

## SUMMER 2013

# 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) CPE's. 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, Room 3002, 8701 Perry Hwy., Pgh., PA 15237  
 XGD079-5602 CCAC, South Campus, Bldg. D, Room D201, 1750 Clairton Rd., West Mifflin, PA 15122  
 XGD079-5603 CCAC, Boyce Campus, 595 Beatty Rd., Monroeville, PA 15146

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

### CLASS INFORMATION

<b>Week 1: CPA White Collar Crime</b>		<b>Speaker: Jackelyn Weibel, CFE, Detective</b>	
This course will include an overview of white collar crime including types, stats, red flags, and discuss a handful of case studies. This course will discuss numerous preventative measures that your clients' businesses can implement to deter them from becoming a victim. Also examined are internal controls that can be utilized to detect if white collar crime is occurring in their organization. A discussion will be conducted on what to do if a business is a victim. Additionally, the identity theft component of white collar crime will be covered in detail.			
<b>Category: Accounting &amp; Auditing (Overview)</b>			
Thursday	5/2	North Campus	6:30-9:30 p.m.
Monday	5/6	Boyce Campus	6:30-9:30 p.m.
Saturday	5/4	South Campus	8:00-11:00 a.m.
<b>Week 2: CPA Branding and Survey of Intellectual Property</b>		<b>Speaker: Greg Zegarelli, Esquire</b>	
This course will survey various laws, risks, and strategies regarding commercialization of new products and services. Interplay, acquisition, and protection of intellectual properties, such as company names, copyrights, trademarks, and domain names will also be examined.			
<b>Category: Other (Basic)</b>			
Thursday	5/9	North Campus	6:30-9:30 p.m.
Monday	5/13	Boyce Campus	6:30-9:30 p.m.
Saturday	5/11	South Campus	8:00-11:00 a.m.
<b>Week 3: CPA Overview of Fraud Complaints</b>		<b>Speaker: William J. Miller, Esquire, CPA</b>	
This course will provide an overview of the legal system as it relates to the forensic accountant.			
<b>Category: Accounting &amp; Auditing (Overview)</b>			
Thursday	5/16	North Campus	6:30-9:30 p.m.
Monday	5/20	Boyce Campus	6:30-9:30 p.m.
Saturday	5/18	South Campus	8:00-11:00 a.m.
<b>Week 4: CPA Intermediate Medical Assistance Planning</b>		<b>Speaker: Colin Adair Morgan, Esquire</b>	
This course will discuss the broad concepts of Medical Assistance, compare pre-planning and crisis planning techniques. A discussion will be held on helpful tips for your clients in preparing for long term care costs.			
<b>Category: Other (Intermediate)</b>			
Thursday	5/30	North Campus	6:30-9:30 p.m.
Monday	6/3	Boyce Campus	6:30-9:30 p.m.
Saturday	6/1	South Campus	8:00-11:00 a.m.
<b>Week 5: CPA Inheritance Tax Issues: Revocable Living Trusts</b>		<b>Speaker: Barry K. Gerber, CPA, M.B.A., J.D.</b>	
This course will address and discuss issues concerning living trusts, how to save on Pennsylvania Inheritance taxes, and administrative expenses.			
<b>Category: Tax (Basic)</b>			
Thursday	6/6	North Campus	6:30-9:30 p.m.
Monday	6/10	Boyce Campus	6:30-9:30 p.m.
Saturday	6/8	South Campus	8:00-11:00 a.m.
<b>Week 6: CPA The Affordable Care Act and Medicare</b>		<b>Speaker: William McKendree, J.D.</b>	
This course will examine how recent federal health care legislation, collectively referred to as the Affordable Care Act will impact the Medicare health care system.			
<b>Category: Other (Intermediate)</b>			
Thursday	6/13	North Campus	6:30-9:30 p.m.
Monday	6/17	Boyce Campus	6:30-9:30 p.m.
Saturday	6/15	South Campus	8:00-11:00 a.m.
<b>Week 7: CPA PA Death Taxes and Estate Documents and Administration</b>		<b>Speaker: George Entenmann, Esquire</b>	
This course will review the PA Inheritance Tax, as well as other obligations which a small estate may encounter. There will be a discussion of various documents in an estate plan which impact the disposition of property at death, end of life decisions, and the administration of a decedent's estate.			
<b>Category: Tax (Basic)</b>			
Thursday	6/20	North Campus	6:30-9:30 p.m.
Monday	6/24	Boyce Campus	6:30-9:30 p.m.
Saturday	6/22	South Campus	8:00-11:00 a.m.
<b>Week 8: CPA The Effects of Unethical Conduct and the Resulting Civil Problems Faced by Tax Practitioners</b>		<b>Speaker: Paul Skirtich, Esquire</b>	
This course will provide an in-depth look at the practical consequences (criminal, civil, and administrative effects) of the unethical conduct of tax practitioners in Pennsylvania and across the United States, on and off the work setting. Recent court cases and disciplinary decisions will be analyzed and discussed including projections on future sanctions and practical suggestions on how to avoid civil, administrative, and criminal liability.			
<b>Category: Ethics (Intermediate)</b>			
Thursday	6/27	North Campus	6:30-9:30 p.m.
Monday	7/1	Boyce Campus	6:30-9:30 p.m.
Saturday	6/29	South Campus	8:00-11:00 a.m.
<b>Week 9: CPA State and Local Business Tax Update</b>		<b>Speaker: Philip Cook Jr., Esquire</b>	
This course will discuss the recent legislation, case law, and other current events involving state and local taxation.			
<b>Category: Tax (Intermediate)</b>			
Thursday	7/11	North Campus	6:30-9:30 p.m.
Monday	7/15	Boyce Campus	6:30-9:30 p.m.
Saturday	7/13	South Campus	8:00-11:00 a.m.
<b>Week 10: CPA Accounting for Bankruptcy</b>		<b>Speaker: Frederich Earl Liechti, J.D., CPA</b>	
This course will address bankruptcy tax concerns for debtors and guarantors of debt.			
<b>Category: Accounting &amp; Auditing (Advanced)</b>			
Thursday	7/18	North Campus	6:30-9:30 p.m.
Monday	7/22	Boyce Campus	6:30-9:30 p.m.
Saturday	7/20	South Campus	8:00-11:00 a.m.
<b>Week 11: CPA Estate Planning in 2013 and Beyond</b>		<b>Speaker: John M. Hartzell, Jr., Esquire, CPA</b>	
This course will review and discuss the current federal estate and gift tax laws including the recent "fiscal-cliff" legislation, The American Taxpayer Relief Act of 2012, passed by Congress on January 1, 2013, and signed by President Obama January 2, 2013.			
<b>Category: Tax (Intermediate)</b>			
Thursday	7/25	North Campus	6:30-9:30 p.m.
Monday	7/29	Boyce Campus	6:30-9:30 p.m.
Saturday	7/27	South Campus	8:00-11:00 a.m.
<b>Week 12: CPA Patient Protection and Affordable Care Act of 2010 ("Health Care Reform") – Employer Sponsored Healthcare – Responsibilities, Penalties and Fees</b>		<b>Speaker: Beverly Kossum</b>	
This course will familiarize you with the aspects of health care reform that will have the greatest impact for employers sponsoring health care plans.			
<b>Category: Other (Intermediate)</b>			
Thursday	8/1	North Campus	6:30-9:30 p.m.
Monday	8/5	Boyce Campus	6:30-9:30 p.m.
Saturday	8/3	South Campus	8:00-11:00 a.m.

