Governmental Accounting and Auditing Conference • 2561

5/6/2010-5/7/2010 • Clarion Meridian Conv. Ctr., OKC

Designed For:
Objectives:
Highlights:
Prerequisite:
Advanced Preparation:
Note:

Level:
Recommended CPE credit: 16
Vendor: OSCPA
Instructor:

Early Bird Rates:
Good through: 4/22/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $203
AICPA Member Only: $
Nonmember: $303

Standard Rates:
Effective: 4/23/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $228
AICPA Member Only: $
Nonmember: $328

Fields of Interest:

How to Conduct a Review Under the AICPA Practice-Monitoring Program • 100

5/10/2010-5/11/2010 • OSCPA Offices, OKC

Make the transition from auditor to peer reviewer and successfully conduct a peer review with the help of this mandatory training course for team and review captains. It features realistic case studies of system peer review circumstances and several examples of engagement selections in an engagement peer review.

Designed For: * CPAs in public practice who wish to serve as peer review team captains and review captains.
Objectives: * Effectively plan a peer review; * Understand a firm's system of quality control; * Document procedures used in testing the firm's system; * Prepare the peer review report and provide recommendations for follow-up action to the administering entity; and * Understand the effect of organizational issues on a firm's system of quality control.
Highlights: * Evaluating a firm's system of quality control; * Steps in a peer review engagement; * Writing peer review reports; * Assisting firms in preparing letters of response; * Planning and conducting the exit conference; * The role and qualifications of the reviewer for system and engagement peer reviews; * Objectives and requirements related to peer reviews of firms in a peer review program; * Several system peer review case studies involving typical circumstances; * Marketing practice-monitoring services; and * Engagement reviews and their distinct differences from system reviews.
Prerequisite: None
Advanced Preparation:
Note: Accepted for CMA and CFM credit

Level: Basic
Recommended CPE credit: 16
Vendor: AICPA
Instructor: Tom Newell

Early Bird Rates:
Good through: 4/19/2010
OSCPA & AICPA Member: $297
OSCPA Member Only: $327
AICPA Member Only: $397
Nonmember: $427

Standard Rates:
Effective: 4/20/2010
OSCPA & AICPA Member: $322
OSCPA Member Only: $352
AICPA Member Only: $422
Nonmember: $452

Fields of Interest: Accounting and Auditing, Peer Review, Auditing

AICPA Advanced Course: Overview of the AICPA Peer Review Program Standards • 102

5/12/2010-5/12/2010 • OSCPA Offices, OKC

This one-day, advanced course is designed for experienced reviewers who want to heighten their peer-review skills. It is an excellent follow-up to the AICPA's training course, How to Conduct a Review Under the AICPA Practice-Monitoring Programs, and includes an up-to-the-minute analysis of the AICPA Peer Review Program Standards effective Jan. 1, 2009.

Designed For: * Experienced peer reviewers who want to expand their knowledge of the peer review process.
Objectives: * Gain an understanding of the AICPA Peer Review Program Standards effective Jan. 1, 2009; * Increase practice-monitoring expertise; and * Enhance ability to reach conclusions on engagement deficiencies and bridge those conclusions to peer review findings.
Highlights: * Overview of standards effective Jan. 1, 2009; * Risk-based approach to planning a system review; * Evaluating a system of quality control; * Determining the cause of and documenting engagement deficiencies; * Practical solutions to system deficiencies; * Implementation plans; * Conducting exit conferences; and * A refresher for engagement peer reviews.
Prerequisite: The AICPA's How to Conduct a Review Under the AICPA Practice-Monitoring Programs course on May 10-11, 2010 in OKC (or a similar AICPA-approved introductory course) and performance at one review as a team captain.
Advanced Preparation:
Note: Accepted for CMA and CFM credit

Level: Advanced
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Tom Newell

Early Bird Rates:
Good through: 4/21/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 4/22/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Accounting and Auditing, Peer Review, Auditing

Upcoming Peer Review: Is Your Firm Ready? • 104

5/13/2010-5/13/2010 • OSCPA Offices, OKC

What does it take to have an effective quality control system that leads you to a clean, unmodified peer review report? Find out how to prepare for your next review and what can be done on a daily basis to create a strong quality control environment for your firm. Consider the process for selecting the appropriate peer reviewer and the right review year-end for your firm. If you have specialized engagements, such as governmental units, not-for-profit organizations, construction contractors or employee benefit plans, you will learn additional issues that come into play.

