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Building Better Portfolios  
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**NEW CPE**  
pg. 17

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**2026 TAX FILING  
SEASON UPDATE**  
Course #8510

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**INSIDE CYBER:**  
How AI, 5G, IoT,  
and Quantum  
Computing will  
Transform  
Privacy and  
Security  
Course #8470

**HOT TOPIC  
NEW CPE**  
pg. 5

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**WHAT MATTERS  
NEXT: MAKING  
HUMAN-FRIENDLY  
TECH DECISIONS**  
Course #8495

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# HOT NEW COURSES FROM PES



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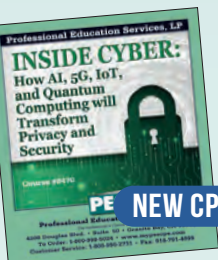
## INSIDE CYBER: HOW AI, 5G, IoT, AND QUANTUM COMPUTING WILL TRANSFORM PRIVACY AND SECURITY

HOT TOPIC

COURSE #8470 • 8 CPE HRS • \$69.50

Providing a critical roadmap for understanding and leveraging the next wave of tech advancements, this course offers a deep dive into how emerging technologies will shape the future of industry and society. It provides explanations of cutting-edge technologies and their impact on

the business world, outlines how to navigate the cybersecurity landscape to safeguard businesses, and more. **MANAGEMENT ADVISORY SERVICES** - See page 5.

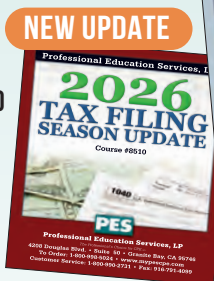


NEW CPE

## 2026 TAX FILING SEASON UPDATE

COURSE #8510  
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 2026 filing season, a general tax review, and important rules governing tax return practices and procedures. **PRE-ORDER NOW! Available to ship: July 7, 2025** **TAXATION** - See page 11.

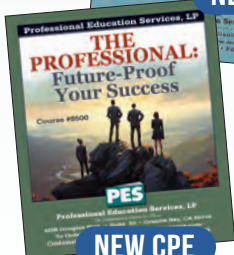


NEW UPDATE

## THE PROFESSIONAL: FUTURE-PROOF YOUR SUCCESS

COURSE #8500  
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From ever-changing client and employer expectations to the rise of artificial intelligence, it has never been more important to future-proof your professional skills. This is an excellent guide for anyone looking to gain a competitive edge in their career. **PRE-ORDER NOW! Available to ship: July 10, 2025. PROFESSIONAL AND PERSONAL DEVELOPMENT** - See page 26.

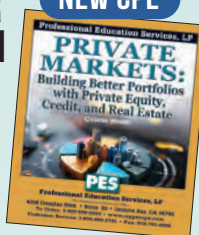


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## PRIVATE MARKETS: BUILDING BETTER PORTFOLIOS WITH PRIVATE EQUITY, CREDIT, AND REAL ESTATE

COURSE #8490  
8 CPE HRS • \$69.50

This course takes a look at the challenges and opportunities with investing in the private markets, including understanding the merits of the asset classes – private equity, private credit, and private real estate – and how to incorporate these versatile and valuable tools into client portfolios. **FINANCIAL AND ESTATE PLANNING** - See page 17.



NEW CPE

## WHAT MATTERS NEXT: MAKING HUMAN-FRIENDLY TECH DECISIONS

COURSE #8495  
10 CPE HRS • \$79.50

This course is a roadmap to achieve business growth, transformation, and innovation through the use of emerging technologies in a human-centric manner

that benefits both business and humanity. It provides strategic guidance, an examination of ethical considerations, as well as practical application. **MANAGEMENT ADVISORY SERVICES** - See page 5.



NEW CPE

## IRREPLACEABLE: STANDING OUT IN THE AGE OF AI

COURSE #8485  
10 CPE HRS • \$79.50

AI and automation are reshaping our world at an unprecedented speed, making traditional skills obsolete while opening new doors of opportunity. Those who adapt and develop unique, irreplaceable abilities will thrive. This course introduces the, "Three Competencies of the Future" to assure how to stay relevant. It will help you better understand AI, learn how to leverage it to your advantage, and use it to scale your business with efficiency and innovation. **PROFESSIONAL AND PERSONAL DEVELOPMENT** - See page 26.



NEW CPE

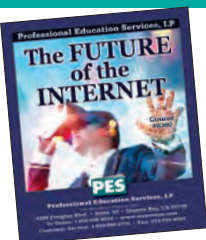
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# MANAGEMENT ADVISORY SERVICES

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



## THE FUTURE OF THE INTERNET

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

Get a head start on how tomorrow's digital economy may impact your organization and the community at large. This course addresses how the Metaverse, Web 3.0, and blockchain are transforming business and society. Understand the impact of these technologies and explore the risks and opportunities presented by them.

**#8255 FINANCIAL MODELING IN EXCEL** (see page 23) . . . . . **10 CPE HRS • \$79.50**

## TECHNOLOGY BUSINESS TRENDS —



### TRIVERGENCE: ACCELERATING INNOVATION WITH AI, BLOCKCHAIN, AND THE IoT

**COURSE #8410 • 12 CPE HRS • \$84.50**

This course explains the concept of how the trivergence of AI, blockchain, and the Internet of Things (IoT) will transform business and society. It offers an insightful guide to the difficult decisions that businesses and society must make to thrive in this new era. You'll learn why AI's power is exploding and how this trivergence morphs Big Data into Infinite Data where thinking machines generate their own content and value without human intervention.