The Community College of Allegheny County (CCAC) and its Board of Trustees are committed to the principle of equal opportunity in education and employment for all. CCAC does not discriminate based upon race, color, religion, national origin, ancestry or place of birth, sex, gender identity or expression, sexual orientation, disability, use of a guide or support animal due to disability, marital status, familial status, genetic information, veteran status, or age. Creating, supporting and sustaining a diverse community prepare our students to be effective in the world outside of CCAC. Questions may be addressed to [diversity@ccac.edu](mailto:diversity@ccac.edu).

# CCAC CONTINUING EDUCATION REGISTRATION FORM (Duplicates accepted) N13SS

MONTH      DATE      YEAR  
  -   -      
 BIRTH DATE REQUIRED FOR ENROLLMENT

LAST NAME (SKIP A SPACE) FIRST NAME (SKIP A SPACE) MIDDLE INITIAL

STREET ADDRESS      APT. NO.

CITY      STATE      ZIP CODE

-    -      
 AREA CODE      HOME TELEPHONE

-    -      
 AREA CODE      ALTERNATE TELEPHONE

Place of Permanent Address (check one)

Allegheny County (1)

Out-of-State (5) \_\_\_\_\_

Out-of County \_\_\_\_\_

THIS INFORMATION IS COMPILED BY THE COLLEGE FOR STATISTICAL PURPOSES ONLY AND NO PERSONALLY IDENTIFIABLE INFORMATION WILL BE RELEASED RACIAL CLASS -OPTIONAL-

**Do you consider yourself to be Hispanic/Latino/Spanish Origin?**

Yes  
 No

In addition, select one or more of the following racial categories to describe yourself:

American Indian/Alaskan Native  
 Asian  
 Black or African American  
 Native Hawaiian or Pacific Islander  
 White

**SEX & MARITAL STATUS**

MALE     FEMALE  
 SINGLE     MARRIED     DIVORCED  
 SEPARATED     WIDOWED  
 NEW ADDRESS

E-Mail Address: \_\_\_\_\_

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Course Number										Semester	Course Title	Location	Cost
X	G	D	0	7	9	5	6			N13SS	Public Accountant, Enrolled Agent, and other Tax Practitioner Program		\$289.00

Student Signature (Required for Enrollment) \_\_\_\_\_ Date \_\_\_\_\_

Make check payable to "CCAC" and mail with this form to: CPA Program, CCAC, West Hills Center, 1000 McKee Road, Oakdale, PA 15071 or call 412.369.3701 to register with a credit card.  
Requests for refunds must be received 24 hrs. prior to the start of Week 1: Call 412.369.3701.



CCAC, West Hills Center  
 1000 McKee Road  
 Oakdale, PA 15071

**Non-Profit Organ.**  
**U.S. Postage Paid**  
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## CERTIFIED PUBLIC ACCOUNTANT SUMMER 2013



PUBLIC ACCOUNTANT, ENROLLED AGENT, AND OTHER TAX PRACTITIONER PROGRAM

PROFESSIONAL CONTINUING EDUCATION PROGRAM  
 Phone: 412.788.7383