STUDY COURSES

1040 INCOME TAX PREPARATION
DTITG15 | 10 CPE | BASIC | $99
FOR: ALL TAX PROFESSIONALS INCLUDING CPA, EA, CTEC, CFP*

Based on the guidance found in the popular PPC Tax Deskbook Series, this course focuses on the preparation of individual tax returns and utilizes a key issue approach in covering such topics as: filing status, exemptions, income and adjustments, personal deductions, tax calculations and tax planning opportunities.

*CFP credits for self-study are half the amount listed for each title.

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