### 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.



### THE SECRETS OF AI VALUE CREATION

**COURSE #8375 • 10 CPE HRS • \$79.50**

This course provides an insightful blueprint for unlocking AI in your organization. It presents a comprehensive framework of the value of AI from strategy to execution. Uncover effective tactics utilized by successful AI achievers to propel business growth. The course will examine the subject from multiple perspectives, including business, technology, data, algorithms, and psychology.



### EMERGING TECHNOLOGIES FOR BUSINESS PROFESSIONALS

**COURSE #8420  
12 CPE HRS • \$84.50**

This course presents a blueprint for emerging technologies that are relevant to business professionals. It outlines how to use cutting-edge technologies, including AI, analytics, robotic process automation, blockchain, and more to maintain a competitive advantage while managing risks. Each chapter offers simple and useful insights in a new technology that can be immediately applied.



### THE NEW AUTOMATION MINDSET — UTILIZING AI

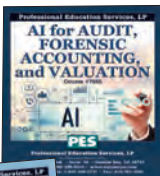
**COURSE #8365 • 10 CPE HRS • \$79.50**

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



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

**COURSE #7955 • 12 CPE HRS • \$84.50**



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

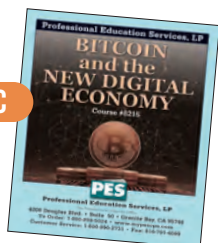


## BITCOIN AND THE NEW DIGITAL ECONOMY

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

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. Also learn the deficiencies of traditional fiat currency, how it's commonly manipulated, and how we can benefit by using digital assets. Note: PES does not promote cryptocurrencies.

**HOT TOPIC**



## ARTIFICIAL INTELLIGENCE & MORE

### WHAT MATTERS NEXT: MAKING HUMAN-FRIENDLY TECH DECISIONS

**NEW CPE**

**COURSE #8495  
10 CPE HRS • \$79.50**

This course is a roadmap to achieve business growth, transformation, and innovation through the use of emerging technologies in a human-centric manner that benefits both business and humanity. It provides strategic guidance, an examination of ethical considerations, as well as practical application. It will outline how to effectively work with our current digital transformation in human terms.



**NEW CPE**

### INSIDE CYBER: HOW AI, 5G, IoT, AND QUANTUM COMPUTING WILL TRANSFORM PRIVACY AND SECURITY

**COURSE #8470 • 8 CPE HRS • \$69.50**

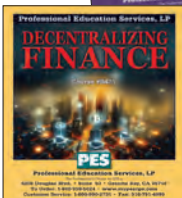
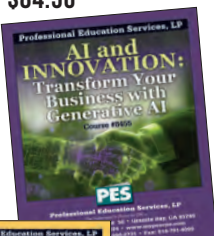
Providing a critical roadmap for understanding and leveraging the next wave of tech advancements, this course offers a deep dive into how emerging technologies will shape the future of industry and society. It provides explanations of cutting-edge technologies and their impact on the business world, outlines how to navigate the cybersecurity landscape to safeguard businesses, and uncovers opportunities that advancements in this area present for creating new value.

### DECENTRALIZING FINANCE - DeFi

**HOT TOPIC**

**COURSE #8425 • 12 CPE HRS • \$84.50**

Learn how decentralized finance (DeFi), digital assets, and distributed ledger technology (DLT) are transforming business. As DLT increasingly optimizes and democratizes financial ecosystems worldwide, this course investigates the most salient aspects of this ongoing transformation. It will also take a look at how this decentralization can coexist and potentially synergize with traditional banking.



### AI AND INNOVATION: TRANSFORM YOUR BUSINESS WITH GENERATIVE AI

**COURSE #8455 • 8 CPE HRS • \$69.50**

This course is a blueprint on shaping and scaling the AI ecosystem of the future, revealing already proven frameworks from major corporations. It outlines how to generate a roadmap of change using a fusion of disciplines, new concepts, and foresight thinking to transform the working environment and realize new market opportunities.

## INVESTING IN FINANCIAL ASSETS USING AI

**COURSE #8380 • 8 CPE HRS • \$69.50**

Utilize the emerging technology of AI to build wealth in stocks, bonds, commodities, and real estate. Learn AI-specific tactics to improve efficiency, mitigate risk, and level up your portfolio's performance. It also provides an analysis of the top AI stocks to watch, how to avoid common pitfalls in AI investing, and outlines the benefits and drawbacks of AI investing.



**#8290 THE CHATGPT REVOLUTION (see page 23) ..... 4 CPE HRS • \$34.50**

# SELF-STUDY ON YOUR TIME.

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





# MANAGEMENT ADVISORY SERVICES

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

## TOOLKITS FOR SUCCESS!

### THE M&A FAILURE TRAP: WHY MOST MERGERS AND ACQUISITIONS FAIL

**COURSE #8460 • 8 CPE HRS • \$69.50**



**NEW CPE**

Offering insights into the most important predictors of mergers and acquisitions failure and success, this course, which is based on a sample of 40,000 real-life merger cases around the world, delivers a practical exploration of the shortcomings of managerial mergers and acquisitions decisions. Topics include why a large percentage of corporate acquisitions fail, how to improve acquisition decisions, how to predict a specific merger outcome, and much more.

### THE PRIVATE EQUITY TOOLKIT

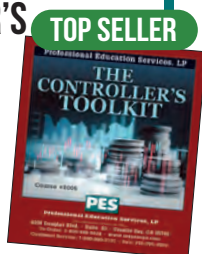
**COURSE #8165 • 14 CPE HRS • \$94.50**

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

**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.

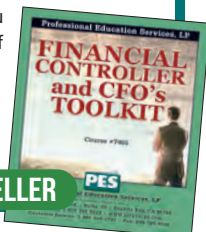


**TOP SELLER**

### 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.

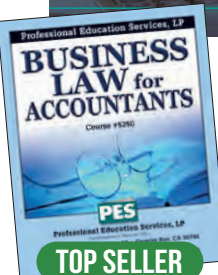


**TOP SELLER**

## LEGAL CONSIDERATIONS AND

### BUSINESS LAW FOR ACCOUNTANTS

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



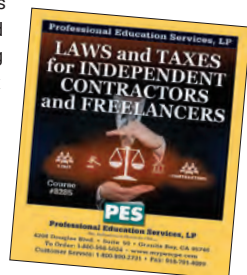
**TOP SELLER**

Today's CPA must have a working familiarity with business law to properly advise clients and to protect their own interests as a practitioner. Business Law for Accountants is designed to meet both objectives. The course 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. You are bound to find many circumstances that are relevant to you and/or your clients.

