

FALL 2018

PUBLIC ACCOUNTANT, ENROLLED AGENT, AND OTHER TAX PRACTITIONER PROGRAM

The objective of the program is to broaden the knowledge of accountants and tax practitioners in order to relate particular specialties to the field of accounting and to examine developments in these professions.

ATTENDANCE: Accurate records of attendance will be maintained to verify and report continuing education hours. Three (3) Continuing Professional Education (CPE) units are awarded for each attended, for a possible total of thirty-six (36) CPEs. To ensure the integrity of the program, student attendance will be periodically monitored for late arrivals and hours attended will be adjusted accordingly. A summary sheet will be sent to each registered participant when the series is completed.

REGISTRATION INFORMATION: Choose the course number that corresponds to the location you plan to attend the most. If you have a schedule conflict you may attend class at one of the other locations. To receive CPE units, students MUST be registered/paid before they attend class. The course fee MUST be paid when you register. To register, complete the attached form and return to CCAC with a check or money order made payable to "CCAC" or call 412.788.7546 to register with a credit card at least one week before the course begins. Requests for refunds must be received 24 hours prior to the start of Week 1: Call 412.788.7546. Refunds will NOT be processed after the start of Week 1.

COURSE NUMBERS AND LOCATIONS:

XGD079-5607	CCAC, North Campus, 8701 Perry Hwy., Pittsburgh, PA 15237, Room 3002
XGD079-5608	CCAC, South Campus, 1750 Clairton Rd., West Mifflin, PA 15122, Room D201
XGD079-5609	CCAC, Boyce Campus, 595 Beatty Rd., Monroeville, PA 15146, Room N545
XGD079-5610	CCAC, West Hills Center, 1000 McKee Rd., Oakdale, PA 15071, Room S1308

COST FOR THE 12 WEEKS - \$319.00 (Regardless of how many presentations you attend).

CLASS INFORMATION:

