

FALL 2021

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 monitored by the instructors throughout each presentation. A summary sheet will be available to be printed by each registered participant when the series is completed.

REGISTRATION INFORMATION: 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.

To Register Online go to our Website: https://shopcommunityed.ccac.edu/Courses/Accountants/CPA_Professional_Ed_Program.aspx

COURSE NUMBERS AND DAYS:

XGD-079-5304 Monday

XGD-079-5305 Wednesday

Monday Evening Zoom Wednesday Evening In-Person at West Hills Center (unless noted in a particular week)

This semester we are trying one class on Zoom and one class in person. Attendance will be monitored on Turbine and certificates will be generated from Turbine upon completion of the program.

COST FOR THE 12 WEEKS - \$349.00 (Regardless of how many presentations you attend).

CLASS INFORMATION:

Week 1: CPA Intermediate Medical Assistance Planning

Speaker: Colin Adair Morgan, Esquire

This course will discuss the broad concepts of Medical Assistance. Will compare pre-planning and crisis planning techniques and will discuss helpful tips for your clients preparing for long term care costs.

Category: Other (Intermediate)

Monday 9/20/21 6:30-9:30 p.m. via Zoom

Week 2: CPA Property Tax in Pennsylvania

Speaker: Michael J. Suley, CRB, CRS, GRI, CPE

This course will explain the administration of the tax assessment system in Pennsylvania.

Category: Tax (Intermediate)

Wednesday 9/29 6:30-9:30 p.m. In-Person - West Hills Center

Week 3: CPA Intro to Hardware

Speaker: Ray Milhem

This course will help you understand all the main elements of Hardware (e.g.: Boards, CPU, GPU, HDD, Interfaces, etc...), It will also help you understand how Hardware is helping CPA's and all Professionals to manage, track, organize, calculate, and secure your Data (along with Software). This applies to Hardware in Mobile phones, Printers, PC's, Laptops, IoT, Servers on prem- (Data Center) and on the Cloud.

Category: Accounting & Auditing (Basic)

Monday 10/4 6:30-9:30 p.m. via Zoom

Wednesday 10/6 6:30-9:30 p.m. In-Person - West Hills Center

Week 4: CPA Making Sense of Medicare - Understanding the Medicare System

Speaker: William McKendree, J.D.

This presentation is an overview of the Medicare system and how it can be used effectively to obtain affordable quality health services.

Category: Other (Basic)

Monday 10/11 6:30-9:30 p.m. via Zoom

Wednesday 10/13 6:30-9:30 p.m. In-Person - West Hills Center

Week 5: CPASimple, Complex or Grantor Trusts - What's the Difference?

Speaker: Barry K. Gerber, Attorney at Law, CPA

This course will compare and contrast the basics of various trust income taxation categories applicable to commonly encountered trusts including simple, complex, grantor trusts. PA inheritance tax applicability will be discussed

Category: Tax (Basic)

Monday 10/18 6:30-9:30 p.m. via Zoom

Wednesday 10/20 6:30-9:30 p.m. In-Person - West Hills Center

Week 6: CPA Estate and Gift Tax Update 3.0

Speaker: John M. Hartzell, Jr., Esquire, CPA

This course will discuss existing tax provisions and current proposals.

Category: Tax (Intermediate)

Wednesday 10/27 6:30-9:30 p.m. In-Person - West Hills Center

Week 7: CPA The Latest from Harrisburg including 2021 DOR Q & A's

Speaker: Barry K. Gerber, Attorney at Law, CPA

This course will update CPA's on the latest "policies and procedures" from the PA Dept of Revenue ("DOR") as well as the tentative DOR responses given to the latest written tax questions posed.

Category: Tax (Basic)

Monday 11/1 6:30-9:30 p.m. via Zoom

Wednesday 11/3 6:30-9:30 p.m. In-Person - West Hills Center

Week 8: CPA Intro to Software

Speaker: Ray Milhem

This course will help you understand all the main elements of Software from OS (Operating System) to Apps (Applications) on PC's, Laptops, cell phones and Servers. It will also help you understand how software is helping CPA's and all Professionals to manage, track, organize, calculate, and secure your Data. This applies to Software on Servers on-prem (Data Center) and on the Cloud.

Category: Accounting & Auditing (Basic)

Monday 11/8 6:30-9:30 p.m. via Zoom

Wednesday 11/10 6:30-9:30 p.m. In-Person - West Hills Center

Week 9: CPA Overview of Fraud Complaints

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)

Monday 11/15 6:30-9:30 p.m. via Zoom

Wednesday 11/17 6:30-9:30 p.m. In-Person - West Hills Center

Week 10: CPA Intermediate Veteran Affairs Planning

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)

Monday 11/29 6:30-9:30 p.m. via Zoom

Week 11: CPA Wealth: Making the Complicated Simple

Speaker: Brian S. Bohn, CFP®, CFPA

This course will take the confusion and mystery out of wealth planning by teaching a process of success. We will discuss specific circumstances that may arise in one's life and eliminate the anxiety that might create. Questions regarding market volatility, gifting, and health care planning will be answered and simplified.

Category: Accounting & Auditing (Intermediate)

Monday 12/6 6:30-9:30 p.m. via Zoom

Wednesday 12/8 6:30-9:30 p.m. In-Person - West Hills Center

Week 12: CPA Valuing a Business/Determining Sales Price

Speaker: Todd B. Fortier, CPA, M.B.A.

This course will be an awareness session of common metrics in determining the "value" of a business as part of the fundraising process & determining the selling price for a business. Additionally, strategies for maximizing the value of a business prior to sale or valuation will be provided and discussed.

Category: Accounting & Auditing (Basic)

Monday 12/13 6:30-9:30 p.m. via Zoom

Wednesday 12/15 6:30-9:30 p.m. In-Person - West Hills Center

PROFESSIONAL CONTINUING EDUCATION NON-CREDIT REGISTRATION FORM

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

N21FA

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)
 Are you a dependent of a Veteran (circle one)? No – Yes (see below)

NOTE: If YES to either question, please contact the CCAC Veterans Services Office at 412.237.6503.

Veteran Benefits:
 35 Dependent Chapter 33 Post 9/11 Gi Bill Veteran not using benefits

This voluntary information is compiled by the college for statistical purposes only and no personally identifiable information will be released.

Place of Permanent Address (check one)
 Allegheny County (1)
 Out-of-State (5)
 Out-of County

Marital Status:
 Single Married Divorced Separated Widowed
Sex:
 Male Female

Do you consider yourself to be Hispanic/Latino/Spanish Origin?
 Yes No

In addition, select one or more of the following racial categories to describe yourself:
 American Indian/Alaskan Asian
 Black or African American White or Caucasian
 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 Day	Cost (if applicable)
XGD079-53	N21FA	Public Accountant, Enrolled Agent, and other Tax Practitioner Program		\$349.00

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 2021



Workforce
 Development

PUBLIC ACCOUNTANT, ENROLLED AGENT, AND OTHER TAX PRACTITIONER PROGRAM

PROFESSIONAL CONTINUING EDUCATION PROGRAM

Phone: 412.788.7383 or 412-788-7534

Registration Phone: 412.788.7546