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2016 CPE
CATALOG

live seminars | conferences | clusters | 24/7 on demand | online learning

We help you meet your professional development needs.

TSCPA offers an outstanding collection of CPE programming designed to sharpen your skills, keep you informed of the latest developments and enhance your career.

With a huge selection of programs each year, TSCPA provides high-quality CPE in a variety of formats to fit your needs, preferences and budget.

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Subject Codes

The Tennessee State Board of Accountancy has adopted the following subject codes to use when reporting CPE:

- A = Accounting & Auditing
- E = Ethics: General
- S = Ethics: State-Specific
- M = Management Advisory Services
(including financial advising)
- O = Other (non-technical)
- T = Tax

All programs qualify for CPE credit required under TCA 62-1-107.

Contact Us

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Facts to Know

Registration Fees

Registration fees for one (1), two (2) or three (3) day programs include course materials, boxed lunch daily and beverages. Broadcast courses and four-hour courses (including four-hour courses at Knoxville, Memphis and Nashville Account-Fest and Appalachian and Chattanooga Cluster events) will not provide lunch.

TSCPA Member Discount: You may qualify to receive the TSCPA member discount fee if you are a member in good standing. (NOTE: TSCPA membership is on an individual basis only, not by firm/company.)

Early Bird Registration Discount: An early bird registration discount is available to members and non-members who register with payment two weeks or more before the program date.

AICPA Member Discount: AICPA members will receive a \$30 discount per 8 hours of content off the price of designated 8-hour and 16-hour AICPA events where applicable. This discount is available until the date of the event and cannot be applied retroactively. Designated AICPA events will be

identified in all marketing pieces. Members of the AICPA who are not members of the state society are NOT entitled to the TSCPA member discount. AICPA courses are identified by a ★ symbol in the following pages.

Time Zone: All courses are listed in the time zone of the course location on the TSCPA website.

Sponsor Number

TSCPA has obtained Tennessee Exempt Organization (TEO) status with the Tennessee State Board of Accountancy.

TSCPA's sponsor number is TEO 001.

Facilities Note

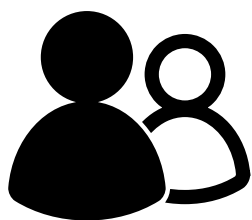
The facility names listed in this guide have been shortened or substituted by an acronym due to space constrictions. The full names are listed on our website and can be viewed when registering online at www.tscpa.com.

Instructor Note

The instructor names listed in the guide for each course may change due to unforeseen circumstances.

A Variety of CPE to Meet YOUR Needs!

We understand there are a lot of CPE options out there. That's why we've expanded our learning platform to encompass the latest technology with the best instructors. TSCPA is offering CPE the way you want it, when you want it, where you want it!



Face-to-Face

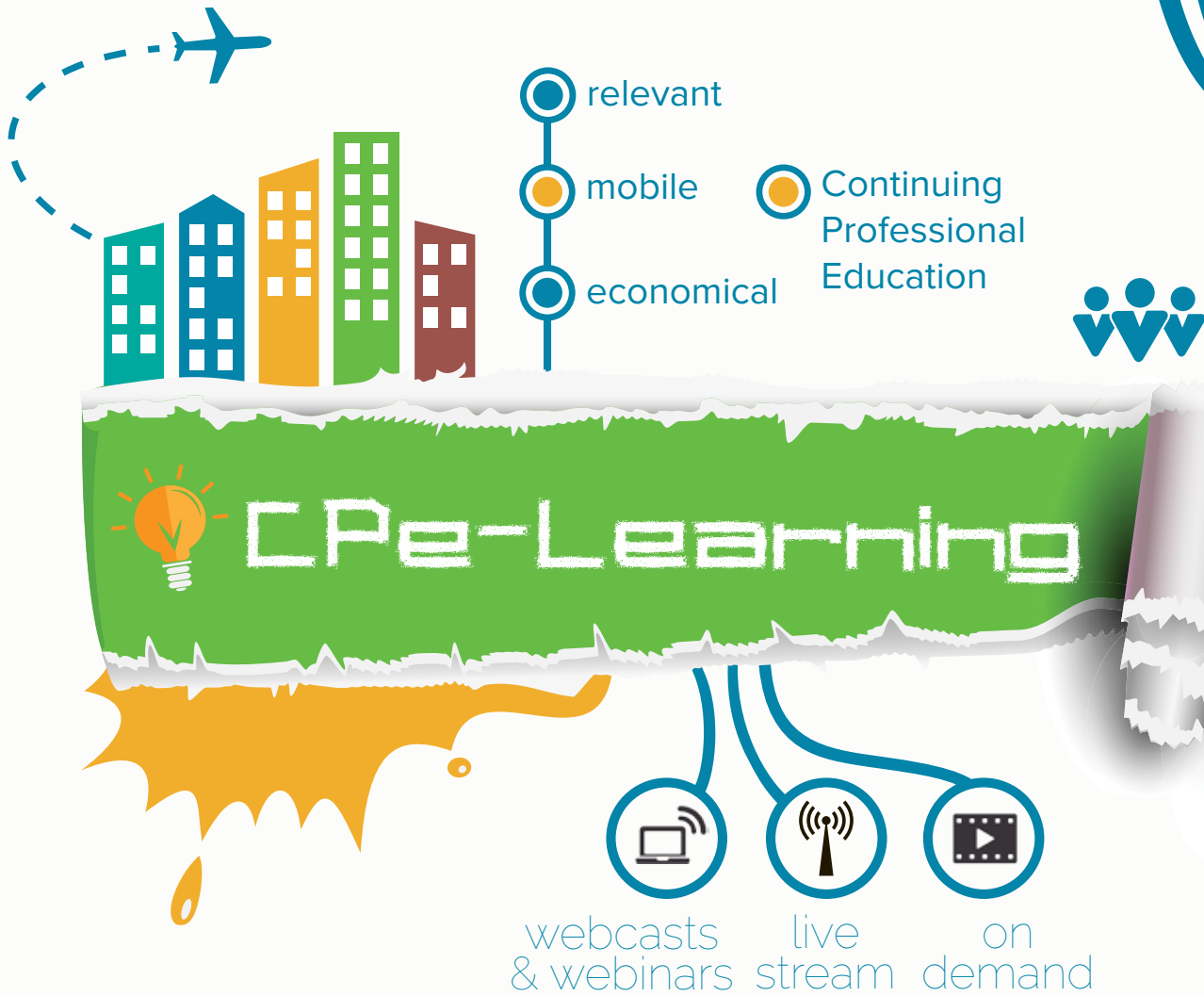
- Seminars
- Conferences
- Clusters
- On-Site Training



Online

- Webcasts
- Webcast Replays
- Webinars
- On Demand
- Live Stream

TSCPA Online Learning



For the busy CPA, online learning provides an excellent alternative to traditional classroom seminars. Online learning offers the opportunity to earn CPE credit at your convenience in a variety of different formats.



Date	Event Code	Event Title	Key Code	CPE Hrs	Subject Code	Facility	Member Early Bird Fee	Page Number
CONFERENCES								
5/16	601	Controllers Conference	C	8	GE/M	Embassy Suites Cool Springs	\$330	14
6/6-7	602	Governmental & Not-for-Profit Conference	C	16	A/M/SE	Embassy Suites Cool Springs	\$415	14
9/20	619	Women's Career Summit		8	M	The Factory at Franklin	\$330	14
9/26	606	Financial Institutions Conference		8	A/M	Tennessee Bankers Association	\$330	14
10/24-26	610	Southeastern Forensic & Valuation Services Conference	C	20	A	TSCPA	\$475	14
10/28	612	Personal Financial Planning Conference	C	8	T	TSCPA	\$330	14
11/7	620	NEW! Cyber Security Conference	C	8	M	TSCPA	\$330	15
11/14-15	614	Accounting & Auditing Symposium	C	16	A	Embassy Suites Cool Springs	\$430	15
11/16	615WED	Tennessee Federal Tax Conference - Wednesday Only	C	7	E/S/T	Cool Springs Marriott	\$295	15
11/16-18	615	Tennessee Federal Tax Conference	C	24	E/M/S/T	Cool Springs Marriott	\$525	15
11/28-29	616	Health Care Conference		16	M/O/S	Cool Springs Marriott	\$450	15
12/1-2	617	Technology Conference		16	O	Embassy Suites Cool Springs	\$495	15
LIVE STREAM								
7/15	805	Audits of 401(k) Plans	★	8	A	Live Stream	\$295	20
8/23	806	Financial Forecasting and Decision Making	★	8	A	Live Stream	\$295	24
8/26	822	Excel PivotTables for Accountants		8	O	Live Stream	\$295	34
9/28	807	NEW! FASB's "Big 3" - Revenue Recognition, Leases and Financial Instruments		8	A	Live Stream	\$295	24
10/10	808	Internal Controls and Risk Assessment: Key Factors in a Successful Audit	★	8	A	Live Stream	\$295	27
10/12	809	Annual Update for Accountants and Auditors	★	8	A	Live Stream	\$295	19
11/1	810	Multistate Tax Update	C	8	T	Live Stream	\$295	42
11/8	811	Special Purpose Frameworks: Preparing and Reporting on Cash, Modified Cash and Tax Basis Financial Statements		8	A	Live Stream	\$295	30
11/10	812	Social Security, Medicare and Prescription Drug Retirement Benefits: What Every Baby Boomer Needs to Know Now	C F	8	T	Live Stream	\$295	43
12/12	813	NEW! Fiduciary Income Tax Returns - Form 1041 Workshop with Filled-in Forms	C F	8	T	Live Stream	\$295	39
12/13	814	Multigenerational Financial and Tax Planning for Clients	C F	8	T	Live Stream	\$295	42
12/19	815	NEW! Accounting and Reporting Update for Tax Practitioners		8	A	Live Stream	\$295	16
12/20	816	NEW! The Casual Tax Preparer: 1040 Forms Update for 2016	C	8	T	Live Stream	\$295	44
WEBCAST REPLAYS								
9/8	818	Standards for Tennessee CPAs - State Specific Ethics		2	SE	Online	\$55	35
10/19	819	Standards for Tennessee CPAs - State Specific Ethics		2	SE	Online	\$55	35
11/10	820	Standards for Tennessee CPAs - State Specific Ethics		2	SE	Online	\$55	35
12/8	821	Standards for Tennessee CPAs - State Specific Ethics		2	SE	Online	\$55	35
12/15	817	2016 Federal Tax Update with Walter Nunnallee	C	8	T	Online	\$295	36
APPALACHIAN CLUSTER								
11/17 a.m.	220	NEW! Advanced Concepts in SSARS 21 and Nonattest Services		4	A	MeadowView Marriott CC	\$169	18
11/17 a.m.	218	NEW! Preparing Special Purpose Framework Financial Statements: Cash, Modified Cash and Tax Basis		4	A	MeadowView Marriott CC	\$169	28

SCHEDULE at a GLANCE

Date	Event Code	Event Title	Key Code	CPE Hrs	Subject Code	Facility	Member Early Bird Fee	Page Number
11/17 p.m.	221	NEW! Financial Statement Disclosures: A Guide for Small and Medium-Sized Businesses	📍	4	A	MeadowView Marriott CC	\$169	24
11/17 p.m.	219	NEW! The Statement of Cash Flows: Preparation Guidance and Presentation Illustrations	📍	4	A	MeadowView Marriott CC	\$169	31
11/18 a.m.	228	NEW! Fraud Basics: Protecting the Company Till	📍	4	A	MeadowView Marriott CC	\$169	25
11/18 a.m.	226	NEW! Key Partnership and S Corporation Tax Planning Strategies	C 📍	4	T	MeadowView Marriott CC	\$169	41
11/18 p.m.	229	NEW! Proven Controls to Steer You Clear of Fraud	📍	4	A	MeadowView Marriott CC	\$169	28
11/18 p.m.	227	NEW! Select Estate and Life Planning Issues for the Middle-Income Client	C F 📍	4	T	MeadowView Marriott CC	\$169	43
CHATTANOOGA CLUSTER								
9/19 a.m.	124	Annual FASB Update and Review	📍	4	A	Chattanooga Marriott	\$169	19
9/19 a.m.	126	NEW! Critical New COSO Internal Control Framework Concepts	📍	4	A	Chattanooga Marriott	\$169	22
9/19 a.m.	128	NEW! Individual Income Tax Return Mistakes and How to Fix Them	C 📍	4	T	Chattanooga Marriott	\$169	41
9/19 p.m.	125	Guide and Update to Compilations, Reviews and New Preparations	📍	4	A	Chattanooga Marriott	\$169	26
9/19 p.m.	129	NEW! Key Partnership and S Corporation Tax Planning Strategies	C 📍	4	T	Chattanooga Marriott	\$169	41
9/19 p.m.	127	NEW! Preparing Special Purpose Framework Financial Statements: Cash, Modified Cash and Tax Basis	📍	4	A	Chattanooga Marriott	\$169	28
9/20 a.m.	130	NEW! Advanced Concepts in SSARS 21 and Nonattest Services	📍	4	A	Chattanooga Marriott	\$169	18
9/20 a.m.	132	NEW! Innovative Forecasting and Budgeting: Moving Beyond the Traditional Techniques	📍	4	A	Chattanooga Marriott	\$169	26
9/20 a.m.	134	NEW! Essential Depreciation Update for Practitioners	C 📍	4	T	Chattanooga Marriott	\$169	39
9/20 p.m.	131	Current Issues in Accounting and Auditing: An Annual Update	📍	4	A	Chattanooga Marriott	\$169	22
9/20 p.m.	133	NEW! Thriving in a Chaotic Economic Environment: Planning and Strategy Formulation for Your Organization	📍	4	A	Chattanooga Marriott	\$169	31
9/20 p.m.	135	NEW! Guide to Understanding the Passive Activity Rules in 2016	C F 📍	4	T	Chattanooga Marriott	\$169	40
9/21 a.m.	138	NEW! Financial Statement Disclosures: A Guide for Small and Medium-Sized Businesses	📍	4	A	Chattanooga Marriott	\$169	24
9/21 a.m.	140	NEW! Fraud Basics: Protecting the Company Till	📍	4	A	Chattanooga Marriott	\$169	25
9/21 p.m.	139	The Statement of Cash Flows: Preparation Guidance and Presentation Illustrations	📍	4	A	Chattanooga Marriott	\$169	31
9/21 p.m.	141	NEW! Proven Controls to Steer You Clear of Fraud	📍	4	A	Chattanooga Marriott	\$169	28
CHATTANOOGA AREA								
6/17	101	Audits of 401(k) Plans	★ 📍	8	A	Chattanooga Marriott	\$295	20
8/24	118	NEW! Financial Statement Analysis: Basis for Management Advice	★ 📍	8	A	Chattanooga Marriott	\$295	24
9/22	143	NEW! Employment Law Update: Key Risks and Recent Trends	★ C 📍	8	M	Chattanooga Marriott	\$295	32
11/29	242	2016 Federal Tax Update with Walter Nunnallee	C	8	T	Chattanooga Convention Center	\$295	36
12/1	247	NEW! Internal Controls and Risk Assessment: Key Factors in a Successful Audit	★ 📍	8	A	Chattanooga Marriott	\$295	27
12/2	250	NEW! Forensic Accounting: Fraudulent Reporting and Concealed Assets	★ 📍	8	A	Chattanooga Marriott	\$295	25
12/5	255	Annual Update for Preparation, Compilation and Review Engagements	★ 📍	8	A	Chattanooga Marriott	\$295	19
12/5	254	NEW! Determining How Much Money You Need to Retire, and Tax Ideas and Money Management in Retirement	F 📍	8	M/T	Chattanooga Marriott	\$295	32, 39
12/6	258	NEW! The Casual Tax Preparer: 1040 Forms Update for 2016	C 📍	8	T	Chattanooga Marriott	\$295	44

Date	Event Code	Event Title	Key Code	CPE Hrs	Subject Code	Facility	Member Early Bird Fee	Page Number
12/7	263	NEW! Individual and Financial-Planning Tax Camp	C F 📍	8	T	Chattanooga Marriott	\$295	41
12/12	274	NEW! FASB's "Big 3" - Revenue Recognition, Leases and Financial Instruments	📍	8	A	Chattanooga Marriott	\$295	24
12/13	279	NEW! Sweeping Your Workpapers for Landmines: Avoiding Deficient Audits	📍	8	A	Chattanooga Marriott	\$295	30
12/15	300	Recognizing and Responding to Fraud Risk in Governmental and Not-for-Profit Organizations	Y ★ 📍	8	A	Chattanooga Marriott	\$295	29
12/16	311	NEW! Top Governmental and Not-for-Profit Accounting and Auditing Issues Facing CPAs	Y ★ 📍	8	A	Chattanooga Marriott	\$295	31
12/20	324	Annual Update for Accountants and Auditors	★ 📍	8	A	Chattanooga Marriott	\$295	19
COOKEVILLE AREA								
12/5	256	Annual Accounting and Auditing Attestation Update	📍	8	A	Tennessee Tech	\$295	18
12/6	259	Compilations, Reviews and New Preparations: Engagement Performance and Annual Update	📍	8	A	Tennessee Tech	\$295	22
JACKSON AREA								
12/5	257	NEW! Corporate Tax Workshop: Get Ready for Busy Season	C ★ 📍	8	T	Courtyard Marriott Jackson	\$295	38
12/6	260	NEW! Cut Your Client's Tax Bill: Individual Tax Planning Tips and Strategies	C ★ 📍	8	T	Courtyard Marriott Jackson	\$295	38
12/8	267	Annual Accounting and Auditing Attestation Update	📍	8	A	Courtyard Marriott Jackson	\$295	18
12/9	270	Compilations, Reviews and New Preparations: Engagement Performance and Annual Update	📍	8	A	Courtyard Marriott Jackson	\$295	22
KNOXVILLE AREA								
6/23	103	NEW! Audits of 401(k) Plans	★ 📍	8	A	Embassy Suites Knoxville	\$295	20
10/24	166	NEW! Corporate Tax Workshop: Get Ready for Busy Season	★ C 📍	8	T	Embassy Suites Knoxville	\$295	38
10/25	171	NEW! Form 990: Exploring the Form's Complex Schedules	★ C 📍	8	T	Embassy Suites Knoxville	\$295	40
11/7	197	NEW! From Hiring to Firing and Everything in Between: Legal, Tax and Health Care Issues	C 📍	8	M/T	Embassy Suites Knoxville	\$295	32, 40
11/8	199	NEW! IRA Boot Camp	C F 📍	8	T	Embassy Suites Knoxville	\$295	41
11/17	222	NEW! Individual and Financial-Planning Tax Camp	C F 📍	8	T	Embassy Suites Knoxville	\$295	41
11/28	240	2016 Federal Tax Update with Walter Nunnallee	C	8	T	Knoxville Marriott	\$295	36
11/29	243	Annual Update for Preparation, Compilation and Review Engagements	★ 📍	8	A	Embassy Suites Knoxville	\$295	19
12/7	264	NEW! FASB's "Big 3" - Revenue Recognition, Leases and Financial Instruments	📍	8	A	Embassy Suites Knoxville	\$295	24
12/8	268	Annual Update for Accountants and Auditors	★ 📍	8	A	Embassy Suites Knoxville	\$295	19
12/12	275	NEW! Critical Tax Issues and Planning for Accounting Periods, Methods, Related Party Transactions and Form 3115	C 📍	8	T	Embassy Suites Knoxville	\$295	38
12/13	280	NEW! Multigenerational Financial and Tax Planning for Clients	C F 📍	8	T	Embassy Suites Knoxville	\$295	42
12/14	288	NEW! Common Frauds and Internal Controls for Revenue, Purchasing and Cash Receipts	★ 📍	8	A	Embassy Suites Knoxville	\$295	21
12/15	301	NEW! Internal Controls and Risk Assessment: Key Factors in a Successful Audit	★ 📍	8	A	Embassy Suites Knoxville	\$295	27

SCHEDULE at a GLANCE

Date	Event Code	Event Title	Key Code	CPE Hrs	Subject Code	Facility	Member Early Bird Fee	Page Number
KNOXVILLE ACCOUNT-FEST								
12/19 a.m.	313	NEW! Annual FASB Update and Review		4	A	Embassy Suites Knoxville	\$169	19
12/19 a.m.	315	NEW! Advanced Concepts in SSARS 21 and Nonattest Services		4	A	Embassy Suites Knoxville	\$169	18
12/19 p.m.	314	NEW! Latest Developments in Government and Non-Profit Auditing 2016	Y	4	A	Embassy Suites Knoxville	\$169	28
12/19 p.m.	316	NEW! Financial Statement Disclosures: A Guide for Small and Medium-Sized Businesses		4	A	Embassy Suites Knoxville	\$169	24
12/20 a.m.	320	NEW! A Guide to the New Revenue Recognition Model for All CPAs		4	A	Embassy Suites Knoxville	\$169	16
12/20 a.m.	322	NEW! Fraud Basics: Protecting the Company Till		4	A	Embassy Suites Knoxville	\$169	25
12/20 p.m.	321	NEW! The Auditor's Responsibilities Related to Fraud and Abuse Under GAAS and the Yellow Book	Y	4	A	Embassy Suites Knoxville	\$169	30
12/20 p.m.	323	NEW! Proven Controls to Steer You Clear of Fraud		4	A	Embassy Suites Knoxville	\$169	28
MEMPHIS AREA								
5/18	100	Broadcast: LLCs & Partnerships Update		8	T	Memphis Light, Gas & Water Division	\$245	37
6/22	102	Broadcast: Not-for-Profit Accounting, Auditing and Tax Update	Y	8	A/T	Memphis Light, Gas & Water Division	\$245	21, 37
7/14	106	Audits of 401(k) Plans	★	8	A	Fogelman Executive Center	\$295	20
7/27	108	Broadcast: Governmental Accounting and Auditing Update	Y	8	A	Memphis Light, Gas & Water Division	\$245	21
8/15	109	NEW! Nexus Update: Latest Developments in State Income, Franchise and Sales Taxes	C ★	8	T	Fogelman Executive Center	\$295	42
8/16	111	Advanced Mergers, Acquisitions and Sales of Closely Held Businesses	C ★	8	T	Fogelman Executive Center	\$295	36
8/16	110	Broadcast: Financial Statement Preparation, Compilation and Review Update		8	A	Memphis Light, Gas & Water Division	\$245	21
9/1	121	NEW! Form 990: Exploring the Form's Complex Schedules	C ★	8	T	Fogelman Executive Center	\$295	40
9/21	137	Broadcast: 2016 Business Fraud Update		8	A	Memphis Light, Gas & Water Division	\$245	20
10/17	158	NEW! Audits of Banks and Other Financial Institutions	★	8	A	Fogelman Executive Center	\$295	20
10/18	159	NEW! Public Company Update: SEC, PCAOB and Other Developments	★	8	A	Fogelman Executive Center	\$295	29
10/19	160	Broadcast: Accounting and Auditing Update		8	A	Memphis Light, Gas & Water Division	\$245	20
11/7	198	NEW! Critical Tax Issues and Planning for Accounting Periods, Methods, Related Party Transactions and Form 3115	C	8	T	Fogelman Executive Center	\$295	38
11/8	200	Comprehensive Guide To Tax Depreciation, Amortization and Property Transactions From Acquisition To Exchange Or Disposition	C	8	T	Fogelman Executive Center	\$295	38
11/9	203	NEW! Individual and Financial-Planning Tax Camp	C F	8	T	Fogelman Executive Center	\$295	41
11/10	206	Annual Update for Accountants and Auditors	★	8	A	Fogelman Executive Center	\$295	19
11/11	209	Annual Update for Preparation, Compilation and Review Engagements	★	8	A	Fogelman Executive Center	\$295	19

