

## SUMMER 2019

### 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) CPE's. 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:** XGD079-5615 CCAC, North Campus, Room 3002, 8701 Perry Hwy., Pgh., PA 15237  
 XGD079-5616 CCAC, Boyce Campus, Room N545, 595 Beatty Rd., Monroeville, PA 15146

**COST FOR THE 12 WEEKS - \$339.00 (Regardless of how many presentations you attend).**

#### CLASS INFORMATION

<p><b>Week 1: <u>CPA Deep Dive into Pennsylvania's Property Tax System</u></b>                      This course will cover the essential elements of the state's property tax system. There will be discussion of the reassessment process and also assessment appeals in each county. The annual equalization factor used in the appeal process will be highlighted.  <b>Category: Tax (Advanced)</b></p>	<p><b>Speaker: Michael J. Suley, CRB, CRS, CPE</b></p>
<p>Thursday 5/2 North Campus 6:30-9:30 p.m.</p>	<p>Monday 5/6 Boyce Campus 6:30-9:30 p.m.</p>
<p><b>Week 2: <u>CPA Financial Investigations</u></b>                      This course will discuss methods of financial investigations and auditing for fraud.  <b>Category: Accounting &amp; Auditing (Overview)</b></p>	<p><b>Speaker: William J. Miller, Esquire, CPA</b></p>
<p>Thursday 5/9 North Campus 6:30-9:30 p.m.</p>	<p>Monday 5/13 Boyce Campus 6:30-9:30 p.m.</p>
<p><b>Week 3: <u>CPA Trust Taxation</u></b>                      This course will initiate or enhance tax practitioners understanding of basic trust income taxation. Historical background of trusts will be explored, leading to the various trust types of today. Trust concepts include simple, complex, grantor (including federal and PA differences), and estate income taxation. The effect of the TCJA upon trusts in 2018 will be illustrated.  <b>Category: Tax (Basic)</b></p>	<p><b>Speaker: Barry K. Gerber, Attorney at Law, CPA</b></p>
<p>Thursday 5/16 North Campus 6:30-9:30 p.m.</p>	<p>Monday 5/20 Boyce Campus 6:30-9:30 p.m.</p>
<p><b>Week 4: <u>CPA Planning for the New Age of Retirement</u></b>                      This course will discuss retiring in 2019. We will discuss life expectancy, health care costs, long term care, social security, and a plethora of other pertinent topics. We will also talk about the financial strategies in place that accountants and attorneys should be aware of when advising clients.  <b>Category: Tax (Intermediate)</b></p>	<p><b>Speaker: Brian S. Bohn, CFP®, CPFA</b></p>
<p>Thursday 5/30 North Campus 6:30-9:30 p.m.</p>	<p>Monday 6/3 Boyce Campus 6:30-9:30 p.m.</p>
<p><b>Week 5: <u>CPA Health Care Coverage for the Senior Client</u></b>                      This course will provide a general overview of health care system for senior Americans (65 year and older). The presentation will include the various components of health care coverage (Medicare, Medicaid, employer provided health benefits, and private health coverage) their characteristics and function, and how they interact with each other.  <b>Category: Other (Basic)</b></p>	<p><b>Speaker: William McKendree, J.D.</b></p>
<p>Thursday 6/6 North Campus 6:30-9:30 p.m.</p>	<p>Monday 6/10 Boyce Campus 6:30-9:30 p.m.</p>
<p><b>Week 6: <u>CPA Update on Employment Law Issues for Accountants</u></b>                      This course will review recent decisions, changes in the law concerning hot topics in employment law, including overtime, salary/duties tests, issues under the Fair Labor Standards Act, issues unique to Pennsylvania under the PA Minimum Wage Act. We will also review tips regarding utilizing independent contractors, the PA Wage Payment and Collection Act, confidentiality and non-compete agreements, and other areas of interest.  <b>Category: Other (Advanced)</b></p>	<p><b>Speaker: Michael D. Simon, Esquire</b></p>
<p>Thursday 6/13 North Campus 6:30-9:30 p.m.</p>	<p>Monday 6/17 Boyce Campus 6:30-9:30 p.m.</p>
<p><b>Week 7: <u>CPA Estate and Gift Tax Planning; Be Sure to Ask the Right Questions</u></b>                      This course will present the common/basic questions to ask, information to gather, and realistic goals to achieve for various types of estate plans. Tax and non-tax reasons to engage in estate planning will be discussed, in addition to the benefits of entity versus individual ownership of inherited assets.  <b>Category: Tax (Intermediate)</b></p>	<p><b>Speaker: John M. Hartzell, Jr., Esquire, CPA</b></p>