Designed For: * CPAs in public practice subject to peer review.
Objectives: * Create a firm environment that focuses on quality control; * Understand the basic steps for monitoring and inspections; * Establish quality control system based on the Quality Control Standards; * Recognize significant recurring engagement deficiencies and how to prevent them; and * Preparing for your next peer review.
Highlights: * What to do between reviews to maintain a quality control environment and continually prepare for the next review; * Common engagement deficiencies to be aware of; * Selection process – the peer reviewer and the review year end; * Overview of the Quality Control Standards; * What you need to assemble for your reviewer; * Peer review wrap up expectations; and * Solutions to common quality control issues.
Prerequisite: Experience in providing audit, compilation and review services
Advanced Preparation:
Note: Accepted for CMA and CFM credit

Level: Intermediate
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Tom Newell

Early Bird Rates:
Good through: 4/22/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 4/23/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Accounting and Auditing, Peer Review, Auditing

Religious and Other Faith-Based Nonprofits: Tax, Accounting and Management • 106

5/17/2010-5/17/2010 • OSU-Tulsa, Tulsa

There are more than two million nonprofit organizations operating in the United States today. A large percentage of those are religious, religious-affiliated or based to some degree upon principles of faith. Religious and other faith-based nonprofits have some truly unique characteristics, which affect tax, accounting and management issues.

Designed For: * CPAs in public practice who provide accounting, management consulting, tax or auditing services to religious or other faith-based nonprofit organizations; and * CPAs serving on the boards of these organizations.
Objectives: * Recognize the principles of a faith-based organization; * Understand the origin and the history of the Faith-Based and Community Initiative (FBCI); * Identify the nature of the various types of nonprofit religious organizations and understand these entities, from both an IRS and legal perspective; * Learn about internal controls and fraud protection for religious organizations; * Understand the presentation of financial information for a faith-based organization; and * Design financial statements to fit a particular type of religious or other faith-based nonprofit organization.
Highlights: * How federal, state or local tax laws affect these organizations and some of their professional staff such as ministers and missionaries; * The organizations' responsibilities to volunteers, employees, other service providers, donors and grantors and society; * How financial reporting can enhance resource production; * Concerns with Sarbanes-Oxley; * Faith-Based and Community Initiative and how it works.
Prerequisite: None
Note: Accepted for CMA and CFM credit

Level: Intermediate
Recommended CPE credit: 8
Vendor: AICPA
Instructor: William Wagner

Early Bird Rates:
Good through: 4/26/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 4/27/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Accounting and Auditing, Nonprofit, Tax, Accounting, Specialized Knowledge

Nonprofit Auditing and Accounting Update • 108

5/18/2010-5/18/2010 • OSU-Tulsa, Tulsa

Have you ever had a discussion with a client regarding a recent not-for-profit accounting or auditing development? Solve the entire case through this timely update designed to help you understand the latest accounting and auditing developments affecting not-for-profits.

Designed For: * CPAs in public practice providing accounting and financial reporting for nonprofits; and * CPAs in public practice auditing nonprofits.
Objectives: * Apply the most recent FASB requirements directed toward nonprofits; * Utilize a solid understanding of the latest developments in A-133 and Yellow Book requirements; and * Understand recent activities of the AICPA including GAAS requirements.
Highlights: * Yellow Book developments; * Latest A-133 and OMB compliance supplement developments; * Latest activities and standards issued by the AICPA relating to nonprofits; and * New requirements issued or pending by the FASB.
Prerequisite: Knowledge of nonprofit auditing and accounting
Advanced Preparation:
Note: Accepted for Yellow Book, CMA and CFM credit.

Level: Update
Recommended CPE credit: 8
Vendor: AICPA
Instructor: William Wagner

Early Bird Rates:
Good through: 4/27/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 4/28/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Nonprofit, GAA, Audit, Yellow Book

Farm and Ranch Accounting and Tax Update • 110

5/19/2010-5/19/2010 • East Central University, Ada

Satellite Broadcast: Handling the accounting and tax issues of farmers and ranchers has never been more challenging than it is today. 2010 promises to be a year of major changes due to the new administration and the efforts being developed to stimulate the economy. This environment creates risks and opportunities for the family and corporate farms alike. This all-new ACPEN course will provide you with the latest accounting requirements and the changes in the tax law that those in agribusiness must be aware of, if they intend to succeed. Address important issues such as farm income averaging, appropriate accounting methods, special tax rules for agriculture, estate planning options for farmers and ranchers and much more. In addition, the panel will explain the current status of federal programs available to assist farmers and the lending standards now being applied by banks. More details will be posted six weeks prior to course date.

Designed For: * CPAs in public practice with farm and ranch clients.
Objectives:
Highlights:
Prerequisite: None
Advanced Preparation:
Note:

Level: Intermediate
Recommended CPE credit: 8
Vendor: ACPEN
Instructor: Group

Early Bird Rates:
Good through: 4/28/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $163
AICPA Member Only: $
Nonmember: $263

Standard Rates:
Effective: 4/29/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $188
AICPA Member Only: $
Nonmember: $288

Fields of Interest: Accounting and Auditing, Taxes

Farm and Ranch Accounting and Tax Update • 112

5/19/2010-5/19/2010 • Autry Technology Center, Enid

Satellite Broadcast: Handling the accounting and tax issues of farmers and ranchers has never been more challenging than it is today. 2010 promises to be a year of major changes due to the new administration and the efforts being developed to stimulate the economy. This environment creates risks and opportunities for the family and corporate farms alike. This all-new ACPEN course will provide you with the latest accounting requirements and the changes in the tax law that those in agribusiness must be aware of, if they intend to succeed. Address important issues such as farm income averaging, appropriate accounting methods, special tax rules for agriculture, estate planning options for farmers and ranchers and much more. In addition, the panel will explain the current status of federal programs available to assist farmers and the lending standards now being applied by banks. More details will be posted six weeks prior to course date.