Date	Event Code	Event Title	Key Code	CPE Hrs	Subject Code	Facility	Member Early Bird Fee	Page Number
11/14	212	2016 Federal Tax Update with Walter Nunnallee	C	8	T	Holiday Inn Memphis-University of Memphis	\$295	36
11/15	214	NEW! Single Audit Testing and Documentation Under the Unified Circular	Y	8	A	Fogelman Executive Center	\$295	30
11/16	215	NEW! Broadcast: Tax Planning for Real Estate	Ⓜ	8	T	Memphis Light, Gas & Water Division	\$245	37
11/16	216	NEW! Governmental and Not-for-Profit Accounting and Auditing Update	Y	8	A	Fogelman Executive Center	\$295	26
11/17	223	NEW! IT Risks and Controls in Current and Emerging Environments	★ 📍	8	A	Fogelman Executive Center	\$295	27
11/18	230	Internal Control and COSO Essentials for Financial Managers, Accountants and Auditors	★ 📍	8	A	Fogelman Executive Center	\$295	27
11/21	233	NEW! Employment Law Update: Key Risks and Recent Trends	C ★ 📍	8	M	Fogelman Executive Center	\$295	32
12/1	248	NEW! Estate and Life Planning Issues for the Middle-Income Client	C F 📍	8	T	Fogelman Executive Center	\$295	39
12/2	251	Social Security, Medicare and Prescription Drug Retirement Benefits: What Every Baby Boomer Needs to Know Now	C F 📍	8	T	Fogelman Executive Center	\$295	43
12/7	262	Broadcast: Annual Tax Update	C Ⓜ	8	T	Memphis Light, Gas & Water Division	\$245	37
12/7	265	NEW! Form 1041: Income Taxation of Estates and Trusts	C ★ 📍	8	T	Fogelman Executive Center	\$295	40
12/8	269	NEW! FASB's "Big 3" - Revenue Recognition, Leases and Financial Instruments	📍	8	A	Fogelman Executive Center	\$295	24
12/9	271	NEW! Sweeping Your Workpapers for Landmines: Avoiding Deficient Audits	📍	8	A	Fogelman Executive Center	\$295	30
12/12	276	NEW! The Eight Hour MBA: Key Concepts of Business Strategy	C 📍	8	M	Fogelman Executive Center	\$295	33
12/13	281	NEW! The Eight Hour MBA: Key Concepts of Performance Management	📍	8	M	Fogelman Executive Center	\$295	33
12/15	302	NEW! Determining How Much Money You Need to Retire, and Tax Ideas and Money Management in Retirement	F 📍	8	M/T	Fogelman Executive Center	\$295	32, 39
12/16	312	NEW! IRA Boot Camp	C F 📍	8	T	Fogelman Executive Center	\$295	41
12/19	317	Detecting and Preventing Fraud and Abuse in Government and Non-Profits 2016 Update	Y	8	A	Fogelman Executive Center	\$295	23
12/20	325	NEW! Fraud: 2016 Alert for Small and Midsize Entities	Y 📍	8	A	Fogelman Executive Center	\$295	25
1/11/17	331	Broadcast: Small Business Entity Tax Forms Workshop	Ⓜ	8	T	Memphis Light, Gas & Water Division	\$245	37
MEMPHIS ACCOUNT-FEST								
12/14 a.m.	284	Federal Tax Update	C F 📍	4	T	Fogelman Executive Center	\$169	39
12/14 a.m.	286	NEW! Current Issues in Accounting and Auditing: An Annual Update	📍	4	A	Fogelman Executive Center	\$169	22
12/14 p.m.	285	NEW! K-1 Boot Camp for LLCs	C 📍	4	T	Fogelman Executive Center	\$169	41
12/14 p.m.	287	NEW! Proven Controls to Steer You Clear of Fraud	📍	4	A	Fogelman Executive Center	\$169	28
NASHVILLE AREA								
6/29	104	NEW! 2016 Current Practice Issues and Update for Audits of Employee Benefit Plans	📍	8	A	TSCPA	\$295	16
6/29-30	339	NEW! Advanced Auditing for Defined Contribution Retirement Plans	C 📍	16	A	TSCPA	\$1,345	16
6/30	105	NEW! Risk-Based Audit Standards: Effective Utilization	Y 📍	8	A	TSCPA	\$295	29

SCHEDULE at a GLANCE

Date	Event Code	Event Title	Key Code	CPE Hrs	Subject Code	Facility	Member Early Bird Fee	Page Number
7/15	107	Audits of 401(k) Plans	★ 📺 📺	8	A	TSCPA	\$295	20
8/1-2	341	NEW! Advanced Auditing for Health and Welfare Benefit Plans	C 📺	16	A	TSCPA	\$1,345	16
8/17	112	NEW! The Eight Hour MBA: Key Concepts of Business Strategy	C 📺	8	M	TSCPA	\$295	33
8/18	113	NEW! The Eight Hour MBA: Key Concepts of Performance Management	📺	8	M	TSCPA	\$295	33
8/22	338	Annual Update for Controllers	★ 📺	8	A	TSCPA	\$295	19
8/23	116	Financial Forecasting and Decision Making	★ 📺 📺	8	A	TSCPA	\$295	24
8/24	117	Excel Tips, Tricks and Techniques for Accountants	📺	8	O	TSCPA	\$295	34
8/25 a.m.	114	NEW! Tech Tools and Gadgets for a More Efficient You!	📺	4	O	TSCPA	\$169	34
8/25 p.m.	115	NEW! Technology Update	📺	4	O	TSCPA	\$169	35
8/25-26	340	NEW! Advanced Auditing for Defined Benefit Pension Plans	C 📺	16	A	TSCPA	\$1,345	16
8/26	119	Excel PivotTables for Accountants	📺 📺	8	O	TSCPA	\$295	34
8/30	120	NEW! Form 990: Exploring the Form's Complex Schedules	C ★ 📺	8	T	TSCPA	\$295	40
9/12	122	FASB: Common U.S. GAAP Issues Facing CPAs	★ 📺	8	A	TSCPA	\$295	23
9/13	123	NEW! Public Company Update: SEC, PCAOB and Other Developments	★ 📺	8	A	TSCPA	\$295	29
9/20	136	Current Developments and Best Practices for Today's CFOs and Controllers	📺	8	A	TSCPA	\$295	22
9/21	142	CFO/Controller's Roadmap to Organization Success with Intergrated Planning Forecasting and Budgeting	📺	8	A	TSCPA	\$295	21
9/23	145	NEW! Employment Law Update: Key Risks and Recent Trends	C ★ 📺	8	M	TSCPA	\$295	32
9/27	146	NEW! Latest Developments in Government and Non-Profit Auditing 2016	📺	8	A	TSCPA	\$295	27
9/28	147	NEW! FASB's "Big 3" - Revenue Recognition, Leases and Financial Instruments	📺 📺	8	A	TSCPA	\$295	24
9/29	148	Forensic Accounting Investigative Practices	★ 📺	8	A	TSCPA	\$295	25
9/30	149	NEW! Real World Fraud in Today's Small to Medium- Sized Entities	★ 📺	8	A	TSCPA	\$295	29
10/3-4	150	Annual Accounting and Auditing Workshop	C ★ 📺	16	A	TSCPA	\$455	18
10/5	332	NEW! Identity Theft: Preventing, Detecting and Investigating	📺	8	A	TSCPA	\$295	26
10/10	151	NEW! Internal Controls and Risk Assessment: Key Factors in a Successful Audit	★ 📺 📺	8	A	TSCPA	\$295	27
10/11	153	Advanced Auditing of HUD-Assisted Projects	★ 📺	8	A	TSCPA	\$295	18
10/11	152	Audit Workpapers: Documenting and Reviewing Field Work	★ 📺	8	A	TSCPA	\$295	19
10/12	154	Annual Update for Accountants and Auditors	★ 📺 📺	8	A	TSCPA	\$295	19
10/13	155	NEW! Key Financial and Economic Issues Facing the Financial Executive	C 📺	8	M	TSCPA	\$295	32
10/14	157	NEW! Essential Strategic CFO and Controller Skills	📺	8	O	TSCPA	\$295	34
10/14	156	Frequent Frauds Found in Governments and Not-for-Profits	★ 📺	8	A	TSCPA	\$295	26
10/28	184	Engagement Essentials: Preparation, Compilation and Review of Financial Statements	★ 📺	8	A	TSCPA	\$295	23
10/31	185	NEW! Analyzing Financial Statements, Including Techniques for Cash Flow Analysis	📺	8	A	TSCPA	\$295	18
10/31	186	The Best S Corporation, Limited Liability and Partnership Update Course	C 📺	8	T	TSCPA	\$295	44
11/1	187	NEW! Deceptive Revenue Recognition and Other Accounting Techniques: Recognizing the Warning Signs	Y 📺	8	A	TSCPA	\$295	23
11/1	188	Multistate Tax Update	C 📺 📺	8	T	TSCPA	\$295	42
11/1	210	Community Banking Update		8	A	TSCPA	\$295	21

Date	Event Code	Event Title	Key Code	CPE Hrs	Subject Code	Facility	Member Early Bird Fee	Page Number
11/2	190	Advanced Excel	👤	8	O	TSCPA	\$295	33
11/2	189	Handbook for Mastering Basis, Distributions and Loss Limitation Issues for S Corporations, LLCs and Partnerships	C 👤	8	T	TSCPA	\$295	40
11/3	193	Buying and Selling a Business: Critical Tax and Structuring Issues	C 👤	8	T	TSCPA	\$295	37
11/3	194	Excel Financial Reporting and Analysis	👤	8	A	TSCPA	\$295	23
11/8	201	Advanced Critical Tax Issues for Limited Liability Companies and Partnerships	C F 👤	8	T	TSCPA	\$295	36
11/8 a.m.	291	NEW! Healthcare Fraud & Abuse Update for Auditors and CFOs	Y	4	A	TSCPA	\$169	26
11/8	202	Special Purpose Frameworks: Preparing and Reporting on Cash, Modified Cash and Tax Basis Financial Statements	👤 📄	8	A	TSCPA	\$295	30
11/9	278	Fraud: 2016 Alert for Small and Midsize Entities	Y 👤	8	A	TSCPA	\$295	25
11/9	204	NEW! K-1 Boot Camp for S Corporations and LLCs	C 👤	8	T	TSCPA	\$295	41
11/9	205	Tackling the New Revenue Recognition Model: A Practical Comparison of Old and New Rules	👤	8	A	TSCPA	\$295	30
11/10	283	Detecting and Preventing Internal Fraud, Theft and Abuse 2016 Update		8	A	TSCPA	\$295	23
11/10	208	From Hiring to Firing and Everything in Between: Legal, Tax and Health Care Issues	C 👤	8	M/T	TSCPA	\$295	32, 40
11/10	207	Social Security, Medicare and Prescription Drug Retirement Benefits: What Every Baby Boomer Needs to Know Now	C F 👤 📄	8	T	TSCPA	\$295	43
11/11	211	NEW! Estate and Life Planning Issues for the Middle-Income Client	C F 👤	8	T	TSCPA	\$295	39
11/14	213	Form 990: Mastering Its Unique Characteristics	C Y ★ 👤	8	T	TSCPA	\$295	40
11/14	335	Revenue Recognition: Mastering the New FASB Requirements	★ 👤	8	A	TSCPA	\$295	29
11/15	336	Leases: Mastering the New FASB Requirements	★ 👤	8	A	TSCPA	\$295	28
11/15 a.m.	333	Social Security and Medicare: Maximizing Retirement Benefits	C 👤	4	T	TSCPA	\$169	43
11/15 p.m.	334	Reviewing Individual Tax Returns: What Are You Missing?	C 👤	4	T	TSCPA	\$169	43
11/16	217	NEW! FASB Update for Small and Medium-Sized Businesses: A Practical Implementation Guide	👤	8	A	TSCPA	\$295	24
11/17	224	Auditing Not-for-Profit Entities: Superior Skills for an Effective and Efficient Audit	Y 👤	8	A	TSCPA	\$295	20
11/17	225	NEW! The Tactical CFO: Make Your Business Processes Work for You		8	A/M	TSCPA	\$295	31, 33
11/18	231	Annual Update for Preparation, Compilation and Review Engagements	★ 👤	8	A	TSCPA	\$295	19
11/18	232	NEW! Metrics Management: Choose and Use Key Performance Indicators	👤	8	A	TSCPA	\$295	28
11/21	234	NEW! Top Governmental and Not-for-Profit Accounting and Auditing Issues Facing CPAs	Y ★ 👤	8	A	TSCPA	\$295	31
11/21	235	NEW! Real Estate: The Many Complexities of GAAP, SSARS and GAAS Compliance	👤	8	A/T	TSCPA	\$295	29, 43
11/21	236	NEW! Streamlined Tax Staff Training - Individual	C 👤	8	T	TSCPA	\$295	44
11/22	237	Audits of HUD-Assisted Projects	Y ★ 👤	8	A	TSCPA	\$295	20
11/22	238	NEW! Interactive Workshop: Engagement Planning and Risk Assessment Activities	👤	8	A	TSCPA	\$295	27
11/22	239	NEW! Streamlined Tax Staff Training - Business	C 👤	8	T	TSCPA	\$295	43
11/28	241	NEW! Payroll Taxes and 1099 Issues: Everything You Need to Know	C ★ 👤	8	T	TSCPA	\$295	42
11/29	337	Applying the Uniform Guidance for Federal Awards in Your Single Audits	Y ★ 👤	8	A	TSCPA	\$295	19

SCHEDULE at a GLANCE

Date	Event Code	Event Title	Key Code	CPE Hrs	Subject Code	Facility	Member Early Bird Fee	Page Number
11/29	244	The Best Income Tax, Estate Tax and Financial Planning Ideas of 2016	C F 📍	8	T	TSCPA	\$295	44
11/30	246	NEW! IRA Boot Camp	C F 📍	8	T	TSCPA	\$295	41
11/30	245	NEW! Performing Effective and Efficient Audit Testing	Y	8	A	TSCPA	\$295	28
12/1	249	NEW! Single Audit Testing and Documentation Under the Unified Circular	Y	8	A	TSCPA	\$295	30
12/2	252	NEW! Critical Tax Issues and Planning for Accounting Periods, Methods, Related Party Transactions and Form 3115	C 📍	8	T	TSCPA	\$295	38
12/2	253	NEW! Understanding and Documenting The Entity and Its Environment including Internal Controls	Y	8	A	TSCPA	\$295	31
12/6	261	NEW! Current Accounting and Attestation Updates for Practitioners with Small-Business Clients	📍	8	A	TSCPA	\$295	22
12/7	266	NEW! Focus on the Mission: Not-for-Profit Accounting and Reporting Today and Tomorrow	Y 📍	8	A	TSCPA	\$295	24
12/9	272	2016 Federal Tax Update with Walter Nunnallee	C	8	T	Cool Springs Marriott	\$295	36
12/9	273	NEW! Interactive Workshop: Performing Substantive Testing and General Audit Procedures	📍	8	A	TSCPA	\$295	27
12/12	277	Fiduciary Income Tax Returns - Form 1041 Workshop with Filled-in Forms	C F 📍 📺	8	T	TSCPA	\$295	39
12/13	282	Multigenerational Financial and Tax Planning for Clients	C F 📍 📺	8	T	TSCPA	\$295	42
12/14	290	Tennessee State Tax Update	C 📍	8	T	TSCPA	\$295	44
12/19	319	NEW! Accounting and Reporting Update for Tax Practitioners	📍 📺	8	A	TSCPA	\$295	16
12/19	318	Effective and Efficient Senior-Level Review of Individual Tax Returns	C 📍	8	T	TSCPA	\$295	39
12/20	327	NEW! Advanced Concepts in SSARS 21 and Nonattest Services: Are You Certain You Are in Compliance?	📍	8	A	TSCPA	\$295	18
12/20	326	NEW! The Casual Tax Preparer: 1040 Forms Update for 2016	C 📍 📺	8	T	TSCPA	\$295	44
12/21	328	NEW! Corporate Tax Workshop: Get Ready for Busy Season	C ★ 📍	8	T	TSCPA	\$295	38
12/28	329	NEW! IT Risks and Controls in Current and Emerging Environments	★ 📍	8	A	TSCPA	\$295	27
12/29	330	Common Frauds and Internal Controls for Revenue, Purchasing and Cash Receipts	★ 📍	8	A	TSCPA	\$295	21

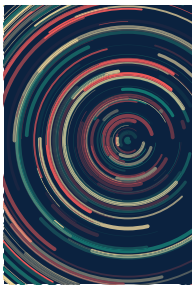
NASHVILLE ACCOUNT-FEST

12/15 a.m.	292	NEW! Annual FASB Update and Review	📍	4	A	Nashville School of Law	\$169	19
12/15 a.m.	294	Individual Income Tax Return Mistakes and How to Fix Them	C 📍	4	T	Nashville School of Law	\$169	41
12/15 a.m.	296	Federal Tax Update	C F 📍	4	T	Nashville School of Law	\$169	39
12/15 a.m.	298	NEW! Financial Statement Disclosures: A Guide for Small and Medium-Sized Businesses	📍	4	A	Nashville School of Law	\$169	24
12/15 p.m.	293	Guide and Update to Compilations, Reviews and New Preparations	📍	4	A	Nashville School of Law	\$169	26
12/15 p.m.	295	NEW! Select Estate and Life Planning Issues for the Middle-Income Client	C F 📍	4	T	Nashville School of Law	\$169	43
12/15 p.m.	297	NEW! K-1 Boot Camp for LLCs	C 📍	4	T	Nashville School of Law	\$169	41
12/15 p.m.	299	NEW! The Statement of Cash Flows: Preparation Guidance and Presentation Illustrations	📍	4	A	Nashville School of Law	\$169	31
12/16 a.m.	303	NEW! Advanced Concepts in SSARS 21 and Nonattest Services	📍	4	A	Nashville School of Law	\$169	18
12/16 a.m.	305	NEW! Mastering Basis Issues for S Corporations, Partnerships and LLCs	C 📍	4	T	Nashville School of Law	\$169	42

Date	Event Code	Event Title	Key Code	CPE Hrs	Subject Code	Facility	Member Early Bird Fee	Page Number
12/16 a.m.	307	NEW! Limited Liability Companies: Losses, Liquidations, Terminations, Continuations and Sales	C ♻️	4	T	Nashville School of Law	\$169	41
12/16 a.m.	309	NEW! Fraud Basics: Protecting the Company Till	♻️	4	A	Nashville School of Law	\$169	25
12/16 p.m.	304	Current Issues in Accounting and Auditing: An Annual Update	♻️	4	A	Nashville School of Law	\$169	22
12/16 p.m.	306	NEW! Guide to Understanding the Passive Activity Rules in 2016	C F ♻️	4	T	Nashville School of Law	\$169	40
12/16 p.m.	308	NEW! S Corporation Taxation: Advanced Issues	C ♻️	4	T	Nashville School of Law	\$169	43
12/16 p.m.	310	NEW! Proven Controls to Steer You Clear of Fraud	♻️	4	A	Nashville School of Law	\$169	28
SMOKY MOUNTAIN CLUSTER								
10/24	165	Compilations, Reviews and New Preparations: Engagement Performance and Annual Update	♻️	8	A	Music Road	\$295	22
10/24	164	NEW! Fraud Update: Detecting and Preventing the Top Ten Fraud Schemes	★ ♻️	8	A	Music Road	\$295	25
10/24	163	NEW! Tax Favored Health Care Plans after the ACA	C	8	T	Music Road	\$295	44
10/24	162	NEW! Working With, Storing and Securing Digital Information		8	O	Music Road	\$295	35
10/25	167	NEW! Advanced Excel Topics for Spreadsheet Power Users		8	O	Music Road	\$295	33
10/25	169	NEW! Common Frauds and Internal Controls for Revenue, Purchasing and Cash Receipts	★ ♻️	8	A	Music Road	\$295	21
10/25	170	NEW! Interactive Workshop: Engagement Planning and Risk Assessment Activities	♻️	8	A	Music Road	\$295	27
10/25	168	NEW! Passive Activities & Rental Real Estate Income Tax Issues	C	8	T	Music Road	\$295	42
10/26	175	Annual Accounting and Attestation Update	♻️	8	A	Music Road	\$295	18
10/26	173	NEW! Excel PivotTables - Powerful and Not Hard to Use		8	O	Music Road	\$295	34
10/26	174	NEW! Federal Tax Individual and Business Current Developments	C	8	T	Music Road	\$295	39
10/26	172	Fraud and Abuse in Not-for-Profit Entities and Governments: Stealing From Everyone	Y ♻️	8	A	Music Road	\$295	25
10/27	177	NEW! Basis Calculations & Distributions for Pass-thru Entity Owners	C	8	T	Music Road	\$295	36
10/27	179	Construction Industry: Accounting and Taxation Issues		8	A/T	Music Road	\$295	22, 38
10/27	178	NEW! Governmental and Not-for-Profit Accounting and Auditing Update	Y	8	A	Music Road	\$295	26
10/27	176	NEW! MBA in a Day!	♻️	8	A/M/O	Music Road	\$295	28, 33, 34
10/28	180	Community Banking Update		8	A	Music Road	\$295	21
10/28	182	NEW! Contributions & Distributions for Traditional, Roth, SEP and Simple IRAs	C	8	T	Music Road	\$295	38
10/28	183	NEW! Performing Effective and Efficient Audit Testing	Y	8	A	Music Road	\$295	28
10/28	181	Special Purpose Frameworks: Preparing and Reporting on Cash, Modified Cash and Tax Basis Financial Statements	♻️	8	A	Music Road	\$295	30
TUNICA CLUSTER								
11/3	191	Compilations, Reviews and New Preparations: Engagement Performance and Annual Update	♻️	8	A	Horseshoe Tunica	\$295	22
11/3	192	The Best Income Tax, Estate Tax and Financial Planning Ideas of 2016	C F ♻️	8	T	Horseshoe Tunica	\$295	44
11/4	196	2016 Annual Tax Planning Guide for S Corporations, Partnerships and LLCs	C ♻️	8	T	Horseshoe Tunica	\$295	36
11/4	195	Annual Accounting and Attestation Update	♻️	8	A	Horseshoe Tunica	\$295	18