Week 1: <u>CPA Circular 230: What to be concerned with, Ethically</u>				Speaker: Barry K. Gerber, Attorney at Law, CPA			
This course will review current Circular 230 regulations, discuss case law and the birth of Circular 230, to provide the practical application of Circular 230 today.							
Category: Ethics (Basic)							
Thursday	9/20	North Campus	6:30-9:30 p.m.	Monday	9/24	Boyce Campus	6:30-9:30 p.m.
Saturday	9/22	South Campus	8:00-11:00 a.m.	Wednesday	9/26	West Hills Ctr.	6:30-9:30 p.m.
Week 2: <u>CPA Intermediate Veterans Affairs Benefits Planning</u>				Speaker: Colin Adair Morgan, Esquire			
This course will describe the various benefits veterans are entitled to as well as how to aid your client in achieving them.							
Category: Other (Intermediate)							
Thursday	9/27	North Campus	6:30-9:30 p.m.	Monday	10/1	Boyce Campus	6:30-9:30 p.m.
Saturday	9/29	South Campus	8:00-11:00 a.m.	Wednesday	10/3	West Hills Ctr.	6:30-9:30 p.m.
Week 3: <u>CPA Estate Planning Under Tax Reform 1.0 and maybe 2.0</u>				Speaker: John M. Hartzell, Jr., Esquire, CPA			
This course will discuss the highlights of the 2017 Tax Reform Act, and the proposals for additional changes. Will also discuss non-tax reasons to engage in estate planning.							
Category: Tax (Intermediate)							
Thursday	10/4	North Campus	6:30-9:30 p.m.	Monday	10/8	Boyce Campus	6:30-9:30 p.m.
Saturday	10/6	South Campus	8:00-11:00 a.m.	Wednesday	10/10	West Hills Ctr.	6:30-9:30 p.m.
Week 4: <u>CPA Balancing Business and Personal Priorities</u>				Speaker: Brian Bohn, CFP®, Senior Portfolio Advisor			
This course will discuss the dynamics of advising business owners of the strategies available to pursue their individual goals and desires. We will cover pre-transaction planning to reduce tax now, estate planning to reduce tax later, and finally, how to properly liquidate a business to pursue goals.							
Category: Tax (Intermediate)							
Thursday	10/11	North Campus	6:30-9:30 p.m.	Monday	10/15	Boyce Campus	6:30-9:30 p.m.
Saturday	10/13	South Campus	8:00-11:00 a.m.	Wednesday	10/17	West Hills Ctr.	6:30-9:30 p.m.
Week 5: <u>CPA 2018 Audit & Accounting Update</u>				Speaker: Todd B. Fortier, CPA, M.B.A.			
This course will review recent pronouncements with focus on the recently released Lease, Not-for-Profit and Credit Loss standards. Additionally, all other auditing and accounting standard pronouncements which would impact the auctioneer will be discussed.							
Category: Accounting & Auditing (Intermediate)							
Thursday	10/18	North Campus	6:30-9:30 p.m.	Monday	10/22	Boyce Campus	6:30-9:30 p.m.
Saturday	10/20	South Campus	8:00-11:00 a.m.	Wednesday	10/24	West Hills Ctr.	6:30-9:30 p.m.
Week 6: <u>CPA The Banking Industry Today/Economic and Regulatory Pressures Facing Banks Today</u>				Speaker: Ed Wielgus, Mng. Dir., Richmond Consulting Services			
This course will provide attendees information and issues that commercial banks are dealing with in uncertain economic times.							
Category: Accounting & Auditing (Intermediate)							
Thursday	10/25	North Campus	6:30-9:30 p.m.	Monday	10/29	Boyce Campus	6:30-9:30 p.m.
Saturday	10/27	South Campus	8:00-11:00 a.m.	Wednesday	10/31	West Hills Ctr.	6:30-9:30 p.m.
Week 7: <u>CPA Transitioning Your Clients into the Medicare System</u>				Speaker: William McKendree, J.D.			
This course will examine the Medicare system and how your clients transition from pre-Medicare health insurance coverage to Medicare coverage and all the concerns and issues that surround this transition. When to/how/to/what to do. What are the options to consider, what are the timelines to follow, what are the landmines to avoid?							
Category: Other (Intermediate)							
Thursday	11/1	North Campus	6:30-9:30 p.m.	Monday	11/5	Boyce Campus	6:30-9:30 p.m.
Saturday	11/3	South Campus	8:00-11:00 a.m.	Wednesday	11/7	West Hills Ctr.	6:30-9:30 p.m.
Week 8: <u>CPA Financial Journey of Women</u>				Speaker: Brian Bohn, CFP®, Senior Portfolio Advisor			
This course will discuss the unique financial needs that face women. The majority of wealth in the United State is held by women. Their needs are unique, with health care costs being more expensive, a longer life expectancy, and caring for family means that a different approach must be taken. We will discuss tax implications and strategies to be used.							
Category: Tax (Basic)							
Thursday	11/8	North Campus	6:30-9:30 p.m.	Monday	11/12	Boyce Campus	6:30-9:30 p.m.
Saturday	11/10	South Campus	8:00-11:00 a.m.	Wednesday	11/14	West Hills Ctr.	6:30-9:30 p.m.
Week 9: <u>CPA Auditing Update and Auditing Issues</u>				Speaker: Frederich Earl Liechti, J.D., CPA			
This course will review current issues in the auditing profession and focus on auditing problems.							
Category: Accounting & Auditing (Overview)							
Thursday	11/15	North Campus	6:30-9:30 p.m.	Monday	11/19	Boyce Campus	6:30-9:30 p.m.
Saturday	11/17	South Campus	8:00-11:00 a.m.	Wednesday	11/28	West Hills Ctr.	6:30-9:30 p.m.
Week 10: <u>CPA 2018 PA Dept. of Revenue Tax Questions & Responses</u>				Speaker: Barry K. Gerber, Attorney at Law, CPA			
This course will update CPA's on the latest Dept. of Revenue "policies" and procedures as well as the responses given to the written tax questions presented to the PA Dept. of Revenue this fall.							
Category: Tax (Basic)							
Thursday	11/29	North Campus	6:30-9:30 p.m.	Monday	12/3	Boyce Campus	6:30-9:30 p.m.
Saturday	12/1	South Campus	8:00-11:00 a.m.	Wednesday	12/5	West Hills Ctr.	6:30-9:30 p.m.
Week 11: <u>CPA Overview of Fraud Complaints</u>				Speaker: William J. Miller, Esquire, CPA			
This course will provide an overview of the legal system as it relates to the forensic accountant.							
Category: Accounting & Auditing (Overview)							
Thursday	12/6	North Campus	6:30-9:30 p.m.	Monday	12/10	Boyce Campus	6:30-9:30 p.m.
Saturday	12/8	South Campus	8:00-11:00 a.m.	Wednesday	12/12	West Hills Ctr.	6:30-9:30 p.m.
Week 12: <u>CPA Risk Avoidance</u>				Speaker: Michael D. Simon, Esquire			
This course will discuss common risks that accountants face in their practice that can result in legal liability. We will focus on procedures for recognizing these risks then analyzing them for various liability issues. Once the various liabilities have been established, we will discuss strategies to resolve and/or minimize them, and also discuss the best practices for risk avoidance.							
Category: Other (Intermediate)							
Thursday	12/13	North Campus	6:30-9:30 p.m.	Monday	12/17	Boyce Campus	6:30-9:30 p.m.
Saturday	12/15	South Campus	8:00-11:00 a.m.	Wednesday	12/19	West Hills Ctr.	6:30-9:30 p.m.