Designed For: * CPAs in public practice with farm and ranch clients.
Objectives:
Highlights:
Prerequisite: None
Advanced Preparation:
Note:

Level: Intermediate
Recommended CPE credit: 8
Vendor: ACPEN
Instructor: Group

Early Bird Rates:
Good through: 4/28/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $163
AICPA Member Only: $
Nonmember: $263

Standard Rates:
Effective: 4/29/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $188
AICPA Member Only: $
Nonmember: $288

Fields of Interest: Accounting and Auditing, Taxes

Farm and Ranch Accounting and Tax Update • 114

5/19/2010-5/19/2010 • Moore-Norman Technology Center, Norman

Satellite Broadcast: Handling the accounting and tax issues of farmers and ranchers has never been more challenging than it is today. 2010 promises to be a year of major changes due to the new administration and the efforts being developed to stimulate the economy. This environment creates risks and opportunities for the family and corporate farms alike. This all-new ACPEN course will provide you with the latest accounting requirements and the changes in the tax law that those in agribusiness must be aware of, if they intend to succeed. Address important issues such as farm income averaging, appropriate accounting methods, special tax rules for agriculture, estate planning options for farmers and ranchers and much more. In addition, the panel will explain the current status of federal programs available to assist farmers and the lending standards now being applied by banks. More details will be posted six weeks prior to course date.

Designed For: * CPAs in public practice with farm and ranch clients.
Objectives:
Highlights:
Prerequisite: None
Advanced Preparation:
Note:

Level: Intermediate
Recommended CPE credit: 8
Vendor: ACPEN
Instructor: Group

Early Bird Rates:
Good through: 4/28/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $163
AICPA Member Only: $
Nonmember: $263

Standard Rates:
Effective: 4/29/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $188
AICPA Member Only: $
Nonmember: $288

Fields of Interest: Accounting and Auditing, Taxes

Farm and Ranch Accounting and Tax Update • 116

5/19/2010-5/19/2010 • Ardmore Conv. Center, Ardmore

Satellite Broadcast: Handling the accounting and tax issues of farmers and ranchers has never been more challenging than it is today. 2010 promises to be a year of major changes due to the new administration and the efforts being developed to stimulate the economy. This environment creates risks and opportunities for the family and corporate farms alike. This all-new ACPEN course will provide you with the latest accounting requirements and the changes in the tax law that those in agribusiness must be aware of, if they intend to succeed. Address important issues such as farm income averaging, appropriate accounting methods, special tax rules for agriculture, estate planning options for farmers and ranchers and much more. In addition, the panel will explain the current status of federal programs available to assist farmers and the lending standards now being applied by banks. More details will be posted six weeks prior to course date.

Designed For: * CPAs in public practice with farm and ranch clients.
Objectives:
Highlights:
Prerequisite: None
Advanced Preparation:
Note:

Level: Intermediate
Recommended CPE credit: 8
Vendor: ACPEN
Instructor: Group

Early Bird Rates:
Good through: 4/28/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $163
AICPA Member Only: $
Nonmember: $263

Standard Rates:
Effective: 4/29/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $188
AICPA Member Only: $
Nonmember: $288

Fields of Interest: Accounting and Auditing, Taxes

Farm and Ranch Accounting and Tax Update • 118

5/19/2010-5/19/2010 • OSU-Tulsa, Tulsa

Satellite Broadcast: Handling the accounting and tax issues of farmers and ranchers has never been more challenging than it is today. 2010 promises to be a year of major changes due to the new administration and the efforts being developed to stimulate the economy. This environment creates risks and opportunities for the family and corporate farms alike. This all-new ACPEN course will provide you with the latest accounting requirements and the changes in the tax law that those in agribusiness must be aware of, if they intend to succeed. Address important issues such as farm income averaging, appropriate accounting methods, special tax rules for agriculture, estate planning options for farmers and ranchers and much more. In addition, the panel will explain the current status of federal programs available to assist farmers and the lending standards now being applied by banks. More details will be posted six weeks prior to course date.