Conferences

Controllers Conference



- Challenges for the CFO & Controller in 2016
- Strategic Skills for Finance
- Applying Ethics in the Real World
- Going Lean in 2016
- Strategic & Operational Risk Analysis
- Awesome Financial Presentations
- Smarter Decision-Making

KEY CODE: C

SUBJECT CODE: GE/M

COURSE LEVEL: Update

MEMBER EARLY BIRD FEE: \$330

Date	Facility	CPE Hrs.	Code
5/16	Embassy Suites Cool Springs	8	601

Financial Institutions Conference



- Commissioner's Update
- Regulatory Reform
- A&A Update
- CECL
- Tennessee Bankers Association Update
- Future of Banking Panel
- Economic Outlook

KEY CODE: A

SUBJECT CODE: A/M

COURSE LEVEL: Update

MEMBER EARLY BIRD FEE: \$330

Date	Facility	CPE Hrs.	Code
9/26	Tennessee Bankers Association	8	606

Governmental & Not-for-Profit Conference



- Effective Internal Control: Techniques Evolve in Response to Changing Times
- GASB Update & Note Disclosures
- The Anatomy of a Fraud: It's a People Problem
- FASB Update: What Lies Ahead for NFPs?
- Risks and Dilemmas of Serving Not-for-Profit Organizations
- State and Local Government Materiality Issues
- Grant Accounting & Transparency Including Cost Allocation
- Government Fraud & Abuse: New Cases, New Rules, New Risks and New Controls
- State-Specific Ethics
- A Fraud Anthology

KEY CODE: C

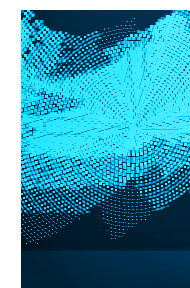
SUBJECT CODE: A/M/S

COURSE LEVEL: Update

MEMBER EARLY BIRD FEE: \$415

Date	Facility	CPE Hrs.	Code
6/6-7	Embassy Suites Cool Springs	16	602

Southeastern Forensic & Valuation Services Conference



- Normalizing & F/S Analysis/Ratios
- Tools & Techniques to Detect Fraud/Data Analytics
- Income Approach/Cost of Capital
- Estate/Divorce Fraud
- Market/Databases
- White Collar Crime/Expert Panel
- Fraud Individual Basics
- Industry Data
- Interviewing
- Assets
- Project Management in Fraud Cases
- Discounts/Premiums
- Exit Planning
- TN/Estate Case Law Update
- Check/Bank Fraud
- Criminal/Civil Cases

KEY CODE: C

MEMBER EARLY BIRD FEE: \$475

COURSE LEVEL: Update

FIRST TIME ATTENDEE EARLY BIRD

SUBJECT CODE: A

FEE: \$375

Date	Facility	CPE Hrs.	Code
10/24-26	TSCPA	20	610

Women's Career Summit



- Your Personal Legend and Manifesto for Leadership
- Leadership Lessons from the story of "Goldilocks and the Three Bears"
- Time and Energy Habits of High Performers
- Today is "Someday!" - Your Future is Waiting
- Executive Presence
- Stop Living Down to Your Excuses and Start Living UP to Your Potential!

KEY CODE: A

SUBJECT CODE: M

COURSE LEVEL: Update

MEMBER EARLY BIRD FEE: \$330

Date	Facility	CPE Hrs.	Code
9/20	The Factory at Franklin	8	619

Personal Financial Planning Conference



- The Top 6 Financial Planning Mistakes Practitioners Make and How to Fix Them
- Estate and Life Planning Issues for the Middle Income Client
- Trans-Generational Financial Planning
- Intro to Mining the Prior Year Return to Identify Tax Planning Opportunities and Develop Your Plan
- Social Security in 2016 and Beyond
- More Ways to Mine the Prior Year Return for Tax Planning Opportunities
- The Best Financial Planning, Income Tax and Estate Tax Ideas of 2016: Ours and Yours

KEY CODE: C

SUBJECT CODE: T

COURSE LEVEL: Update

MEMBER EARLY BIRD FEE: \$330

Date	Facility	CPE Hrs.	Code
10/28	TSCPA	8	612

NEW! Cyber Security Conference



- How NOT to Fail at Cyber Security
- Understanding the Basics of Insurance for "Cyber" Exposures
- Cyber Security Compliance Issues
- Law Isn't Fair, Torts Aren't a Dessert and Liability for Data Breaches Isn't Based on Fault
- You've Been Hacked... Now What?
- Lessons in Innovation from the Criminal Underground and How You Can Protect Yourself and Your Clients from Cyber Warfare
- Cyber Risk: How to Manage, Mitigate and Finance Cyber Liability

KEY CODE: C

SUBJECT CODE: M

COURSE LEVEL: Update

MEMBER EARLY BIRD FEE: \$330

Date	Facility	CPE Hrs.	Code
11/7	TSCPA	8	620

Health Care Conference



- 2016 Election Implications
- Population Health
- MACRA
- A&A Update
- Medicaid Update
- Revenue Recognition
- Tennessee Specific Ethics
- Asset Management
- Cyber Security
- Fraud
- Health Care Technology
- Hospital Technology
- Start-Ups
- Economics of Health Care Reform
- Health Care M&A Panel
- Physician Compensation
- Recent Legal Issues
- Outlook of the Economy

COURSE LEVEL: Update

MEMBER EARLY BIRD FEE: \$450

SUBJECT CODE: M/O/S

Date	Facility	CPE Hrs.	Code
11/28-29	Cool Springs Marriott	16	616

Accounting & Auditing Symposium



- Lease Accounting Standard
- FASB Update
- Getting Ready for 2016 Year End: New ASUs Effective for 12/31/16
- SEC Comment Letter Trends
- Significant FASB Issues All Entities Face
- The Impact of SSARS 21 Implementation
- Audit Quality Matters That Should Be on Your Radar
- Fraud Risk - Critical Trends in Today's Environment
- Third Party Verification: Limiting Your Legal Liability When Getting Requests from Lenders and Others
- FASB's Disclosure Framework Project
- Applying COSO's Enterprise Risk Management Framework to Smaller Entities

KEY CODE: C

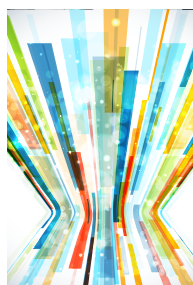
SUBJECT CODE: A

COURSE LEVEL: Update

MEMBER EARLY BIRD FEE: \$430

Date	Facility	CPE Hrs.	Code
11/14-15	Embassy Suites Cool Springs	16	614

Technology Conference



- Tech Update 2016
- A New Day, A New Technology Way
- Securing the Perimeter - A Management View
- CPA Firm Technology Solutions
- Accounting Software Update
- Integrating Excel with Word and PowerPoint
- Should Your Next Computer Even Be a Computer?
- Excel's Top 15 All Time Hints and Tips
- Windows 10 Tips and Tricks
- Adobe Acrobat DC - Big Changes for PDFs
- Profiting with Excel's Best New Features
- Best Technologies for Small Businesses
- QuickBooks Online - Advanced Features and Functions
- Fraud in the Cloud

KEY CODE:

SUBJECT CODE: O

COURSE LEVEL: Update

MEMBER EARLY BIRD FEE: \$495

Date	Facility	CPE Hrs.	Code
12/1-2	Embassy Suites Cool Springs	16	617

Tennessee Federal Tax Conference



- Future of Internal Revenue Service/ Circular 230/IDRs
- Tennessee Ethics for CPAs
- Recent Developments in Estate Planning
- Modern Uses of Partnerships That You Might Not Have Considered
- Venn Diagrams
- Legislative Outlook
- UBI
- R&D: Startup Provisions
- Crowdfunding, SEC Reg. A+ and Other Fundraising Opportunities for Closely Held Businesses
- Partnership Audit Rules
- Recent Developments in Federal Income Taxation
- Choice of Business Entity
- M&A Panel
- Tennessee State & Local Tax Update

KEY CODE: C

EARLY BIRD FEE: \$525

COURSE LEVEL: Update

WED. ONLY EARLY BIRD FEE: \$295

SUBJECT CODE: T/M/E/S

FIRST TIME ATTENDEE

EARLY BIRD FEE: \$425

Date	Facility	CPE Hrs.	Code
11/16	Cool Springs Marriott	7	615WED
11/16-18	Cool Springs Marriott	24	615

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Accounting & Auditing

NEW! 2016 Current Practice Issues and Update for Audits of Employee Benefit Plans

Employee benefit plan audits continue to present a myriad of practice issues and risks that practitioners must address. This advanced course will give you the skills to:

- Identify and address difficult and complex accounting, auditing and financial reporting issues in EBK engagements.
- Stay current on ongoing regulatory initiatives, findings and actions.
- Effectively perform and document required auditing procedures.

PREREQUISITE: Experience in conducting audits of employee benefit plans.

KEY CODE:

VENDOR: Loscalzo Associates

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
6/29	TSCPA	Rebecca Lee	8 A	104

NEW! A Guide to the New Revenue Recognition Model for All CPAs

Designed for accounting and auditing practitioners at all levels in both public accounting and business and industry, this course provides a thorough review of the FASB's comprehensive new revenue recognition guidance found in ASU No. 2014-09, Revenue from Contracts with Customers. The course begins with a quick overview of the new guidance from 30,000 feet, before diving into the details of the FASB's new 5-step revenue recognition model. Additional guidance, presentations and disclosures are then covered before the course wraps up with a brief look at changes already being proposed to the new guidance. Plenty of examples are used to illustrate the practical application of the ins and outs of the new guidance (including journal entries) to help you better understand and apply the complexities of this completely revamped area of accounting.

PREREQUISITE: Experience in accounting and auditing.

KEY CODE:

VENDOR: Surgent McCoy CPE, LLC

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$169

Date	Facility	Instructor	Credit	Code
12/20 a.m.	Embassy Suites Knoxville	Michael Morgan	4 A	320

NEW! Accounting and Reporting Update for Tax Practitioners

Designed for all tax practitioners, this course will replenish your accounting and reporting tank with an update of recent standard setting activities at the PCC, FASB, ASB and ARSC. And since for many tax practitioners, compilation, preparation and review engagements also make up a substantial part of their overall professional practice, this course reviews the authoritative standards and guidance for performing these types of engagements found in SSARS No. 21, Clarification and Recodification. The course utilizes plenty of hands-on examples and illustrations to increase your overall understanding and application of the material.

PREREQUISITE: Experience in accounting and reporting.

KEY CODE:

VENDOR: Surgent McCoy CPE, LLC

COURSE LEVEL: Update

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	CPE	Code
12/19	TSCPA	Gregory Clark	8 A	319
12/19	Live Stream	Gregory Clark	8 A	815

NEW! Advanced Auditing for Defined Benefit Pension Plans

Through a series of hands-on case studies and advanced learning exercises, you will learn and grow your expertise with regard to defined contribution plan audits. This course will have you take part in a mock audit, which will follow a single "client" through each phase of a defined benefit pension plan audit engagement, from planning to reporting.

PREREQUISITE: Prior experience auditing defined benefit pension plans.

KEY CODE: C

VENDOR: AICPA

COURSE LEVEL: Advanced

MEMBER EARLY BIRD FEE: \$1,345

Date	Facility	Instructor	Credit	Code
8/25-26	TSCPA	Ray Nowicki	16 A	340

NEW! Advanced Auditing for Defined Contribution Retirement Plans

Through a series of hands-on case studies and advanced learning exercises, you will learn and grow your expertise with regard to defined contribution plan audits. This course will have you take part in a mock audit, which will follow a single "client" through each phase of a defined contribution plan audit engagement, from planning to reporting.

PREREQUISITE: Prior experience auditing defined contribution retirement plans.

KEY CODE: C

VENDOR: AICPA

COURSE LEVEL: Advanced

MEMBER EARLY BIRD FEE: \$1,345

Date	Facility	Instructor	Credit	Code
6/29-30	TSCPA	Daryl Krause	16 A	339

NEW! Advanced Auditing for Health and Welfare Benefit Plans

The main goal of this course is for advanced participants to learn and grow their skills through a series of hands-on case studies and advanced learning exercises. Participants will take part in a mock audit, which will cover all phases of a defined benefit pension plan audit engagement, from planning to reporting.

PREREQUISITE: Prior experience auditing health and welfare benefit plans.

KEY CODE: C

VENDOR: AICPA

COURSE LEVEL: Advanced

MEMBER EARLY BIRD FEE: \$1,345

Date	Facility	Instructor	Credit	Code
8/1-2	TSCPA	Melissa Critcher	16 A	341

INTRODUCING

EMPLOYEE BENEFIT PLANS AUDIT CERTIFICATES

New Programs to Help You Demonstrate Your Expertise

Competency-based exams that test your skills. Flexible learning options. The AICPA's newest certificate programs sharpen proficiency so you can meet the professional demands associated with employee benefit plan audits and better serve your clients.

- ▶ **Advanced Defined Contribution Plans Audit Certificate**
Course #339 | June 29-30 | Brentwood | \$1,345 (includes exam)
- ▶ **Advanced Health and Welfare Plans Audit Certificate**
Course #341 | Aug. 1-2 | Brentwood | \$1,345 (includes exam)
- ▶ **Advanced Defined Benefit Plans Audit Certificate**
Course #340 | Aug. 25-26 | Brentwood | \$1,345 (includes exam)

To learn more about the Employee Benefit Plans Audit Certificates and Exams, visit the TSCPA website at www.tscpa.com or contact cpe@tscpa.com.

Note: AICPA discount does not apply to these courses.

Advanced Auditing of HUD-Assisted Projects

Gain important insights into compliance pitfalls for HUD-assisted housing owners and managers. Learn to recognize and apply the latest changes in the federally assisted housing industry and efficiently plan, perform and report a HUD-assisted engagement. Uncover the effects of OMB on HUD-assisted not-for-profit entities.

PREREQUISITE: Experience in conducting and/or planning HUD audits.

KEY CODE: C ★  **VENDOR:** AICPA
COURSE LEVEL: Advanced **MEMBER EARLY BIRD FEE:** \$295

Date	Facility	Instructor	Credit	Code
10/11	TSCPA	Lee Klumpp	8 A	153

NEW! Advanced Concepts in SSARS 21 and Nonattest Services

Practitioners who provide non-audit services must strike the right balance between complying with relevant professional and regulatory standards while mitigating litigation and other practice management risks. This course contains many best practices for managing the accounting, reporting and performance issues associated with the attest services of compilations and reviews where reports are issued, as well as the new SSARS 21 preparation of financial statements nonattest service.

PREREQUISITE: Experience with performing non-audit services.

KEY CODE:  **VENDOR:** Surgent McCoy CPE, LLC
COURSE LEVEL: Advanced **MEMBER EARLY BIRD FEE:** \$169

Date	Facility	Instructor	Credit	Code
9/20 a.m.	Chattanooga Marriott	Michael Brand	4 A	130
11/17 a.m.	MeadowView Marriott	William Eskin	4 A	220
12/16 a.m.	Nashville School of Law	Michael Brand	4 A	303
12/19 a.m.	Embassy Suites Knoxville	Robert W. Wells	4 A	315

NEW! Advanced Concepts in SSARS 21 and Nonattest Services: Are You Certain You Are in Compliance?

Practitioners who provide non-audit services must strike the right balance between complying with relevant professional and regulatory standards while mitigating litigation and other practice management risks. This course contains many best practices for managing the accounting, reporting and performance issues associated with the attest services of compilations and reviews where reports are issued, as well as the new SSARS 21 preparation of financial statements nonattest service.

PREREQUISITE: Experience with performing non-audit services.

KEY CODE:  **VENDOR:** Surgent McCoy CPE, LLC
COURSE LEVEL: Advanced **MEMBER EARLY BIRD FEE:** \$295

Date	Facility	Instructor	Credit	Code
12/20	TSCPA	Gregory Clark	8 A	327

NEW! Analyzing Financial Statements, Including Techniques for Cash Flow Analysis

Re-examine traditional analysis techniques to recognize their strengths and limitations when performing financial statement analysis. Take analysis to a new level by incorporating cash flow based measurements. Utilize cases ranging from public companies to small privately helds to assess profitability and management of resources.

PREREQUISITE: None


KEY CODE:  **VENDOR:** Loscalzo Associates
COURSE LEVEL: Basic **MEMBER EARLY BIRD FEE:** \$295

Date	Facility	Instructor	Credit	Code
10/31	TSCPA	Mark Mishler	8 A	185

Annual Accounting and Attestation Update

Designed for accounting and attestation practitioners at all levels in both public accounting and business and industry, this course provides a comprehensive review of recent standard setting activities of the PCC, FASB, ASB and ARSC. Not only will this course bring you up-to-date on the requirements, it also provides you with many hands-on examples and illustrations to help you apply the guidance in practice. You'll learn about the latest standards, exposure drafts and guidance focusing on issues applicable to accountants and attestation practitioners in public accounting and private industry. This course also includes a compilation, preparation and review update specifically covering the new SSARS No. 21, Clarification and Recodification, and recent attestation matters on the radar.

PREREQUISITE: Experience in accounting and attestation.


KEY CODE:  **VENDOR:** Surgent McCoy CPE, LLC
COURSE LEVEL: Update **MEMBER EARLY BIRD FEE:** \$295

Date	Facility	Instructor	CPE Credit	Code
10/26	Music Road	Jennifer Louis	8 A	175
11/4	Horseshoe Tunica	Joann Cross	8 A	195
12/5	Tennessee Tech	Thomas Snell	8 A	256
12/8	Courtyard Marriott Jackson	Robert W. Wells	8 A	267

Annual Accounting and Auditing Workshop

Are your accounting and auditing skills up to date and on par with industry standards? Be sure with this comprehensive, two-day course that updates you on the latest accounting, auditing, compilation and review, and other professional standards. Materials include practical applications of the topics covered to help you understand and apply the standards to real-life scenarios. With the rate of change in today's regulatory environment, you must stay current on all of the topics impacting the profession. Your clients are counting on you!

PREREQUISITE: Auditing and accounting experience.

KEY CODE: ★  **VENDOR:** AICPA
COURSE LEVEL: Update **MEMBER EARLY BIRD FEE:** \$455

Date	Facility	Instructor	Credit	Code
10/3-4	TSCPA	Kurt Oestriecher	16 A	150

NEW! Annual FASB Update and Review

Designed for practitioners and their staff, whether in public accounting or business and industry, this course will provide you with an overview of FASB accounting and reporting developments. You will focus on recently issued Accounting Standards Updates and exposure drafts, analyzing guidance that has a major effect on all industries, including those covering revenue recognition and leases. Special attention is given to standard setters' activities that affect small and medium-sized entities. Examples and illustrations provide hands-on application to help you assess and implement the new standards and guidance applicable to your practice and clients.

PREREQUISITE: Experience in financial accounting and reporting.

KEY CODE: **VENDOR:** Surgent McCoy CPE, LLC
COURSE LEVEL: Intermediate **MEMBER EARLY BIRD FEE:** \$169

Date	Facility	Instructor	Credit	Code
9/19 a.m.	Chattanooga Marriott	Michael Brand	4 A	124
12/15 a.m.	Nashville School of Law	Michael Brand	4 A	292
12/19 a.m.	Embassy Suites Knoxville	Michael Morgan	4 A	313

Annual Update for Accountants and Auditors

Keep abreast of the fast-paced changes in accounting and auditing. This comprehensive course covers relevant pronouncements, exposure drafts and other guidance recently issued in the accounting, auditing, review and compilation arenas. Let us sort through the complexities and help you identify and apply recently issued FASB, PCAOB and ASB standards and guidance. With the rate of change in today's regulatory environment, you must stay current on the topics impacting the profession - don't get left behind!

PREREQUISITE: Previous experience in accounting and auditing.

KEY CODE: **VENDOR:** AICPA
COURSE LEVEL: Update **MEMBER EARLY BIRD FEE:** \$295

Date	Facility	Instructor	Credit	Code
10/12	TSCPA	Lee Klumpp	8 A	154
10/12	Live Stream	Lee Klumpp	8 A	809
11/10	Fogelman	James Myers	8 A	206
12/8	Embassy Suites Knoxville	James Myers	8 A	268
12/20	Chattanooga Marriott	James Myers	8 A	324

Annual Update for Controllers

Strengthen your abilities as a controller and help your management team understand current economic issues through the latest trends in accounting, finance, human resources, treasury management and business systems. In this course you will discuss leading-edge topics in managerial accounting and finance in a session that is packed with useful tips and practical guidance that you can apply immediately.

PREREQUISITE: None

KEY CODE: **VENDOR:** AICPA
COURSE LEVEL: Update **MEMBER EARLY BIRD FEE:** \$295

Date	Facility	Instructor	Credit	Code
8/22	TSCPA	Anthony LaRusso	8 A	338

Annual Update for Preparation, Compilation and Review Engagements

A go-to reference for training staff and managing your preparation, compilation and review engagements, this course will enable you to be in compliance with all of the professional standards surrounding engagements performed in accordance with Statements on Standards for Accounting and Review Services (SSARs). A practice-oriented review of the latest developments and cases, as well as lively discussion among the experienced participants, make this class informative and practical.

PREREQUISITE: Experience with engagements performed in accordance with SSARs.

KEY CODE: **VENDOR:** AICPA
COURSE LEVEL: Update **MEMBER EARLY BIRD FEE:** \$295

Date	Facility	Instructor	CPE Credit	Code
11/11	Fogelman	Robert W. Wells	8 A	209
11/18	TSCPA	Robert W. Wells	8 A	231
11/29	Embassy Suites Knoxville	Robert W. Wells	8 A	243
12/5	Chattanooga Marriott	Robert W. Wells	8 A	255

Applying the Uniform Guidance for Federal Awards in Your Single Audits

Does a single audit have you running in circles? This course provides you with the knowledge to be more efficient and effective at planning and performing audits in accordance with the requirements of the Uniform Guidance for Federal Awards and the Single Audit Act. Make sure your skills are up to date with the latest information in this challenging audit area.

