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**IMPLEMENTATION of the NEW LEASE STANDARD**  
 Course #8305  
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**The NEW AUTOMATION MINDSET - UTILIZING AI**  
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**FRAUD SCHEMES**  
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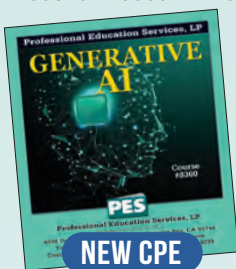




Unless otherwise noted: All course material provided. No prerequisites. Course level: Basic.

## GENERATIVE AI

**COURSE #8360 • 14 CPE HRS • \$94.50**



**NEW CPE**

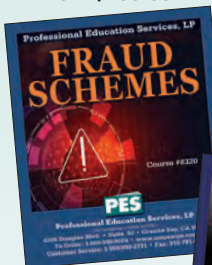
This course presents an intelligent discussion of the current capabilities, future potential, and inner workings of generative artificial intelligence. It looks at the history of generative AI,

what it has achieved so far, and how it is likely to evolve in the future. **MANAGEMENT ADVISORY SERVICES** - See page 5.

## FRAUD SCHEMES

**NEW CPE**

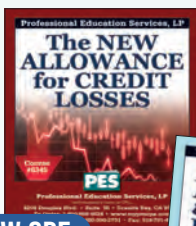
**COURSE #8320 • 16 CPE HRS • \$109.50**



This course will define and describe many types of corporate fraud schemes that all companies should be on the lookout for. It will identify the schemes, red flags to be aware of, and tools that can be used to offset or avoid the likelihood of the fraud being successful. **ACCOUNTING AND AUDITING** - See page 20.

## THE NEW ALLOWANCE FOR CREDIT LOSSES

**COURSE #8345 • 2 CPE HRS • \$29.50**



**NEW CPE**

The objective of this course is to address the changes made by ASU 2016-13 to the recording of credit losses on financial instruments. **ACCOUNTING AND AUDITING** - See page 21.

## CAR, TRAVEL, AND HOME OFFICE DEDUCTIONS

**COURSE #7730 • 8 CPE HRS • \$64.50**

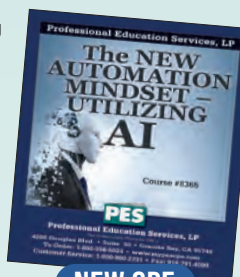


**TOP SELLER**

With detailed explanations and practical examples, this course guides you through the ins-and-outs of maximizing business deductions for car expenses, travel, meals, and home offices. **TAXATION** - See page 16.

## THE NEW AUTOMATION MINDSET – UTILIZING AI

**COURSE #8365 • 10 CPE HRS • \$79.50**



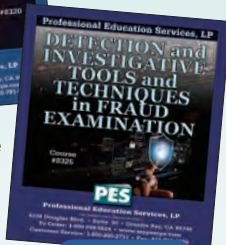
**NEW CPE**

Businesses are being reshaped faster than ever before; agility and adaptability are now critical components of a business' survival. This course will serve as a guide to implementing automation and AI in the real world.

**MANAGEMENT ADVISORY SERVICES** - See page 5.

## DETECTION AND INVESTIGATIVE TOOLS AND TECHNIQUES IN FRAUD EXAMINATION

**COURSE #8325 • 12 CPE HRS • \$94.50**



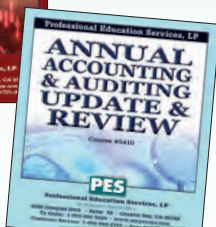
**NEW CPE**

This course takes a closer look at some of the tools available for fraud detection and prevention. It will first discuss good techniques for finding red flags and performing risk assessments.

Then it delves into how to best conduct fraud examinations with good interviewing techniques and use of today's technological tools. **ACCOUNTING AND AUDITING** - See page 20.

## ANNUAL ACCOUNTING & AUDITING UPDATE & REVIEW

**COURSE #5410**  
**24\* CPE HRS • \$209.50**  
\* 16 ACCOUNTING  
AND 8 AUDITING HRS



**TOP SELLER**

The purpose of this course is to inform the reader of the various changes affecting accounting, compilation and review, and auditing engagements, as well as a review and recall of existing standards. Topics include a summary of newly issued FASB statements, new statements issued by the Auditing Standards Board, changes in compilation and review engagements, current and pending developments, practice issues, and more. **ACCOUNTING AND AUDITING** - See page 17.



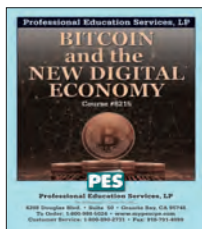
# MANAGEMENT ADVISORY SERVICES

Unless otherwise noted: All course material provided. No prerequisites. Course level: Basic.

## BITCOIN AND THE NEW DIGITAL ECONOMY

**COURSE #8215**  
**10 CPE HRS • \$79.50**

**HOT TOPIC**



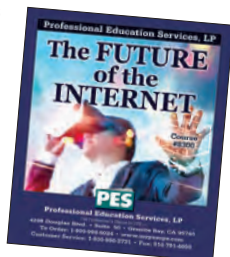
This course explains what Bitcoin is, how it works, and how and why we are transitioning to a digital economy. It outlines how Bitcoin and the blockchain operate in the real

world today. It also discusses the deficiencies of traditional fiat currency, how it's commonly manipulated, and how we can benefit from the adoption of new digital assets. **Note: PES does not promote cryptocurrencies.**

## THE FUTURE OF THE INTERNET

**COURSE #8300 • 10 CPE HRS • \$79.50**

Perfect for business leaders who want to get a head start on understanding how tomorrow's digital economy may impact their organization and the community at large, this course addresses how the Metaverse, Web 3.0, and blockchain are currently transforming business and society. It examines the current and potential impact of these technologies and explores the risks and opportunities presented by them.



## MANAGE THE EVOLVING WORKPLACE

### FUTURE SKILLS — HOW TO SUCCEED IN A DIGITAL WORLD

**COURSE #8190 • 10 CPE HRS • \$79.50**



This course provides the groundwork on how to best prepare a business for the digital future of workplaces by exploring which skills will be most in demand and why those will command a premium price. It also addresses

strategies for improving teamwork and collaboration in a digital work setting.

### REMOTE WORK TECHNOLOGY

**COURSE #8110 • 16 CPE HRS • \$99.50**

This course outlines how to use SaaS technology and communication apps to successfully run a business remotely. It includes valuable case studies of businesses that embraced remote work and cautionary tales regarding the challenges of this new reality.



### THE ECOSYSTEM ECONOMY

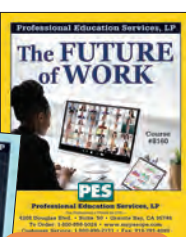
**COURSE #8225**  
**8 CPE HRS • \$69.50**

Examining the emerging ecosystem economy and what it means for companies, this course describes how most successful companies today have adopted entirely new mindsets as opposed to relying on old-school best practices. The course also explains how this new ecosystem economy will continue to evolve, dissolving borders between the traditional sectors of the economy.



### THE FUTURE OF WORK

**COURSE #8160 • 8 CPE HRS • \$69.50**



Over the last few years, the way we work has changed! This course explains how to use flexible working to unlock the potential of your team, how to lead teams to produce their best output, and how to manage

**HOT TOPICS**

and measure outcome to get the most of this new work environment.

### BUSINESS TRENDS IN PRACTICE

**COURSE #8115 • 10 CPE HRS • \$79.50**

Discussing emerging consumer trends and new technologies including AI, business process automation, remote work, and sustainable trends, this course is valuable for business leaders in order to stay on top of current and anticipated changes.



## BEST CUSTOMER SERVICE

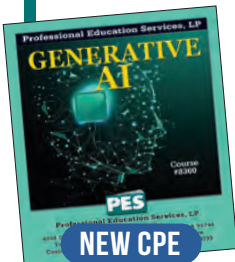
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## AI - ARTIFICIAL INTELLIGENCE

### GENERATIVE AI

COURSE #8360 • 14 CPE HRS • \$94.50



This course presents an intelligent discussion of the current capabilities, future potential, and inner workings of generative artificial intelligence. It looks at the history of generative AI, what it has achieved so far, and how it is likely to evolve in the future. It also touches on the ethical concerns and social implications of the GenAI space.

### AI FOR AUDIT, FORENSIC ACCOUNTING, AND VALUATION

COURSE #7955 • 12 CPE HRS • \$84.50

AI is set to make dramatic changes to accounting and auditing professions, yet existing AI tends to solve very narrow business issues. Accounting and auditing firms need a comprehensive framework for intelligent, automation-centric modernization. Understand how AI can be integrated within audit management, leading to better automated models and forensic accounting.



### THE NEW AUTOMATION MINDSET – UTILIZING AI

COURSE #8365 • 10 CPE HRS • \$79.50



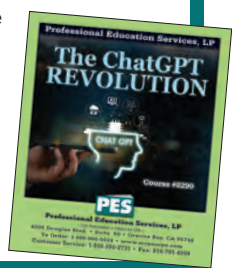
Businesses are being reshaped faster than ever before; agility and adaptability are now critical components of a business' survival. This course will serve as a guide to implementing automation and AI in the real world. It includes concrete examples of the successful integration of automated technologies deployed by some companies and the positive results attained by them.

### THE CHATGPT REVOLUTION

HOT TOPIC

COURSE #8290 • 4 CPE HRS • \$34.50

We are on the edge of an AI revolution, so now is the time to understand how this latest (evolving) technology can be utilized to streamline some of the tasks in both our personal and professional lives. This course will demonstrate how easy it is to use ChatGPT for a variety of things, outline the program's efficiencies, and discuss how this new technology will transform the future of work.



## MANAGEMENT FOR BUSINESS SUCCESS!

### KEY PERFORMANCE INDICATORS UPDATED

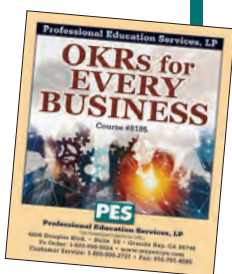
COURSE #7825 • 10 CPE HRS • \$79.50



KPIs help define and measure special goals fundamental to an organization's current and future success. This course outlines a concise KPI model for simplifying the complex areas of KPIs to help avoid common mistakes.

### OKRs FOR EVERY BUSINESS

COURSE #8185 • 8 CPE HRS • \$69.50



OKRs (objectives and key results) have become the successor to KPIs. This course serves as an actionable guide on how to use OKRs efficiently to help managers and teams organize everyday decisions around shared and important goals.