SATURDAY TAX SEMINARS

Location: CCAC North Campus, Room 3002, 8701 Perry Highway, Pgh., PA 15237

* INDIVIDUAL TAX	XGD203-5641	12/1/18	8:00 a.m. – 12:00 p.m.	Speaker: Kathleen Sheehan, Esquire
* BUSINESS TAX	XGD202-5642	12/1/18	1:00 p.m. – 5:00 p.m.	Speaker: William McKendree, J.D.

COST FOR EACH 4 HOUR SEMINAR: **\$59.00** 4 credits each FOR OUT OF STATE RATES CALL 412.788.7546



PROFESSIONAL CONTINUING EDUCATION NON-CREDIT REGISTRATION FORM

Please print. Complete and return this form with payment (if applicable). No further notice will be provided.

N18FA

Date of Birth (required for enrollment) MM/DD/YYYY:		Soc. Sec. #:			
Last Name:		First Name:		Middle Initial:	
Street Address:			Apt:		
City:	State:	Zip:	County:		
Home Phone:		Alternate Phone:			
Email Address:				New Address (X):	

Have you ever served in the Military (circle one)? No – Yes (see below) **NOTE:** If YES to either question, please contact the CCAC Veterans Services Office at 412.237.6503.
Are you a dependent of a Veteran (circle one)? No – Yes (see below)

Veteran Benefits: <input type="checkbox"/> 35 Dependent <input type="checkbox"/> Chapter 33 Post 9/11 Gi Bill <input type="checkbox"/> Veteran not using benefits	This voluntary information is compiled by the college for statistical purposes only and no personally identifiable information will be released. Marital Status: <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Divorced <input type="checkbox"/> Separated <input type="checkbox"/> Widowed Sex: <input type="checkbox"/> Male <input type="checkbox"/> Female
Place of Permanent Address (check one) <input type="checkbox"/> Allegheny County (1) <input type="checkbox"/> Out-of-State (5) <input type="checkbox"/> Out-of County	Do you consider yourself to be Hispanic/Latino/Spanish Origin? <input type="checkbox"/> Yes <input type="checkbox"/> No In addition, select one or more of the following racial categories to describe yourself: <input type="checkbox"/> American Indian/Alaskan <input type="checkbox"/> Asian <input type="checkbox"/> Black or African American <input type="checkbox"/> White or Caucasian <input type="checkbox"/> Native Hawaiian or Pacific Islander

Payment Must Be Enclosed (if applicable)
 Print Phone Number on Check or Money Order (Checks Payable to CCAC).
Mail To: CPA Program
 CCAC West Hills Center – Room N1200
 1000 McKee Road
 Oakdale, PA 15071-1099

TO REGISTER:
 Complete this form and return to CCAC with a check or money order or call 412-788-7546 to register with a credit card at least one week before the course begins.

REFUND POLICY:
 Requests for refunds must be received 24 hrs. prior to the start of Week 1:
 Call 412-788-7546.

Course Number	Semester	Course Title	Course Location	Cost (if applicable)
XGD079-560	N18FA	Public Accountant, Enrolled Agent, and other Tax Practitioner Program		\$319.00

Student Signature (Required for enrollment)	Date
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I agree that once I register, I become legally bound by and agree to the terms of Community College of Allegheny County Student Financial Responsibility Agreement and as such become responsible for all charges incurred, unless I drop classes during the designated refund period.

The college is subject to provisions and complies with the Family Educational Rights and Privacy Act of 1974. A statement of the college policy can be found in the student handbook and college catalog. Voluntary information used to comply with Federal reporting and has no effect on admission to the college. Form Updated 2017

**CERTIFIED PUBLIC ACCOUNTANT
 FALL 2018**



PUBLIC ACCOUNTANT, ENROLLED AGENT, AND OTHER TAX PRACTITIONER PROGRAM
PROFESSIONAL CONTINUING EDUCATION PROGRAM
 Phone: 412.788.7383
 Registration Phone: 412.788.7546