PREREQUISITE: None

KEY CODE: **VENDOR:** AICPA
COURSE LEVEL: Intermediate **MEMBER EARLY BIRD FEE:** \$295

Date	Facility	Instructor	Credit	Code
11/29	TSCPA	Beth Stenberg	8 A	337

Audit Workpapers: Documenting and Reviewing Field Work

Workpapers are the building blocks of an audit. If it's not in the workpapers, the manager and partner might not know about it or consider its ramifications. A badly prepared workpaper is a time-waster for managers and partners, so training in proper workpaper preparation is critical. Make this course part of the firm's quality control system. Learn the fundamentals of workpaper preparation - form and content - to make sure everything is properly documented. You will also explore examples which show field work supervisors what factors to consider and what steps to follow when reviewing workpapers. In addition, typical workpaper deficiencies are explained to help minimize potential liability.

PREREQUISITE: None

KEY CODE: **VENDOR:** AICPA
COURSE LEVEL: Basic **MEMBER EARLY BIRD FEE:** \$295

Date	Facility	Instructor	Credit	Code
10/11	TSCPA	Glenn Helms	8 A	152

Auditing Not-for-Profit Entities: Superior Skills for an Effective and Efficient Audit

It's been said that you cannot fit a square peg into a round hole. The same principle holds true for audits of not-for-profit entities. You cannot apply a standard commercial audit approach to the audit of a not-for-profit entity and expect a good fit. Skilled auditors will instead adjust and hone the audit approach to fit the not-for-profit entity. This course is designed to help you obtain the superior skills needed to excel in auditing not-for-profit entities. The course materials utilize a highly illustrative and innovative format. Over 20 focused exercises are included to provide an enhanced working knowledge of auditing not-for-profit entities.

PREREQUISITE: Basic auditing knowledge.

KEY CODE: Y ★

VENDOR: Surgent McCoy CPE, LLC

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
11/17	TSCPA	Jerry Spratt	8 A	224

NEW! Audits of 401(k) Plans

Since 401(k) plans make a popular option for employee benefit plans, auditors of employee benefit plans must have the proper skills to audit these plans effectively. You will work through how to audit a 401(k) plan and prepare financial statements that satisfy ERISA and SEC requirements. Tap into ways to plan and conduct 401(k) audits more efficiently and effectively, and understand the differences between 401(k) audits and other employee benefit plan audits.

PREREQUISITE: Experience with the employee benefit plan audit process and a working knowledge of ERISA.

KEY CODE: ★

VENDOR: AICPA

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	CPE Credit	Code
6/17	Chattanooga Marriott	Melissa Critcher	8 A	101
6/23	Embassy Suites Knoxville	Christopher Rouse	8 A	103
7/14	Fogelman	Randy Dummer	8 A	106
7/15	TSCPA	Randy Dummer	8 A	107
7/15	Live Stream	Randy Dummer	8 A	805

NEW! Audits of Banks and Other Financial Institutions

This program is dedicated to demonstrating how audit, consulting and tax associates can learn the accounting, tax and auditing fundamentals of modern depository and lending institutions, as well as non-bank institutions. The course is complete with practical worksheets and insights such as the applicable metrics that create value for depository and lending institutions. These institutions are specialized and are one of the most regulated industries in the world. Numerous references to best practice audits allow the auditor and consultants the opportunity to plan efficient and effective audits and reports.

PREREQUISITE: General audit knowledge or experience.

KEY CODE: ★

VENDOR: AICPA

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
10/17	Fogelman	Bruce Shepard	8 A	158

Audits of HUD-Assisted Projects

Do your audits of HUD-assisted projects make the grade? Receive high marks when you are well-versed on HUD organizations, programs, policies and procedures. Learn how to discern the various audit requirements for HUD programs and how to comply with specific HUD regulations, contracts and procedures. Plus, review the latest developments on professional standards affecting particular federal programs and how they impact your audits.

PREREQUISITE: None

KEY CODE: Y ★

VENDOR: AICPA

COURSE LEVEL: Basic

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
11/22	TSCPA	Jeanette Bax-Kurtz	8 A	237

Broadcast: 2016 Business Fraud Update

Fraud can and will affect every organization sooner or later and to varying degrees, whether it is a small-dollar theft of assets, a systematic embezzlement of funds by a "trusted" accountant or a major book-cooking financial statement fraud with catastrophic ramifications. Everyone needs to be aware, vigilant and proactive concerning fraud deterrence, prevention and detection: the business owner, investor, controller, CFO, manager, financial statement preparer, internal or external auditor, or governing board member. Perhaps the biggest hurdle to be overcome in the fight against fraud is the attitude that most organizations have that "It can't happen here." This year's edition is a fast-moving seminar that will provide a comprehensive look at fraud from the technical, legal and operational perspectives and update participants on the most recent legal and regulatory developments in this important area of professional responsibility. Particular attention and focus will be directed to "best practices" for implementing the recently revised Internal Control Integrated Framework issued by the Committee of Sponsoring Organizations (COSO) of the Treadway Commission. In particular, the updated COSO Framework includes a new principle focused specifically on fraud.

PREREQUISITE: None

KEY CODE: 📺

VENDOR: ACPEN/BPN

COURSE LEVEL: Update

MEMBER EARLY BIRD FEE: \$245

Date	Facility	Instructor	Credit	Code
9/21	Memphis LGW Division	Broadcast	8 A	137

Broadcast: Accounting and Auditing Update

This course is designed to provide its participants with a comprehensive, in-depth review of what's happening at the FASB, AICPA and other professional bodies who may impact accounting and auditing this year, including FASB Statements and Interpretations, Statements on Auditing Standards, Auditing Interpretations, Audit Guides, Statements of Position, exposure drafts and projects in progress, with emphasis on the practical application and impact on practitioners in small to medium-sized firms and members in industry.

PREREQUISITE: None

KEY CODE: 📺

VENDOR: ACPEN/BPN

COURSE LEVEL: Update

MEMBER EARLY BIRD FEE: \$245

Date	Facility	Instructor	Credit	Code
10/19	Memphis LGW Division	Broadcast	8 A	160

Broadcast: Financial Statement Preparation, Compilation and Review Update

This course is designed to assist CPAs who perform financial statement preparation, compilation or review engagements. SSARS No. 21 is effective for financial statement periods ending on or after Dec. 15, 2016. SSARS No. 21 is the biggest change to the standards since they were issued over 30 years ago, and introduces a new level of service: the financial statement preparation service. Our panelists will discuss all four sections of SSARS No. 21 and explain the requirements of each. The course will also point out the changes in practice resulting from the new SSARS, and will discuss best practices when implementing SSARS No. 21.

PREREQUISITE: None

KEY CODE: 

VENDOR: ACPEN/BPN

COURSE LEVEL: Update


MEMBER EARLY BIRD FEE: \$245

Date	Facility	Instructor	Credit	Code
8/16	Memphis LGW Division	Broadcast	8 A	110

Broadcast: Governmental Accounting and Auditing Update

Practitioners and government finance officials talk about breaking government accounting and audit issues. The panel of experts will review recent governmental accounting and auditing developments impacting governments and government auditors. This includes single audit and Yellow Book issues, new and recently effective GASB pronouncements, audit issues and issues on the horizon.

PREREQUISITE: None

KEY CODE: Y 

VENDOR: ACPEN/BPN

COURSE LEVEL: Intermediate


MEMBER EARLY BIRD FEE: \$245

Date	Facility	Instructor	Credit	Code
7/27	Memphis LGW Division	Broadcast	8 A	108

Broadcast: Not-for-Profit Accounting, Auditing and Tax Update

There have been major changes to not-for-profit accounting that alter how not-for-profit organizations tell donors, creditors and the public how they spend and invest their money. The IRS continues to refine and revise the Form 990 and 990-EZ. Our panel of experts will provide you with what you need to know about the latest and most important GAAP and tax proposals and developments affecting non-profit organizations.

PREREQUISITE: None

KEY CODE: Y 

VENDOR: ACPEN/BPN

COURSE LEVEL: Update

MEMBER EARLY BIRD FEE: \$245

Date	Facility	Instructor	Credit	Code
6/22	Memphis LGW Division	Broadcast	8 A/T	102

CFO/Controller's Roadmap to Organization Success with Integrated Planning, Forecasting and Budgeting

Many organizations spend huge amounts of money and effort at planning, forecasting and budgeting, and all too often the three disciplines are separated and not connected throughout the company. It appears that people who are doing the strategic planning aren't talking with the people who are doing the budgeting or forecasting. Also, there is a lack of uniform accountability throughout the organization. This program is designed to completely integrate the planning process and show how it can move from long-range thinking, through medium-term planning, through the annual budget and to the monthly cash-flow forecast. Also, the program will teach the participant how to avoid many political pitfalls that end up causing a lack of accountability and often cause the planning process to be demotivating to the staff. This isn't just a strategic planning course or a budgeting course. It is a course that looks at the entire planning process from beginning to end and shows how much smoother it can be when it is an integrated process. While it is a technical course discussing many of the technical tricks and tips for producing a good plan, it is also a management course in that it will discuss the political aspects of planning.

PREREQUISITE: Experience in financial management of a small or midsize company.

KEY CODE: 

VENDOR: Surgent McCoy CPE, LLC

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
9/21	TSCPA	Arthur Pulis	8 A	142

NEW! Common Frauds and Internal Controls for Revenue, Purchasing and Cash Receipts

As an accounting professional, you are in a unique position to protect your organization from fraud and human error. Learn how to establish a cost-effective system of controls to reduce your organization's exposure while maximizing profits. Explore the common areas for misstatements, both unintentional and fraudulent, that fall within an entity's revenue and purchase cycles and learn how to protect your clients or company against these risks.

PREREQUISITE: None

KEY CODE: ★ 

VENDOR: AICPA

COURSE LEVEL: Basic

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
10/25	Music Road	Glenn Helms	8 A	169
12/14	Embassy Suites Knoxville	Glenn Helms	8 A	288
12/29	TSCPA	Glenn Helms	8 A	330

Community Banking Update

This seminar is designed to update and inform the auditor and CFO of all new and significant changes recently affecting the banking industry and enable the auditor and CFO to utilize these changes in an effective manner.

PREREQUISITE: None

KEY CODE: None

VENDOR: KraftCPAs

COURSE LEVEL: Update

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
10/28	Music Road	Wynne Baker	8 A	180
11/1	TSCPA	Wynne Baker	8 A	210

Accounting & Auditing

Compilations, Reviews and New Preparations: Engagement Performance and Annual Update

Specifically designed for compilation, preparation and review practitioners and their staff, this course will provide you with a comprehensive review and hands-on application for performing compilation, preparation and review engagements. You'll learn the ins and outs of SSARS No. 21, Clarification and Recodification, the most significant changes to the compilation and review standards since their inception over 30 years ago. Not only will this course bring you up to date on SSARS requirements and guidance, but more importantly it will provide you with practical examples and illustrations to help you effectively and efficiently perform compilation, preparation and review engagements. This course is intended to be your go-to reference for training your staff and managing your compilation, preparation and review practice services.

PREREQUISITE: Experience in performing and managing compilation, preparation and review engagements.

KEY CODE: **VENDOR:** Surgent McCoy CPE, LLC
COURSE LEVEL: Update **MEMBER EARLY BIRD FEE:** \$295

Date	Facility	Instructor	Credit	Code
10/24	Music Road	Jennifer Louis	8 A	165
11/3	Horseshoe Tunica	Joann Cross	8 A	191
12/6	Tennessee Tech	Thomas Snell	8 A	259
12/9	Courtyard Marriott Jackson	Robert W. Wells	8 A	270

Construction Industry: Accounting and Taxation Issues

Participants will learn how to provide accounting, tax and consulting services for contractors as independent CPAs and as CFO/controller. The course will include a review of construction accounting basics and address various problems encountered in the construction industry. The discussion will include updates on current techniques, recent trends and new tax legislation as they pertain to the industry. The course will also include discussion of recommended internal controls, key ratios and financial statement disclosures important to those in the industry. Participants will take away examples of accounting and tax documents that will aid those engaged in construction tax and accounting.

PREREQUISITE: None

KEY CODE: None **VENDOR:** Marcum LLP
COURSE LEVEL: Update **MEMBER EARLY BIRD FEE:** \$295

Date	Facility	Instructors	Credit	Code
10/27	Music Road	James Lundy/ Robert Davidson	8 A/T	179

NEW! Critical New COSO Internal Control Framework Concepts

This course will provide practical guidance on exactly what a sound system of internal controls "looks like" and the resulting impact on the reliability of financial statements, particularly for smaller entities. In addition, we will explore COSO's 2013 updates to the original 1992 Internal Control - Integrated Framework to better manage the unique and challenging risks of today's entities.

PREREQUISITE: Experience with designing, evaluating or monitoring internal controls.

KEY CODE: **VENDOR:** Surgent McCoy CPE, LLC
COURSE LEVEL: Intermediate **MEMBER EARLY BIRD FEE:** \$169

Date	Facility	Instructor	Credit	Code
9/19 a.m.	Chattanooga Marriott	Gregory Clark	4 A	126

NEW! Current Accounting and Attestation Updates for Practitioners with Small-Business Clients

Specifically tailored for practitioners who do not perform audits but provide other attest and non-attest services to small and medium-sized businesses, this course is a comprehensive update covering recently issued accounting, compilation and review standards, as well as other professional guidance impacting small and medium-sized business accountants. The course uses practical examples and illustrations to help you understand and apply the material in practice.

PREREQUISITE: Experience in accounting and auditing.

KEY CODE: **VENDOR:** Surgent McCoy CPE, LLC
COURSE LEVEL: Intermediate **MEMBER EARLY BIRD FEE:** \$295

Date	Facility	Instructor	Credit	Code
12/6	TSCPA	John "Jack" Georger	8 A	261

Current Developments and Best Practices for Today's CFOs and Controllers

In today's rapidly changing world, finance professionals are required to wear many hats and are often the keys to the organization's success. On one hand, they need to be abreast of the latest proven financial skills for making the best decisions, and on the other hand they need the best skills to motivate, manage and lead people. Being pigeon-holed into one area or another is neither good for career building nor good for the organization. This course has been designed to give the CFO and controller the skills needed to lead their organizations into the rapidly changing decade. The course's author has been in the trenches, having held positions in finance and senior management, and understands the issues from both perspectives. Another unique aspect of this course is its constant evolution. We know change is occurring at an exponential rate, so certain chapters dealing with current domestic and global economic conditions are included along with current technical issues on the cloud and social media. The course is updated annually and as necessary throughout the year to include the most recent developments.

PREREQUISITE: Experience in financial management of a small or midsize company.

KEY CODE: **VENDOR:** Surgent McCoy CPE, LLC
COURSE LEVEL: Update **MEMBER EARLY BIRD FEE:** \$295

Date	Facility	Instructor	CPE Credit	Code
9/20	TSCPA	Arthur Pulis	8 A	136

NEW! Current Issues in Accounting and Auditing: An Annual Update

Designed for accounting and attestation practitioners at all levels in both public accounting and business and industry, this course provides an overview of recent accounting, compilation, preparation, review and attestation matters, including recently issued Accounting Standards Updates (ASUs); the FASB's comprehensive new Revenue Recognition standard, ASU No. 2014-09; Lease Accounting; Financial Instruments; SSARS No. 21, Clarification and Recodification; current attestation matters that need to be on your radar; and other important accounting and auditing practice matters.

PREREQUISITE: Experience in accounting and attestation.

KEY CODE: **VENDOR:** Surgent McCoy CPE, LLC
COURSE LEVEL: Update **MEMBER EARLY BIRD FEE:** \$169

Date	Facility	Instructor	Credit	Code
9/20 p.m.	Chattanooga Marriott	Michael Brand	4 A	131
12/14 a.m.	Fogelman	Douglas Warren	4 A	286
12/16 p.m.	Nashville School of Law	Michael Brand	4 A	304

NEW! Deceptive Revenue Recognition and Other Accounting Techniques – Recognizing the Warning Signs

Don't join the growing list of accounting professionals in trouble. We will discuss: The accounting "stories" behind over 40 famous financial statement frauds such as Fannie Mae, McAfee, Parmalat, Tyco, Waste Management and WorldCom. We will also cover deceptive accounting practices and the warning signs of problems in areas such as revenue recognition, related parties, significant estimates, capital items vs. expenses, choices among accounting methods and improper activity to evade taxes.

PREREQUISITE: None

KEY CODE: Y

VENDOR: Loscalzo Associates

COURSE LEVEL: Basic

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
11/1	TSCPA	Mark Mishler	8 A	187

Detecting and Preventing Fraud and Abuse in Government and Non-profits 2016 Update

Why is the risk greater if you miss fraud or abuse in government and non-profits? Using actual cases, find out why government and non-profits have a higher risk of fraud and abuse, how to detect and prevent it and how to protect yourself.

PREREQUISITE: None

KEY CODE: Y

VENDOR: The Pros and The Cons

COURSE LEVEL: Update

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
12/19	Fogelman	Gary Zeune	8 A	317

Detecting and Preventing Internal Fraud, Theft and Abuse 2016 Update

Private companies lose an average of 6 percent of revenue to fraud theft and abuse. Gary Zeune will show you simple methods to keep your money, including: Just because you made a sale doesn't mean the cash went in the drawer:

- Do you know who your highest paid employees are? (Hint: this is a fraud course)
- How employees steal money from your checking account (and a simple way to protect it)
- How employees collude with vendors and customers to steal you blind
- See how easy it is to steal inventory and other goods
- Find out why corruption kickback and bid-rigging schemes are so hard to detect
- Don't let employee bribery and conflicts of interest harm your bottom line
- How employees manipulate non-financial measurements to steal from you.

PREREQUISITE: None

KEY CODE: None

VENDOR: The Pros and The Cons

COURSE LEVEL: Update

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
11/10	TSCPA	Gary Zeune	8 A	283

Engagement Essentials: Preparation, Compilation and Review of Financial Statements

This course covers the fundamentals you need to know to perform preparation, compilation and review engagements. You will learn what distinguishes a preparation, compilation and review engagement from a traditional audit. Then, after an overview of current Statements on Standards for Accounting and Review Services, you will walk through the steps of these engagements and work through practice questions and case studies to increase concept comprehension and retention.

PREREQUISITE: None

KEY CODE: ★

VENDOR: AICPA

COURSE LEVEL: Basic

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
10/28	TSCPA	Robert W. Wells	8 A	184

Excel Financial Reporting and Analysis

Microsoft Office Excel is a powerful tool for analyzing financial data and preparing financial reports. If you are ready to harness the power of Excel for financial reporting and analysis, then this program is for you. In this course, you will learn how to put Excel to use to deliver accounting and financial solutions in critical areas such as formatting reports and financial statements using advanced techniques, assembling and printing reports and schedules and using templates to automate reporting processes. You will also learn options for consolidating financial data from multiple sources, how to create Excel visualizations to improve reader's comprehension of financial information and advanced data analysis techniques such as PivotTables connected in real-time to your accounting database. Like most powerful tools, Excel contains features and functions useful for reporting and analysis that are not immediately obvious to many users. In this course, you will uncover many of these hidden features to help you prepare computationally accurate and aesthetically pleasing reports in far less time than you might imagine possible.

PREREQUISITE: Fundamental knowledge of Microsoft Office Excel 2007 or newer.

KEY CODE: ♡

VENDOR: K2 Enterprises

COURSE LEVEL: Advanced

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
11/3	TSCPA	Steven Phelan	8 A	194

FASB: Common U.S. GAAP Issues Facing CPAs

Are you looking for a review and update of common GAAP issues important to all CPAs? This broad-ranging course covers FASB accounting and reporting developments that apply to all companies. Emphasizing financial statement disclosures in addition to accounting methods, this course presents implementation guidelines and disclosure illustrations from actual financial statements. Review reporting standards for the balance sheet, income statement and statement of cash flows to gain an understanding of the FASB standards that have the greatest impact on accounting and financial reporting.

PREREQUISITE: Experience in application of accounting standards.

KEY CODE: ★ ♡

VENDOR: AICPA

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
9/12	TSCPA	Ronald Kral	8 A	122

Accounting & Auditing

NEW! FASB Update for Small and Medium-Sized Businesses: A Practical Implementation Guide

Designed for small and medium-sized business practitioners and their staff, whether in public accounting or business and industry, this course will provide you with a comprehensive review of recent FASB accounting and reporting matters most relevant to smaller companies, including: Private Company Standard Setting activities; Accounting Standards Updates (ASUs) recently issued and the FASB's current technical agenda; Revenue Recognition; Lease Accounting; and other important practice matters that small and medium-sized businesses should be aware of. Examples and illustrations provide hands-on application to help you assess and implement the new standards and guidance applicable to your practice and clients.

PREREQUISITE: Experience in financial accounting and reporting.

KEY CODE:  

VENDOR: Surgent McCoy CPE, LLC

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
11/16	TSCPA	Jerry Spratt	8 A	217

NEW! FASB's "Big 3" - Revenue Recognition, Leases and Financial Instruments

Sometimes we can avoid addressing the elephant in the room for a while. However, when there are three elephants in the room, it's time to address the issues. Designed for practitioners and their staff, whether in public accounting or business and industry, this course provides a comprehensive review and update of the FASB's "Big 3" accounting and reporting areas: Revenue Recognition, Leases and Financial Instruments. We will focus on providing you the most updated details of relevant FASB activity, covering these critical areas of your practice or organization. We will analyze the Big 3, which have a major effect on all industries, using examples and illustrations to provide a hands-on approach that will help you better assess and implement the new standards and guidance applicable to your clients or organization.

PREREQUISITE: Experience in financial accounting and reporting.

KEY CODE:   

VENDOR: Surgent McCoy CPE, LLC

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
9/28	TSCPA	Jeffrey Lieman	8 A	147
9/28	Live Stream	Jeffrey Lieman	8 A	807
12/7	Embassy Suites Knoxville	Thomas Snell	8 A	264
12/8	Fogelman	Thomas Newell	8 A	269
12/12	Chattanooga Marriott	Gregory Clark	8 A	274

Financial Forecasting and Decision Making

Proper planning is key to any company's success. With CPAs constantly being asked to plan a company's future, forecasting is one area to demonstrate your unique value. This course provides the basic tools necessary to project the balance sheet and statements of income and cash flow. Determine the company's maximum sustainable growth and predict its external fund requirements.