<p>Thursday 6/20 North Campus 6:30-9:30 p.m.</p>	<p>Monday 6/24 Boyce Campus 6:30-9:30 p.m.</p>
<p><b>Week 8: <u>CPA Family Matters</u></b>                      This course will discuss topics related to death, divorce, and incapacitation.  <b>Category: Other (Basic)</b></p>	<p><b>Speaker: Pauline Calabrese, Esquire</b></p>
<p>Thursday 6/27 North Campus 6:30-9:30 p.m.</p>	<p>Monday 7/1 Boyce Campus 6:30-9:30 p.m.</p>
<p><b>Week 9: <u>CPA Individual Taxation Under the Tax Cuts and Jobs Act</u></b>                      This course will discuss the Tax Cuts and Jobs Act, 115 P.L. 97, that the Internal Revenue Service has characterized as the most comprehensive change to the tax system in 30 years. Come learn about changes to individual taxation as a result of the Tax Cuts and Jobs Act and receive a refresher on basic individual taxation law.  <b>Category: Tax (Basic)</b></p>	<p><b>Speaker: Kathleen Sheehan, Esquire</b></p>
<p>Thursday 7/11 North Campus 6:30-9:30 p.m.</p>	<p>Monday 7/15 Boyce Campus 6:30-9:30 p.m.</p>
<p><b>Week 10: <u>CPA White Collar Crime</u></b>                      This course will talk in specificity about identity theft including the types of identity theft, how information is stolen, how best to protect both your personal and business' identifying information and what to do once you or your business becomes a victim. Additionally, numerous white collar crime schemes that target the elderly population will be identified.  <b>Category: Accounting &amp; Auditing (Basic)</b></p>	<p><b>Speaker: Jackelyn Weibel, CFE, Detective</b></p>
<p>Thursday 7/18 North Campus 6:30-9:30 p.m.</p>	<p>Monday 7/22 Boyce Campus 6:30-9:30 p.m.</p>
<p><b>Week 11: <u>CPA The Financial Journey of Modern Parenting</u></b>                      This course will discuss the financial considerations for parenting in the 21<sup>st</sup> century. We will cover the details of costs, saving strategies, and other considerations when expanding the family tree. We will also talk about strategies to reduce tax, maximize return, and do this with consistent values.  <b>Category: Accounting &amp; Auditing (Basic)</b></p>	<p><b>Speaker: Brian S. Bohn, CFP®, CPFA</b></p>
<p>Thursday 7/25 North Campus 6:30-9:30 p.m.</p>	<p>Monday 7/29 Boyce Campus 6:30-9:30 p.m.</p>
<p><b>Week 12: <u>CPA Tax Aspects of Separation and Divorce</u></b>                      This course will explore the tax considerations and consequences of equitable distribution, support, and custody under Pennsylvania law.  <b>Category: Tax (Intermediate)</b></p>	<p><b>Speaker: David S. Pollock, Esquire</b></p>
<p>Thursday 8/1 North Campus 6:30-9:30 p.m.</p>	<p>Monday 8/5 Boyce Campus 6:30-9:30 p.m.</p>



**PROFESSIONAL CONTINUING EDUCATION NON-CREDIT REGISTRATION FORM**

**N19SP**

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

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):		

<b>Have you ever served in the Military (circle one)?</b> No – Yes (see below) <b>Are you a dependent of a Veteran (circle one)?</b> No – Yes (see below)	<b>NOTE:</b> If YES to either question, please contact the CCAC Veterans Services Office at 412.237.6503.
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<b>Veteran Benefits:</b> <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.
<b>Place of Permanent Address (check one)</b> <input type="checkbox"/> Allegheny County (1) <input type="checkbox"/> Out-of-State (5) <input type="checkbox"/> Out-of County	<b>Marital Status:</b> <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Divorced <input type="checkbox"/> Separated <input type="checkbox"/> Widowed
	<b>Do you consider yourself to be Hispanic/Latino/Spanish Origin?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No <b>In addition, select one or more of the following racial categories to describe yourself:</b> <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
	<b>Sex:</b> <input type="checkbox"/> Male <input type="checkbox"/> Female

**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)
XGD079-56	N19SP	Public Accountant, Enrolled Agent, and other Tax Practitioner Program		\$339.00

<b>Student Signature (Required for enrollment)</b>	<b>Date</b>
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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  
 SUMMER 2019**



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