Designed For: * CPAs in public practice with farm and ranch clients.
Objectives:
Highlights:
Prerequisite: None
Advanced Preparation:
Note:

Level: Intermediate
Recommended CPE credit: 8
Vendor: ACPEN
Instructor: Group

Early Bird Rates:
Good through: 4/28/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $163
AICPA Member Only: $
Nonmember: $263

Standard Rates:
Effective: 4/29/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $188
AICPA Member Only: $
Nonmember: $288

Fields of Interest: Accounting and Auditing, Taxes

Spring Industry Conference • 2575

5/21/2010-5/21/2010 • Clarion Meridian Conv. Ctr., OKC

Designed For:
Objectives:
Highlights:
Prerequisite:
Advanced Preparation:
Note:

Level:
Recommended CPE credit: 8
Vendor: OSCPA
Instructor:

Early Bird Rates:
Good through: 4/30/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $173
AICPA Member Only: $
Nonmember: $273

Standard Rates:
Effective: 5/1/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $198
AICPA Member Only: $
Nonmember: $298

Fields of Interest:

Annual Members Meeting • 2563

6/11/2010-6/11/2010 • Embassy Suites, Norman

Designed For:
Objectives:
Highlights:
Prerequisite:
Advanced Preparation:
Note:

Level:
Recommended CPE credit:
Vendor: OSCPA
Instructor:

Early Bird Rates:
Good through: 5/21/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $
AICPA Member Only: $
Nonmember: $

Standard Rates:
Effective: 5/22/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $
AICPA Member Only: $
Nonmember: $

Fields of Interest:

AICPA/AHI Staff Training – Beginning In-Charge • 120

6/14/2010-6/16/2010 • OSCPA Offices, OKC

Cultivate your staff's level of performance with this third course in the AICPA/AHI staff training series. It provides extensive training in crucial procedural, evaluative and supervisory areas. Help your staff improve their planning, review, audit and other engagement skills and give them techniques for effective communication with clients and colleagues. Your staff's ability to assess risk and materiality and to make non-statistical sampling decisions will greatly improve with this all-inclusive course.

Designed For: * Second- or third-year staff members who have been in charge of at least two audits or review engagements, or plan to have in-charge responsibilities within the next six months.
Objectives: * Plan and efficiently complete engagements; * Assume higher levels of responsibility; and * Supervise staff, review working papers and deal with clients.
Highlights: * Assessing risk and materiality; * Making non-statistical sampling decisions; * Planning engagements; * Completing engagements in a timely manner; * Reviewing assistants' working papers; * Supervising staff assistants; * Helping the firm expand revenues; and * Much more.
Prerequisite: A minimum of two years of public accounting experience
Advanced Preparation:
Note: Accepted for CMA and CFM credit

Level: Intermediate
Recommended CPE credit: 24
Vendor: AICPA
Instructor: Kurt Oestriecher

Early Bird Rates:
Good through: 5/24/2010
OSCPA & AICPA Member: $401
OSCPA Member Only: $431
AICPA Member Only: $501
Nonmember: $531

Standard Rates:
Effective: 5/25/2010
OSCPA & AICPA Member: $426
OSCPA Member Only: $456
AICPA Member Only: $526
Nonmember: $556

Fields of Interest: Accounting and Auditing, Staff Training, Audit, Analytical Procedures

Current Practice Issues and Solutions in Audits of Employee Benefit Plans • 122

6/15/2010-6/15/2010 • OSU-Tulsa, Tulsa

Employee benefit plan audits continue to present a myriad of issues and risks that practitioners must address. Develop the skills to identify and address complex accounting, audit and financial reporting issues. Stay current on ongoing regulatory initiatives and effectively document required auditing procedures.

Designed For: * CPAs in public practice who audit employee benefit plans.
Objectives: * Address current changes and issues in financial reporting for employee benefit plans; * Examine current auditing issues and challenges facing employee benefit plans; * Prepare sufficient audit documentation; and * Avoid mistakes in audit testing and financial reporting.
Highlights: * Current legislative and compliance initiatives and issues; * Current DOL and EBSA issues, programs and requirements; * Form 5500 issues and changes; * Current auditing issues and risk areas inherent in plan audits; * Investment fair value accounting; * Updating planning and testing of the RAS standards; * Practitioner deficiencies and errors; * Peer review issues and requirements; * Financial statement disclosure issues; and * Unique accounting requirements for defined benefit plans and health and welfare plans.
Prerequisite: Experience in conducting audits of employee benefit plans
Advanced Preparation:
Note: Includes practice aids that are updated for new developments

Level: Intermediate
Recommended CPE credit: 8
Vendor: Loscalzo Associates
Instructor: Christa Dunn

Early Bird Rates:
Good through: 5/25/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 5/26/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Accounting and Auditing, Audit, Employee Benefit, Accounting

Compilation and Review Essentials – The New Rules for Local Practitioners • 124

6/16/2010-6/16/2010 • OSU-Tulsa, Tulsa

With the most massive rewrite of SSARS since 1978, you will be required to redraft all compilation and review reports. Rethink the application of independence when performing certain non-attest services. Obtain engagement letters on all compilation and review engagements and meet minimum documentation requirements for both compilations and reviews. Participants will also learn how to meet minimum performance standards.

Designed For: *CPAs who perform bookkeeping, compilations and reviews for small business clients.
Objectives: * Identify changes made to the SSARS standards; * Effectively perform compilations and reviews under the new standards; * Efficiently document compilations and reviews under the new standards; and * Identify requirements when non-traditional issues are faced.
Highlights: * The new SSARS standards; * How to document and perform compilations and reviews under the new standards; * Association with financial statements – when a report is required; * How internal control services will impact compilations and reviews; * What OCBOA financial statements are and when they can be used; * Common issues raised in peer reviews; and * How to perform and document analytical procedures appropriately.
Prerequisite: Basic familiarity with SSARS
Advanced Preparation:
Note:

Level: Intermediate
Recommended CPE credit: 8
Vendor: Loscalzo Associates
Instructor: Christa Dunn

Early Bird Rates:
Good through: 5/26/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 5/27/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Accounting and Auditing, Comp & Review, Auditing

AICPA's Technical Hotline Annual Update: Top 12 Audit Speed Bumps • 126

6/17/2010-6/17/2010 • OSCPA Offices, OKC

Enhance your knowledge and application of professional judgment with a review of the top 12 auditing speed bumps encountered by the AICPA technical hotline during the past year.

Designed For: * CPAs in public practice providing auditing services.
Objectives: * Recognize the impact of economic crisis on the audit process; * Identify and respond to increased audit risks and pitfalls; and * Focus on the audit issues currently causing the most trouble for practitioners.
Highlights: * The economic meltdown – audit impact; * Going concern issues; * Fair value measurement; * Audit planning guidance; * Auditor communications; * Auditing in the current economic environment; * Going concern and subsequent event issues; * Auditing fair value measurements; * SAS Nos. 114 and 115 communications; and * Auditing hard-to-value investments.
Prerequisite: Experience in auditing
Advanced Preparation:
Note: Accepted for CMA and CFM credit

Level: Update
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Mark Dauberman

Early Bird Rates:
Good through: 5/27/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 5/28/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Accounting and Auditing, Audit

Lean Accounting for Service and Non-manufacturing Businesses • 128

6/17/2010-6/17/2010 • OSU-Tulsa, Tulsa

Lean principles originated on the factory floor at Toyota. Since then they have been successfully applied in offices of manufacturing companies and other industries. So what are these Lean principles? How can they be applied to non-manufacturing environments in small as well as large companies? Learn more about these principles and how they can benefit your company.

Designed For: * CPAs in non-manufacturing organizations.
Objectives: * Grasp the basic universal principles of lean; * Picture lean principles application in a variety of different organizations; * Implement lean successfully; * Make financial and non-financial reporting changes required to support lean; and * Capitalize on both tangible and intangible benefits of lean.
Highlights: * Using lean principles to reduce waste and cost and improve operating results; * How the basic principles of lean work; * Creating better decisions throughout the organization; * Where the lean principles apply and where they don't; * Quantifying the potential benefits of lean; * How to effectively implement lean; and * The accounting changes required to support lean.
Prerequisite: Responsibility for planning and budgeting
Advanced Preparation:
Note: Accepted for CMA and CFM credit

Level: Intermediate
Recommended CPE credit: 8
Vendor: AICPA
Instructor: John Cox

Early Bird Rates:
Good through: 5/27/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 5/28/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Management, Accounting, Industry

AICPA's Technical Hotline Annual Update: Top 10 GAAP Speed Bumps • 130

6/18/2010-6/18/2010 • OSCPA Offices, OKC

Learn practical guidance on interpreting and applying 10 topics that accountants in today's complex environment.

Designed For: * CPAs in industry.
Objectives: * Get an understanding of the top ten hot topics; * Examine how recent accounting standards impact privately held companies; * Apply fair value and impairment issues to assets and liabilities on your financial statements; * Review actual and proposed changes to Defined Benefit Plans, Business Combinations and FIN 46R; and * Become aware of the GAAP Codification.
Highlights: * Fair value application; * Impairment issues; * IFRS; * GAAP codification; * How to apply fair value in the current economic environment (SFAS 157, SFAS 159, FSP 157-3, FSP 157-4, FSP 107-1/APB 28-1); * What to do when assets and liabilities have been impaired (SFAS 115, FSP 115-1, FSP 124-1, EITF 99-20, SFAS 114, SFAS 144, SFAS 142); * Effects of changes in the market on not-for-profits; * Treatment of endowment funds per SFAS 117 and FSP 117-1.4; * What IFRS means for the privately held company; * How to value privately held companies' stock options; * How to account for a Defined Benefit Plan per SFAS 158; * Derivatives: simplifying the process; * Proposed amendments to FIN 46R; * Business combinations and SFAS 141R and SFAS 160; * How will the GAAP codification affect you; and * Much more.
Prerequisite: None
Advanced Preparation:
Note:

Level: Update
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Mark Dauberman

Early Bird Rates:
Good through: 5/28/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 5/29/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Accounting and Auditing, Auditing

Coaching: Improving Employee Performance • 132

6/18/2010-6/18/2010 • OSU-Tulsa, Tulsa

Through this course, you will discover how to function as a skilled coach who is an active listener, facilitates employee goal-setting and delegates to develop employees. Learn top ways to track employee performance, provide corrective feedback and follow up on performance problems.

Designed For: * CPAs and financial managers in industry who have supervisory responsibilities.
Objectives: * Develop coaching skills for specific employee situations; * Understand differences between coaching, counseling and mentoring; and * Enhance interpersonal and communication skills.
Highlights: * Assessing one's coaching skills; * Choosing a coaching model that will work for you; * Understanding causes of bad attitudes, reasons for poor performance in the workplace and employee defensiveness; * Giving positive and constructive feedback; * Reviewing basic human behavior to understand why people act the way they do; * Using "coachable moments" to enhance employee responsibility and learning; * Focusing on problem-solving as a means of resolving conflicts with employees; * The GROW model; and * Assessing the strengths and weaknesses of work teams.
Prerequisite: Experience in a supervisory position
Advanced Preparation:
Note: Accepted for CMA and CFM credit

Level: Basic
Recommended CPE credit: 8
Vendor: AICPA
Instructor: John Cox

Early Bird Rates:
Good through: 5/28/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 5/29/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Personal Development, Management, Industry

Audits of 403(b) Plans: A Challenging New Audit Area • 134

6/21/2010-6/21/2010 • OSCPA Offices, OKC

Learn the similarities and the differences between the audit of a 403(b) plan in comparison to the 401(k) plan. This course is designed to build upon what you already know about auditing benefit plans. It will provide a background on the tax rules applicable to a 403(b) plan and how these plans are different and how the audit procedures must be modified. Particular attention will be paid to the open issues created by the first time audit of the benefit plan.

Designed For: * CPAs in public practice providing employee benefit plan audit and accounting services; and * Benefit plan administrators with responsibility for accounting and reporting for 403(b) plans.
Objectives: * Distinguish between the operating differences of a 401(k) and a 403(b) plan; * Identify the key issues in preparing for the initial audit of the 403(b) plan; * Recognize the unique internal controls that should be present for a 403(b) plan; * Recognize the open issues on the definition of a plan participant and a plan asset; * Design audit procedures for 403(b) plans; * Plan the audit with particular attention to first time through procedures; and * Apply the accounting requirement for employee benefit plans to this arrangement.
Highlights: * The structure of these arrangements under final IRS regulations; * Implications of changes in regulations on the internal control systems for such program; * Recognizing which arrangements are subject to ERISA's reporting and disclosure scheme; * How former employees are treated under 403(b) plans; * What asset types are permitted?; * What unique audit risks exist?; * What is the tax status?; and * Much more.
Prerequisite: Working knowledge of the audit requirements of a 401(k) plan and ERISA
Advanced Preparation:
Note:

Level: Intermediate
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Glynda McClure

Early Bird Rates:
Good through: 5/31/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 6/1/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Accounting and Auditing, Audit, Employee Benefits

CPA's Guide to E-mail, Record Retention, Destruction and Security for 2009-2010 • 136

6/21/2010-6/21/2010 • OSU-Tulsa, Tulsa

Dozens of companies have been sued because of faulty paper and electronic record retention and destruction policies. Are you next?

Designed For: * CPAs in public practice; * Controllers; * CFOs; * CEOs; * Business owners; and * Security officers.
Objectives: * Protect yourself under the rapidly changing laws of technology, privacy, electronic commerce and computer security.
Highlights: * Criminal prosecution of Arthur Andersen for destroying records; * Record retention policies; * Resolving the conflict between laws requiring document destruction and those that forbid it; * The proliferation of electronic records; * How to reform your record retention policies; * Unraveling the confusion around electronic signatures; * How computer forensic experts uncover damaging information; * The role of computer evidence during a lawsuit; * Record creation/delivery/retention rules for using electronic commerce with consumers; * The new laws requiring companies to notify customers of identity theft and consumer privacy; and * Liability for insecurity of e-records and information systems.
Prerequisite: None
Advanced Preparation:
Note:

Level: Advanced
Recommended CPE credit: 8
Vendor: Gary Zeune & Associates
Instructor: Ben Wright

Early Bird Rates:
Good through: 5/31/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 6/1/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Management, HR, Business Law, Industry, Practice Management

Employee Benefit Plans: Audit and Accounting Essentials • 138

6/22/2010-6/22/2010 • OSCPA Offices, OKC

Master the fundamentals of auditing employee benefit plans in accordance with AICPA and EBSA standards. Explore the accounting and auditing requirements unique to employee benefit plans.

Designed For: * CPAs in public practice providing employee benefit plan audit and accounting services; and * Benefit plan administrators with responsibility for accounting and reporting for benefit plans.
Objectives: * Audit employee benefit plans in accordance with AICPA and EBSA standards; * Design specialized audit tests; * Plan the scope of an audit; * Understand the structure of popular employee benefit plans; and * Understand requirements unique to employee benefit plans.
Highlights: * Common plan types; * Recent developments; * Common audit deficiencies and how to avoid them; * Accounting and reporting standards unique to plans; * GAAP versus ERISA reporting requirements; * Filing and audit requirements; * Planning the audit assessment of risks; * Internal control understanding; * Understanding and auditing 401(k) and other defined contribution plans, employee stock ownership plans, defined benefit plans and health and welfare benefit plans; * Prohibited transactions; and * An overview of tax compliance ERISA schedules.
Prerequisite: None
Advanced Preparation:
Note: Accepted for CMA and CFM credit

Level: Basic
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Glynda McClure

Early Bird Rates:
Good through: 6/1/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 6/2/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Accounting and Auditing, Audit, Employee Benefit

CPA's Guide to Practical Business Law for 2009-2010 • 140

6/22/2010-6/22/2010 • OSU-Tulsa, Tulsa

As the business world changes, so do the law and the best measures for staying out of trouble. Do you know the latest traps in business law? Explore the changes that technology, modern risks and new laws are forcing on accounting practices. Learn to use technology to gain advantage and avoid liability.

Designed For: * CPAs in public practice; * Controllers; * CFOs; * CEOs; * Business owners; and * Security officers.
Objectives: * Negotiate the terms you want in business relationships; * Avoid contract pitfalls; * Exploit technology as a tool of negotiation; * Understand how computer forensics is changing legal practices; and * Learn how savvy accountants know when crooks are abusing corporate computer networks.
Highlights: * Turning records into your allies; * Protecting yourself from missteps beyond just malpractice; * Lessons from recent business scandals; and * Tips for procuring software or technology consulting.
Prerequisite: None
Advanced Preparation:
Note:

Level: Advanced
Recommended CPE credit: 8
Vendor: Gary Zeune & Associates
Instructor: Ben Wright

Early Bird Rates:
Good through: 6/1/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 6/2/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Management, Business Law, Industry, Practice Management

Not-for-Profit Accounting, Auditing and Tax Update • 142

6/23/2010-6/23/2010 • East Central University, Ada

Satellite Broadcast: Not-for-profit organizations of all sizes are finding that they are subject to more oversight and regulation than ever. The slow economic recovery continues to have a major impact on many non-profit organizations and those practicing in the not-for-profit industry are faced with new challenges daily. Learn what you need to know about the latest and most important developments affecting non-profit organizations. More details will be posted six weeks prior to course date.

Designed For: * CPAs in public practice who have nonprofit clients.
Objectives:
Highlights: * A thorough review of the latest developments affecting tax and GAAP issues for these specialized entities; * Recent AICPA audit and accounting guidance affecting not-for-profits and the work of the Accountability Task Force; * Special focus on lessons learned in initial years of preparation and completion of the IRS form 990 series of forms and schedules; * A refresher on Unrelated Business Income Tax (UBIT); and * What to expect from the IRS under a new administration.
Prerequisite: None
Advanced Preparation:
Note:

Level: Update
Recommended CPE credit: 8
Vendor: ACPEN
Instructor: Group

Early Bird Rates:
Good through: 6/2/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $163
AICPA Member Only: $
Nonmember: $263

Standard Rates:
Effective: 6/3/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $188
AICPA Member Only: $
Nonmember: $288

Fields of Interest: Nonprofit, Accounting & Auditing, Taxes, Specialized Knowledge

Not-for-Profit Accounting, Auditing and Tax Update • 144

6/23/2010-6/23/2010 • Autry Technology Center, Enid

Satellite Broadcast: Not-for-profit organizations of all sizes are finding that they are subject to more oversight and regulation than ever. The slow economic recovery continues to have a major impact on many non-profit organizations and those practicing in the not-for-profit industry are faced with new challenges daily. Learn what you need to know about the latest and most important developments affecting non-profit organizations. More details will be posted six weeks prior to course date.

Designed For: * CPAs in public practice who have nonprofit clients.
Objectives:
Highlights: * A thorough review of the latest developments affecting tax and GAAP issues for these specialized entities; * Recent AICPA audit and accounting guidance affecting not-for-profits and the work of the Accountability Task Force; * Special focus on lessons learned in initial years of preparation and completion of the IRS form 990 series of forms and schedules; * A refresher on Unrelated Business Income Tax (UBIT); and * What to expect from the IRS under a new administration.
Prerequisite: None
Advanced Preparation:
Note:

Level: Update
Recommended CPE credit: 8
Vendor: ACPEN
Instructor: Group

Early Bird Rates:
Good through: 6/2/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $163
AICPA Member Only: $
Nonmember: $263

Standard Rates:
Effective: 6/3/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $188
AICPA Member Only: $
Nonmember: $288

Fields of Interest: Nonprofit, Accounting & Auditing, Taxes, Specialized Knowledge

Not-for-Profit Accounting, Auditing and Tax Update • 146

6/23/2010-6/23/2010 • Moore-Norman Technology Center, Norman

Satellite Broadcast: Not-for-profit organizations of all sizes are finding that they are subject to more oversight and regulation than ever. The slow economic recovery continues to have a major impact on many non-profit organizations and those practicing in the not-for-profit industry are faced with new challenges daily. Learn what you need to know about the latest and most important developments affecting non-profit organizations. More details will be posted six weeks prior to course date.

Designed For: * CPAs in public practice who have nonprofit clients.
Objectives:
Highlights: * A thorough review of the latest developments affecting tax and GAAP issues for these specialized entities; * Recent AICPA audit and accounting guidance affecting not-for-profits and the work of the Accountability Task Force; * Special focus on lessons learned in initial years of preparation and completion of the IRS form 990 series of forms and schedules; * A refresher on Unrelated Business Income Tax (UBIT); and * What to expect from the IRS under a new administration.
Prerequisite: None
Advanced Preparation:
Note:

Level: Update
Recommended CPE credit: 8
Vendor: ACPEN
Instructor: Group

Early Bird Rates:
Good through: 6/2/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $163
AICPA Member Only: $
Nonmember: $263

Standard Rates:
Effective: 6/3/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $188
AICPA Member Only: $
Nonmember: $288

Fields of Interest: Nonprofit, Accounting & Auditing, Taxes, Specialized Knowledge

Not-for-Profit Accounting, Auditing and Tax Update • 148

6/23/2010-6/23/2010 • Ardmore Conv. Center, Ardmore

Satellite Broadcast: Not-for-profit organizations of all sizes are finding that they are subject to more oversight and regulation than ever. The slow economic recovery continues to have a major impact on many non-profit organizations and those practicing in the not-for-profit industry are faced with new challenges daily. Learn what you need to know about the latest and most important developments affecting non-profit organizations. More details will be posted six weeks prior to course date.

Designed For: * CPAs in public practice who have nonprofit clients.
Objectives:
Highlights: * A thorough review of the latest developments affecting tax and GAAP issues for these specialized entities; * Recent AICPA audit and accounting guidance affecting not-for-profits and the work of the Accountability Task Force; * Special focus on lessons learned in initial years of preparation and completion of the IRS form 990 series of forms and schedules; * A refresher on Unrelated Business Income Tax (UBIT); and * What to expect from the IRS under a new administration.
Prerequisite: None
Advanced Preparation:
Note:

Level: Update
Recommended CPE credit: 8
Vendor: ACPEN
Instructor: Group

Early Bird Rates:
Good through: 6/2/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $163
AICPA Member Only: $
Nonmember: $263

Standard Rates:
Effective: 6/3/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $188
AICPA Member Only: $
Nonmember: $288

Fields of Interest: Nonprofit, Accounting & Auditing, Taxes, Specialized Knowledge

Not-for-Profit Accounting, Auditing and Tax Update • 150

6/23/2010-6/23/2010 • OSU-Tulsa, Tulsa

Satellite Broadcast: Not-for-profit organizations of all sizes are finding that they are subject to more oversight and regulation than ever. The slow economic recovery continues to have a major impact on many non-profit organizations and those practicing in the not-for-profit industry are faced with new challenges daily. Learn what you need to know about the latest and most important developments affecting non-profit organizations. More details will be posted six weeks prior to course date.

Designed For: * CPAs in public practice who have nonprofit clients.
Objectives:
Highlights: * A thorough review of the latest developments affecting tax and GAAP issues for these specialized entities; * Recent AICPA audit and accounting guidance affecting not-for-profits and the work of the Accountability Task Force; * Special focus on lessons learned in initial years of preparation and completion of the IRS form 990 series of forms and schedules; * A refresher on Unrelated Business Income Tax (UBIT); and * What to expect from the IRS under a new administration.
Prerequisite: None
Advanced Preparation:
Note:

Level: Update
Recommended CPE credit: 8
Vendor: ACPEN
Instructor: Group

Early Bird Rates:
Good through: 6/2/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $163
AICPA Member Only: $
Nonmember: $263

Standard Rates:
Effective: 6/3/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $188
AICPA Member Only: $
Nonmember: $288

Fields of Interest: Nonprofit, Accounting & Auditing, Taxes, Specialized Knowledge

Accounting Software Forum – The Most You Can Learn About Accounting Software in One Day • 154

6/23/2010-6/23/2010 • OSU-Tulsa, Tulsa

This symposium is an informative overview of accounting software products. Hear about and see the latest products and approaches to solving your business accounting problems. Even if you are happy with your current solution, you will be surprised at how new features in other products can help you run your business more profitably. The course will provide an overview of the key accounting and business management applications available for financial management and reporting, business intelligence and performance measurement, budgeting and customer relationship management.

Designed For: * CPAs in industry who hold senior management positions; and * CPAs who advise and assist their clients in improving business operations.
Objectives: * Become more proficient in selecting and recommending accounting software; * Understand the value of optimized accounting solutions to management; and * