

WINTER-SPRING 2014

PUBLIC ACCOUNTANT, ENROLLED AGENT, AND OTHER TAX PRACTITIONER PROGRAM

The objective of the program is to broaden the knowledge of accountants and tax practitioners in order to relate particular specialties to the field of accounting and to examine developments in these professions.

ATTENDANCE: Accurate records of attendance will be maintained to verify and report continuing education hours. Three (3) Continuing Professional Education (CPE) units are awarded for each attended, for a possible total of thirty-six (36) CPEs. To ensure the integrity of the program, student attendance will be periodically monitored for late arrivals and hours attended will be adjusted accordingly. A summary sheet will be sent to each registered participant when the series is completed.

REGISTRATION INFORMATION: Choose the course number that corresponds to the location you plan to attend the most. If you have a schedule conflict you may attend class at one of the other locations. To receive CPE units, students **MUST** be registered/paid before they attend class. The course fee **MUST** be paid when you register. To register, complete the attached form and return to CCAC with a check or money order made payable to "CCAC" or call 412.369.3701 to register with a credit card at least one week before the course begins. Requests for refunds must be received 24 hours prior to the start of Week 1: Call 412.369.3701. Refunds will **NOT** be processed after the start of Week 1.

COURSE NUMBERS AND LOCATIONS:

XGD079-5601	CCAC, North Campus, 8701 Perry Hwy., Pittsburgh, PA 15237
XGD079-5602	CCAC, South Campus, 1750 Clairton Rd., West Mifflin, PA 15122
XGD079-5603	CCAC, West Hills Center, 1000 McKee Rd., Oakdale, PA 15071

COST FOR THE 12 WEEKS - \$289.00 (Regardless of how many presentations you attend).

CLASS INFORMATION:

Week 1: CPA Estate and Gift Tax Planning under American Taxpayer Relief Act of 2012

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

This course will discuss Estate and Succession Planning focusing on protecting and transferring wealth which accomplishes client's goals and objectives.

Category: Tax (Intermediate)

Thursday	1/30	North Campus	6:30-9:30 p.m.	Wednesday	2/5	West Hills Ctr.	6:30-9:30 p.m.
Saturday	2/1	South Campus	8:00-11:00 a.m.				

Week 2: CPA Fraud Detection and Prevention

Speaker: William J. Miller, Esquire, CPA

Fraud investigating and auditing procedures will be applied to case studies. Civil and criminal differences along with prevention will also be discussed.

Category: Accounting & Auditing (Overview)

Thursday	2/6	North Campus	6:30-9:30 p.m.	Wednesday	2/12	West Hills Ctr.	6:30-9:30 p.m.
Saturday	2/8	South Campus	8:00-11:00 a.m.				

Week 3: CPA Survey of Intellectual Property and Branding

Speaker: Gregg R. Zegarelli, Esquire

This course will survey various intellectual properties, such as company names, copyrights, patents, trademarks, domain names and privacy/likeness rights.

Category: Other (Basic)

Thursday	2/13	North Campus	6:30-9:30 p.m.	Wednesday	2/19	West Hills Ctr.	6:30-9:30 p.m.
Saturday	2/15	South Campus	8:00-11:00 a.m.				

Week 4: CPA Asset Protection Techniques for The Elderly

Speaker: Colin Adair Morgan, Esquire

This course will present the basics in planning strategies and techniques for the elderly and those facing potential long term care costs.

Category: Tax (Basic)

Thursday	2/20	North Campus	6:30-9:30 p.m.	Wednesday	2/26	West Hills Ctr.	6:30-9:30 p.m.
Saturday	2/22	South Campus	8:00-11:00 a.m.				

Week 5: CPA Inheritance Tax Issues: Revocable Living Trusts

Speaker: Barry K. Gerber, CPA, M.B.A., J.D.

This course will address and discuss issues concerning living trusts, how to save on Pennsylvania Inheritance taxes, and administrative expenses.

Category: Tax (Basic)

Thursday	2/27	North Campus	6:30-9:30 p.m.	Wednesday	3/5	West Hills Ctr.	6:30-9:30 p.m.
Saturday	3/1	South Campus	8:00-11:00 a.m.				

Week 6: CPA Understanding Tax-Exempt Organizations

Speaker: Norma M. Caquatto, Esquire

This course will present legal concepts related to Tax-Exempt Organizations, describe the process of becoming a tax-exempt organization, and outline best practices for continuing compliance with state and federal regulations.