### 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.



# MANAGEMENT ADVISORY SERVICES



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

## MANAGEMENT FOR BUSINESS SUCCESS!

### SELLING YOUR BUSINESS WITH CONFIDENCE

**HOT TOPIC**

**COURSE #8435 • 12 CPE HRS • \$84.50**

When it comes time to sell a company, most mid-market owners find themselves unprepared, underestimating the time, effort, money, and complexity involved. This course will share insights on both the art and the science of selling a mid-market company. It includes timelines and strategies, the reasoning behind important elements of the process, framework for determining the optimal time to sell, negotiating tactics, expectations of the deal team members, and more.

### FINDING SMALL BUSINESS SUCCESS

**COURSE #8370 • 8 CPE HRS • \$69.50**

This course is an exciting roadmap to entrepreneurial success for small business owners. The course offers six non-negotiable, must-have strategies for entrepreneurs as well as examples that highlight businesspeople who have successfully confronted and overcome the many challenges that accompany small business ownership. It will address lifecycle automation, work-life balance and how to find more time, money, and freedom in the entrepreneurial journey.

### ANALYTICS THE RIGHT WAY: A BUSINESS LEADER'S GUIDE

**NEW CPE**

**COURSE #8465 • 10 CPE HRS • \$79.50**

This course outlines a clear approach to putting analytics to productive use with a three-part framework that brings together the realities of the modern business environment with the deep truths underpinning statistics, computer science, machine learning, and artificial intelligence. Combining real world examples along with vivid hypotheticals, this course provides a pragmatic guide for putting foundational analytical and statistical concepts to effective use in a business context.

### 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.

## PLANNING FOR BUSINESS

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

**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.

**TOP SELLERS!**

**#5645 BUSINESS ENTITIES AND THE LAW ..... 4 CPE HRS • \$34.50**

**#8405 UNDERSTANDING BENEFICIAL OWNERSHIP INFORMATION ..... 2 CPE HRS • \$24.50**

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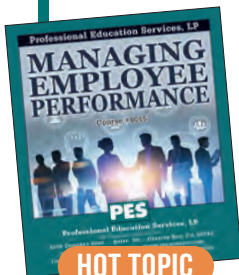
# MANAGEMENT ADVISORY SERVICES

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## LEADERSHIP TOPICS

### MANAGING EMPLOYEE PERFORMANCE

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



**HOT TOPIC**

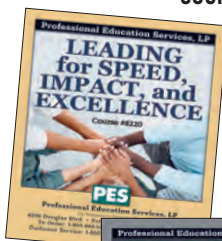
Serving as a guide for managing all types of employee performance, this course offers smart strategies to get the most out of your team while also providing practical legal advice to address employee

issues. You'll find out how to identify potential problems early on, decide when discipline is necessary, effectively manage remote workforces, and protect against wrongful termination lawsuits.

### LEADING FOR SPEED, IMPACT, AND EXCELLENCE

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

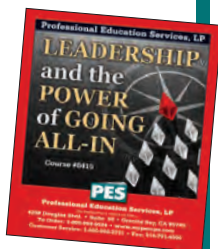
This course presents ways for corporate leaders to build a workplace culture that drives organizational excellence and unleashes the full potential of every employee. It is delivered by a world-renowned management consultant, motivational speaker, and former NFL professional, and provides a hands-on blueprint for more employee engagement and opportunities for peak productivity.



### LEADERSHIP AND THE POWER OF GOING ALL-IN

**COURSE #8415  
8 CPE HRS • \$69.50**

This course presents effective strategies so that you can lead your people to do more, be more, and achieve more. It creates a roadmap for you to design your own unique path to leadership greatness. You'll learn skills to coach your employees well, eliminate bad habits, establish a big picture mission, use data to identify your team's weak spots, and mentor the next generation of leaders.



### LEADERSHIP ADVICE FROM THE EXPERTS

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

Packed with advice from 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. It contains a revolutionary collection of contributions from 52 of the world's best management experts. You'll find real life solutions to commonly encountered leadership problems.



## EDUCATE & ADVISE ON SOCIAL SECURITY,

### SOCIAL SECURITY, MEDICARE, AND GOVERNMENT PENSIONS

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

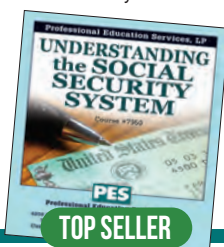
Discussing retirement benefits, qualifications, application processes, Medicare, Medicaid and even government pensions and veteran benefits, this "all in one" course provides information on these government benefits and more.



### UNDERSTANDING THE SOCIAL SECURITY SYSTEM

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

A great resource for navigating the often-complex world of Social Security retirement benefits and the U.S. Social Security Administration. If you are assisting someone who is nearing retirement age, this guide will show you how to avoid common pitfalls, determine when to claim benefits, and figure out how much they can expect to receive.



**TOP SELLER**

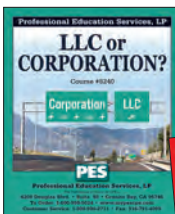




## LLC OR CORPORATION?

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

Choosing the best business form of operation for a new business is important. Learn about 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 • 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).



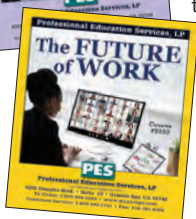
## MANAGE THE EVOLVING WORKPLACE

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

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

This course provides the groundwork for how you can best prepare yourself and your business for the digital future of work. You'll learn which skills will be in the most demand as workplaces continue to evolve and see why these skill sets will command a premium price. You'll find explanations for digital skills like data literacy and cyber threat awareness, plus strategies for improving skills like teamwork and collaboration.

**TOP SELLER**

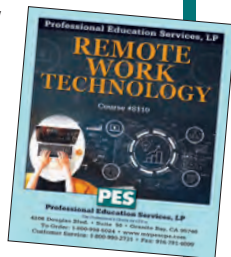


### REMOTE WORK TECHNOLOGY

**HOT TOPIC**

**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 FUTURE OF WORK

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

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

## MEDICARE & LONG-TERM CARE PLANNING

### LONG-TERM CARE

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

Understanding long-term care is important. The more you know about long-term care, the better off you will be when these decisions need to be made by yourself or your clients. 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.



**HOT TOPIC**

### THE FUNDAMENTALS OF MEDICARE

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

Making sense of Medicare can sometimes feel insurmountable, but this course gives you the accurate, practical information you and your clients will need to overcome the confusion and handle the Medicare process with confidence. Learn about benefits offered and how to avoid common costly pitfalls.





# TAXATION

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

## 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.

### RESIDENTIAL RENTAL PROPERTY TAX AND ACCOUNTING ISSUES

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

The tax benefits of residential rental property make it a popular investment opportunity. This course covers the accounting issues related to residential rental property, including the rental of vacation homes, installment sales, and the passive activity and at-risk rules.

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

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

### 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 an 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.

## KEEP UP-TO-DATE WITH TAX LAW

### INDIVIDUAL INCOME TAX

**COURSE #5300v24 • 24 CPE HRS • \$124.50**

Our most popular course updated for filing **2024** federal income tax returns for individuals! 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.

### INDIVIDUAL INCOME TAX WITH 2025 U.S. MASTER TAX GUIDE

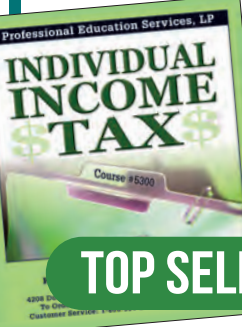
**COURSE #5345 • 24 CPE HRS • \$204.50**

Includes the updated CPE course **#5300v24: Individual Income Tax (for 2024 tax returns)** listed above and a copy of the **2025 U.S. Master Tax Guide** as an additional reference guide, allowing you to further research tax issues affecting your clients.

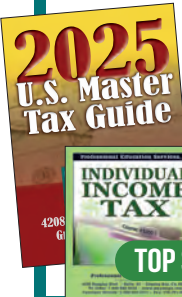
### INDIVIDUAL INCOME TAX WITH 2025 RIA FEDERAL TAX HANDBOOK

**COURSE #5344 • 24 CPE HRS • \$204.50**

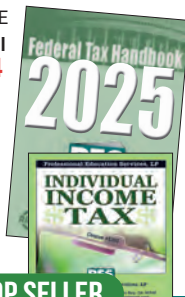
Includes the updated CPE course **#5300v24: Individual Income Tax (for 2024 tax returns)** listed above and a copy of the **2025 RIA Federal Tax Handbook** as an additional companion reference guide, allowing you to further research tax issues affecting your clients.



**TOP SELLER**



**TOP SELLER**



**TOP SELLER**

## MULTI-HOUR DISCOUNTS

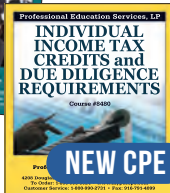
Save 5-20% off your order! See page 2 for discounts.



## TAX DEDUCTIONS FOR PROFESSIONALS

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

Discussing topics 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.



**NEW CPE**

## INDIVIDUAL INCOME TAX CREDITS AND DUE DILIGENCE REQUIREMENTS

**COURSE #8480 • 5 CPE HRS • \$44.50**

This course looks at the refundable and nonrefundable individual federal income tax credits and discusses the nature of the credits, their eligibility requirements, timing, limitations, phase-outs (where appropriate), whether the credit may be carried over, the nature of any qualified expenses, and how they are calculated. It also examines the most common income tax credit errors encountered by the IRS, and the preparer sanctions that may be applied for a failure to be diligent.

## 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. It discusses the general tax laws that apply to ordinary domestic corporations as well as line item instructions to assist in the completion of corporate tax returns.

## 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 reposessions, like-kind exchanges and installment sales, this course explains how to properly record the sale and dispositions of various assets.

## AND CHANGES WITH CPE FROM PES!

### 2026 TAX FILING SEASON UPDATE

**COURSE #8510\*  
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 2026 filing season, a general tax review, and important rules governing tax return practices and procedures. **PRE-ORDER NOW! Available to ship: July 7, 2025**



**NEW CPE**

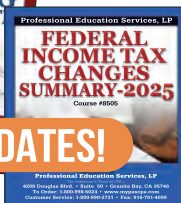
### FEDERAL INCOME TAX CHANGES SUMMARY - 2025

**COURSE #8505\* • 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.

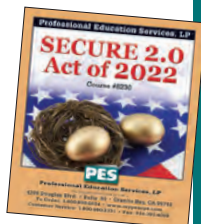
**\*PLEASE NOTE:** Course materials for 8505 and 8510 are similar; therefore, we recommend that you do not take both courses in the same CPE reporting period.