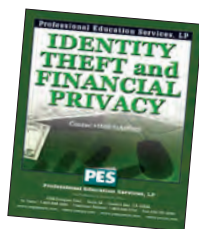
# MANAGEMENT ADVISORY SERVICES

Unless otherwise noted: All course material provided. No prerequisites. Course level: Basic.

## IDENTITY THEFT AND FINANCIAL PRIVACY

**COURSE #5585 • 8 CPE HRS • \$69.50**

More than ever before, the information explosion has led to the expansion of a crime in the form of identity theft. Reviewing the problems and types of identity theft, this course examines tactics businesses can use to reduce the risk of such crimes and also focuses on several rules mandating practices for financial firms to safeguard client information.



## LEGAL CONSIDERATIONS IN BUSINESS

### LEGAL GUIDE TO RUNNING A SMALL BUSINESS: PART 1

**TOP SELLER**

**COURSE #8265 • 15 CPE HRS • \$89.50**

Covering a variety of topics, this new two-part course outlines how to tackle many of the legal issues confronting small business owners.

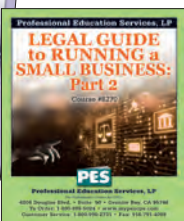
Part 1 focuses on choosing the best business entity, structuring a partnership agreement, creating a corporation and an LLC, licenses and permits, tax basics, raising money, and buying a business.



### LEGAL GUIDE TO RUNNING A SMALL BUSINESS: PART 2

**COURSE #8270 • 15 CPE HRS • \$89.50**

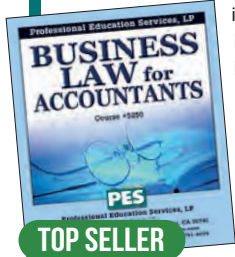
Part 2 focuses on the fundamentals of franchises, business insurance, negotiating leases, home-based business basics, employee and independent contractors, payment processing, small business contracts, and more.



### BUSINESS LAW FOR ACCOUNTANTS

**COURSE #5250 • 24 CPE HRS • \$119.50**

Today's CPA must have a working familiarity with a number of areas of business law to properly advise clients and to protect their own interests as a practitioner. The course is designed to meet both objectives and is broken into six main parts: (1) business entities; (2) civil liability and unfair competition in business; (3) intellectual property; (4) employment law; (5) the law of independent contractors; and (6) bankruptcy law for businesses.

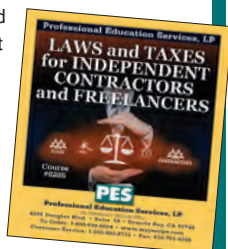


**TOP SELLER**

### LAWS AND TAXES FOR INDEPENDENT CONTRACTORS AND FREELANCERS

**COURSE #8285 • 20 CPE HRS • \$119.50**

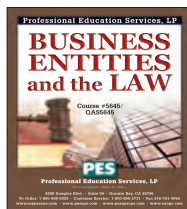
Detailing legal and tax information that you need to assist clients who work for themselves, this course is a well-organized reference that covers issues such as paying estimated taxes, taking advantage of tax deductions and credits, keeping accurate records, writing legally binding contracts, and more.



### BUSINESS ENTITIES AND THE LAW

**COURSE #5645 • 4 CPE HRS • \$34.50**

Deciding to start a business is just the beginning of many important decisions. One of the most important questions to ask is, "What is the best business form to choose?" This course covers many of the factors a business owner should consider when forming a business. **PLEASE NOTE: Course material is similar to #5250; therefore, we recommend that you should not take both courses in the same CPE reporting period.**



## PREFER HARD COPY CPE?

Hard copy format option available (plus shipping / handling).

# MANAGEMENT ADVISORY SERVICES

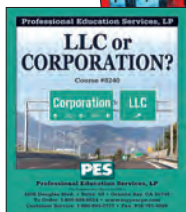


Unless otherwise noted: All course material provided. No prerequisites. Course level: Basic.

## LLC OR CORPORATION?

**COURSE #8240 • 10 CPE HRS • \$79.50**

Choosing the best business form of operation for a new business is important. This course discusses each of these specific business structures, how they differ, and how each affects the bottom line. It provides information on the basics of business entities, profits, losses, and tax treatments, plus information on converting from one type of business entity to another.



## SAFEGUARDING CLIENT DATA

**COURSE #8210** **HOT TOPIC**  
**4 CPE HRS • \$34.50**

Tax professionals have a unique responsibility to safeguard their clients' information because savvy cyber criminals know that they have access to very sensitive data. This course examines security recommendations from the FTC, details the FTC Safeguards rule and outlines how to create a Written Information Security Plan (WISP).

## TOOLKITS FOR SUCCESS!

### THE PRIVATE EQUITY TOOLKIT

**COURSE #8165 • 14 CPE HRS • \$94.50**

Covering every stage of the private equity process from sourcing the deal to the company's exit, this course provides an overview on how to originate attractive investment opportunities, form effective working relationships with management teams, add value on portfolio company boards, and achieve profitable investment exits.

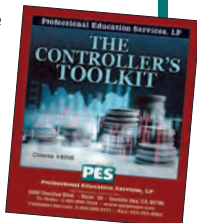


### THE CONTROLLER'S TOOLKIT

**TOP SELLER**

**COURSE #8005 • 20 CPE HRS • \$119.50**

This course provides the tools and information a financial controller needs to master areas such as business ethics, corporate governance, regulatory compliance, risk management, security, IT processes and financial operations. Including a collection of templates, checklists, internal controls and more this will prove to be invaluable for small businesses, multinational firms, and everything in between.



### THE NEW ACCOUNTS PAYABLE TOOLKIT

**COURSE #8000 • 16 CPE HRS • \$104.50**

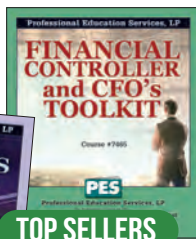
Master a new, comprehensive way of handling accounts payable systems and processes. Filled with best practices, tools and internal controls that can help safeguard a company's cash and assets, the course reviews new and upcoming trends like artificial intelligence, machine learning and robotic process automation, while exploring all aspects of the A/P process.



### FINANCIAL CONTROLLER AND CFO'S TOOLKIT

**COURSE #7465 • 15 CPE HRS • \$99.50**

Incorporating the better practices of more than 5,000 accountants around the world, this course is designed to assist financial controllers and CFOs in becoming effective leaders and achieving the most from their organizations. You will find it to be a hybrid of a handbook and a toolkit to assist in achieving the most for your organization and serve as a good reference tool.



**TOP SELLERS**

### THE FAST CLOSE TOOLKIT

**COURSE #7830 • 10 CPE HRS • \$79.50**

Focusing on critical methods that can be used to dramatically improve the process, this course is a valuable source of information for professionals that have a responsibility for the fiscal close. It provides strategic and tactical suggestions for ways to improve the process, guidance on new legislation requirements, best practice processes, and much more.



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# MANAGEMENT ADVISORY SERVICES

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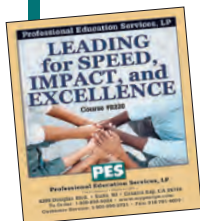
## LEADERSHIP TOPICS

### LEADING FOR SPEED, IMPACT, AND EXCELLENCE

**COURSE #8220 • 10 CPE HRS • \$79.50**

This course presents ways for corporate leaders to build a workplace culture that drives organizational excellence and unleashes the full potential of every employee. It provides a hands-on blueprint for more employee

engagement and opportunities for peak productivity. It also details five common roadblocks that prevent leaders from using culture to get the best from their people and how to overcome those.



### LEADERSHIP ADVICE FROM THE EXPERTS

**COURSE #8125 • 12 CPE HRS • \$84.50**

Filled with leadership advice from some of the world's best management experts, and covering topics such as communication, emotional intelligence, delegation, coaching, and career development, this course provides real life solutions to commonly encountered leadership problems.

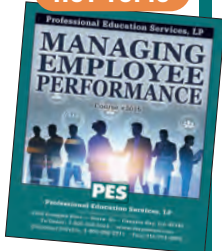


### MANAGING EMPLOYEE PERFORMANCE

**COURSE #8015 • 15 CPE HRS • \$94.50**

Serving as a reliable guide for managing all types of employee performance, this course offers smart strategies to get the most out of your team while also providing practical legal advice to address employee issues.

**HOT TOPIC**



### BUILDING EFFECTIVE STARTUP BOARDS

**COURSE #8195 • 6 CPE HRS • \$59.50**

This course will show you how to structure, manage, and leverage a board of directors so that a young company can effectively grow, avoid pitfalls, and get the most out of the board. It will analyze such things as a board's purpose, the

legal obligations, how to recruit directors, tips for compensating and onboarding directors, and suggestions on how to build a diverse board.



## SOCIAL SECURITY, MEDICARE & LONG-TERM CARE

### SOCIAL SECURITY, MEDICARE, AND GOVERNMENT PENSIONS

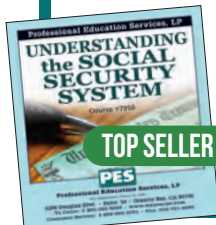
**COURSE #7840 • 18 CPE HRS • \$109.50**

Discussing retirement benefits, qualifications, application processes, Medicare, Medicaid and even government pensions and veteran benefits, this "all in one" course provides information on these government benefits and more.

### UNDERSTANDING THE SOCIAL SECURITY SYSTEM

**COURSE #7950 • 15 CPE HRS • \$99.50**

Providing valuable information for clients nearing retirement, this course serves as a resource for navigating the complex world of retirement benefits.



**TOP SELLER**

### LONG-TERM CARE

**COURSE #8260  
14 CPE HRS • \$94.50**

Understanding long-term care is important. This course provides information on evaluating facilities, getting the most of Medicare, Medicaid and Veteran's programs, understanding the needs of those with dementia, and evaluating long-term care insurance.



**TOP SELLER**

**HOT TOPIC**

### THE FUNDAMENTALS OF MEDICARE

**COURSE #7945 • 20 CPE HRS • \$119.50**

Understanding Medicare can be overwhelming! This course provides practical information to help navigate this intimidating process in order to understand the benefits offered and to avoid costly pitfalls.

## SELF-STUDY ON YOUR TIME

You choose when, where and how to take your CPE.





Unless otherwise noted: All course material provided. No prerequisites. Course level: Basic.

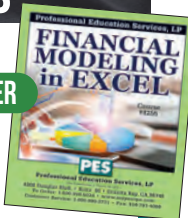
## EFFECTIVE BUSINESS ANALYSIS

### FINANCIAL MODELING IN EXCEL

COURSE #8255 • 10 CPE HRS • \$79.50

TOP SELLER

This course provides a practical introduction to financial modeling in Excel. It includes a strategic toolkit to learn modeling from scratch, focusing on the core economic concepts and the structures commonly required within Excel models and more. Prerequisite: Basic understanding of Excel and financial models.