PREREQUISITE: None

KEY CODE:   

VENDOR: AICPA

COURSE LEVEL: Basic

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
8/23	TSCPA	Anthony LaRusso	8 A	116
8/23	Live Stream	Anthony LaRusso	8 A	806

NEW! Financial Statement Analysis: Basis for Management Advice

More and more, businesses turn to you for advice on financial performance. Are you ready? This course presents the financial statements as a set of dynamic instruments that can be used for accurate, relevant and timely financial decisions. Focus on the economic and financial conditions that caused the statements to change and discover how businesses can manage liquidity, debt and profitability. Plus, explore effect ratios, causal ratios, pro forma analysis, sustainable growth and much more.

PREREQUISITE: None

KEY CODE: 

VENDOR: AICPA

COURSE LEVEL: Basic


MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
8/24	Chattanooga Marriott	Anthony LaRusso	8 A	118

NEW! Financial Statement Disclosures: A Guide for Small and Medium-Sized Businesses

A clear and concise set of proper financial statement disclosures can make or break an entity's financial statements. Such disclosures are no longer simply additional information provided by a business; they can be complex in nature and difficult to both prepare and understand, even for small and medium-sized businesses. Oftentimes, financial statement users will first turn to the notes in the financial statements in order to get a feel for where the business and its numbers might be heading. This course will focus on key balance sheet and income statement disclosure as well as those relating to accounting policies, changes in accounting estimates and errors, subsequent events, going concern and related party disclosures. The course will use illustrations and real-world examples from financial statements to provide you with a hands-on feel for the disclosure requirements across a number of accounting standards.

PREREQUISITE: None

KEY CODE: 

VENDOR: Surgent McCoy CPE, LLC

COURSE LEVEL: Basic

MEMBER EARLY BIRD FEE: \$169

Date	Facility	Instructor	Credit	Code
9/21 a.m.	Chattanooga Marriott	Gregory Clark	4 A	138
11/17 p.m.	MeadowView Marriott CC	William Eskin	4 A	221
12/15 a.m.	Nashville School of Law	Robert W. Wells	4 A	298
12/19 p.m.	Embassy Suites Knoxville	Robert W. Wells	4 A	316

NEW! Focus on the Mission: Not-for-Profit Accounting and Reporting Today and Tomorrow

This course will help you to master the key accounting and reporting rules that not-for-profits use to tell their story of mission achievement today. This course will also look at how some of those rules will change in the future with the FASB's Financial Statements of Not-for-Profit Entities project. The course materials utilize a highly illustrative and innovative format. Over 30 focused exercises are included to provide an enhanced working knowledge of not-for-profit accounting and reporting.

PREREQUISITE: Some introductory background in not-for-profit accounting and reporting.

KEY CODE: 

VENDOR: Surgent McCoy CPE, LLC

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
12/7	TSCPA	John "Jack" Georger	8 A	266

Forensic Accounting Investigative Practices

If you are looking to gain more skills in the growing and lucrative field of forensic accounting, you'll want to start with this course. Effective forensic accountants are part of a new breed of practitioners who possess a broad spectrum of traits and knowledge. This course dives into the unique investigative and communications skills and analytical practices required of the best forensic accountants by teaching you how to provide expert witness testimony in mediations, arbitrations and governmental hearings. You'll also learn how to use proven research, investigative methods and proper documentation of evidence to successfully complete a forensic accounting engagement. This course demonstrates the keys to success in the exciting field of forensic accounting.

PREREQUISITE: Experience in accounting and financial reporting.

KEY CODE: ★ ♻️

VENDOR: AICPA

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
9/29	TSCPA	Douglas Warren	8 A	148

NEW! Forensic Accounting: Fraudulent Reporting and Concealed Assets

Forensic accountants know all too well the increasing pressure to accurately detect fraudulent financial reporting and to preemptively redesign internal controls to prevent misappropriation of assets. The endless spotlight of major business failures and scandals only perpetuate the forensic accountant's responsibilities and due diligence. Recognizing fraudulent or deceptive practices is not always easy, but this course will sharpen your forensic skills with techniques to uncover fraudulent activities and help you to see them in their many guises.

PREREQUISITE: Experience in accounting and financial reporting.

KEY CODE: ★ ♻️

VENDOR: AICPA

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
12/2	Chattanooga Marriott	Glenn Helms	8 A	250

Fraud and Abuse in Not-for-Profit Entities and Governments: Stealing From Everyone

When not-for-profit entities and governments fall prey to fraud and abuse, it breaks the hearts of donors and taxpayers. Fraud and abuse also cause donors and taxpayers to lose confidence in those not-for-profit entities and governments. In this course, we will focus on the common types of fraud and abuse that occur in not-for-profit entities and governments, and also address the auditor's responsibilities related to fraud and abuse. The course materials utilize a highly illustrative and innovative format. Over 30 focused exercises are included to provide an enhanced knowledge of fraud and abuse in not-for-profit entities and governments.

PREREQUISITE: Basic knowledge of the not-for-profit and government environment.

KEY CODE: Y ♻️

VENDOR: Surgent McCoy CPE, LLC

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
10/26	Music Road	Joann Cross	8 A	172

NEW! Fraud Basics: Protecting the Company Till

Our focus is to reduce the overall risk of fraud. To that end, this course focuses on what factors contribute to turning honest employees into schemers. Discussion will include integrity and ethics, as well as how people may react in certain situations.

PREREQUISITE: None

KEY CODE: ♻️

VENDOR: Surgent McCoy CPE, LLC

COURSE LEVEL: Basic

MEMBER EARLY BIRD FEE: \$169

Date	Facility	Instructor	Credit	Code
9/21 a.m.	Chattanooga Marriott	Douglas Warren	4 A	140
11/18 a.m.	MeadowView Marriott	Douglas Warren	4 A	228
12/16 a.m.	Nashville School of Law	Robert W. Wells	4 A	309
12/20 a.m.	Embassy Suites Knoxville	Robert W. Wells	4 A	322

NEW! Fraud Update: Detecting and Preventing the Top Ten Fraud Schemes

Many costly fraudulent schemes have occurred repeatedly throughout the past several decades. Why do these material and frequently recurring frauds succeed? One reason is that business owners, management, auditors and employees fail to recognize the red flags that have been associated with these financial statement and misappropriation of asset frauds. Another major reason is that the reporting and transaction processing systems do not have adequate controls to either prevent and/or detect these schemes. This course will provide descriptions of how these major frauds are perpetrated (including real-world examples) and the types of cost-effective controls that can be implemented by both small and large businesses and nonprofit entities to identify and prevent these deceptive acts.

PREREQUISITE: Experience in accounting and reporting.

KEY CODE: ★ ♻️

VENDOR: AICPA

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
10/24	Music Road	Glenn Helms	8 A	164

NEW! Fraud: 2016 Alert for Small and Midsize Entities

New fraud cases and new fraud risks in private companies, non-profits and government entities.

PREREQUISITE: None

KEY CODE: Y ♻️

VENDOR: The Pros and The Cons

COURSE LEVEL: Advanced

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
11/9	TSCPA	Gary Zeune	8 A	278
12/20	Fogelman	Gary Zeune	8 A	325

Frequent Frauds Found in Governments and Not-for-Profits

What common frauds occur in governments and not-for-profits and how could they have been avoided? Through an informative case study approach, this course illustrates common frauds that make headlines and damage the reputations of government and not-for-profit organizations. Recognizing fraudulent or deceptive practices is not always easy, but this course will sharpen your forensic skills with techniques to help you to uncover fraudulent activities in the governmental and not-for-profit environments.

PREREQUISITE: Knowledge of government and not-for-profit sectors.

KEY CODE: Y ★ 📍

VENDOR: AICPA

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
10/14	TSCPA	Jeffrey Lieman	8 A	156

NEW! Governmental and Not-for-Profit Accounting and Auditing Update

The Governmental and Not-for-Profit Update is designed to provide its participants with a comprehensive, in-depth review of what's happening at the GASB, FASB, AICPA, GAO and OMB, including GASB and FASB Statements and Interpretations, Statements on Auditing Standards, Auditing Interpretations, Statements of Position, exposure drafts and projects in progress, with emphasis on the practical application and impact on practitioners in small to medium-sized firms and members in government.

PREREQUISITE: None

KEY CODE: Y

VENDOR: Altec, Inc.

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
10/27	Music Road	J. Michael Inzina	8 A	178
11/16	Fogelman	J. Michael Inzina	8 A	216

Guide and Update to Compilations, Reviews and New Preparations

Specifically designed for compilation, preparation and review practitioners and their staff, this course will provide you with an overview, update and hands-on application for performing compilation, preparation and review engagements. You'll learn the ins and outs of SSARS No. 21, Clarification and Recodification, the most significant change to the compilation and review standards since their inception over 30 years ago. Not only will this course bring you up to date on SSARSs requirements and guidance, more importantly it will provide you with practical examples and illustrations to help you effectively and efficiently perform compilation, preparation and review engagements.

PREREQUISITE: Experience in performing and managing compilation, preparation and review engagements.

KEY CODE: 📍

VENDOR: Surgent McCoy CPE, LLC

COURSE LEVEL: Update

MEMBER EARLY BIRD FEE: \$169

Date	Facility	Instructor	Credit	Code
9/19 p.m.	Chattanooga Marriott	Michael Brand	4 A	125
12/15 p.m.	Nashville School of Law	Michael Brand	4 A	293

NEW! Healthcare Fraud & Abuse Update for Auditors and CFOs

Rapidly changing health care rules and requirements are creating unprecedented risk for CPAs.

PREREQUISITE: None

KEY CODE: Y

VENDOR: The Pros and The Cons

COURSE LEVEL: Advanced

MEMBER EARLY BIRD FEE: \$169

Date	Facility	Instructor	Credit	Code
11/8 a.m.	TSCPA	Gary Zeune	4 A	291

NEW! Identity Theft: Preventing, Detecting and Investigating

Protect yourself and your clients from identity theft, which includes the theft of personal and professional identities. No one is immune from this rising tide of criminal misconduct, and as your clients seek your advice, you will be required to perform due diligence in protecting their IDs. Some will even be tasked with investigating the crime. This course addresses the needs of each.

PREREQUISITE: None

KEY CODE: ★ 📍

VENDOR: AICPA

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
10/5	TSCPA	Douglas Warren	8 A	332

NEW! Innovative Forecasting and Budgeting: Moving Beyond the Traditional Techniques

Forecasting and budgeting - two words that often draw an adverse reaction from many financial professionals. Let us help you "turn that frown upside down" with our innovative approach to planning and budgeting. We'll move beyond the traditional techniques and show you easier ways to complete the process while cutting out the political pitfalls that end up causing a lack of accountability and can be demotivating to the staff. During the seminar we'll cover such topics as the sales/income plan, capital equipment planning, the "one-year operating plan" (formerly referred to as a budget), the "monthly operating plan" cash planning, risk planning and much more. Join us for this seminar as we help you streamline your forecasting and budgeting processes, which turns into a win-win for the employees and the organization.

PREREQUISITE: Experience in financial management of a small or midsize company.

KEY CODE: 📍

VENDOR: Surgent McCoy CPE, LLC

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$169

Date	Facility	Instructor	Credit	Code
9/20 a.m.	Chattanooga Marriott	Gregory Clark	4 A	132

NEW! Interactive Workshop: Engagement Planning and Risk Assessment Activities

This fast-paced, highly interactive and hands-on workshop is designed for auditors of small and medium-sized businesses. Every 15 minutes, a 10-minute case study, exercise, discussion group or other form of interaction will be used to create the most dynamic learning environment possible to allow you to put your learning into action. Then, it will be time to move on to the next topic. Whether you do one audit or multiple audits - this course is guaranteed to be practical, engaging and interesting.

PREREQUISITE: Basic familiarity with financial statement audits, as this will be a fast-paced look at only the most important aspects of an audit.

KEY CODE: **VENDOR:** Surgent McCoy CPE, LLC
COURSE LEVEL: Intermediate **MEMBER EARLY BIRD FEE:** \$295

Date	Facility	Instructor	Credit	Code
10/25	Music Road	Jennifer Louis	8 A	170
11/22	TSCPA	William Eskin	8 A	238

NEW! Interactive Workshop: Performing Substantive Testing and General Audit Procedures

This fast-paced, dynamic workshop is designed for auditors of small and medium-sized businesses. Through case studies, exercises and discussion groups, participants will learn how to describe properly designed and performed audit procedures for common areas of risk, explain key audit report and other required audit communication considerations, and much more.

PREREQUISITE: Basic familiarity with financial statement audits, as this will be a fast-paced look at only the most important aspects of an audit.

KEY CODE: **VENDOR:** Surgent McCoy CPE, LLC
COURSE LEVEL: Intermediate **MEMBER EARLY BIRD FEE:** \$295

Date	Facility	Instructor	Credit	Code
12/9	TSCPA	James Myers	8 A	273

Internal Control and COSO Essentials for Financial Managers, Accountants and Auditors

Many managers, supervisors and accountants in business, government or nonprofits are not able to identify their departmental policies and procedures that function as the primary controls against errors and fraud. Alternately, auditors performing field work may be confused about how to interpret and evaluate management's documentation of accounting processes and controls. Neither party may truly understand how their duties differ. After an overview of the COSO guidance on the components and principles of internal control, this course introduces participants to basic tools used to document processes and controls. Participants also discuss the identification of the risks of errors and fraud and consideration of the presence (or absence) of related controls.

PREREQUISITE: None

KEY CODE: **VENDOR:** AICPA
COURSE LEVEL: Basic **MEMBER EARLY BIRD FEE:** \$295

Date	Facility	Instructor	Credit	Code
11/18	Fogelman	Glenn Helms	8 A	230

NEW! Internal Controls and Risk Assessment: Key Factors in a Successful Audit

Under generally accepted auditing standards (GAAS), all auditors are required to follow a risk-based approach to auditing. The consideration of internal control is key to risk assessment and to the determination of overall audit approach. Understand the requirements in a financial statement audit for understanding internal control and assessing the design and implementation thereof. The focus of this course is to help you get it right. Throughout the course we'll enhance your understanding with exercises designed to illustrate how the concepts apply to practical audit situations.

PREREQUISITE: None

KEY CODE: **VENDOR:** AICPA
COURSE LEVEL: Basic **MEMBER EARLY BIRD FEE:** \$295

Date	Facility	Instructor	Credit	Code
10/10	TSCPA	Glenn Helms	8 A	151
10/10	Live Stream	Glenn Helms	8 A	808
12/1	Chattanooga Marriott	Glenn Helms	8 A	247
12/15	Embassy Suites Knoxville	Glenn Helms	8 A	301

NEW! IT Risks and Controls in Current and Emerging Environments

Accounting transactions and other types of processing are conducted in a variety of IT environments. These IT environments could be traditional, such as Local Area Networks, or emerging, such as cloud and mobile computing. There are internal controls and risks that are common to all IT environments in both large and small entities. There are also IT internal controls and risks that are unique to less complex, more complex, traditional and emerging technologies. This course will cover these topics and others, including trust services associated with the internet and cloud computing, testing procedures, management controls, electronic evidence, COSO IT controls and the most recently ranked top IT technologies.

PREREQUISITE: None

KEY CODE: **VENDOR:** AICPA
COURSE LEVEL: Intermediate **MEMBER EARLY BIRD FEE:** \$295

Date	Facility	Instructor	Credit	Code
11/17	Fogelman	Glenn Helms	8 A	223
12/28	TSCPA	Glenn Helms	8 A	329

NEW! Latest Developments in Government and Non-Profit Auditing 2016

2016 is yet another year of significant change in the world of governmental accounting and auditing. Time is valuable, and it's hard to stay current in today's rapidly changing environment. Let us save you time and effort in staying current through this informative update course. The course materials utilize a highly illustrative and innovative format. Over 30 focused exercises are included to provide an enhanced working knowledge of the latest developments in governmental accounting and auditing.

PREREQUISITE: Knowledge of government accounting and auditing.

KEY CODE: **VENDOR:** Surgent McCoy CPE, LLC
COURSE LEVEL: Update **MEMBER EARLY BIRD FEE:** \$295

Date	Facility	Instructor	Credit	Code
9/27	TSCPA	Jeffrey Lieman	8 A	146

NEW! Latest Developments in Government and Non-Profit Auditing 2016

2016 is yet another year of significant change in the world of governmental accounting and auditing. Time is valuable, and it's hard to stay current in today's rapidly changing environment. Let us save you time and effort in staying current through this informative update course. The course materials utilize a highly illustrative and innovative format. Over 30 focused exercises are included to provide an enhanced working knowledge of the latest developments in governmental accounting and auditing.

PREREQUISITE: Knowledge of government accounting and auditing.

KEY CODE: Y 

VENDOR: Surgent McCoy CPE, LLC

COURSE LEVEL: Update

MEMBER EARLY BIRD FEE: \$169

Date	Facility	Instructor	Credit	Code
12/19 p.m.	Embassy Suites Knoxville	Michael Morgan	4 A	314

Leases: Mastering the New FASB Requirements

This course addresses that question by examining the core principles of the new standard, including identification, recognition, measurement, presentation and disclosure requirements. This course explains the lessee accounting model, including lease classification, amortization of the right-of-use asset and interest on the lease liability. This course also explains the lessor accounting model, including transfer of risk, profit recognition and collectability. Additional topics include short-term leases, purchase options, variable lease payments, and sale and leaseback transactions.

PREREQUISITE: None

KEY CODE: ★ 

VENDOR: AICPA

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
11/15	TSCPA	Richard Gesseck	8 A	336

NEW! MBA in a Day!

The purpose of this course is to help CPAs develop a comprehensive background on business finance and management concepts and skills. With this knowledge and these skills, CPAs in industry and public accounting can better manage all aspects of their own businesses while helping their clients make more informed business and financial decisions.

PREREQUISITE: Experience in financial management.

KEY CODE: 

VENDOR: Surgent McCoy CPE, LLC

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
10/27	Music Road	Joann Cross	8 A/M/O	176

NEW! Metrics Management: Choose and Use Key Performance Indicators

This seminar shows how to build a framework for performance management, linking the company's high-level strategic objectives to performance metrics at the individual cost center or profit center level. This session focuses on how to move the dials on every executive's dashboard.

PREREQUISITE: None

KEY CODE: 

VENDOR: Executive Education, Inc.

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
11/18	TSCPA	Diane White	8 A	232

NEW! Performing Effective and Efficient Audit Testing

A review of all of the "tools in the bag," this course is designed to assist auditors in becoming more efficient while maintaining effectiveness when applying procedures - a "must" course for all levels of staff.

PREREQUISITE: Minimum to intermediate level of auditing experience.

KEY CODE: Y

VENDOR: Altec, Inc.

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
10/28	Music Road	J. Michael Inzina	8 A	183
11/30	TSCPA	J. Michael Inzina	8 A	245

NEW! Preparing Special Purpose Framework Financial Statements: Cash, Modified Cash and Tax Basis

For many businesses preparing financial statements, using a special purpose framework may provide an alternative to the complexity of U.S. GAAP. This course will provide you with an overview and hands-on application for preparing financial statements using a special purpose framework. You will learn the unique measurement and disclosure requirements of various SPF options using example financial statements and illustrative disclosures. The course also includes an introduction to the AICPA's new SPF for small and medium-sized entities - FRF for SMEs - as well as common practice issues encountered when preparing SPF financial statements.

PREREQUISITE: None

KEY CODE: 

VENDOR: Surgent McCoy CPE, LLC

COURSE LEVEL: Basic

MEMBER EARLY BIRD FEE: \$169

Date	Facility	Instructor	Credit	Code
9/19 p.m.	Chattanooga Marriott	Gregory Clark	4 A	127
11/17 a.m.	MeadowView Marriott	Michael Brand	4 A	218

NEW! Proven Controls to Steer You Clear of Fraud

Organizations that fall victim to fraud (and that is every organization in the world) have many controls in place to combat fraud. We will discuss means and methods to stop fraud and the controls that victim organizations employ to seek improvements for our organizations.

PREREQUISITE: None

KEY CODE: 

VENDOR: Surgent McCoy CPE, LLC

COURSE LEVEL: Basic

MEMBER EARLY BIRD FEE: \$169

Date	Facility	Instructor	Credit	Code
9/21 p.m.	Chattanooga Marriott	Douglas Warren	4 A	141
11/18 p.m.	MeadowView Marriott	Douglas Warren	4 A	229
12/14 p.m.	Fogelman	Douglas Warren	4 A	287
12/16 p.m.	Nashville School of Law	Robert W. Wells	4 A	310
12/20 p.m.	Embassy Suites Knoxville	Robert W. Wells	4 A	323

NEW! Public Company Update: SEC, PCAOB and Other Developments

Keep up with the changes in the requirements for public companies, their management and their auditors. The corporate financial reporting manager or independent auditor is responsible for keeping up with the modifications. This course will update you on the latest pronouncements, regulations and guidance issued by the SEC and PCAOB as they apply to the filings and audits of this reporting cycle. Plus, you will learn what these organizations are planning and saying about the future so you can be out front in identifying developments that affect your company or auditing firm.

PREREQUISITE: Experience in SEC accounting and reporting.

KEY CODE: ★

VENDOR: AICPA

COURSE LEVEL: Update

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
9/13	TSCPA	Ronald Kral	8 A	123
10/18	Fogelman	Bruce Shepard	8 A	159

NEW! Real Estate: The Many Complexities of GAAP, SSARS and GAAS Compliance

Accounting for real estate activities is always a complicated adventure. From how to account for development costs, to how to recognize impairment losses, to how to recognize gain or loss on its sale are all challenging issues for the accountant. And then to top things off, when it comes to the income tax side, we have a whole set of different rules. No other industry has such differences between GAAP and income tax reporting.

PREREQUISITE: None

KEY CODE: Ⓜ

VENDOR: Surgent McCoy CPE, LLC

COURSE LEVEL: Basic

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
11/21	TSCPA	William Eskin	8 A/T	235

NEW! Real World Fraud in Today's Small to Medium-Sized Entities

This course uses hands-on case studies based on real-world frauds to help participants carry out their financial statement fraud responsibilities. Auditors and corporate accounting and finance professionals in small to medium-sized entities will find this course relevant. The course includes an overview of the auditor's responsibilities related to financial statement fraud. In addition, the course includes information relevant to management's responsibility for fraud and internal controls. Cases address revenue recognition, various financial statement manipulations, purchasing fraud and other common areas of interest.