### SECURE 2.0 ACT OF 2022

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

The original SECURE Act in 2019 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. In December 2022, the SECURE 2.0 Act was passed to build on the original Act. This course highlights some of the sections most relevant to CPAs and enrolled agents.







# TAXATION

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

## PREPARE FOR IRS AUDITS

### STAND UP TO THE IRS

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

Learn 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 divorce or death of a loved one and even tax fraud.

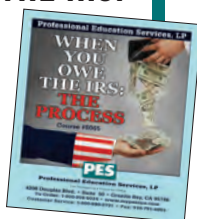
**TOP SELLER**

### WHEN YOU OWE THE IRS: THE PROCESS

**COURSE #8065**

**4 CPE HRS • \$34.50**

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.**



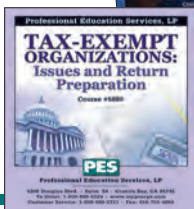
## NON-PROFIT TAX GUIDANCE

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

**TOP SELLER**

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

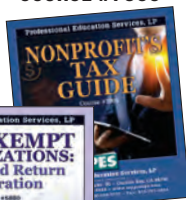
This course provides details on how Form 990 is used by tax-exempt organizations to “tell their story” as well as walking through the form and its related schedules line by line. **Course level: Basic/Intermediate.**



### 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.



## 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

**HOT TOPIC**

**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.



## PREFER HARD COPY CPE?

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



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.



**TOP SELLERS**

## DIVORCE TAXATION

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

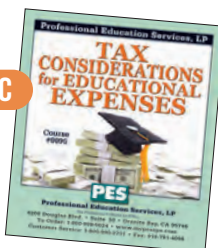
Often a tax professional is asked to guide a client through the complicated tax issues and consequences surrounding divorce. This course covers many of these issues, including those associated with alimony and child support, the splitting and transferring of property, changes in filing status, and the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



## 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.



**HOT TOPIC**

## ESTATE PLANNING & RETURN PREPARATION

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

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

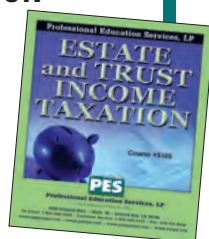
Providing valuable insights and strategies to help preserve wealth and plan an estate under current tax rules (including the TCJA), this course offers information on retirement planning, trusts, charitable contributions, gifts, life insurance, and wills. **PLEASE NOTE: Not accepted for Enrolled Agents.**



### 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.



## PARTNERSHIPS AND LLCs

### PARTNERSHIPS AND LLCs — PART 1

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

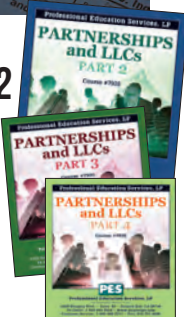
Part 1 focuses on preliminary considerations such as partnership formation, liability issues, IRS classification, audit issues, presentation of partnership income, and more.



### PARTNERSHIPS AND LLCs — PART 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.



**#7930 PARTNERSHIPS AND LLCs — PART 3 ..... 6 CPE HRS • \$59.50**  
**#7935 PARTNERSHIPS AND LLCs — PART 4 ..... 6 CPE HRS • \$59.50**

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

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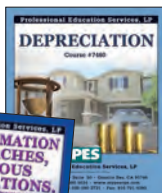
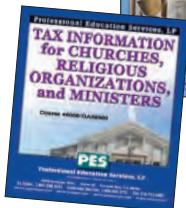
# TAXATION

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

## 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**

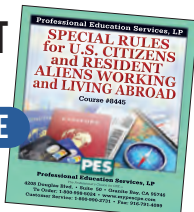
This course discusses how to recover the cost of business or income-producing property through deductions for depreciation, including the special depreciation allowance and deductions under the MACRS. It also explains how to take a Section 179 deduction, instead of depreciation, for certain property,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

## SPECIAL RULES FOR U.S. CITIZENS AND RESIDENT ALIENS WORKING AND LIVING ABROAD

**COURSE #8445 • 3 CPE HRS • \$29.50**

This course covers special tax rules for U.S. citizens and resident aliens who work abroad or who have income earned in foreign countries.

**NEW CPE**



## 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).



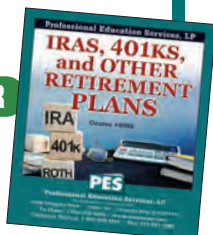
### IRAS, 401KS, AND OTHER RETIREMENT PLANS

**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**







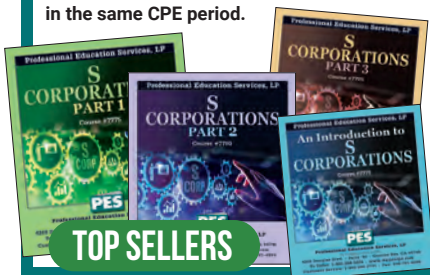
Unless otherwise noted: All course material provided. No prerequisites. Course level: Basic.

## • 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 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 2

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

### S CORPORATIONS — PART 3

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

\*PLEASE NOTE: Course level: Intermediate. Prerequisites: Working knowledge of the S corporation status and its taxation issues. Visit [www.mypescpe.com](http://www.mypescpe.com) for course descriptions.

## • 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.



## 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
#6890	TAX IMPLICATIONS OF DEATH	4 CPE HRS • \$34.50
#7180	KIDDIE TAX RULES	2 CPE HRS • \$24.50
#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.

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# FINANCIAL AND ESTATE PLANNING

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

## ESTATE AND RETIREMENT GUIDANCE

### A GUIDE TO ESTATE PLANNING

**NEW CPE**

**COURSE #8430 • 16 CPE HRS • \$94.50**



Proper estate planning can help ensure that loved ones are protected from legal hassles and financial uncertainty, and that property passes to the right people with minimal delay, red tape, and cost.

This comprehensive course covers everything from wills and living trusts to tax-saving strategies, financial powers of attorney, and health care directives, providing the knowledge and the tools needed to assist in your own or your client's estate planning needs.

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

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

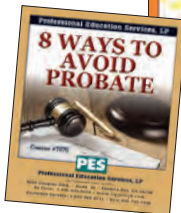
Providing valuable insights and strategies to help preserve wealth and plan an estate under current tax rules (including the TCJA), this course offers information on retirement planning, trusts, charitable contributions, gifts, life insurance, and wills.



### 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.

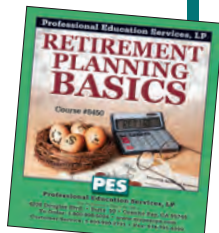


### RETIREMENT PLANNING BASICS

**NEW CPE**

**COURSE #8450 • 14 CPE HRS • \$89.50**

This basic course will assist in managing and optimizing a 401(k), balancing retirement savings with other financial needs, setting up pensions and insurance. It provides a map for the journey of all things retirement related including information on the SECURE Act, the latest withdrawal rules, HSA rules, and self-employment considerations.



### THE EXECUTOR'S GUIDE

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

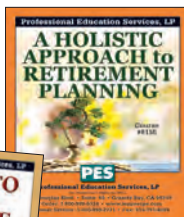


**TOP SELLER**

While addressing topics such as preparing to be an executor, 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.

### 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.

### 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. This course covers the tax issues and consequences related to investment decisions, retirement planning, and estate and education planning.

### 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).

# 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**

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



## HOW TO GROW YOUR WEALTH

### PRIVATE MARKETS: BUILDING BETTER PORTFOLIOS WITH PRIVATE EQUITY, CREDIT, AND REAL ESTATE

**COURSE #8490 • 8 CPE HRS • \$69.50**

**NEW CPE**

This course takes a look at the challenges and opportunities with investing in the private markets, including understanding the merits of the asset classes – private equity, private credit, and private real estate – and how to incorporate these versatile and valuable tools into client portfolios. You'll be able to examine the historical risk and return characteristics of the private markets and explore the benefits of these once elusive investments.



### GROW WEALTH WITH ALTERNATIVE ASSETS

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

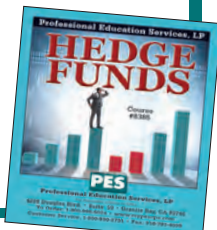
This course discusses alternative investing opportunities; such as commercial property, infrastructure, private equity, private credit, agriculture, commodities, and more. It presents the pros and cons of various asset classes, outlines how those assets may possibly earn more than traditional investments, and explains how to assess risks, avoid pitfalls, perform due diligence, and more.



### HEDGE FUNDS

**COURSE #8385 • 16 CPE HRS • \$109.50**

Hedge funds use pooled funds to focus on high-risk, high-return investments. This course discusses the diversity of hedge funds, their pros and cons, and their potentially lucrative role as part of a balanced portfolio. It outlines how to build a hedge fund strategy based on tested techniques and the latest market data, plus how to choose funds that make the most sense for a particular given situation.

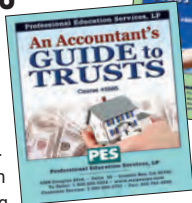


## TRUSTS: SIMPLE TO COMPLEX

### 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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## 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

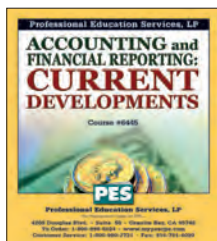
This course discusses the general rules and applications used in the preparation of and reporting on tax-basis financial statements and other bases of accounting found within the special purpose frameworks (also referred to as other comprehensive bases of accounting). Topics include an overview of the types of special purpose frameworks, advantages and disadvantages of using tax-basis financial statements, tax-basis accrual versus cash-basis, reviewing the key differences between GAAP and tax-basis revenue and expenses and other differences, tax-basis disclosures, reporting options for tax-basis financial statements, unusual reporting and presentation issues related to tax-basis financial statements, an overview of other types of special purpose frameworks, and more. This course also addresses the presentation and disclosures for the Employee Retention Credit (ERC), the Pass-Through Entity (PTE) tax, and leases.

## 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-post-COVID, the Employee Retention Credit (ERC), including the IRS ERC Withdrawal program, 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*

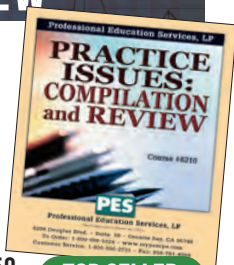
*Standards for Accounting and Review Services - 2016*, SSARS No. 24, *Omnibus Statement on Standards for Accounting and Review Services - 2018*, SSARS No. 25, *Materiality in a Review of Financial Statements and Adverse Conclusions*, and SSARS No. 26, *Quality Management for an Engagement Conducted in Accordance with Statements on Standards for Accounting and Review Services*.

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

### PRACTICE ISSUES: COMPILATION AND REVIEW

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

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.



**TOP SELLER**

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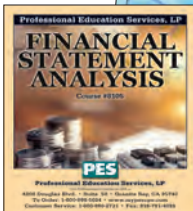


## FINANCIAL STATEMENT ANALYSIS

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.



## ACCOUNTING AND AUDITING ANNUAL UPDATE & REVIEW

COURSE #8475 • 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.

TOP SELLER

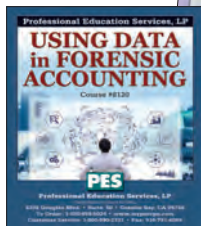
**Prerequisites:** Basic understanding of U.S. GAAP, compilation and review, and auditing standards.



## 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 techniques can help improve the quality of your work product.



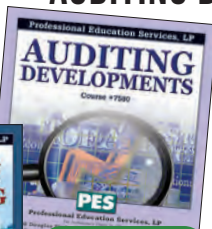
## AUDITING DEVELOPMENTS

COURSE #7580  
16 CPE HRS • \$109.50

The objective of this course is to address the latest developments affecting 2025 and 2024 audit engagements. In addition, auditors will learn about auditing estimates,

TOP SELLER

changes made to the auditor's understanding of the entity and its environment, risk assessment procedures, using the work of specialists as audit evidence, changes to compliance audits, and more. These changes are found in newly issued SAS Nos. 143-149. The course focuses on recalling, recognizing, and identifying rules related to auditing standards, including new developments pertaining to those standards.



## AUDIT REPORTING STANDARDS

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

COURSE #8090 • 4 CPE HRS • \$44.50

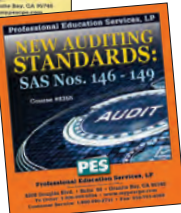
The first section of this course addresses SAS No. 142's expanded guidance on what comprises audit evidence in a financial statement audit. The second segment is a review of SAS No. 143's guidance on accounting estimates. The third portion consists of a review of SAS No. 144's changes to auditing standards 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.





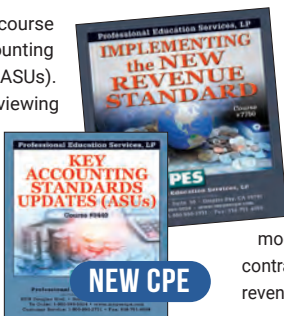
# ACCOUNTING AND AUDITING

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

## KEY ACCOUNTING STANDARDS UPDATES (ASUs)

**COURSE #8440 • 2 CPE HRS • \$29.50**

The objective of this course is to address key accounting standards updates (ASUs). Topics include reviewing the new ASUs on accounting for joint ventures, accounting for crypto assets, income tax disclosures, and disaggregation of expenses.



## IMPLEMENTING THE NEW REVENUE STANDARD

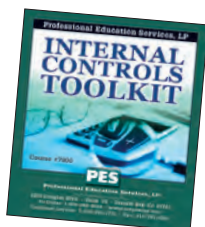
**COURSE #7750 • 8 CPE HRS • \$69.50**

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 2020 and are addressing post-implementation issue. 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.

## INTERNAL CONTROLS TOOLKIT

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

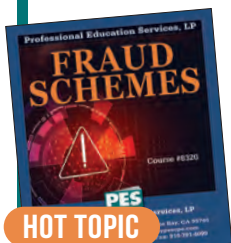
Internal controls are necessary in order to provide the reliable, timely, and useful data needed to support operating, budgeting, and policy decisions. This course takes a "tool-kit" approach to address the practical need for a series of standards of internal controls that can be used to mitigate risk 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...

### FRAUD SCHEMES

**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, note

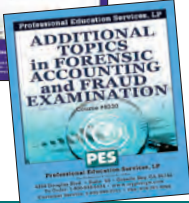
red flags to be aware of, and tools that can be used to offset or avoid the likelihood of the fraud being successful.

**PLEASE NOTE: The course content contains material from course #8310: Financial Statement Fraud, therefore, we recommend you not take both of these courses in the same CPE reporting period.**

### DETECTING FRAUD IN FINANCIAL STATEMENTS

**COURSE #7170  
4 CPE HRS • \$44.50**

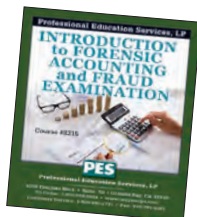
This course provides the knowledge necessary to identify where financial statement fraud happens, when to expect it, and how to detect it.



### INTRODUCTION TO FORENSIC ACCOUNTING AND FRAUD EXAMINATION

**COURSE #8315 • 10 CPE HRS • \$84.50**

Forensic accounting and fraud examination can be complex. This course provides an introduction into the core foundations of this complicated world. It will contrast forensic accounting engagements to fraud examinations, identify how best to find the perpetrators, and then delve into the legal and regulatory aspects.



### ADDITIONAL TOPICS IN FORENSIC ACCOUNTING AND FRAUD EXAMINATION

**COURSE #8330 • 8 CPE HRS • \$69.50**

This course builds on the more complex issues of forensic accounting and fraud examination. It will delve deeper into the types of financial crimes being committed today, including fraud in our elaborate digital age. Then it will discuss how to best deter these efforts with a strong corporate culture and good prevention techniques.





## REAL ESTATE ACCOUNTING

**COURSE #6970 • 6 CPE HRS • \$59.50**



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.

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

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



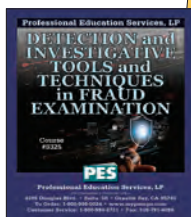
This course addresses the accounting and financial reporting for the current post-COVID economic climate including the effects of inflation, supply-chains, rising interest rates, and other events on company financial statements for 2023 and 2024. The course also discusses the accounting for selected tax changes affecting 2023 and 2024 financial statements.

## FINANCIAL STATEMENT FRAUD TODAY!

### DETECTION AND INVESTIGATIVE TOOLS AND TECHNIQUES IN FRAUD EXAMINATION

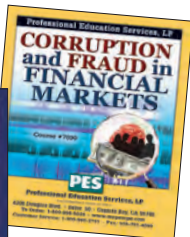
**COURSE #8325 • 12 CPE HRS • \$94.50**

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.



### CORRUPTION AND FRAUD IN FINANCIAL MARKETS

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



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

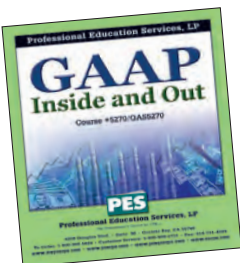
prevent a company from falling victim to unethical practices. It covers detection, prevention, and regulation of corruption and fraud within different financial markets and offers details on the many practices that bring potentially devastating consequences, which include insider trading, bribery, false disclosures, frontrunning, options backdating, and much more. **Course level: Intermediate. Prerequisites: Understanding of financial market terms/concepts and advanced mathematical calculations. This course uses British terminology.**

### FINANCIAL STATEMENT FRAUD



**COURSE #8310**  
**4 CPE HRS • \$44.50**

Focusing on real-world practicality, real-life examples, and case studies to reinforce comprehension, this course examines some of the principles underlying financial statement fraud. It looks specifically at identifying fraudulent financial statement schemes, the detection of such, and how to deter financial statement fraud.



## 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.

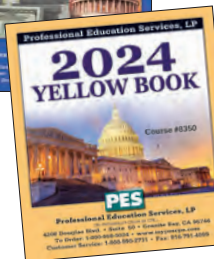
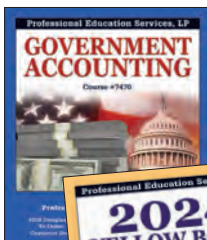
## GOVERNMENT AND NOT-FOR-PROFIT

### GOVERNMENT ACCOUNTING 2024 YELLOW BOOK

COURSE #7470 • 24 CPE HRS • \$159.50

COURSE #8350 • 8 CPE HRS • \$64.50

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.



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.

#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

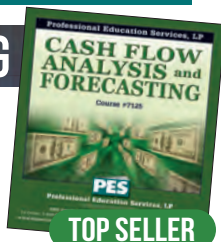
COURSE #7585 • 4 CPE HRS • \$39.50

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
#8345	THE NEW ALLOWANCE FOR CREDIT LOSSES .....	2 CPE HRS • \$29.50

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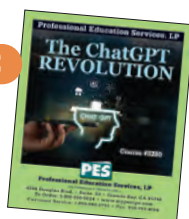


## THE CHATGPT REVOLUTION

**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.

**HOT TOPIC**



## LEARN QUICKBOOKS SKILLS

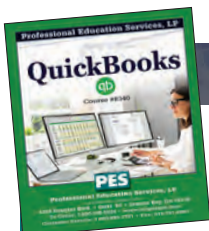
### QUICKBOOKS

**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

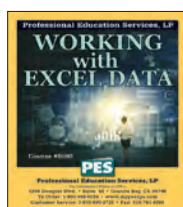
### FINANCIAL MODELING IN EXCEL

**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. **Prerequisite:** Basic understanding of Excel and financial models.

### WORKING WITH EXCEL DATA

**COURSE #8080 • 14 CPE HRS • \$99.50**



Master some of the more advanced functions of Excel. The course 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 PIVOT TABLES, POWER QUERY, AND POWER PIVOT

**COURSE #8390 • 8 CPE HRS • \$69.50**

Excel tools like Pivot tables, Power Query, and Power Pivot can help you manage and report on your Excel data in meaningful ways. This course offers an in-depth look at how you can put these tools to work so that you can import, sort, transform, summarize, and present your data professionally without having to be a programmer. It outlines the topics in easy-to-use steps and screenshots so you will be able to put these advanced Excel skills into immediate practice.

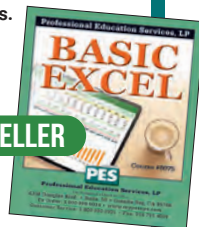
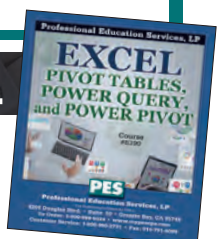
**Prerequisites:** Working knowledge of Excel capabilities and functions.

**Course level:** Intermediate.\*

### BASIC EXCEL

**COURSE #8075 • 20 CPE HRS • \$109.50**

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**

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

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# PROFESSIONAL ETHICS

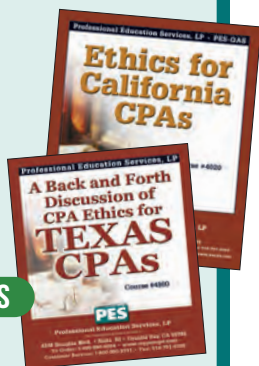
Unless otherwise noted: All course material provided. No prerequisites. Course level: Basic.

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- COMPLIANT WITH REQUIRED AICPA/NASBA RULES
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### TOP SELLERS



If you have more questions regarding your ethics CPE requirement, please call PES Customer Service at

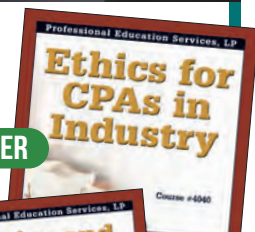
**1-800-990-2731**

... we have the answers!

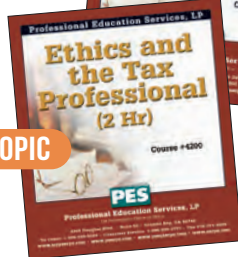
## • GENERAL ETHICS •

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

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



## 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
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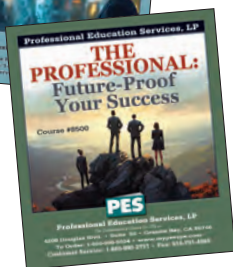
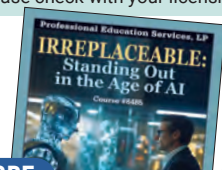
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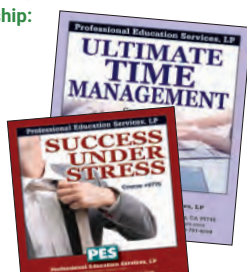
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