### FINANCIAL PLANNING, ANALYSIS, AND PERFORMANCE MANAGEMENT

COURSE #7595 • 18 CPE HRS • \$109.50

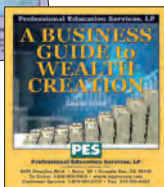
This course provides guidance on areas that impact an organizations effectiveness such as planning and forecasting, building analytical capability of financial information, evaluating capital investments, and utilizing analytical tools.



### A BUSINESS GUIDE TO WEALTH CREATION

COURSE #8150 • 10 CPE HRS • \$79.50

Along with detailed case studies, this course provides a look into how businesses work to provide wealth to entrepreneurs and investors. It highlights crucial business and financial concepts, outlines characteristics of successful business models, and more.



## FINANCIAL AND ESTATE PLANNING



Unless otherwise noted: All course material provided. No prerequisites. Course level: Basic.

### TAX CONSIDERATIONS IN FINANCIAL PLANNING

COURSE #6870 • 20 CPE HRS • \$119.50

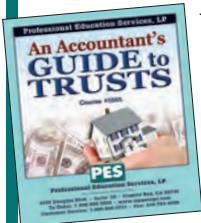
This course covers the tax issues and consequences related to investment decisions, retirement planning, and estate and education planning. See page 15 for full description.



## TRUSTS: SIMPLE TO COMPLEX

### AN ACCOUNTANT'S GUIDE TO TRUSTS

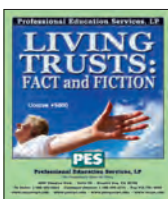
COURSE #5565 • 16 CPE HRS • \$94.50



Trusts are widely used in both financial and estate planning. This course provides an overview of the rules governing the formation of trusts, the tax consequences of different trust vehicles, and the rules governing the administration of trusts.

### LIVING TRUSTS: FACT AND FICTION

COURSE #5600 • 8 CPE HRS • \$64.50



Living trusts can be used to accomplish many goals. This course explains the role of living trusts in estate planning including discussing the limitations of such in order to help determine if it is a good tool for your client's estate, tax and financial planning needs.

- #6035 THE CREATION, MODIFICATION AND TERMINATION OF TRUSTS . . . . . 2 CPE HRS • \$24.50
- #6040 THE LIVING TRUST, THE CHARITABLE TRUST, AND TRUST ALTERNATIVES . . . . . 4 CPE HRS • \$34.50
- #6045 WILLS AND THE DECEDENT'S FINAL TAX RETURN . . . 2 CPE HRS • \$24.50

VISIT [WWW.MYPESCPE.COM](http://WWW.MYPESCPE.COM) FOR COURSE DESCRIPTIONS.

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Save up to 5–20% off on your order! See page 2 for discounts.



# FINANCIAL AND ESTATE PLANNING

Unless otherwise noted: All course material provided. No prerequisites. Course level: Basic.

## SECRETS OF FINANCIAL PLANNING

**COURSE #8085 • 20 CPE HRS • \$119.50**

The financial planning business has had many changes lately, this course provides recommendations from top-level advisors in the industry on how to adapt to the new environment, how to best relate to clients and how to build a strong business while also presenting advice on investing, retirement and education planning, income tax issues and more.



## GROW WEALTH WITH ALTERNATIVE ASSETS

**COURSE #8295  
8 CPE HRS • \$64.50**

This course discusses alternative investing opportunities; such as commercial property, infrastructure, private equity, private credit,

agriculture, commodities, and more. It presents the pros and cons of various asset classes, outlines how those assets may

possibly earn more than traditional investments, and explains how to assess risks, avoid pitfalls, perform due diligence, and navigate fees and finances.



## INDIVIDUAL RETIREMENT ARRANGEMENTS (IRAS)

**COURSE #5175 • 8 CPE HRS • \$64.50**

See page 16 for full description.

## ESTATE AND RETIREMENT GUIDANCE



### PLAN YOUR ESTATE

**COURSE #7665  
24 CPE HRS • \$129.50**

With proper estate planning, an individual can ensure that his or her property will pass to the right people with minimal delay, red tape, and cost. This course explains estate planning in plain English, step by step, option by option. It covers the goals of leaving property, providing for young children, planning for incapacity, avoiding probate, and reducing estate tax.

### A HOLISTIC APPROACH TO RETIREMENT PLANNING

**COURSE #8155 • 14 CPE HRS • \$94.50**

This course provides a newly inspired and holistic approach to retirement planning focusing on critical issues affecting retirees such as health, relationships, politics, demographics, niche retirement lifestyles, and even retirement communities. It includes surveys, questionnaires, and worksheets to understand different needs and outline the steps to take that affect retirement planning.



## NEW RULES FOR ESTATE, RETIREMENT, AND TAX PLANNING

**COURSE #7705 • 16 CPE HRS • \$94.50**

Providing valuable insights and strategies to help preserve wealth and plan an estate under current tax rules (including the TCJA), this course offers information on retirement planning, trusts, charitable contributions, gifts, life insurance, and wills.



## THE EXECUTOR'S GUIDE

**COURSE #8025 • 20 CPE HRS • \$119.50**

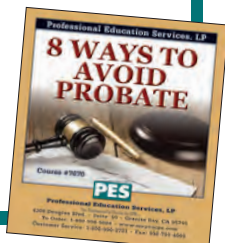
While addressing topics such as preparing to be an executor / trustee, making sense of a will, determining whether probate is necessary, handling simple trusts and navigating probate court proceedings, this course provides the guidance needed to serve as an executor.



## 8 WAYS TO AVOID PROBATE

**COURSE #7670 • 6 CPE HRS • \$59.50**

Learn easy and effective ways to skip the probate process so that property goes directly to the intended beneficiaries and avoids costly and time-consuming court proceedings.



## REAL ESTATE TAX ISSUES

### SHORT-TERM RENTAL TAX GUIDE

**COURSE #8250**  
8 CPE HRS • \$64.50

Short-term rentals entitle hosts to take advantage of a variety of deductions and other tax benefits. This course reviews the tax rules specific to this market, including the 20% pass-through deduction. The course addresses which expenses can be deducted, how to report income, how to deduct losses, as well as vacation home and tax-free rental rules.

### THE LANDLORD'S TAX DEDUCTION GUIDE

**COURSE #8180** • 20 CPE HRS • \$119.50

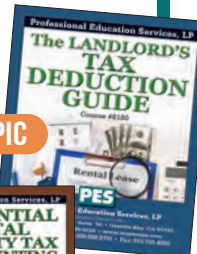
Including changes and updates to tax laws revised because of the COVID pandemic this course covers rules for deducting an NOL and claiming a NOL refund, landlord tax classifications, reporting income, allowable deductions, handling casualty and theft losses, depreciation, and more. Filled with real-world examples, this course will help you understand how to advise your landlord clients to maximize their deductions.

**HOT TOPIC**

### RESIDENTIAL RENTAL PROPERTY TAX AND ACCOUNTING ISSUES

**COURSE #7300** • 8 CPE HRS • \$64.50

This course covers the accounting issues related to residential rental property, including the rental of vacation homes, installments sales, and the passive activity and at-risk rules.



**TOP SELLER**

**#5630 REAL ESTATE TAX ISSUES** ..... 2 CPE HRS • \$24.50

VISIT [WWW.MYPESCPE.COM](http://WWW.MYPESCPE.COM) FOR COURSE DESCRIPTIONS.

## S CORPS: LARGEST US BUSINESS TAX FILER

### AN INTRODUCTION TO S CORPORATIONS

**COURSE #7770** • 4 CPE HRS • \$34.50

This course provides an overview on topics such as tax considerations, advantages and disadvantages, requirements, and trusts that qualify as S Corp shareholders. **Note: This course content is included in course #7775; therefore you should not take both courses in the same CPE period.**

### S CORPORATIONS — PART 2

**COURSE #7780\*** • 15 CPE HRS • \$109.50

This course covers taxes and credits affecting S corporations, when a shareholder recognizes income and losses, how items passed to shareholders are allocated, the tax consequences on distributions, and income and estate planning situations for S corps.

**\*PLEASE NOTE: Course level: Intermediate. Prerequisites: Working knowledge of the S corporation status and its taxation issues.**

### S CORPORATIONS — PART 1

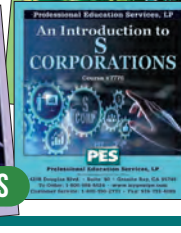
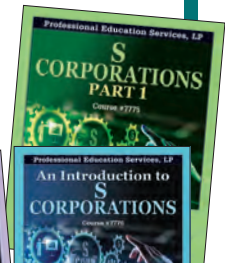
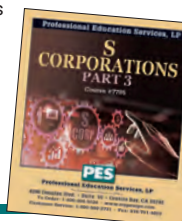
**COURSE #7775** • 16 CPE HRS • \$119.50

Starting with the information included in course #7770, this also addresses filing an election and tax return, accounting methods and tax years, and items related to an S corp's income, loss and deductible expenses.

### S CORPORATIONS — PART 3

**COURSE #7785\*** • 15 CPE HRS • \$109.50

This course covers changes such as the termination and revocation of S corp status, provides a comparison to other business entities, and reviews subsidiaries, ESOPs, and the effect that Code Sec. 1411 has on S Corp shareholders.



**TOP SELLERS**

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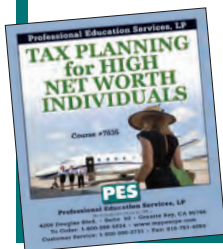


## TAX CUTS & JOBS ACT SPECIALTY CPE

### TAX PLANNING FOR HIGH NET WORTH INDIVIDUALS

**COURSE #7635 • 4 CPE HRS • \$34.50**

The Tax Cuts and Jobs Act of 2017 (TCJA) directly affects high net worth individuals, their investment entities, and family offices. This course addresses the impact of the TCJA on high net worth individuals and its likelihood to spur gift planning, increase the use of trusts, give rise to new compensation arrangements and even consider the conversion from an individual status to corporate formation.



### PASS-THROUGH ENTITIES INCLUDING SECTION 199A

**COURSE #7625 • 6 CPE HRS • \$59.50**

This course focuses on the major changes made to the tax rules for pass-through entities, including LLCs, partnerships, S Corporations and sole proprietorships.

It covers the mechanics of the new qualified business income deduction and other major changes that impact pass-through entities and their owners.