PREREQUISITE: None

KEY CODE: ★

VENDOR: AICPA

COURSE LEVEL: Basic

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
9/30	TSCPA	Douglas Warren	8 A	149

Recognizing and Responding to Fraud Risk in Governmental and Not-for-Profit Organizations

Recognizing fraud risks in governmental and not-for-profit organizations is often challenging due to the inherent nature of these organizations. In addition to their public nature, these organizations may have limited support staff or staff with limited accounting expertise which can result in less than effective fraud prevention and detection programs and/or increased opportunities for fraud. Using a combination of examples, explanations of audit standards and case studies, obtain an understanding of the frauds most commonly perpetrated in government and not-for-profit organizations and what prevention and detection procedures are effective in responding to these fraud risks. This course also discusses how auditors might address their responsibilities with respect to fraud in a financial statement audit of governmental and not-for-profit organizations.

PREREQUISITE: Knowledge of government and not-for-profit sectors.

KEY CODE: Y ★

VENDOR: AICPA

COURSE LEVEL: Basic

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
12/15	Chattanooga Marriott	John "Jack" Georger	8 A	300

Revenue Recognition: Mastering the New FASB Requirements

The effective date of the new accounting standard for revenue recognition is fast approaching. With the issuance of FASB ASU No. 2014-09, Revenue from Contracts with Customers, FASB has completed a convergence project with the IASB to improve financial reporting by creating common revenue recognition guidance for U.S. GAAP and IFRS. For years, revenue recognition has been the cause of audit failures and the focus of corporate abuse and fraud allegations. This course will provide you with an in-depth understanding of the framework for revenue recognition built around the core principle that is applied in a five-step process. In addition, understanding the changes and new requirements is critical for successful implementation of this new standard. Supported by practical examples, this course will assist you in avoiding revenue recognition traps and provide you with the latest FASB guidance. In addition, you will understand how the new guidance impacts certain industries as a result of new criteria for recognizing revenue and changes in disclosure requirements.

PREREQUISITE: None

KEY CODE: ★

VENDOR: AICPA

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
11/14	TSCPA	Richard Gesseck	8 A	335

NEW! Risk-Based Audit Standards: Effective Utilization

This program will review the requirements of risk-based auditing, address best practices when conducting planning and risk assessment procedures, describe audit testing strategies including sampling and internal control testing, and illustrate documentation examples that comply with the risk assessment standards.

PREREQUISITE: Basic auditing course or equivalent experience.

KEY CODE: Y

VENDOR: Loscalzo Associates

COURSE LEVEL: Basic

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
6/30	TSCPA	Rebecca Lee	8 A	105

NEW! Single Audit Testing and Documentation Under the Unified Circular

A review of Subpart F of the Unified Circular of the Single Audit requirements, with suggested audit procedures and sample working paper documentation.

PREREQUISITE: Minimum to advanced level of auditing experience in performance of Single Audits.

KEY CODE: Y

VENDOR: Altec, Inc.

COURSE LEVEL: Advanced

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
11/15	Fogelman	J. Michael Inzina	8 A	214
12/1	TSCPA	J. Michael Inzina	8 A	249

Special Purpose Frameworks: Preparing and Reporting on Cash, Modified Cash and Tax Basis Financial Statements

For many businesses, preparing financial statements using a special purpose framework (SPF) may provide an alternative to the complexity of U.S. GAAP. This course will provide you with a comprehensive review and hands-on application for preparing and reporting on financial statements using a special purpose framework. You will learn the unique measurement and disclosure requirements of various SPF options, using example financial statements and illustrative disclosures. You will be introduced to the AICPA's new SPF for small and medium-sized entities: FRF for SMEs. The course will also guide you through SPF engagements from acceptance and planning to reporting, highlighting common practice issues.

PREREQUISITE: None

KEY CODE:

VENDOR: Surgent McCoy CPE, LLC

COURSE LEVEL: Basic

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	CPE Credit	Code
10/28	Music Road	Joann Cross	8 A	181
11/8	TSCPA	Curtis Quickel	8 A	202
11/8	Live Stream	Curtis Quickel	8 A	811

NEW! Sweeping Your Workpapers for Landmines: Avoiding Deficient Audits

Reviewing workpapers is a critical internal quality control safeguard that ensures issued audit reports are appropriate given the specific engagement's circumstances. This course will provide tips and techniques for effective and efficient review of audit workpapers, the success of which heavily depends on an auditor's proper application of critical financial statement audit concepts such as assessing audit risk, applying strong substantive analytical procedures and evaluating areas of estimates and uncertainty.

PREREQUISITE: Involvement in supervision, review or other quality control functions.

KEY CODE:

VENDOR: Surgent McCoy CPE, LLC

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
12/9	Fogelman	Thomas Newell	8 A	271
12/13	Chattanooga Marriott	Gregory Clark	8 A	279

Tackling the New Revenue Recognition Model: A Practical Comparison of Old and New Rules

The long-anticipated release of the new Revenue Recognition standard, Revenue from Contracts from Customers (ASC 606), was issued in May 2014. This new standard represents a fundamental change in a company's approach to revenue recognition. In addition, other than some limited-scope exceptions, it applies to all companies and industries. However, since the new standard will not go into effect for public companies until fiscal years beginning after Dec. 15, 2017 (and for private companies a year after that), this program will include present accounting guidance and also an increased coverage of the new standard. This program will provide participants with practical guidance about how to work with the current concepts and principles of revenue recognition under GAAP. In addition, we will do a deep dive into the concepts and frameworks that are the basis for Revenue from Contracts with Customers.

PREREQUISITE: Basic understanding of current revenue recognition guidance.

KEY CODE:

VENDOR: Surgent McCoy CPE, LLC

COURSE LEVEL: Basic

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
11/9	TSCPA	Curtis Quickel	8 A	205

NEW! The Auditor's Responsibilities Related to Fraud and Abuse Under GAAS and the Yellow Book

The clarified AU Section 240, Consideration of Fraud in a Financial Statement Audit, and the Yellow Book both contain auditor responsibilities related to fraud that are applicable to audits of not-for-profit entities and governments. The Yellow Book also contains auditor responsibilities related to abuse, which is a concept not found in GAAS. In this course, we will prepare you to meet the auditor's responsibilities related to fraud and abuse under GAAS and the Yellow Book in audits of not-for-profit entities and governments. The course materials utilize a highly illustrative and innovative format. Over a dozen focused exercises are included to provide an enhanced working knowledge of the auditor's responsibilities related to fraud and abuse under GAAS and the Yellow Book.

PREREQUISITE: Basic knowledge of the not-for-profit and government environment.

KEY CODE: Y

VENDOR: Surgent McCoy CPE, LLC

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$169

Date	Facility	Instructor	Credit	Code
12/20 p.m.	Embassy Suites Knoxville	Michael Morgan	4 A	321

NEW! The Statement of Cash Flows: Preparation Guidance and Presentation Illustrations

From its humble beginnings in 1963, when the Accounting Principles Board "encouraged" the presentation of a funds statement, the Statement of Cash Flows has turned into a required, critical statement that is often considered the most important financial statement in an entity's financial reporting package. This course will provide you with an overall review of the authoritative literature used for preparing a statement of cash flows, FASB Accounting Standards Codification (ASC) 230, Statement of Cash Flows, as well as implementation guidance and real-world presentation examples from published financial statements. Hands-on exercises will be used to help you apply the requirements and guidance, which can be challenging especially in those situations when non-operating changes in assets and liabilities are involved. Disclosure requirements will also be reviewed and illustrated across a number of accounting standards.

PREREQUISITE: None

KEY CODE:

COURSE LEVEL: Basic

VENDOR: Surgent McCoy CPE, LLC

MEMBER EARLY BIRD FEE: \$169

Date	Facility	Instructor	Credit	Code
9/21 p.m.	Chattanooga Marriott	Gregory Clark	4 A	139
11/17 p.m.	MeadowView Marriott CC	Michael Brand	4 A	219
12/15 p.m.	Nashville School of Law	Robert W. Wells	4 A	299

NEW! The Tactical CFO: Make Your Business Processes Work for You

Effective CFOs drive continuous improvements in their departments and beyond. Come share ideas with experienced CFOs that will allow you to improve your department's performance in four key areas. Learn skills that will allow you to improve the effectiveness of your finance team and the company as a whole.

PREREQUISITE: None

KEY CODE: None

COURSE LEVEL: Update

VENDOR: Executive Education, Inc.

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
11/17	TSCPA	Diane White	8 A/M	225

NEW! Thriving in a Chaotic Economic Environment: Planning and Strategy Formulation for Your Organization

Sick and tired of taking CPE that has no practical application or just regurgitates the same information over and over? Join us for this practical course, which will present a fresh approach to planning and strategy formulation for your organization. Often thought of as a painful process, planning and strategy formulation is probably one of the most important processes any organization undertakes in order to achieve financial success. We'll explore this fresh approach to many different planning stages, including the marketing plan, the technology plan, the capital plan, the five-year operating plan and much more. Today's dynamic economic environment requires much more careful planning and strategy execution. Come find out how to make that happen for your organization.

PREREQUISITE: Experience in financial management of a small or medium-sized company.

KEY CODE:

COURSE LEVEL: Intermediate

VENDOR: Surgent McCoy CPE, LLC

MEMBER EARLY BIRD FEE: \$169

Date	Facility	Instructor	Credit	Code
9/20 p.m.	Chattanooga Marriott	Gregory Clark	4 A	133

NEW! Top Governmental and Not-for-Profit Accounting and Auditing Issues Facing CPAs

Preparers of governmental and not-for-profit financial statements and their auditors often seek advice from the AICPA's Technical Hotline as well as from the GASB Technical Inquiry System. The advice they receive from these sources is high-quality and non-authoritative, but offers viable solutions or reasonable alternatives for accounting and auditing issues related to governmental and nonprofit organizations. The objective of this course is to enhance participants' knowledge and application of professional judgment by providing a review of the top accounting and auditing issues faced by preparers of governmental and not-for-profit financial statements and their auditors based on calls and inquiries received by both the AICPA and GASB over the past year.

PREREQUISITE: Experience in governmental accounting and auditing.

KEY CODE: Y ★

COURSE LEVEL: Update

VENDOR: AICPA

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
11/21	TSCPA	Jeanette Bax-Kurtz	8 A	234
12/16	Chattanooga Marriott	John "Jack" Georger	8 A	311

NEW! Understanding and Documenting the Entity and Its Environment, Including Internal Controls

A review of the requirements of AU-C Section 315, to obtain and document sufficient understanding of the entity and its environment, including internal controls, with focus on the smaller entity.

PREREQUISITE: Minimum to advanced level of auditing experience.

KEY CODE: Y

COURSE LEVEL: Intermediate

VENDOR: Altec, Inc.

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
12/2	TSCPA	J. Michael Inzina	8 A	253

NEW! Determining How Much Money You Need to Retire, and Tax Ideas and Money Management in Retirement

This course gives CPAs the knowledge and tools to help their clients implement tax-effective investment and portfolio strategies for successfully accumulating wealth and maintaining their real after-tax retirement income.

PREREQUISITE: Basic knowledge in retirement planning.

KEY CODE: F

VENDOR: Surgent McCoy CPE, LLC

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
12/5	Chattanooga Marriott	William Taylor	8 M/T	254
12/15	Fogelman	David Hulstrom	8 M/T	302

NEW! Employment Law Update: Key Risks and Recent Trends

Businesses and non-profits today face an explosion of EEOC actions and employment litigation that can threaten the organization's financial stability as well as its reputation. This course will update you on, and provide tips about mitigating exposure for, the key employment risks that every employer faces: cyber issues such as social media, device and internet use, wrongful termination, retaliation, whistleblowers, all types of discrimination and harassment, workplace safety, wage and hour laws, immigration issues, laws such as the FMLA, ADA, HIPAA, COBRA, FLSA and more. Know how to react to developing employment issues, understand recent trends in employment claims and arm yourself with the knowledge and assessment tools that can make a difference for your employer or your clients.

PREREQUISITE: Experience in and knowledge of employment law issues encountered by businesses and non-profits.

KEY CODE: C ★

VENDOR: AICPA

COURSE LEVEL: Advanced

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
9/22	Chattanooga Marriott	Curtis Quickel	8 M	143
9/23	TSCPA	Curtis Quickel	8 M	145
11/21	Fogelman	Dane Dover	8 M	233

NEW! From Hiring to Firing and Everything in Between: Legal, Tax and Health Care Issues

The employer-employee relationship strains both sides in a troubled economy, and businesses need CPAs, controllers and other advisors to provide understanding of the complex legal, tax and health care issues associated with all aspects of employment. This course provides in-depth coverage of this critical area.

PREREQUISITE: None

KEY CODE: C

VENDOR: Surgent McCoy CPE, LLC

COURSE LEVEL: Basic

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
11/7	Embassy Suites Knoxville	William Taylor	8 M/T	197
11/10	TSCPA	Robert Thelen	8 M/T	208

NEW! Key Financial and Economic Issues Facing the Financial Executive

In this course, you will explore the current economic trends and analyze their impact on you as the financial executive in areas of human resource management; credit markets and banking; uncertainty and regulatory policy; cash flow planning strategies; debt and equity mix impacts in uncertain markets; globalization of the market; social security funding and impact on retirement planning; and acquiring distressed companies and assets. Specific recommendations and insights will be offered to you to deal with the challenges.

PREREQUISITE: None

KEY CODE: C

VENDOR: Business Learning Institute

COURSE LEVEL: Basic

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
10/13	TSCPA	Frank Ryan	8 M	155



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www.tscpa.com/on-site

NEW! MBA in a Day!

The purpose of this course is to help CPAs develop a comprehensive background on business finance and management concepts and skills. With this knowledge and these skills, CPAs in industry and public accounting can better manage all aspects of their own businesses while helping their clients make more informed business and financial decisions.

PREREQUISITE: Experience in financial management.

KEY CODE:

VENDOR: Surgent McCoy CPE, LLC

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
10/27	Music Road	Joann Cross	8 M/A/O	176

NEW! The Eight Hour MBA: Key Concepts of Business Strategy

If you don't have the time to complete an MBA degree but still want to understand the key concepts of business strategy, then this course is for you. This course is designed for managers, professionals and business owners who want to develop a broad perspective to deal more effectively in today's rapidly changing and increasingly complex business environment.

PREREQUISITE: A basic understanding of financial statements

KEY CODE:

VENDOR: Business Learning Institute

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
8/17	TSCPA	Peter Margaritis	8 M	112
12/12	Fogelman	Peter Margaritis	8 M	276

NEW! The Eight Hour MBA: Key Concepts of Performance Management

If you don't have the time to complete an MBA degree but still want to understand the key concepts of performance management, then this course is for you. After attending this course, participants will understand the key characteristics of the balanced scorecard, and how it helps align business activities to the vision and strategy of the organization. Other areas covered include the 14 steps to business process improvement, the three pillars of "lean" business, the underlying elements of effective change management and project management, and much more.

PREREQUISITE: A basic understanding of financial statements

KEY CODE:

VENDOR: Business Learning Institute

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
8/18	TSCPA	Peter Margaritis	8 M	113
12/13	Fogelman	Peter Margaritis	8 M	281

NEW! The Tactical CFO: Make Your Business Processes Work for You

Effective CFOs drive continuous improvements in their departments and beyond. Come share ideas with experienced CFOs that will allow you to improve your department's performance in four key areas. Learn skills that will allow you to improve the effectiveness of your finance team and the company as a whole.

PREREQUISITE: None

KEY CODE:

VENDOR: Executive Education, Inc.

COURSE LEVEL: Update

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
11/17	TSCPA	Diane White	8 M/A	225

Other

Advanced Excel

If you are an experienced Excel user seeking to elevate your skills, join the K2 team for K2's Advanced Excel. In this laptop-friendly program, you will learn critical advanced Excel skills in six key areas: 1) collaborating with other users and securing workbooks; 2) using tables to analyze and report data; 3) integrating and manipulating data from external sources; 4) creating and auditing complex formulas; 5) advanced data analysis tools; and 6) visualization techniques to analyze and communicate information. The content of this course draws from over 25 years of experience in delivering Excel training to accountants and other business professionals. Throughout the program, relevant, real-world examples reinforce the major topics presented. You do not want to miss this opportunity to become more efficient and proficient in Microsoft Office Excel, the accounting and financial professional's tool of choice. This course covers advanced Excel topics found in Excel 2007 through Excel 2016.

PREREQUISITE: Experienced Excel user.

KEY CODE:

VENDOR: K2 Enterprises

COURSE LEVEL: Advanced

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
11/2	TSCPA	Steven Phelan	8 O	190

NEW! Advanced Excel Topics for Spreadsheet Power Users

Accountants and other business professionals that work in Excel extensively become very strong with many aspects of the ubiquitous spreadsheet application. They, however, often do not have knowledge of the numerous advanced features available in Excel. In this session we highlight many of the powerful tools found in Excel and provide details as to how they are beneficial and how they are used. Topics include data connectivity, advanced functions available for formula creation, Excel Tables and PivotTables, and charting tools. Many proficient Excel users only utilize a limited percentage of available tools when they work with spreadsheets, which is like tying one's hands behind their back.

PREREQUISITE: An understanding of Excel conventions.

KEY CODE: None

VENDOR: Phoenix Beach LLC

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
10/25	Music Road	Karl Egnatoff	8 O	167

NEW! Essential Strategic CFO and Controller Skills

The advent of the CGMA (Chartered Global Management Accountant) certification for industry CPAs and the Ethics Codification Project for 2015 have increased the awareness of the critical skills needed by the industry financial professional. This course will provide an introduction to some of the most essential tools for fully integrating the CGMA standards and is designed to assist the CPA in improving organizational results.

PREREQUISITE: None

KEY CODE: **VENDOR:** Business Learning Institute
COURSE LEVEL: Basic **MEMBER EARLY BIRD FEE:** \$295

Date	Facility	Instructor	Credit	Code
10/14	TSCPA	Frank Ryan	8 O	157

NEW! Excel PivotTables - Powerful and Not Hard to Use

Excel users that regularly manipulate, analyze or present data can improve their productivity substantially by utilizing PivotTables. Many users avoid PivotTables even though they know how powerful they are because they believe PivotTables are confusing to work with and hard to use. Additionally, many people know that they provide a benefit but do not realize the depth of capabilities that the PivotTable reporting feature possesses. This session shows users that with a basic understanding of PivotTable conventions, the intimidation factor disappears. Additionally, it details the robust feature set built into PivotTables. This course also spends time providing information about Excel Tables, which are helpful as a stand-alone feature, but can also be used to enhance PivotTable use.

PREREQUISITE: An understanding of Excel conventions.

KEY CODE: **VENDOR:** Phoenix Beach LLC
COURSE LEVEL: Intermediate **MEMBER EARLY BIRD FEE:** \$295

Date	Facility	Instructor	Credit	Code
10/26	Music Road	Karl Egnatoff	8 O	173

Excel PivotTables for Accountants

PivotTables are widely considered the most powerful feature in Excel, yet most accounting and financial professionals do not use them in their day-to-day activities. If you are ready to learn how to take advantage of PivotTables or how to extend your existing knowledge of PivotTables, then you should make time to participate in this course. In this program, you will learn how to build PivotTables, how to group data inside PivotTables, including grouping options for fiscal periods, and how to create user-defined calculations in your PivotTables. You will also learn advanced PivotTable techniques, including how to build PivotTables that consolidate data from multiple data ranges and PivotTables dynamically connected to external databases and financial accounting systems. Additionally, you will learn how to take advantage of other Excel features associated with PivotTables, including Slicers, Power Query and Power Pivot. At the end of the day, you will be a master of Excel PivotTables. If you have been leery of working with PivotTables or have struggled to realize their many benefits, this course is for you. With a little information, guidance and coaching from your K2 instructor, you will be ready to use PivotTables to analyze and report on very large data sets in a fraction of the time you are spending presently to complete such tasks.

PREREQUISITE: Fundamental understanding of Microsoft Office Excel 2007 or newer.

KEY CODE: **VENDOR:** K2 Enterprises
COURSE LEVEL: Advanced **MEMBER EARLY BIRD FEE:** \$295

Date	Facility	Instructor	Credit	Code
8/26	TSCPA	Mac McClelland	8 O	119
8/26	Live Stream	Mac McClelland	8 O	822

Excel Tips, Tricks and Techniques for Accountants

Excel is the accountant's tool of choice for analyzing and reporting financial data, yet many use time-consuming and error-prone processes to complete everyday tasks. Regardless of your level of experience, if you use Excel, you need this course to learn more efficient and effective ways to work with Excel. In this course, you will learn countless tips, tricks and techniques to improve your general level of productivity, reduce the amount of time you spend on mundane tasks, such as formatting, and customize Excel for greater accuracy and efficiency. You will also learn valuable formula-building skills, best practices for linking Excel data from other worksheets and workbooks, and how to streamline report generation and printing processes. Throughout the program, your K2 instructor will reinforce key learning points with practical, real-world examples that will improve your understanding and comprehension of the topics presented. This highly acclaimed course draws on over 25 years of experience in delivering spreadsheet training to accounting and financial professionals, which assures you of the relevance and usefulness of the information and guidance provided during the program.

PREREQUISITE: Fundamental knowledge of Microsoft Office Excel 2007 or newer.

KEY CODE: **VENDOR:** K2 Enterprises
COURSE LEVEL: Intermediate **MEMBER EARLY BIRD FEE:** \$295

Date	Facility	Instructor	Credit	Code
8/24	TSCPA	Brian Tankersley	8 O	117

NEW! MBA in a Day!

The purpose of this course is to help CPAs develop a comprehensive background on business finance and management concepts and skills. With this knowledge and these skills, CPAs in industry and public accounting can better manage all aspects of their own businesses while helping their clients make more informed business and financial decisions.

PREREQUISITE: Experience in financial management.

KEY CODE: **VENDOR:** Surgent McCoy CPE, LLC
COURSE LEVEL: Intermediate **MEMBER EARLY BIRD FEE:** \$295

Date	Facility	Instructor	Credit	Code
10/27	Music Road	Joann Cross	8 O/A/M	176

NEW! Tech Tools and Gadgets for a More Efficient You!