Category: Tax (Intermediate)

Thursday	3/6	North Campus	6:30-9:30 p.m.	Wednesday	3/12	West Hills Ctr.	6:30-9:30 p.m.
Saturday	3/8	South Campus	8:00-11:00 a.m.				

Week 7: CPA Preparing Your Client's Business for Sale and Assisting with the Selling Process

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

This course will discuss how accountants can assist their clients in determining if they should sell their business. Also addressed will be what steps are involved in the selling process and where they will add value to the process.

Category: Accounting & Auditing (Intermediate)

Thursday	3/13	North Campus	6:30-9:30 p.m.	Wednesday	3/19	West Hills Ctr.	6:30-9:30 p.m.
Saturday	3/15	South Campus	8:00-11:00 a.m.				

Week 8: CPA A Review of Investment, Tax & Insurance Planning for Client Assets

Speaker: Joseph Grunwald CFP®/Associate Vice President

This course will discuss the current investment, tax and insurance landscape and the potential impact on clients. This includes investment portfolio construction, Social Security, income distribution planning, and the impact on income and transfer taxes.

Category: Tax (Overview)

Thursday	3/20	North Campus	6:30-9:30 p.m.	Wednesday	3/26	West Hills Ctr.	6:30-9:30 p.m.
Saturday	3/22	South Campus	8:00-11:00 a.m.				

Week 9: CPA White Collar Crime and Identity Theft

Speaker: Jackelyn Weibel, CFE, Detective

This course is an overview of white collar crime which will include: types of white collar crime, red flags that may indicate that fraud is occurring within a business; numerous preventative measures that clients' businesses can implement to deter them from becoming a victim, and what a business should do if it becomes a victim. A large number of actual criminal case studies will be discussed. Additionally, the identity theft component of white collar crime will be covered in detail, including the current trends and measures to protect your personal and business' identifying information.

Category: Accounting & Auditing (Overview)

Thursday	3/27	North Campus	6:30-9:30 p.m.	Wednesday	4/2	West Hills Ctr.	6:30-9:30 p.m.
Saturday	3/29	South Campus	8:00-11:00 a.m.				

Week 10: CPA Ethics Lessons for Tax Practitioners from Criminal and Civil Prosecutions

Speaker: Paul Skirtich, Esquire

This course will discuss recent court decisions, both national and local, that should provide valuable insights in how Tax Practitioners can avoid the potential consequences of criminal convictions or civil judgments by adhering to ethical principles and guidelines.

Category: Ethics (Intermediate)

Thursday	4/3	North Campus	6:30-9:30 p.m.	Wednesday	4/9	West Hills Ctr.	6:30-9:30 p.m.
Saturday	4/5	South Campus	8:00-11:00 a.m.				

Week 11: CPA Tax Aspects of Separation and Divorce

Speaker: David S. Pollock, Esquire

This course will discuss income tax consequences of property transfers, alimony, spousal support, separate maintenance, child support, etc.

Category: Tax (Overview)

Thursday	4/10	North Campus	6:30-9:30 p.m.	Wednesday	4/16	West Hills Ctr.	6:30-9:30 p.m.
Saturday	4/12	South Campus	8:00-11:00 a.m.				

Week 12: New Business Opportunities When Working with Entrepreneurs and Certified Businesses

Speaker: Francine B. Cameron, CPA, M.B.A.

This course will focus on accountants working with entrepreneurs and certified businesses and the new business opportunities that are created.

Category: Other (Basic)

Thursday	4/24	North Campus	6:30-9:30 p.m.	Wednesday	4/30	West Hills Ctr.	6:30-9:30 p.m.
Saturday	4/26	South Campus	8:00-11:00 a.m.				

SATURDAY TAX SEMINARS

Location: CCAC North Campus, Room 3002, 8701 Perry Highway, Pgh., PA 15237

* BUSINESS TAX	XGD202-5601	2/22/14	8:00 a.m. – 12:00 p.m.	Speaker: Philip Cook, Jr., Esquire
* INDIVIDUAL TAX	XGD203-5602	2/22/14	1:00 p.m. – 5:00 p.m.	Speaker: William McKendree, J.D.

COST FOR EACH 4 HOUR SEMINAR: **\$49.00** 4 credits each FOR OUT OF STATE RATES CALL 412.369.3701