**TOP SELLER**

## KEEP UP-TO-DATE WITH THE NEW

### 2024 TAX FILING SEASON UPDATE

**COURSE #8280\* • 8 CPE HRS • \$64.50**

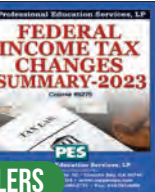
Each year, income tax return preparation must take into account inflation-related changes to various limits and new tax laws. This course outlines those changes as well as recent updates for the 2024 filing season, a general tax review, and important rules governing tax return practices and procedures.



**TOP SELLERS**

### FEDERAL INCOME TAX CHANGES SUMMARY - 2023

**COURSE #8275\* • 3 CPE HRS • \$29.50**



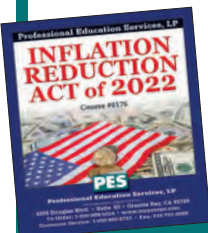
Each year, various limits affecting income tax preparation and planning change. Some changes commonly occur each year as a result of inflation indexing, while others occur because of new legislation or the sunset of existing law.

**\*PLEASE NOTE:** Course materials for 8280 and 8275 are similar; therefore, we recommend that you should not take both courses in the same CPE reporting period.

### INFLATION REDUCTION ACT OF 2022

**COURSE #8175 • 2 CPE HRS • \$24.50**

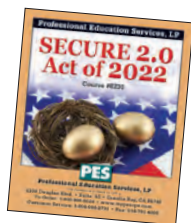
This course addresses the provisions of the Act most likely to be of interest to tax preparers. It examines the tax credits available for energy-efficient home improvements, for purchase of new and used electric vehicles, for electric car charging and natural gas powered car fueling devices, clean energy generation, and more.



### SECURE 2.0 ACT OF 2022

**COURSE #8230  
2 CPE HRS • \$24.50**

The original SECURE Act was passed in 2019, which made changes to retirement and tax law in an attempt to make it easier for individuals to save for retirement and provide more flexibility in how retirement savings can be used. Then in December of 2022, the SECURE 2.0 Act was passed to build on the original Act. This course will detail the SECURE 2.0 Act and highlight some of the sections most relevant to CPAs and Enrolled Agents.



## MULTI-HOUR DISCOUNTS

Save 5-20% off your order! See page 2 for discounts.



Unless otherwise noted: All course material provided. No prerequisites. Course level: Basic.

## PARTNERSHIPS AND LLCs

### PARTNERSHIPS AND LLCs – PART 1

**COURSE #7920 • 10 CPE HRS • \$74.50**

Part 1 focuses on preliminary considerations such as partnership formation, liability issues, IRS classification, audit issues, presentation of partnership income, and more.

### PARTNERSHIPS AND LLCs – PART 3

**COURSE #7930 • 6 CPE HRS • \$59.50**

Part 3 focuses on the impact of the sale of a partnership interest, partnership distributions, and basis adjustments to partnership property.

### PARTNERSHIPS AND LLCs – PART 2

**COURSE #7925 • 8 CPE HRS • \$64.50**

Part 2 focuses on partnership allocations and limitations on partnership deductions and outlines the tax treatment of pre-opening expenses.

### PARTNERSHIPS AND LLCs – PART 4

**COURSE #7935 • 6 CPE HRS • \$59.50**

Part 4 focuses on advanced topics including related party and disguised sales, the death or retirement of a partner, and S corporations.

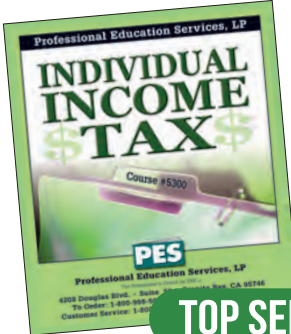


## TAX LAWS AND CHANGES WITH PES!

### INDIVIDUAL INCOME TAX

**COURSE #5300v23 • 24 CPE HRS • \$124.50**

Our most popular course! This course provides a general overview of federal income tax laws for individuals **filing 2023 tax returns**. It explains who must file, which tax forms to use, when the return is due, and other general information. It will provide guidance on which filing status can be used and whether the income received is taxable. The course also explains the standard deduction, the kinds of expenses that can be deducted, and the various credits that are available to reduce the total tax due.

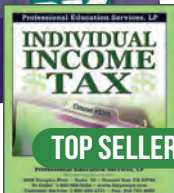
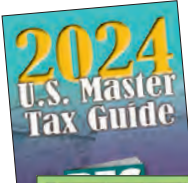


**TOP SELLER**

### INDIVIDUAL INCOME TAX WITH 2024 U.S. MASTER TAX GUIDE

**COURSE #5343 • 24 CPE HRS • \$194.50**

Includes the updated CPE course #5300v23: **Individual Income Tax**. This course provides a general overview of federal income tax laws for individuals **filing 2023 tax returns**. In addition, a copy of the **2024 U.S. Master Tax Guide** will be shipped out to you as an additional companion reference guide, allowing you to further research tax issues affecting your clients.

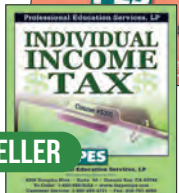
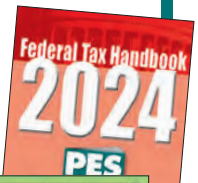


**TOP SELLER**

### INDIVIDUAL INCOME TAX WITH 2024 RIA FEDERAL TAX HANDBOOK

**COURSE #5342 • 24 CPE HRS • \$194.50**

Includes the updated CPE course #5300v23: **Individual Income Tax**. This course provides a general overview of federal income tax laws for individuals **filing 2023 tax returns**. In addition, a copy of the **2024 RIA Federal Tax Handbook** will be shipped out to you as an additional companion reference guide, allowing you to further research tax issues affecting your clients.



**TOP SELLER**

## SELF-STUDY ON YOUR TIME.

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# TAXATION

Unless otherwise noted: All course material provided. No prerequisites. Course level: Basic.



## CORPORATE AND PARTNERSHIP INCOME TAXATION

**COURSE #5180**  
**12 CPE HRS • \$84.50**

This course provides detailed instructions on how to complete returns for a regular corporation, S corporation and a partnership.

## TAXATION OF LIKE-KIND EXCHANGES AND OTHER SALES

**COURSE #6580 • 10 CPE HRS • \$74.50**

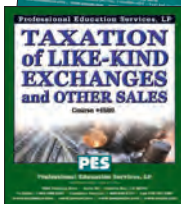
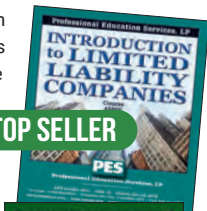
Covering topics such as sales and exchanges, abandonments, foreclosures and repossessions, like-kind exchanges and installment sales, this course explains how to properly record the sale and dispositions of various assets.

## INTRODUCTION TO LIMITED LIABILITY COMPANIES

**COURSE #6860 • 8 CPE HRS • \$64.50**

Comparing the LLC with other business entities, this course provides guidance on the formation, operation, dissolution and taxation of LLCs.

**TOP SELLER**



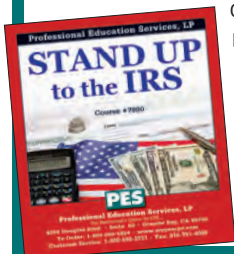
## PREPARE FOR IRS AUDITS

### STAND UP TO THE IRS

**TOP SELLER**

**COURSE #7980 • 18 CPE HRS • \$109.50**

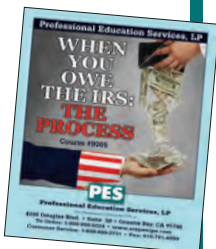
This course provides the tools needed to successfully deal with the IRS in different scenarios. Topics covered include handling an audit, defending deductions, appealing an audit report or IRS decision, negotiating a payment plan, settling a tax debt through the OIC program, avoiding property seizures, and more. The course also discusses how to deal with the IRS in the event of a divorce or death of a loved one and even tax fraud.



### WHEN YOU OWE THE IRS: THE PROCESS

**COURSE #8065**  
**4 CPE HRS • \$34.50**

This course provides the tools needed to successfully deal with the IRS when addressing and settling a tax debt. It presents information on the most common way taxpayers attempt to reduce tax debts – the Offer in Compromise (OIC). It also reviews the bankruptcy code and details the penalties and interest that can accrue. **This course content is included in course #7980; therefore, you should not take both courses in the same CPE period.**

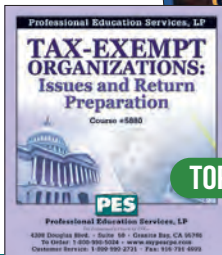


## NON-PROFIT TAX GUIDANCE

### TAX-EXEMPT ORGANIZATIONS: ISSUES AND RETURN PREPARATION

**COURSE #5880 • 24 CPE HRS • \$119.50**

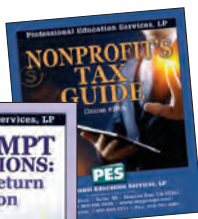
This course provides details on how Form 990 is used by tax-exempt organizations to “tell their story” as well as walking through the form and its related schedules line by line. **Course level: Basic/Intermediate.**



### NONPROFIT'S TAX GUIDE

**COURSE #7805 • 18 CPE HRS • \$109.50**

This course explains the ongoing and annual IRS compliance requirements for nonprofits, provides details on Form 990, reviews non-profit bookkeeping, and discusses rules related to charitable giving, compensation, UTBI, and more.



**TOP SELLER**



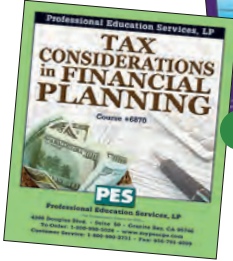


Unless otherwise noted: All course material provided. No prerequisites. Course level: Basic.

## TAX CONSIDERATIONS IN FINANCIAL PLANNING

**COURSE #6870 • 20 CPE HRS • \$119.50**

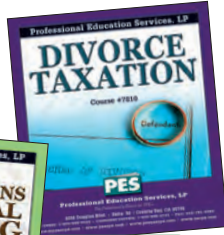
Any type of investment decision or financial plan must include an analysis of many factors, including the risk of the investment, the individual or couple's short term and long term financial needs, and the related tax implications. This course covers the tax issues and consequences related to investment decisions, retirement planning, and estate and education planning.



## DIVORCE TAXATION

**COURSE #7810 • 10 CPE HRS • \$74.50**

Often a tax professional is asked to guide a client through the complicated tax issues and consequences surrounding divorce. This course covers many of these issues, including those associated with alimony and child support, the splitting and transferring of property, changes in filing status, and the impact of community property laws.



**TOP SELLERS**

## ESTATE PLANNING & RETURN PREPARATION

### NEW RULES FOR ESTATE, RETIREMENT, AND TAX PLANNING

**COURSE #7705 • 16 CPE HRS • \$94.50**

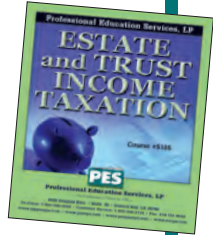
Providing valuable insights and strategies to help preserve wealth and plan an estate under current tax rules (including the TCJA), this course offers information on retirement planning, trusts, charitable contributions, gifts, life insurance, and wills. **PLEASE NOTE: Not accepted for Enrolled Agents.**



### ESTATE AND TRUST INCOME TAXATION

**COURSE #5185  
12 CPE HRS • \$84.50**

This course outlines the aspects of preparing a U.S. Income Tax return for estates and trusts on Form 1041. This course has two major components. Section 1 is an overview of the responsibilities of the person in charge of the estate for a deceased individual. Section 2 provides detailed instructions on how to prepare an estate and trust return.



## TAX-WISE SOLUTIONS FOR SMALL BUSINESS

### TAX PLANNING FOR YOUR SMALL BUSINESS

**COURSE #7700 • 6 CPE HRS • \$59.50**

This course serves as an excellent resource for day to day planning strategies while also providing guidance on opening or closing a business, running a sideline activity, and succession planning.

### TAX ISSUES FOR SMALL BUSINESSES

**COURSE #7295 • 12 CPE HRS • \$84.50**

Providing a detailed look at the tax issues affecting the most popular type of business in the U.S., this course includes an overview of entity options, a detailed discussion on the filing and paying of business taxes, and information on expense deductions, plus much more.

### COMPREHENSIVE SMALL BUSINESS TAXATION

**COURSE #7695 • 24 CPE HRS • \$119.50**

Taking into account how new tax laws can help small business owners improve their bottom line, this course provides detailed coverage of the newest tax laws, court decisions, and IRS rulings. The course provides information on available write-offs, such as the QBI deduction, as well as dollar limits, recordkeeping requirements, and also includes sample forms and checklists and instructions on where to report income and claim deductions and credits.



**HOT TOPIC**

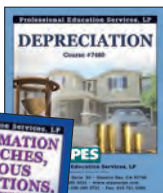
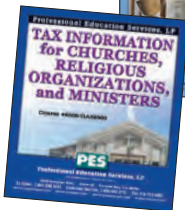
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## TAX INFORMATION FOR CHURCHES, RELIGIOUS ORGANIZATIONS, AND MINISTERS

**COURSE #6500**  
**6 CPE HRS • \$59.50**

This course provides an overview of the tax laws for churches, religious organizations, and ministers. It covers the information an accountant needs to know to best assist his or her clients in this area.



## DEPRECIATION

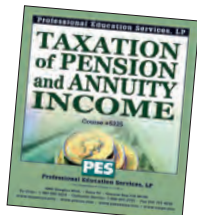
**COURSE #7460**  
**6 CPE HRS • \$59.50**

This course discusses how to recover the cost of business or income-producing property through deductions for depreciation, including the special depreciation allowance and deductions under the MACRS. It also explains how to take a Section 179 deduction, instead of depreciation, for certain property, and the additional rules for listed property.

## TAXATION OF PENSION AND ANNUITY INCOME

**COURSE #5225 • 8 CPE HRS • \$64.50**

Covering the "General Rule", the "Simplified Method", and qualified and nonqualified plans, this course is designed to provide an overview of how pension and annuity income is taxed as well as addressing how U.S. Civil Service Retirement benefits are taxed.

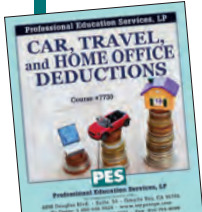


## HOME BUSINESS TAX PLANNING

### CAR, TRAVEL, AND HOME OFFICE DEDUCTIONS

**COURSE #7730 • 8 CPE HRS • \$64.50**

Including detailed explanations and practical examples, this course guides you through the ins-and-outs of maximizing business deductions for car expenses, travel, meals, and home offices.



### HOME BUSINESS TAX DEDUCTIONS

**COURSE #7985**  
**16 CPE HRS • \$94.50**

This course looks at home business tax issues from all angles. Topics such as what qualifies as a home business, recordkeeping and accounting, start up and operating expenses, and more advanced deductions such as long-term assets, medical expenses, and retirement plans are covered.



**HOT TOPIC**

## EXPLORE THE MANY IRA OPTIONS

### ROTH IRAS

**COURSE #5705 • 4 CPE HRS • \$34.50**

This course examines Roth IRA benefits, discusses contribution limits, eligibility requirements, rules for converting one type of IRA into another, and rules governing the withdrawal of funds.



### INDIVIDUAL RETIREMENT ARRANGEMENTS (IRAS)

**COURSE #5175 • 8 CPE HRS • \$64.50**

This course outlines the rules associated with the various individual retirement arrangements; traditional IRAs, Roth IRAs, Simplified Employee Pensions (SEPs), and Savings Incentive Match Plans for Employees (SIMPLEs).



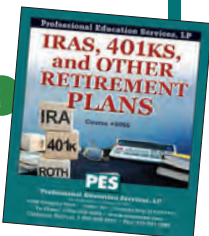
### IRAS, 401KS, AND OTHER RETIREMENT PLANS

**COURSE #8055 • 12 CPE HRS • \$84.50**

Covering tax strategies, required distributions, penalties, inherited plans and what happens upon death or divorce, this course helps make sense of the different rules for taking money out of IRAs, 401(k)s, Keoghs and other retirement plans. It also addresses recent changes, including new rules of inherited plans, and rules regarding taxation and repayment of COVID-related distributions.

**HOT TOPIC**

**TOP SELLER**



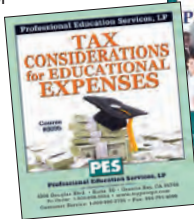


Unless otherwise noted: All course material provided. No prerequisites. Course level: Basic.

## TAX CONSIDERATIONS FOR EDUCATIONAL EXPENSES

**COURSE #8095 • 5 CPE HRS • \$44.50**

This course details the tax benefits and savings opportunities for 529 plans, the American opportunity credit, the lifetime learning credit, student loans, Cover Dell Education Savings Accounts, Education Savings Bond Programs and more.



## TAX DEDUCTIONS FOR PROFESSIONALS

**COURSE #7735 • 18 CPE HRS • \$109.50**

Discussing topics specifically geared towards professionals, such as start-up expenses, continuing education costs, retirement plan contributions, medical expenses and more, this course delves into the special tax rules applicable



to professionals such as architects, lawyers, doctors, dentists, and chiropractors.



## CONVENIENT, QUICK 2-4 HR TAXATION CPE

#5680	MEDICAL & HEALTH SAVINGS PLANS	4 CPE HRS • \$34.50
#5810	PARTNERSHIP GENERAL TAX INFORMATION	2 CPE HRS • \$24.50
#6025	DIVIDENDS, CORPORATE DISTRIBUTIONS, AND OTHER INCOME TAXATION	2 CPE HRS • \$24.50
#6070	TAXATION OF OWNERS' DISTRIBUTION	2 CPE HRS • \$24.50
#6075	TERMINATION / DISSOLUTION OF BUSINESS ENTITIES	2 CPE HRS • \$24.50
#6200	CORPORATE GENERAL TAX INFORMATION	2 CPE HRS • \$24.50
#6890	TAX IMPLICATIONS OF DEATH	4 CPE HRS • \$34.50
#7180	KIDDIE TAX RULES	2 CPE HRS • \$24.50
#7320	TAX GUIDE FOR U.S. CITIZENS AND RESIDENT ALIENS ABROAD	4 CPE HRS • \$34.50
#7325	EMPLOYER'S TAX GUIDE TO FRINGE BENEFITS	3 CPE HRS • \$29.50
#8130	TAX TREATMENT OF VIRTUAL CURRENCY <b>HOT TOPIC</b>	2 CPE HRS • \$24.50

VISIT [WWW.MYPESCOPE.COM](http://WWW.MYPESCOPE.COM) FOR COURSE DESCRIPTIONS.

## ACCOUNTING AND AUDITING



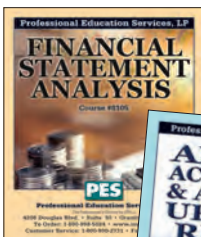
Unless otherwise noted: All course material provided. No prerequisites. Course level: Basic.

## FINANCIAL STATEMENT ANALYSIS

**TOP SELLER**

**COURSE #8105 • 20 CPE HRS • \$129.50**

This course is a guide to interpreting and unpacking GAAP and non-GAAP financial statements. It provides the analytical framework needed to scrutinize a company's financial statements and outlines straightforward techniques for uncovering the reality behind the numbers. This course also addresses current information relevant to today's volatile markets and uncertain economy.

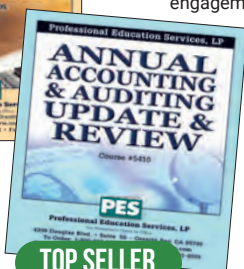


## ANNUAL ACCOUNTING & AUDITING UPDATE & REVIEW

**COURSE #5410 • 24\* CPE HRS • \$209.50**  
\* 16 ACCOUNTING AND 8 AUDITING HRS

The purpose of this course is to inform the reader of the various changes affecting accounting, compilation and review, and auditing engagements, as well as a review and recall of existing standards. Topics include a summary of newly issued FASB statements, new statements issued by the Auditing Standards Board, changes in compilation and review engagements, current and pending developments, practice issues, and more. **Prerequisites:**

Basic understanding of U.S. GAAP, compilation and review, and auditing standards.



**TOP SELLER**

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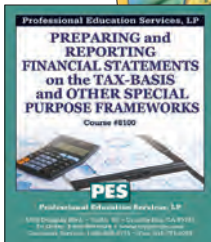


Unless otherwise noted: All course material provided. No prerequisites. Course level: Basic.

## PREPARING AND REPORTING FINANCIAL STATEMENTS ON THE TAX-BASIS AND OTHER SPECIAL PURPOSE FRAMEWORKS

**COURSE #8100 • 10\* CPE HRS • \$84.50**  
\* 5 ACCOUNTING AND 5 AUDITING HRS

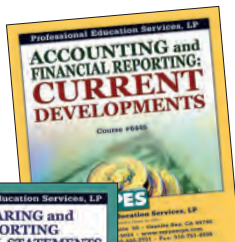
This course discusses the general rules and applications used in the preparation of and reporting on tax-basis financial statements and other bases of accounting found within the special purpose frameworks (also referred to as OCBOA). Updated for changes made by the TCJA, the CARES Act, and the Consolidated Appropriations Act, topics include an overview of the types of special purpose frameworks, advantages and disadvantages of using tax-basis financial statements, key differences between GAAP and tax-basis revenue and expenses, tax-basis disclosures, reporting options, and more. The course also addresses the presentation and disclosures for PPP loans, the Employee Retention Credit (ERC), and the Pass-Through Entity (PTE) tax.



## ACCOUNTING AND FINANCIAL REPORTING – CURRENT DEVELOPMENTS

**TOP SELLER**

**COURSE #6445 • 16 CPE HRS • \$109.50**



Topics include a review of FASB projects, including those related to financial performance, leases, financial instruments, practice issues involving the statement of cash flows, fair value reporting, pensions, the international convergence project, little GAAP, and more. The structure of the course is to encourage the reader to recall existing GAAP rules coupled with identifying, stating, and outlining rules related to new and proposed pronouncements. This course also includes a discussion of accounting and financial reporting issues related to COVID-19, PPP loans, the Employee Retention Credit (ERC), and the Pass-Through Entity (PTE) Tax.

## COMPILATION AND REVIEW

### COMPILATION AND REVIEW STANDARDS: SSARS NOS. 21 - 26

**COURSE #8235 • 12 CPE HRS • \$94.50**

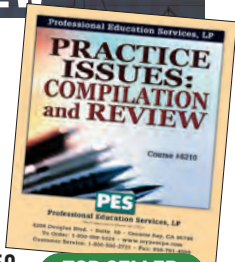
This course provides information on the various changes made to the compilation and review codification by SSARS No. 21 and as amended by SSARS No. 22, *Compilation of Pro Forma Financial Information*, SSARS No. 23, *Omnibus Statement on Standards for Accounting and Review Services - 2016*, SSARS No. 24, *Omnibus Statement on Standards for Accounting and Review Services - 2018*, SSARS No. 25, *Materiality in a Review of Financial Statements and Adverse Conclusions*, and SSARS No. 26, *Quality Management for an Engagement Conducted in Accordance with Statements on Standards for Accounting and Review Services*.



**TOP SELLER**

### PRACTICE ISSUES: COMPILATION AND REVIEW

**COURSE #6210**  
**20 CPE HRS • \$129.50**



**TOP SELLER**

The objective of this course is to inform the reader of the various changes made to the compilation and review standards by the AICPA's Accounting and Review Services Committee (ARSC), and to address practice issues related to compilation and review engagements. Included in this course is an overview of SSARS No. 21, as amended by SSARS Nos. 22 through 26, addressing the three types of engagements that can be performed under the SSARSs and a discussion of the new Quality Management (QM) Standards in SSARS No. 26. It includes practice issue topics, such as an accountant's responsibility for fraud, internal control and going concern, representation letters, and more.

- #7860 SSARS NO. 25 ..... 4 CPE HRS • \$39.50
- #8045 ETHICS AND INDEPENDENCE RULES FOR SSARS ENGAGEMENTS ..... 3 CPE HRS • \$34.50

VISIT [WWW.MYPESCPE.COM](http://WWW.MYPESCPE.COM) FOR COURSE DESCRIPTIONS.

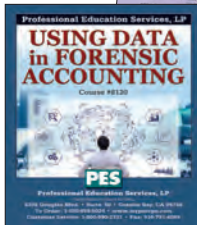


Unless otherwise noted: All course material provided. No prerequisites. Course level: Basic.

## USING DATA IN FORENSIC ACCOUNTING

**COURSE #8120 • 12 CPE HRS • \$94.50**

This course will serve as your guide to financial investigation that can be applied to almost any forensic accounting case. It emphasizes the use of best evidence to work through problem-solving data analysis that addresses the challenges of imperfect and incomplete information. It utilizes modern fraud investigation, as well as practical applications and processes for working accountants and auditors. You'll find that these methods and techniques can help improve the quality of your work product.



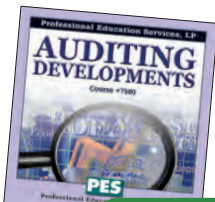
## AUDITING DEVELOPMENTS

**COURSE #7580 • 16 CPE HRS • \$109.50**

This course provides a review of the latest developments affecting 2022 and 2023 audit engagements. The peer review comments and new auditing statements provide further guidance on current issues. Additionally,

**TOP SELLER**

in this course, auditors will learn how to perform more efficient engagements, understand the new auditor's report guidance found in SAS Nos. 142-148, the new attestation standards found in SSAE Nos. 21-22, and much more.



## AUDIT REPORTING STANDARDS

### AUDITING STANDARDS: SAS NOS. 142-145

**COURSE #8090 • 4 CPE HRS • \$44.50**

The first section of this course addresses SAS No. 142's expanded guidance on what comprises audit evidence in a financial statement audit. The second segment is a review of SAS No. 143's guidance on accounting estimates. The third portion consists of a review of SAS No. 144's changes to auditing standards in connect with use of specialists and the final section addresses significant changes made by SAS No. 145 to the auditor's understanding of an entity and its environment and the assessment of risks of material misstatement.



### NEW AUDITING STANDARDS: SAS NOS. 146-149

**COURSE #8355 • 2 CPE HRS • \$29.50**

This course reviews the requirements found in SAS No. 146 related to quality management of an audit engagement, discusses the various changes made to AU-C 210, *Terms of Engagement*, by SAS No.147, addresses amendments made to U-C 935, *Compliance Audits*, by SAS No. 148 and reviews SAS No.149 which addresses special considerations that apply to a group audit.



**NEW CPE**

## COVID ACCOUNTING AND PPP LOANS

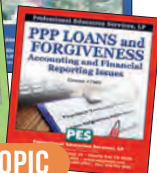
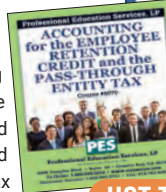
### ACCOUNTING AND FINANCIAL REPORTING IN A POST- COVID ECONOMY

**COURSE #8200 • 4\* CPE HRS • \$39.50**  
\* 2 ACCOUNTING AND 2 AUDITING HRS

This course addresses the accounting and financial reporting for the current post-COVID economic climate including the effects of inflation, supply-chains, rising interest rates, and other events on company financial statements for 2022 and 2023. The course also discusses the accounting for selected tax changes affecting 2022 and 2023 financial statements.

**#7960 PPP LOANS AND FORGIVENESS - ACCOUNTING AND FINANCIAL REPORTING ISSUES . . . 2 CPE HRS • \$29.50**

**#8070 ACCOUNTING FOR EMPLOYEE RETENTION CREDIT AND THE PASS-THROUGH ENTITY TAX . . . . . 2 CPE HRS • \$29.50**



**HOT TOPIC**

VISIT [WWW.MYPESCOPE.COM](http://WWW.MYPESCOPE.COM) FOR COURSE DESCRIPTIONS.

## BEST CUSTOMER SERVICE

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Unless otherwise noted: All course material provided. No prerequisites. Course level: Basic.

## IMPLEMENTING THE NEW REVENUE STANDARD

**COURSE #7750 • 8 CPE HRS • \$69.50**

This course addresses the new revenue standard in ASC 606 and its related updates. It provides guidance to nonpublic entities who implemented the standard in 2019 or 2020 and are addressing post-implementation issues in 2021 and 2022. Topics include an overview of the new standard, its core principle, an analysis of the five steps required in the revenue model, and various issues on how to account for contract costs, financial statement presentation of revenue-related accounts, disclosures, and more.



## BEYOND AUDIT

**COURSE #8010  
14 CPE HRS • \$99.50**

This course provides a foundational understanding of the new remote business environment, and provides a set of tools to improve audit methodology and enhance execution in order to ensure that either your traditional or remote auditing fits with the objectives and goals of your business partners.

## INTERNAL CONTROLS TOOLKIT

**COURSE #7800 • 12 CPE HRS • \$94.50**

Internal controls are necessary in order to provide the reliable, timely, and useful data needed to support operating, budgeting, and policy decisions. This course takes a "tool-kit" approach to address the practical need for a series of standards of internal controls that can be used to mitigate risk within any size organization. It contains detailed controls and risks for key business processes as well as material to improve internal control efforts. It also provides guidance for M&A projects and SOX 404 initiatives.



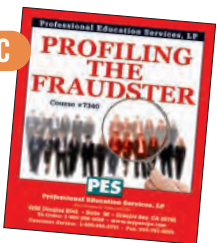
## ANALYZE... DETECT... PREVENT...

### PROFILING THE FRAUDSTER

**COURSE #7340 • 10 CPE HRS • \$74.50**

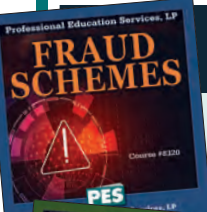
**HOT TOPIC**

About 80% of occupational fraud is committed by insiders, primarily due to organizations failing to adequately understand the characteristics of fraud perpetrators. Most fraud prevention and detection programs focus on controlling the environment, rather than on the actual source of the fraud: people. This course provides an overview of investigative psychology that will allow businesses to close this gap on fraud prevention.



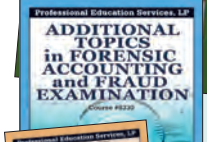
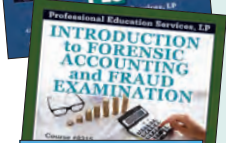
## INCREASE YOUR KNOWLEDGE AND SKILLS ABOUT FORENSIC ACCOUNTING AND FRAUD EXAMINATION

This series examines various aspects of forensic accounting and fraud examination. They can be purchased together or individually (in any order) to build a comprehensive understanding of this important topic. Please check our website for full course descriptions.



- #8315 INTRODUCTION TO FORENSIC ACCOUNTING AND FRAUD EXAMINATION ..... 10 CPE HRS • \$84.50
- #8320\* FRAUD SCHEMES ..... 16 CPE HRS • \$109.50
- #8325 DETECTION AND INVESTIGATIVE TOOLS AND TECHNIQUES IN FRAUD EXAMINATION ... 12 CPE HRS • \$94.50
- #8330 ADDITIONAL TOPICS IN FORENSIC ACCOUNTING AND FRAUD EXAMINATION .. 8 CPE HRS • \$69.50
- #8335\*\* FRAUD EXAMINATION: LITIGATION ADVISORY SERVICES AND REMEDIATION ..... 8 CPE HRS • \$69.50

\*PLEASE NOTE: Includes content from course #8310; therefore, we recommend that you should not take both courses in the same CPE reporting period. \*\* CPE credits for course #8335 will be Management Services, not A&A.



**NEW CPE**





Unless otherwise noted: All course material provided. No prerequisites. Course level: Basic.

## IMPLEMENTATION OF THE NEW LEASE STANDARD

COURSE #8305 • 10 CPE HRS • \$84.50

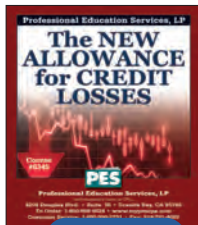


This course reviews the changes made to lease accounting by ASU 2016-02, *Leases* (as further amended by ASU 2018-01, *Land Easement – Practical Expedient for Transition to Topic 842 and numerous other amendments*),

and establishes the principles that lessees and lessors shall apply to report information to users of financial statements about the amount, timing, and uncertainty of cash flows arising from a lease.

## THE NEW ALLOWANCE FOR CREDIT LOSSES

COURSE #8345 • 2 CPE HRS • \$29.50

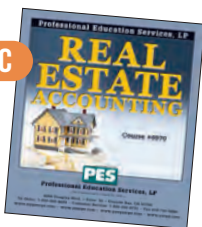


The objective of this course is to address the changes made by ASU 2016-13 to the recording of credit losses on financial instruments. Topics include reviewing examples of types of assets subject to the expected credit loss model, how to present the new allowance on the balance sheet, and more.

## REAL ESTATE ACCOUNTING

COURSE #6970 • 6 CPE HRS • \$59.50

HOT TOPIC



This course is filled with practical information for putting basic real estate accounting principles to work for you or your organization. It is a road map to a broad range of real estate accounting topics, including all forms of ownership. It will introduce real estate terms and products, discuss various types of transactions, and address the audits that real estate entities are subjected to.

## FINANCIAL STATEMENT FRAUD TODAY!

### DETECTING FRAUD IN FINANCIAL STATEMENTS

COURSE #7170  
4 CPE HRS • \$44.50

Visit [www.mypescpe.com](http://www.mypescpe.com) for course description.



HOT TOPIC

### FINANCIAL STATEMENT FRAUD

COURSE #8310  
4 CPE HRS • \$44.50

Visit [www.mypescpe.com](http://www.mypescpe.com) for course description.

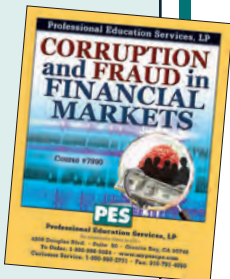
## AVOID UNETHICAL PRACTICES AND PROTECT YOUR COMPANY!

### CORRUPTION AND FRAUD IN FINANCIAL MARKETS

COURSE #7890\* • 24 CPE HRS • \$139.50

TOP SELLER

This course is designed to provide an understanding of the potential issues surrounding all types of fraud, misconduct, price/volume manipulation, and other forms of malpractice in order to prevent a company from falling victim to unethical practices. It covers detection, prevention, and regulation of corruption and fraud within different financial markets and offers details on the many practices that bring potentially devastating consequences, which include insider trading, bribery, false disclosures, frontrunning, options backdating, and much more. **Course level: Intermediate. Prerequisites: Understanding of financial market terms/concepts and advanced mathematical calculations.**

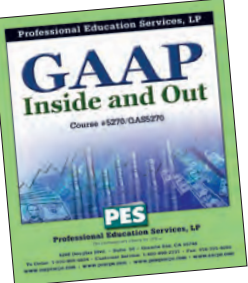


- #7905\* OVERVIEW OF MARKET MANIPULATION ..... 4 CPE HRS • \$44.50
- #7910\* FINANCIAL MISCONDUCT AND INSIDER TRADING ..... 4 CPE HRS • \$44.50
- #7915\* FRAUD AND MANIPULATION WITHIN CRYPTOCURRENCY MODELS ..... 4 CPE HRS • \$44.50

\*PLEASE NOTE: These are components of course #7890 and should not be taken in the same CPE reporting period. These courses all use British terminology.

**IN A HURRY? INSTANT ACCESS CPE.**  
Instant CPE access after you complete your order online.

Unless otherwise noted: All course material provided. No prerequisites. Course level: Basic.



## GAAP: INSIDE AND OUT

COURSE #5270 • 16 CPE HRS • \$109.50

**TOP SELLER**

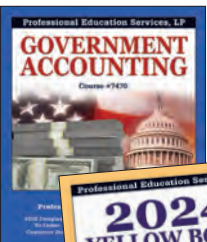
This course covers a variety of issues related to GAAP, including the unusual reporting and disclosure issues that develop in practice, such as how to disclose life insurance, leases, catastrophes, and tax-basis financial statements. Most of the course is in a Q&A format. Prerequisites: General understanding of GAAP and tax-basis financial statements.

## GOVERNMENT AND NOT-FOR-PROFIT

### GOVERNMENT ACCOUNTING

COURSE #7470 • 24 CPE HRS • \$159.50

Designed to provide current accounting and reporting standards and practices related to government accounting, this covers the reasons behind the standards and practices, their strengths and limitations, and possible alternatives. It also covers the changes in the standards as a result of several new GASB Statements that have required implementation over the past years. **PLEASE NOTE: If you are interested in an extension of this course related to Not-for-Profit accounting, please see course #7540.**



### 2024 YELLOW BOOK

COURSE #8350 • 8 CPE HRS • \$64.50

Based on the 2024 revision of the *Yellow Book*, this course provides a framework for performing high-quality audit work according to Generally Accepted Government Auditing Standards (GAGAS) with competence, integrity, objectivity, and independence to provide accountability and to help improve government operations and services.

**NEW CPE**

#7540 NOT-FOR-PROFIT ACCOUNTING ..... 5 CPE HRS • \$49.50

VISIT [WWW.MYPESCPE.COM](http://WWW.MYPESCPE.COM) FOR COURSE DESCRIPTIONS.

## ANALYSIS AND FORECASTING

### FINANCIAL FORECASTING AND DECISION MAKING

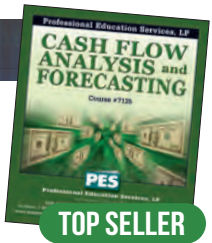
COURSE #7585 • 4 CPE HRS • \$39.50

This course shows how to use a forecasting model to forecast sales and maximize sustainable growth. It examines the effect of debt usage on a company's value and looks at the relationship between its value and taxes, risk, and even bankruptcy. Prerequisite: Understanding of financial forecasting. Course level: Intermediate.

### CASH FLOW ANALYSIS AND FORECASTING

COURSE #7125 • 15 CPE HRS • \$99.50

This course provides the tools and knowledge needed to restate published cash flows into a more user-friendly format and to extract the maximum information from them for any type of business. **PLEASE NOTE: This course uses British terminology.**



**TOP SELLER**

## CONVENIENT, QUICK 2-3 HR ACCOUNTING AND AUDITING CPE

#6000	EMPLOYEE FRAUD .....	2 CPE HRS • \$29.50
#6005	MANAGEMENT FRAUD.....	2 CPE HRS • \$29.50
#6180	INTRODUCTION TO FRAUD IN CASH COLLECTIONS AND DISBURSEMENTS.....	3 CPE HRS • \$34.50
#7345	TAX BASIS FINANCIAL STATEMENTS .....	2 CPE HRS • \$29.50

VISIT [WWW.MYPESCPE.COM](http://WWW.MYPESCPE.COM) FOR COURSE DESCRIPTIONS.

# COMPUTER APPLICATIONS



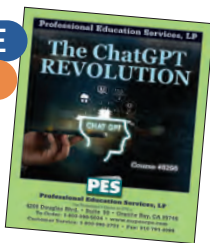
Unless otherwise noted: All course material provided. No prerequisites. Course level: Basic.

## THE CHATGPT REVOLUTION

COURSE #8290 • 4 CPE HRS • \$34.50

We are on the edge of an AI revolution, so now is the time to understand how this latest (evolving) technology can be utilized to streamline some of the tasks in both our personal and professional lives. This course will demonstrate how easy it is to use ChatGPT for a variety of things, outline the program's efficiencies, and discuss how this new technology will transform the future of work.

NEW CPE  
HOT TOPIC



## LEARN QUICKBOOKS SKILLS

### QUICKBOOKS

TOP SELLER

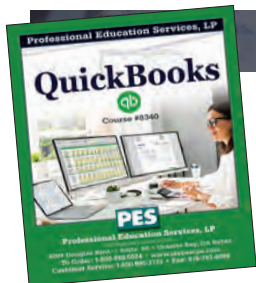
COURSE #8340 • 20 CPE HRS • \$109.50

This course will show you how to use QuickBooks (desktop version of the QuickBooks program - not the online version) to perform all of your accounting and payroll needs in one place. *This QuickBooks material was written by a CPA to provide instruction for all individuals planning*

*to use QuickBooks; and, therefore, some of the material will seem to be basic to the seasoned CPA.*

*However, we believe the overall content is relevant to learning QuickBooks, whether you are using the information for your own business or to advise a client on his or her use of QuickBooks. PLEASE*

**NOTE:** *if you previously took course #8205 QuickBooks, there are very few changes, and therefore we recommend that you do not take this course in the same CPE reporting period. COMPUTER SOFTWARE IS NOT INCLUDED.*



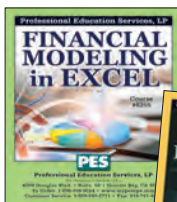
## MASTER MICROSOFT EXCEL

### FINANCIAL MODELING IN EXCEL

TOP SELLER

COURSE #8255 • 10 CPE HRS • \$79.50

This course provides a practical introduction to financial modeling in Excel. It includes a strategic toolkit to learn modeling from scratch, focusing on the core economic concepts and the structures commonly required within Excel models. It also discusses the use of models and the factors to consider when designing them. Prerequisite: Basic understanding of Excel and financial models.

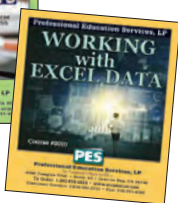


### WORKING WITH EXCEL DATA

COURSE #8080 • 14 CPE HRS • \$99.50

This course will help you master some of the more advanced functions of Excel. It will teach you how to protect and

share workbooks and data, plus better manage and analyze large files. It shows how to create charts, graphics, and macros and even addresses some VBA programming. **Prerequisites:** Working knowledge of Excel capabilities and functions.



Course level: Intermediate.\*

### EXCEL PORTABLE GENIUS

COURSE #7990 • 8 CPE HRS • \$69.50

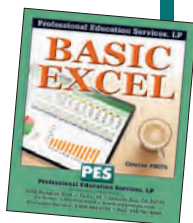
Perfect for the novice or experienced Excel user, this course addresses the nine key questions users are most likely to have when using this popular but sometimes challenging program. Along with tips and advice on some of the lesser-known features, this course explains how to sort, filter, organize, build formulas, chart data and communicate results.

\* These Excel courses are not specific to any version of Excel. They are written with a Windows format but the majority of the information is applicable to Mac users as well. **COMPUTER PROGRAM SOFTWARE IS NOT INCLUDED WITH COURSES.**

### BASIC EXCEL

COURSE #8075  
20 CPE HRS • \$109.50

This course helps to unlock Excel's full potential! From designing worksheets, using formulas and functions, to collaborating with colleagues, it provides a step-by-step guide for Excel's basic functions and then introduces some more advanced topics, making this course useful for both the new or experienced Excel user. \*



TOP SELLER

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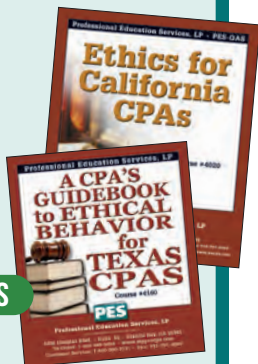
# PROFESSIONAL ETHICS

Unless otherwise noted: All course material provided. No prerequisites. Course level: Basic.

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A LEADER IN SELF-STUDY ETHICS CPE!



- STATE BOARD APPROVED (IF REQUIRED)
- COMPLIANT WITH REQUIRED AICPA/NASBA RULES
- **IN A HURRY?** INSTANT ACCESS WITH THE PDF DOWNLOAD FORMAT!
- OR, YOU CAN STILL CHOOSE THE HARD COPY TO BE SHIPPED.



TOP SELLERS

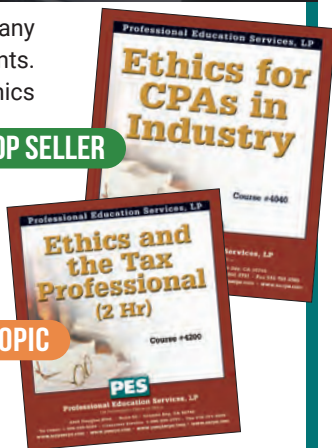
If you have more questions regarding your ethics CPE requirement, please call PES Customer Service at **1-800-990-2731** ... we have the answers!

## GENERAL ETHICS

The following ethics courses can be taken by any interested CPA to meet general CPE requirements. In addition, some states allow general ethics to fulfill their specific ethics CPE requirement. **If your state allows general ethics, we suggest that for your first renewal you take the state specific course listed on the next page.** You may also visit [www.mypescpe.com](http://www.mypescpe.com) to view detailed course descriptions on any of the following courses which includes a list of states that will accept this course for their ethics requirement.

TOP SELLER

HOT TOPIC



#4035	FRIVOLOUS TAX POSITIONS .....	2 CPE HRS • \$34.50
#4200	ETHICS AND THE TAX PROFESSIONAL (2 HR) .....	2 CPE HRS • \$34.50
#4205	ETHICS AND THE TAX PROFESSIONAL (4 HR) .....	4 CPE HRS • \$54.50
#4325	ETHICS AND PROFESSIONAL CONDUCT FOR CPAS ...	4 CPE HRS • \$54.50
#4040	ETHICS FOR CPAS IN INDUSTRY (4 HR) .....	4 CPE HRS • \$54.50
#4045	ETHICS FOR CPAS IN INDUSTRY (2 HR) .....	2 CPE HRS • \$34.50

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## SELF-STUDY ON YOUR TIME

You choose when, where and how to take your CPE.



Unless otherwise noted: All course material provided. No prerequisites. Course level: Basic.

## STATE SPECIFIC ETHICS

STATE	COURSE# / TITLE	HOURS	PRICE
AK	#4510: Ethics for Alaska CPAs	4 CPE Hrs	\$54.50
AL	#4975: Ethics for Alabama CPAs	2 CPE Hrs	\$34.50
AR	#4655: General Ethics for Arkansas CPAs	3 CPE Hrs	\$44.50
AZ	#4025: Ethics for Arizona CPAs	4 CPE Hrs	\$54.50
CA	#4015: California Ethics - Regulatory Review	2 CPE Hrs	\$34.50
CA	#4020: Ethics for California CPAs	4 CPE Hrs	\$54.50
CA	#4030: Tax Ethics for California CPAs	4 CPE Hrs	\$54.50
CA	#4055: Industry Ethics for California CPAs	4 CPE Hrs	\$54.50
CO	#4000: Colorado Ethics and CR&R	2 CPE Hrs	\$34.50
CO	#4060: Ethics and Professional Conduct for Colorado CPAs	4 CPE Hrs	\$54.50
CT	#4605: Ethics for Connecticut CPAs	4 CPE Hrs	\$54.50
DC	#4405: Ethics for District of Columbia CPAs	4 CPE Hrs	\$54.50
DE	#4410: Ethics for Delaware CPAs	4 CPE Hrs	\$54.50
EA	#4525: Enrolled Agent Ethics	2 CPE Hrs	\$34.50
FL	#4805: Ethics for Florida CPAs	4 CPE Hrs	\$54.50
GA	#4935: Ethics for Georgia CPAs	4 CPE Hrs	\$54.50
HI	#4110: Ethics for Hawaii CPAs	4 CPE Hrs	\$54.50
IA	#4210: Ethics for Iowa CPAs	4 CPE Hrs	\$54.50
ID	#4010: Ethics for Idaho CPAs	4 CPE Hrs	\$54.50
IL	#4900: Ethics for Illinois CPAs	4 CPE Hrs	\$54.50
IN	#4455: Ethics for Indiana CPAs	4 CPE Hrs	\$54.50
KS	#4950: Ethics for Kansas CPAs	2 CPE Hrs	\$34.50
KY	#4910: Ethics for Kentucky CPAs	2 CPE Hrs	\$34.50
MA	#4925: Ethics for Massachusetts CPAs	4 CPE Hrs	\$54.50
MD	#4705: Ethics for Maryland CPAs	4 CPE Hrs	\$54.50
ME	#4050: Ethics for Maine CPAs	4 CPE Hrs	\$54.50
MN	#5220: Ethics for Minnesota CPAs	8 CPE Hrs	\$94.50
MO	#4425: Ethics for Missouri CPAs	2 CPE Hrs	\$34.50
MS	#4630: Ethics for Mississippi CPAs	4 CPE Hrs	\$54.50
MT	#4505: Ethics for Montana CPAs	2 CPE Hrs	\$34.50
NC	#4835: North Carolina Professional Ethics	1 CPE Hr	\$19.50
NE	#4105: Ethics for Nebraska CPAs	4 CPE Hrs	\$54.50
NH	#4600: Ethics for New Hampshire CPAs	4 CPE Hrs	\$54.50
NM	#4915: Ethics for New Mexico CPAs	4 CPE Hrs	\$54.50
NY	#4250: New York Ethics: Foundation Course	4 CPE Hrs	\$54.50
NY	#4550: New York Ethics: Taxation Course	4 CPE Hrs	\$54.50
NV	#4305: Ethics for Nevada CPAs	4 CPE Hrs	\$54.50
OH	#4850: Ethics for Ohio CPAs	3 CPE Hrs	\$44.50
OK	#4750: Ethics for Oklahoma CPAs (2 Hr)	2 CPE Hrs	\$34.50
OK	#4755: Ethics for Oklahoma CPAs (4 Hr)	4 CPE Hrs	\$54.50
OR	#4800: Ethics for Oregon CPAs	4 CPE Hrs	\$54.50
PA	#4920: Ethics for Pennsylvania CPAs	4 CPE Hrs	\$54.50
RI	#4905: Ethics for Rhode Island CPAs	6 CPE Hrs	\$74.50
TX	#4970: Managing Ethical Dilemmas for Texas CPAs	4 CPE Hrs	\$54.50
TX	#4980: A Back and Forth Discussion of CPA Ethics for Texas CPAs	4 CPE Hrs	\$54.50
UT	#4955: General Ethics for Utah CPAs	3 CPE Hrs	\$44.50
UT	#4960: Utah CPA Licensing Act and Rule	1 CPE Hr	\$19.50
VA	#4225: 2024 Ethics and Professional Conduct for Virginia CPAs	2 CPE Hrs	\$34.50
VT	#4725: Ethics for Vermont CPAs	4 CPE Hrs	\$54.50
WA	#4300: Ethics and Professional Conduct for Washington CPAs - 2024 Edition	4 CPE Hrs	\$54.50
WV	#4930: Ethics for West Virginia CPAs	4 CPE Hrs	\$54.50

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# PROFESSIONAL AND PERSONAL DEVELOPMENT

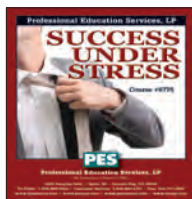
Unless otherwise noted: All course material provided. No prerequisites. Course level: Basic.



Some states limit or may prohibit CPE credits earned in personal development. Please check with your licensing board for details / limitations.

## SUCCESS UNDER STRESS

COURSE #6775 • 10 CPE HRS • \$69.50

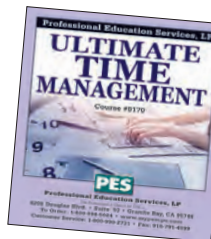


Satisfaction, respect and a sense of accomplishment come from completing a project or closing a deal. However, many of us are running around with too much

to do, facing obstacles to progress, and having to deal with stressed-out people. This course provides an arsenal of solutions for increasing your productivity and minimizing your stress. It will help you turn down your internal pressure-cooker, remove friction from relationships, and find more career satisfaction.

## ULTIMATE TIME MANAGEMENT

COURSE #8170 • 8 CPE HRS • \$69.50

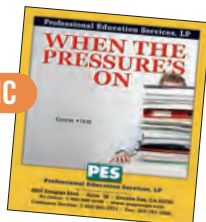


Business professionals often dedicate long hours to work, sometimes with little to show for it. This course helps to identify where you may be sabotaging your own goals, where you are losing personal time, and where you could be possibly mismanaging career time. Using practical productivity tools and techniques it shows how you can be more productive at work, have more time to pursue life goals, and avoid burnout.

## WHEN THE PRESSURE'S ON

COURSE #7430 • 6 CPE HRS • \$59.50

HOT TOPIC



How a person functions in high pressure situations can be critical to one's success. This course reveals five core mental skills necessary for excelling under duress: goal setting, adaptive thinking, stress/energy management, attention control, and imagery. Tailored for business leaders, this course identifies and brings peak performance principles to the workplace through practical exercises, assessments, and real life stories.

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