Technology - specifically the ever-evolving world of tools, gadgets and apps - continues to awe and amaze while "the Internet of Things" is rapidly turning this evolution into a revolution. By learning how to utilize these tools and gadgets, you can enhance both personal and team productivity, and in this program, you will learn how to take advantage of many features in tools that you likely already own, such as Microsoft Windows and Microsoft Office, to become more productive. You will also learn about numerous applications and services to help with managing personal finances, creating and organizing notes and to-do lists, speaking text into your computer, invoking handwriting recognition and improving personal information security. You will witness demonstrations of leading tools, gadgets and apps, many of which are free, all designed to make you more efficient, effective and productive. All too often, we get "locked-in" to static means of completing personal and business-oriented tasks even though a vast set of other options is available. If you are curious about the tools and gadgets that are available today to get more work done in less time, then make plans to participate in this program. You will walk away amazed at the opportunities that are available to you.

PREREQUISITE: Fundamental knowledge of computer operations.

KEY CODE: **VENDOR:** K2 Enterprises
COURSE LEVEL: Intermediate **MEMBER EARLY BIRD FEE:** \$169

Date	Facility	Instructor	Credit	Code
8/25 a.m.	TSCPA	Mac McClelland	4 O	114

NEW! Technology Update

Are you ready to learn about the latest trends in technology? Do you sometimes feel lost in the technology jungle? Would you like clear guidance regarding Windows, Office, the cloud, security and other technology-related issues? If you answered “yes” to any of these questions, then make plans now to invest four hours in this fast-paced and highly informative seminar that is sure to ramp up your return on technology investment. The technology tools available to businesses have never been better, but many are not taking full advantage of these tools. This course helps professionals, at all levels, understand the major trends in hardware, software and services, and how to utilize these tools to meet organizational objectives both efficiently and effectively. More than just a seminar on the latest computers, you will learn about the full spectrum of practical technology available to you and your team and how to implement these tools for maximum impact.

PREREQUISITE: Fundamental understanding of basic technology concepts.

KEY CODE: ♡

VENDOR: K2 Enterprises

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$169

Date	Facility	Instructor	Credit	Code
8/25 p.m.	TSCPA	Mac McClelland	4 O	115

NEW! Working With, Storing and Securing Digital Information

The amount of electronic content that business organizations contend with is growing at incredible rates. Terms like “Big Data,” “Information Overload” and “Business Analytics” are being used by overwhelmed information workers on a daily basis. This session discusses the places that businesses keep digital information ranging from legacy hard drives to solid state drives, and all the way to cloud storage. It addresses the importance of maintaining, organizing and securing corporate digital data, and show ways to achieve high standards in all three areas. Individuals and organizations will not only control, but mastery, of digital information have a decided edge over those that do not have a high level of governance. Participants in this session will gain an understanding of the concepts needed to improve the way they and their companies work with, store and secure digital information.

PREREQUISITE: None

KEY CODE: None

VENDOR: Phoenix Beach LLC

COURSE LEVEL: Basic

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
10/24	Music Road	Karl Egnatoff	8 O	162

State Ethics



Looking for a fast, convenient way to get your Tennessee state ethics credit?

TSCPA has three easy ways!

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 Watch the 2-hour state-specific ethics course from your computer.
Fee: \$55 TSCPA Member/\$85 Non-member

Sept. 8 (818)	Nov. 10 (820)
Oct. 19 (819)	Dec. 8 (821)
- 3. On-Site Training**
 Experience the ease and convenience of learning from one of TSCPA's highly-rated instructors or maximize customization by having a member of your organization conduct the training using course materials provided by TSCPA. The course time and location will be picked by you!

For more information, visit www.tscpa.com/ethics.

2016 Annual Tax Planning Guide for S Corporations, Partnerships and LLCs

As long as LLCs, partnerships and S corporations form the backbone of many CPAs' practices, in-depth knowledge of all tax aspects of these entities will be essential. The purpose of this practical course is to focus on planning issues in creating, operating and liquidating S corporations, partnerships and LLCs. This course is essential for CPAs in public accounting and industry who advise these entities or their investors.

PREREQUISITE: A basic course in partnership theory and S corporation theory.

KEY CODE: C 

VENDOR: Surgent McCoy CPE, LLC

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
11/4	Horseshoe Tunica	Michael Frost	8 T	196

2016 Federal Tax Update with Walter Nunnallee

Recent tax legislation, including provisions of the Protecting Americans from Tax Hikes (PATH) Act; new law provisions and other developments first effective in 2016, including PATH Act provisions allowing R&E credit against employer's FICA tax liability, 50% 168(k) for "qualified improvement property," accelerated due dates for filing W-2s, new preparer "due diligence" rules and new rules for education expenses; important regulation provisions (including regulations concerning the new basis consistency rules for assets received from an estate and the regulations concerning reporting of specified foreign financial assets held by entities), court cases, rulings, etc.; developments concerning the reimbursement of employees' (including S corporation owner/employees) individual health insurance policy premiums and other ACA developments; IRS audit issues and other practical problems affecting CPAs. The developments covered will be those important to practitioners and CPAs in industry. Tax planning opportunities will be emphasized.

PREREQUISITE: The course format is designed to update CPAs with various levels of experience.

KEY CODE: C 

VENDOR: Don Farmer

COURSE LEVEL: Update

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
11/14	Holiday Inn Memphis-University of Memphis	Walter Nunnallee	8 T	212
11/28	Knoxville Marriott	Walter Nunnallee	8 T	240
11/29	Chattanooga CC	Walter Nunnallee	8 T	242
12/9	Cool Springs Marriott	Walter Nunnallee	8 T	272



**Can't Make a Live Seminar?
We're Offering a Webcast Option!**

The 2016 Federal Tax Update will be recorded for a webcast replay!
For more information or to register, visit www.tscpa.com/nunnallee.

Dec. 15 | 817 | CPE Credit: 8 Tax (6.67 CLE)

Advanced Critical Tax Issues for Limited Liability Companies and Partnerships

The purpose of this course is to provide an in-depth discussion of selected advanced-level issues affecting LLCs and LLPs.

- Keep abreast of current private company standard setting activities of the PCC Review recently issued accounting and non-audit attestation pronouncements.
- Understand the new SSARS No. 21 relating to the preparation of financial statements and new guidance on compilations and reviews.
- Be aware of other important guidance affecting small and medium-sized business practitioners.

PREREQUISITE: A basic course in LLCs/partnerships or equivalent knowledge and experience.

KEY CODE: C F 

VENDOR: Surgent McCoy CPE, LLC

COURSE LEVEL: Advanced

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
11/8	TSCPA	Robert Gilwee	8 T	201

Advanced Mergers, Acquisitions and Sales of Closely Held Businesses

If you ever wanted to know the mechanics of buying, selling or merging companies, this course offers key insights into the transaction marketplace. This material is aimed at a broad audience of business owners, senior managers, chief financial officers, advisors to closely held businesses, bankers, auditors and attorneys. Business transactions are marquee events in the history of most closely held businesses. Therefore, they demand inordinate attention to detail and process. Many skill-sets are involved in this process, and topics such as negotiations, business valuations, strategic thinking, finance, family businesses, accounting, taxes and group dynamics are covered. Follow real-life case analysis to gain strategic insights into the fascinating transaction marketplace.

PREREQUISITE: Experience in business taxation and mergers and acquisitions.

KEY CODE: C  

VENDOR: AICPA

COURSE LEVEL: Advanced

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
8/16	Fogelman	Michael Frost	8 T	111

NEW! Basis Calculations and Distributions for Pass-thru Entity Owners

This comprehensive case-driven training is designed to get the accountant up to speed quickly in the area of basis calculations and distribution planning for the owners of pass-through entities (i.e., S corporations, partnerships and limited liability companies (LLCs)). The cornerstone of this course is the line-by-line analysis of the Schedule K-1s and how it affects the basis calculations.

PREREQUISITE: Basic understanding of individual income taxation.

KEY CODE: C

VENDOR: Phoenix Beach LLC

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
10/27	Music Road	Patrick Garverick	8 T	177

Broadcast: Annual Tax Update

This ACPEN course will include a panel of national tax practitioners and experts reviewing the latest legislative and regulatory developments affecting individuals, corporations and other business entities. Legislative changes in the 18 months leading up to the update will be examined. Congress enacted quite a few changes to the Internal Revenue Code in 2015, including the Protecting Americans from Tax Hikes (PATH) Act of 2015 and the 2016 Consolidated Appropriations Act, which made permanent some critical tax provisions and retroactively extended others. Other 2015 tax legislation includes the Fixing America's Surface Transportation Act (2015 FAST Act), which made significant adjustments to the tax due date of business returns, 2015 Bipartisan Budget Act, the Protecting Affordable Coverage for Employees Act (PACE Act), the Airport and Airway Extension Act (2015 Aviation Act), and the Medicare Access and CHIP Reauthorization Act of 2015.

PREREQUISITE: None

KEY CODE: 

VENDOR: ACPEN/BPN

COURSE LEVEL: Update

MEMBER EARLY BIRD FEE: \$245

Date	Facility	Instructor	Credit	Code
12/7	Memphis LGW Division	Broadcast	8 T	262

Broadcast: LLCs & Partnerships Update

The Bipartisan Budget Act of 2015 changed partnership audits forever. TEFRA audit rules are being replaced that impose tax liability at audit at the partnership level even though the partners may have changed, and there is an election to do that for 2015 returns if the partnership elects. Also, the Tax Matters Partner/Member is being replaced by a Partnership Representative who need not be a partner and can bind the partnership at audit. Even the statute of limitations can go beyond three years. Additionally, there are new, proposed and final regulations under Section 706 for changes in a partner's interest, complex new proposed regulations under 734(b), proposed changes to the partnership recourse and nonrecourse basis rules, and proposed regulations on contributions of built-in loss property. And that is only what's new as of year-end 2015. The IRS apparently plans on more regulations on the Bipartisan Budget Act in 2016. Additional topics needing your attention include unwinding family partnerships to prevent loss of income tax basis without corresponding estate tax savings for many families, structuring around the net investment income tax and effectively using disregarded entities in your tax planning.

PREREQUISITE: None

KEY CODE: 

VENDOR: ACPEN/BPN

COURSE LEVEL: Update

MEMBER EARLY BIRD FEE: \$245

Date	Facility	Instructor	Credit	Code
5/18	Memphis LGW Division	Broadcast	8 T	100

Broadcast: Not-for-Profit Accounting, Auditing and Tax Update

There have been major changes to not-for-profit accounting that alter how not-for-profit organizations tell donors, creditors and the public how they spend and invest their money. The IRS continues to refine and revise the Form 990 and 990-EZ. Our panel of experts will provide you with what you need to know about the latest and most important GAAP and tax proposals and developments affecting non-profit organizations.

PREREQUISITE: None

KEY CODE: Y 

VENDOR: ACPEN/BPN

COURSE LEVEL: Update

MEMBER EARLY BIRD FEE: \$245

Date	Facility	Instructor	Credit	Code
6/22	Memphis LGW Division	Broadcast	8 T/A	102

Broadcast: Small Business Entity Tax Forms Workshop

Join our panel of experts as they review the 1120S (S corporation), the 1065 (partnership), the 1040 Schedules C (sole proprietor) and SE (self-employment tax), the 8832 (entity classification election), the 8869 (qualified subchapter S subsidiary election) and the 1095 series (Health Insurance Marketplace Statement, Health Coverage, and Employer-Provided Health Insurance Offer and Coverage Insurance), and how those feed into other forms such as the 8962 (Premium Tax Credit) and 8965 (Health Coverage Exemption).

PREREQUISITE: None

KEY CODE: 

VENDOR: ACPEN/BPN

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$245

Date	Facility	Instructor	Credit	Code
1/11/17	Memphis LGW Division	Broadcast	8 T	331

NEW! Broadcast: Tax Planning for Real Estate

Real estate owners face a variety of tax challenges. Do I qualify for exemption from the passive activity loss rules as a real estate professional? How do I get capital gains treatment on a sale? Am I in a real estate trade or business? How do I avoid converting pre-development appreciation into ordinary income when property is to be developed? What are the limits on deferring gain under the like-kind exchange rules? How are rental properties taxed, and how do I maximize their tax benefits? How does the net investment income tax apply? How are eminent domain proceeds taxed? Allow our panel of experts to guide you through the maze.

PREREQUISITE: None

KEY CODE: 

VENDOR: ACPEN/BPN

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$245

Date	Facility	Instructor	Credit	Code
11/16	Memphis LGW Division	Broadcast	8 T	215

Buying and Selling a Business: Critical Tax and Structuring Issues

One of the major transactions CPA clients enter into is a purchase or disposition of a business. To help tax professionals in advising those clients, this course offers a comprehensive analysis of the business and tax aspects of buying and selling a business. It is a practical guide to help practitioners and industry CPAs understand structuring techniques. All CPAs, including controllers and executives in industry, should understand how difficult the process of buying and selling a business has become.

PREREQUISITE: A basic course in partnerships/LLCs; experience with C corporations.

KEY CODE: C 

VENDOR: Surgent McCoy CPE, LLC

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
11/3	TSCPA	John Sherrick	8 T	193

Comprehensive Guide to Tax Depreciation, Amortization and Property Transactions from Acquisition to Exchange or Disposition

Seemingly every year, economic stimulus packages drastically change depreciation rules. The purpose of this course is to provide an updated, in-depth analysis of the complex maze of rules dealing with depreciation, amortization and sale of property, with an emphasis on identifying special planning opportunities and pitfalls. This reference manual contains many examples and cases to illustrate the most important points CPAs need to be aware of.

PREREQUISITE: Basic knowledge of tax issues for property transactions.

KEY CODE: C  **VENDOR:** Surgent McCoy CPE, LLC
COURSE LEVEL: Intermediate **MEMBER EARLY BIRD FEE:** \$295

Date	Facility	Instructor	Credit	Code
11/8	Fogelman	Arthur Auerbach	8 T	200

Construction Industry: Accounting and Taxation Issues

Participants will learn how to provide accounting, tax and consulting services for contractors as independent CPAs and as CFO/controllers. The course will include a review of construction accounting basics and address various problems encountered in the construction industry. The discussion will include updates on current techniques, recent trends and new tax legislation as they pertain to the industry. The course will also include discussion of recommended internal controls, key ratios and financial statement disclosures important to those in the industry. Participants will take away examples of accounting and tax documents that will aid those engaged in construction tax and accounting.

PREREQUISITE: None

KEY CODE: None **VENDOR:** Marcum LLP
COURSE LEVEL: Update **MEMBER EARLY BIRD FEE:** \$295

Date	Facility	Instructor	Credit	Code
10/27	Music Road	James Lundy/ Robert Davidson	8 T/A	179

NEW! Contributions & Distributions for Traditional, Roth, SEP and Simple IRAs

This comprehensive training is designed to get the accountant up to speed quickly with the different types of individual retirement accounts (IRAs). The cornerstone of the course is an in-depth coverage of the contribution and distribution rules to the Traditional, Roth, Simplified Employee Pension (SEP) and Savings Incentive Match Plan for Employees (SIMPLE) IRAs. The course will also discuss the basics of the health savings account (HSA) as well as any newly enacted tax legislation related to IRAs.

PREREQUISITE: General knowledge of individual/business income taxation and retirement accounts.

KEY CODE: C **VENDOR:** Phoenix Beach LLC
COURSE LEVEL: Intermediate **MEMBER EARLY BIRD FEE:** \$295

Date	Facility	Instructor	Credit	Code
10/28	Music Road	Patrick Garverick	8 T	182

NEW! Corporate Tax Workshop: Get Ready for Busy Season

Originally written by Sid Kess and now led by AICPA's top tax instructors, this course will give you an advantage with our unique perspective on the latest tax changes. Look at the most recent tax laws and other developments affecting C corporations, S corporations and other business entities, including limited liability companies. Learn how to advise clients and employees on the latest tax-planning ideas. Share marketing ideas from top practitioners based on the latest tax strategies. In addition, practical, real-life exercises will help you apply what you've learned from this comprehensive course.

PREREQUISITE: Three years of tax experience.


KEY CODE: C ★  **VENDOR:** AICPA
COURSE LEVEL: Intermediate **MEMBER EARLY BIRD FEE:** \$295

Date	Facility	Instructor	Credit	Code
10/24	Embassy Suites Knoxville	Peter Towle	8 T	166
12/5	Courtyard Marriott Jackson	Dennis Riley	8 T	257
12/21	TSCPA	Michael Frost	8 T	328

NEW! Critical Tax Issues and Planning for Accounting Periods, Methods, Related Party Transactions and Form 3115

This course explores in-depth problems and solutions relating to accounting periods and methods under the Internal Revenue Code. This course will also cover the special rules that apply to transactions between related parties.

PREREQUISITE: Basic familiarity with tax rules relating to individual taxation.


KEY CODE: C  **VENDOR:** Surgent McCoy CPE, LLC
COURSE LEVEL: Intermediate **MEMBER EARLY BIRD FEE:** \$295

Date	Facility	Instructor	Credit	Code
11/7	Fogelman	Arthur Auerbach	8 T	198
12/2	TSCPA	Pam Davis	8 T	252
12/12	Embassy Suites Knoxville	Pam Davis	8 T	275

NEW! Cut Your Client's Tax Bill: Individual Tax Planning Tips and Strategies

Make sure your clients are protecting themselves from the onslaught of higher taxes. Get the latest techniques for building and conserving wealth through proactive tax-planning and investment strategies. Completely updated for tax law changes, this course will bring you up to date on the latest strategies that will keep more money in the hands of your clients and make you look like a hero.

PREREQUISITE: Basic knowledge of individual income taxation.

KEY CODE: C ★  **VENDOR:** AICPA
COURSE LEVEL: Intermediate **MEMBER EARLY BIRD FEE:** \$295

Date	Facility	Instructor	CPE Credit	Code
12/6	Courtyard Marriott Jackson	Dennis Riley	8 T	260

NEW! Determining How Much Money You Need to Retire, and Tax Ideas and Money Management in Retirement

This course gives CPAs the knowledge and tools to help their clients implement tax-effective investment and portfolio strategies for successfully accumulating wealth and maintaining their real after-tax retirement income.

PREREQUISITE: Basic knowledge in retirement planning.

KEY CODE: F 

VENDOR: Surgent McCoy CPE, LLC

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
12/5	Chattanooga Marriott	William Taylor	8 T/M	254
12/15	Fogelman	David Hulstrom	8 T/M	302

Effective and Efficient Senior-Level Review of Individual Tax Returns

The purpose of this course is to give new reviewers an understanding of the procedures utilized to review a tax return. Reviewers with some experience also may find the multitude of checklists allow a more thorough review or supplement to their review technique. The emphasis of the manual is not planning; rather, it is to help develop a strategy to properly review a return effectively and thoroughly.

PREREQUISITE: Experience in preparing Form 1040, reviewing diagnostics and preparing workpapers.

KEY CODE: C 

VENDOR: Surgent McCoy CPE, LLC

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
12/19	TSCPA	Dennis Benvie	8 T	318

NEW! Essential Depreciation Update for Practitioners

Individuals, corporations, partnerships, LLCs, trusts, estates and nonprofits all utilize two of the most often prepared tax forms: Form 4562 - Depreciation and Amortization, and Form 4797 - Sales of Business Property. This course provides a quick dissection of both of these complicated forms. From new staff to experienced, tax preparers may utilize this manual for all tax returns/entities they prepare. This reference manual contains many examples and cases to illustrate the most important points CPAs need to be aware of.

PREREQUISITE: Basic knowledge of tax issues for property transactions.

KEY CODE: C 

VENDOR: Surgent McCoy CPE, LLC

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$169

Date	Facility	Instructor	Credit	Code
9/20 a.m.	Chattanooga Marriott	Jeffrey Snyder	4 T	134

NEW! Estate and Life Planning Issues for the Middle-Income Client

Clients think that estate planning only applies to the very rich. In truth, there are many issues of critical concern for which the middle-income client needs to plan. This course is a must-attend for all CPAs who work with middle-income clients and are looking for ways to provide additional quality services.

PREREQUISITE: None

KEY CODE: C F 

VENDOR: Surgent McCoy CPE, LLC

COURSE LEVEL: Basic

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
11/11	TSCPA	Robert Thelen	8 T	211
12/1	Fogelman	Robert Thelen	8 T	248

NEW! Federal Tax Individual and Business Current Developments

With the increasing complexity and ever-changing nature of tax laws and issues, today's accountant needs a one-day, fast-paced update course focusing on the hottest federal income tax topics affecting individuals, businesses and their owners.

PREREQUISITE: None

KEY CODE: C

VENDOR: Phoenix Beach LLC

COURSE LEVEL: Update


MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
10/26	Music Road	Patrick Garverick	8 T	174

Federal Tax Update

Both businesses and individual clients will be affected by a new tax environment that requires the tax advisor to consider extensive tax planning. The critical tactics in 2016 will depend not only on the major trends and changes in the case and regulatory law but also on proposals that are likely to be executed.

PREREQUISITE: Experience with individual and business clients.

KEY CODE: C F 

VENDOR: Surgent McCoy CPE, LLC

COURSE LEVEL: Update

MEMBER EARLY BIRD FEE: \$169

Date	Facility	Instructor	Credit	Code
12/14 a.m.	Fogelman	Edward A. Harter	4 T	284
12/15 a.m.	Nashville School of Law	Edward A. Harter	4 T	296

NEW! Fiduciary Income Tax Returns - Form 1041 Workshop with Filled-in Forms

As income tax rates rise on estates, trusts and their beneficiaries, consideration of the income tax effects becomes more critical. The purpose of this course is to explain the complicated income tax rules of estates and trusts, fiduciary accounting, and an introduction or refresher of preparing Form 1041. This practical, over 300-page manual is an excellent reference source for your practice.

PREREQUISITE: Experience with the preparation of income tax returns.

KEY CODE: C F  

VENDOR: Surgent McCoy CPE, LLC

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
12/12	TSCPA	Scott Emerson	8 T	277
12/12	Live Stream	Scott Emerson	8 T	813

NEW! Form 1041: Income Taxation of Estates and Trusts

Protect your clients' assets and shield their estates from increased taxation brought about by the changing tax code. Understand the tax obligations of trusts and estates and how these obligations affect beneficiaries. This course provides exercises and examples that reflect the calculation and allocation of taxable income and its presentation on the appropriate forms. You will also learn how to prepare federal Form 1041 and the accompanying schedules.

PREREQUISITE: None

KEY CODE: C ★ 

VENDOR: AICPA

COURSE LEVEL: Basic

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
12/7	Fogelman	Dennis Riley	8 T	265

NEW! Form 990: Exploring the Form's Complex Schedules

Mastery of the current Form 990 beyond its core form pages requires understanding of the form's transparency demands relating to multiple complex issues: transactions with certain insiders; expanded disclosure of highly compensated individuals' calendar year compensation; identifying, and reporting in the presence of, "related organizations," nuances of the two "public support tests;" undertaking of foreign operations and more. This course covers the most advanced tax and nonprofit issues that are the subject of the Form 990's Schedules. Participants will not only gain an understanding of the tax and practical points necessary to complete Schedules A, C, F, J, K, L, N and R of the current Form 990, but also be advised as to how to communicate with exempt clients on each of these Schedules' unique demands.

PREREQUISITE: Basic Knowledge of the "Core Form" 990 Parts I-XII.

KEY CODE: C ★ 

VENDOR: AICPA

COURSE LEVEL: Advanced

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
8/30	TSCPA	Elaine Sommerville	8 T	120
9/1	Fogelman	Elaine Sommerville	8 T	121
10/25	Embassy Suites Knoxville	Peter Towle	8 T	171

Form 990: Mastering Its Unique Characteristics

Explore the tax information and inherent not-for-profit organization issues to be mastered in properly preparing the current Form 990. This course covers the numerous reporting demands the 990 imposes, including how to respond to the form's demands for narrative answers. Participants will gain an understanding of the tax and practical points essential to appropriate completion of the Form 990 and be guided on advising exempt clients on the Form's complexities and diverse demands.

PREREQUISITE: None

KEY CODE: C Y ★ 

VENDOR: AICPA

COURSE LEVEL: Basic

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
11/14	TSCPA	Peter Towle	8 T	213

NEW! From Hiring to Firing and Everything in Between: Legal, Tax and Health Care Issues

The employer-employee relationship strains both sides in a troubled economy, and businesses need CPAs, controllers and other advisors to provide understanding of the complex legal, tax and health care issues associated with all aspects of employment. This course provides in-depth coverage of this critical area.

PREREQUISITE: None

KEY CODE: C 

VENDOR: Surgent McCoy CPE, LLC

COURSE LEVEL: Basic

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
11/7	Embassy Suites Knoxville	William Taylor	8 T/M	197
11/10	TSCPA	Robert Thelen	8 T/M	208

NEW! Guide to Understanding the Passive Activity Rules in 2016

Now more than ever, every business owner and real estate investor must determine if they materially participate in any and all trades or businesses, because there are potential implications for the net investment income tax. These extremely complicated rules require an in-depth understanding of election and planning issues that CPAs need to know. The IRS has been very aggressive in audits under the passive loss rules.

PREREQUISITE: Five or more years in public accounting working on complex individual tax returns.

KEY CODE: C F 

VENDOR: Surgent McCoy CPE, LLC

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$169

Date	Facility	Instructor	Credit	Code
9/20 p.m.	Chattanooga Marriott	Jeffrey Snyder	4 T	135
12/16 p.m.	Nashville School of Law	William Harden	4 T	306

Handbook for Mastering Basis, Distributions and Loss Limitation Issues for S Corporations, LLCs and Partnerships

The most difficult concepts to master when dealing with flow-through business entities are the basis and distribution concepts. Major error and malpractice issues occur if the CPA does not fully understand the impact of these rules. This course is designed to focus on the practical applications of these rules.

PREREQUISITE: Experience in business taxation.

KEY CODE: C 

VENDOR: Surgent McCoy CPE, LLC

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
11/2	TSCPA	John Sherrick	8 T	189

NEW! Individual and Financial-Planning Tax Camp

Each year brings its own set of tax planning challenges, and 2016 is no exception. This course aims to inform tax planners with the most important planning ideas wealthy clients, middle-income clients and closely held business owners need to consider in 2016 to take advantage of the present and plan for the future. Learn strategies that can really have an impact on client lives, while also bringing value to you and your firm.

PREREQUISITE: Experience in individual income tax planning and income tax return preparation.

KEY CODE: C F  **VENDOR:** Surgent McCoy CPE, LLC
COURSE LEVEL: Intermediate **MEMBER EARLY BIRD FEE:** \$295

Date	Facility	Instructor	Credit	Code
11/9	Fogelman	Arthur Auerbach	8 T	203
11/17	Embassy Suites Knoxville	William Harden	8 T	222
12/7	Chattanooga Marriott	William Taylor	8 T	263

NEW! Individual Income Tax Return Mistakes and How to Fix Them

Every practitioner has been confronted with a client who had a different twist on a tax idea. This course focuses on the law in order to break down 25 situations in which a taxpayer has attempted to push one of these ideas. The study of the law underlying the tax mistakes made will assist practitioners in satisfying their professional standards of practice and will help you in preparing Form 1040.

PREREQUISITE: Basic knowledge of individual income taxation


KEY CODE: C  **VENDOR:** Surgent McCoy CPE, LLC
COURSE LEVEL: Intermediate **MEMBER EARLY BIRD FEE:** \$169

Date	Facility	Instructor	Credit	Code
9/19 a.m.	Chattanooga Marriott	Jeffrey Snyder	4 T	128
12/15 a.m.	Nashville School of Law	William Harden	4 T	294

NEW! IRA Boot Camp

Most individuals will accumulate a significant amount of wealth through contributions or rollovers from qualified plans into IRAs. Although the rules in this area provide tremendous planning opportunities, they are very complex. The purpose of this course is to provide insight and practical planning suggestions into this important area of practice.

PREREQUISITE: Basic knowledge in estate and retirement planning.


KEY CODE: C F  **VENDOR:** Surgent McCoy CPE, LLC
COURSE LEVEL: Intermediate **MEMBER EARLY BIRD FEE:** \$295

Date	Facility	Instructor	Credit	Code
11/8	Embassy Suites Knoxville	William Taylor	8 T	199
11/30	TSCPA	William Taylor	8 T	246
12/16	Fogelman	David Hulstrom	8 T	312

NEW! K-1 Boot Camp for LLCs

Schedule K-1 has evolved into the universal correspondent of tax information to business owners. This course is designed to take a deeper look into the vastness of the valuable schedule. The course will be advantageous to those who prepare complicated federal individual income tax returns, and for those who prepare the underlying Schedule K-1s for partnership or LLC pass-through entities.

PREREQUISITE: Basic knowledge of federal taxation.

KEY CODE: C  **VENDOR:** Surgent McCoy CPE, LLC
COURSE LEVEL: Intermediate **MEMBER EARLY BIRD FEE:** \$169

Date	Facility	Instructor	Credit	Code
12/14 p.m.	Fogelman	Edward A. Harter	4 T	285
12/15 p.m.	Nashville School of Law	Edward A. Harter	4 T	297

NEW! K-1 Boot Camp for S Corporations and LLCs

Schedule K-1 has evolved into the universal correspondent of tax information to business owners. This course is designed to take a deeper look into the vastness of the valuable schedule. The course will be advantageous to those who prepare complicated federal individual income tax returns, and for those who prepare the underlying Schedule K-1s for pass-through entities.

PREREQUISITE: Basic knowledge of federal taxation.

KEY CODE: C  **VENDOR:** Surgent McCoy CPE, LLC
COURSE LEVEL: Intermediate **MEMBER EARLY BIRD FEE:** \$295

Date	Facility	Instructor	Credit	Code
11/9	TSCPA	Robert Gilwee	8 T	204

NEW! Key Partnership and S Corporation Tax Planning Strategies

Most of our clients are pass-through entities, for which many of the general business strategies are subject to additional limitations. To provide the tax planning strategies for closely held business clients that will bring more revenue, this course focuses on the special concerns and techniques the practitioner needs to thrive in this market.

PREREQUISITE: Experience with business clients.


KEY CODE: C  **VENDOR:** Surgent McCoy CPE, LLC
COURSE LEVEL: Intermediate **MEMBER EARLY BIRD FEE:** \$169

Date	Facility	Instructor	Credit	Code
9/19 p.m.	Chattanooga Marriott	Jeffrey Snyder	4 T	129
11/18 a.m.	MeadowView Marriott	William Harden	4 T	226

NEW! Limited Liability Companies: Losses, Liquidations, Terminations, Continuations and Sales

The purpose of this course is to provide an in-depth discussion of selected advanced-level issues affecting LLCs and LLPs.

PREREQUISITE: A beginning course in LLCs/partnerships; experience with LLC/partnership clients.

KEY CODE: C  **VENDOR:** Surgent McCoy CPE, LLC
COURSE LEVEL: Advanced **MEMBER EARLY BIRD FEE:** \$169

Date	Facility	Instructor	Credit	Code
12/16 a.m.	Nashville School of Law	Edward A. Harter	4 T	307

NEW! Mastering Basis Issues for S Corporations, Partnerships and LLCs

The most difficult concepts to master when dealing with flow-through business entities are the basis and distribution concepts. Major error and malpractice issues occur if the CPA does not fully understand the impact of these rules. This course is designed to focus on the practical applications of these rules.

PREREQUISITE: Experience in business taxation.

KEY CODE: C 

VENDOR: Surgent McCoy CPE, LLC

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$169

Date	Facility	Instructor	Credit	Code
12/16 a.m.	Nashville School of Law	William Harden	4 T	305

NEW! Multigenerational Financial and Tax Planning for Clients

Many clients overlook planning that takes into account not only their own issues but also the needs of other generations - above and below - of the extended family unit. Advisors can help achieve tax and financial planning objectives for multiple ties within the family. This course will explore various techniques for different net worth/income levels of generations.

PREREQUISITE: Prior experience in advising clients on individual and financial planning issues.

KEY CODE: C F  

VENDOR: Surgent McCoy CPE, LLC

COURSE LEVEL: Intermediate



MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
12/13	TSCPA	Scott Emerson	8 T	282
12/13	Live Stream	Scott Emerson	8 T	814
12/13	Embassy Suites Knoxville	Pam Davis	8 T	280

Multistate Tax Update

Plan to attend this fast-paced class that covers developing topics in state taxation, ranging from individuals to pass-through entities to corporate taxpayers. This class will focus on issues confronting small and middle-market companies and offer practical guidance for minimizing tax liability and negotiating the treacherous waters of compliance.

PREREQUISITE: Experience in corporate taxation.

KEY CODE: C  

VENDOR: Surgent McCoy CPE, LLC

COURSE LEVEL: Update

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
11/1	TSCPA	Jeffrey Snyder	8 T	188
11/1	Live Stream	Jeffrey Snyder	8 T	810

NEW! Nexus Update: Latest Developments in State Income, Franchise and Sales Taxes

The barriers to doing business across state lines have significantly decreased in recent years. However, this creates additional issues for taxpayers and their preparers in determining where and when they have nexus in a state which would require them to file either state income tax or sales tax returns. This class will not only help equip you in learning the various ways that states define and enforce nexus but also in how to determine when your company or client has nexus in a state, thus requiring the filing of tax returns.

PREREQUISITE: Basic knowledge of multistate tax issues.

KEY CODE: C  

VENDOR: AICPA

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
8/15	Fogelman	Michael Frost	8 T	109

NEW! Passive Activities & Rental Real Estate Income Tax Issues

This comprehensive training is designed to get the accountant up to speed quickly with the complex passive activity loss (PAL) rules that apply to certain investments in trades or businesses and rental activities. The cornerstone of the course is the in-depth coverage of the detailed tax law and regulations applicable to passive activities under IRC 469 and how and when the 3.8 percent net investment income tax under 1411 applies.

PREREQUISITE: General knowledge in individual/business income taxation and how they relate to the passive activity laws.

KEY CODE: C

VENDOR: Phoenix Beach, LLC

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
10/25	Music Road	Patrick Garverick	8 T	168

NEW! Payroll Taxes and 1099 Issues: Everything You Need to Know

This course is designed to provide you with practical pointers for managing the payroll tax and reporting function. Learn how to avoid the frequent penalties in payroll tax reporting and stay up to date with the latest information. It also shows how to handle reporting and withholding requirements for employee fringe benefits. Master the often confusing rules for Form 1099-MISC and other information reports including when and how much to report. Make sure you or your clients are in compliance and not subject to IRS penalties.

PREREQUISITE: Working knowledge of payroll tax issues or payroll-type functions.

KEY CODE: C  

VENDOR: AICPA

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
11/28	TSCPA	Beth Stenberg	8 T	241

NEW! Real Estate: The Many Complexities of GAAP, SSARS and GAAS Compliance

Accounting for real estate activities is always a complicated adventure. From how to account for development costs, to how to recognize impairment losses, to how to recognize gain or loss on its sale are all challenging issues for the accountant. And then to top things off, when it comes to the income tax side, we have a whole set of different rules. No other industry has such differences between GAAP and income tax reporting.

PREREQUISITE: None

KEY CODE: 

VENDOR: Surgent McCoy CPE, LLC

COURSE LEVEL: Basic

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
11/21	TSCPA	William Eskin	8 T/A	235

Reviewing Individual Tax Returns: What Are You Missing?

Join us as we discuss the common errors practitioners make on individual tax returns that are often missed by review staff. The intent is to sharpen skills for reviewers by examining case studies and discussing issues where additional information from the client may be warranted and areas of tax law where proper treatment requires additional analysis and information. Multiple issues will be discussed including pass-through K-1s, home office issues, hobby losses, rental property, hiring spouses, depreciation, 179 issues, amortization and more.

PREREQUISITE: None

KEY CODE: C 

VENDOR: AICPA

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$169

Date	Facility	Instructor	Credit	Code
11/15 p.m.	TSCPA	Peter Towle	4 T	334

NEW! S Corporation Taxation: Advanced Issues

This course goes beyond the basics and addresses important practical issues that an experienced practitioner must know about S corporations.

PREREQUISITE: A basic course in S corporations; some experience in advising S corporations and their shareholders.

KEY CODE: C 

VENDOR: Surgent McCoy CPE, LLC

COURSE LEVEL: Advanced

MEMBER EARLY BIRD FEE: \$169

Date	Facility	Instructor	Credit	Code
12/16 p.m.	Nashville School of Law	Edward A. Harter	4 T	308

NEW! Select Estate and Life Planning Issues for the Middle-Income Client

Clients think that estate planning only applies to the very rich. In truth, there are many issues of critical concern for which the middle-income client needs to plan. This course is a must-attend for all CPAs who work with middle-income clients and are looking for ways to provide additional quality services.

PREREQUISITE: None

KEY CODE: C F 

VENDOR: Surgent McCoy CPE, LLC

COURSE LEVEL: Basic

MEMBER EARLY BIRD FEE: \$169

Date	Facility	Instructor	Credit	Code
11/18 p.m.	MeadowView Marriott	William Harden	4 T	227
12/15 p.m.	Nashville School of Law	William Harden	4 T	295

Social Security and Medicare: Maximizing Retirement Benefits

Our Social Security system provides retirement, disability and survivor benefits to millions of Americans. The long-term future of Social Security and Medicare is uncertain, triggering concerns for many workers who are now paying into the system. Attend this course to learn about FICA, the Medicare tax and more. You will cover real-world situations and use the tools provided to advise your clients to make optimal decisions when it comes to Social Security and Medicare.

PREREQUISITE: None

KEY CODE: 

VENDOR: AICPA

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$169

Date	Facility	Instructor	Credit	Code
11/15 a.m.	TSCPA	Peter Towle	4 T	333

Social Security, Medicare and Prescription Drug Retirement Benefits: What Every Baby Boomer Needs to Know Now

Social Security seems poised for changes in benefits and eligibility age. The leading edge of the baby boomer generation has already reached retirement age. Financial and tax planners can expect increased demand for strategies that dovetail Social Security with other retirement- and estate-planning objectives. This course provides tax and financial planning professionals with both the background information on the Social Security system and the strategies clients will need in dealing with Social Security and all the myriad other related retirement planning issues.

PREREQUISITE: None

KEY CODE: C F  

VENDOR: Surgent McCoy CPE, LLC

COURSE LEVEL: Basic

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	CPE Credit	Code
11/10	TSCPA	Curtis Quickel	8 T	207
11/10	Live Stream	Curtis Quickel	8 T	812
12/2	Fogelman	Robert Thelen	8 T	251

NEW! Streamlined Tax Staff Training - Business

From books to tax return - that's the mission. But, how to get started, how to identify and keep track of different reporting for different types of entities, and how to keep track of book/tax differences? How different is the Form 1065 from the Form 1120S? Those questions and more will be answered in this information-packed day.

PREREQUISITE: None

KEY CODE: C 

VENDOR: Nichols Patrick CPE, Inc

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
11/22	TSCPA	Randy Newton	8 T	239

NEW! Streamlined Tax Staff Training - Individual

Essential knowledge for the new income tax return preparer, in an information-packed day of practical instruction. Return preparation techniques are illustrated using real practice situations culled from hundreds of “tax organizers” and thousands of client questions. Jump start the career of the new accountant.

PREREQUISITE: None

KEY CODE: C

VENDOR: Nichols Patrick CPE, Inc

COURSE LEVEL: Basic

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
11/21	TSCPA	Randy Newton	8 T	236

NEW! Tax Favored Health Care Plans after the ACA

Tax favored health care plans are one of the major fringe benefits offered by businesses to their employees. After the enactment of President Obama’s signature health care law, the Affordable Care Act (ACA), the requirements to offer employee health insurance as well as maintaining group health insurance plans were significantly modified. Any employer in non-compliance with the market reforms of the ACA could be subject to a \$36,500 per year, per employee excise tax. The cornerstone of this course is the comprehensive discussion of the different tax favored health care plans available and how they are affected by the ACA.

PREREQUISITE: Basic understanding of tax favored health care plans and the ACA.

KEY CODE: C

VENDOR: Phoenix Beach LLC

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
10/24	Music Road	Patrick Garverick	8 T	163

Tennessee State Tax Update

With the continued evolution of Tennessee’s tax law in the legislature and with constant litigation, rulings and rulemaking proceedings on important tax issues, Tennessee CPAs need to stay up to speed on Tennessee tax. This session, hosted by Brett Carter from Bradley Arant Boult Cummings, will delve into all things Tennessee tax as Brett shares his experience on advanced topics in Tennessee tax law involving all Tennessee’s major taxes, including the sales tax, business tax, franchise and excise tax, Hall income tax and property tax. Brett will also focus on pending Tennessee tax litigation, the evolution of the Retail Accountability Program, remotely accessed software rulings, and the Department of Revenue’s rulemaking proceedings for market sourcing and the research and development exemption. It’s an update that no Tennessee CPA should miss.

PREREQUISITE: None

KEY CODE: C

VENDOR: TSCPA

COURSE LEVEL: Update

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
12/14	TSCPA	Brett Carter	8 T	290

The Best Income Tax, Estate Tax and Financial Planning Ideas of 2016

With higher tax rates for individuals and trusts, tax planning takes on more importance. Plus, with Social Security going bust and interest rates at an all-time low, new ideas for financial planning for retirement must be considered. The purpose of this course is to explore practical tax-planning ideas that practitioners can use to assist clients with their needs. This course is crucial for CPAs who are looking for good ideas that can save clients money.

PREREQUISITE: Basic course in individual income tax, Social Security and estate planning.

KEY CODE: C F

VENDOR: Surgent McCoy CPE, LLC

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
11/3	Horseshoe Tunica	Michael Frost	8 T	192
11/29	TSCPA	William Taylor	8 T	244

The Best S Corporation, Limited Liability and Partnership Update Course

Practitioners need to keep abreast of all tax changes affecting pass-through entities used by their business clients and employers, and this enlightening course delivers that information. You will learn invaluable knowledge, strategies, techniques, innovative tax-planning concepts, income-generating ideas and other planning opportunities available to S corporations, partnerships, LLCs and LLPs.

PREREQUISITE: Experience with pass-through entity clients.

KEY CODE: C

VENDOR: Surgent McCoy CPE, LLC

COURSE LEVEL: Update

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
10/31	TSCPA	Jeffrey Snyder	8 T	186

NEW! The Casual Tax Preparer: 1040 Forms Update for 2016

Many individuals casually prepare a few income tax returns for family members, friends or acquaintances. Many such preparers are professionals in their field; however, that field is not full-time tax preparation. The manual is designed to provide a preparation update to the casual preparer. The manual involves not only new tax rules for the current year, but also understanding how the new and old rules apply to 2016 tax forms. The up-to-date review of important tax form changes will be invaluable to attendees who prepare tax returns for individuals.

PREREQUISITE: Basic familiarity with tax rules relating to individual taxation.

KEY CODE: C

VENDOR: Surgent McCoy CPE, LLC

COURSE LEVEL: Intermediate

MEMBER EARLY BIRD FEE: \$295

Date	Facility	Instructor	Credit	Code
12/6	Chattanooga Marriott	William Taylor	8 T	258
12/20	TSCPA	Dennis Benvie	8 T	326
12/20	Live Stream	Dennis Benvie	8 T	816



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3 Membership Information

Are you a TSCPA Member? Yes No JOIN NOW!

Are you an AICPA Member? Yes No AICPA # _____

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2 Payment Information

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4 How did you hear about the programs you are registering for? (Please check one)

CPE Catalog TSCPA Website

Tennessee CPA Journal Email

Promotional Brochure Other: _____

5 Event Selection

Event Information			TSCPA Member Fees		Fee Adjustments			
Event Title	Event Code	Event Date	Early Bird Fee	Regular Fee	★ AICPA Discount	✕ Non-member Fee	▷ CLE Fee	Subtotal

Total \$ _____

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eMaterials: eMaterials will be provided for all CPE programs. Once program materials have been uploaded to TSCPA's website, TSCPA will not be able to offer a refund regardless of the reason for cancellation (a requirement of the education vendors).

★ **AICPA Discount:** AICPA members will receive a \$30 discount per 8-hours of content off the price of designated 8-hour and 16-hour AICPA events. This discount is available until the date of the event and cannot be applied retroactively. Designated AICPA events will be identified in all marketing pieces. Members of the AICPA who are not members of the state society are NOT entitled to the TSCPA member discount.

✕ **Non-member Fee:** Add \$100 for conferences and 8-hr seminars or \$50 for 4-hr seminars if you are not a TSCPA Member.

▷ **CLE Fee:** \$15 per 4-hr CPE course; \$25 per 8-hr CPE course; \$50 per 16-hr CPE course; \$75 per 24-hr CPE course. You must notify TSCPA in advance and provide your BPR number at the time of registration.

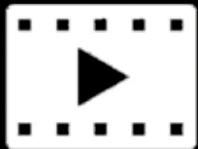
Specific Needs: If you have special needs under the Americans with Disabilities Act, please send an email description to cpe@tscpa.com or call 615/377-3825.

If you have not received an email confirmation two business days prior to the course date, please contact the society office at 615/377-3825. You may fax your completed registration form to 615/377-3904 or mail it to 201 Powell Place, Brentwood, TN 37027.

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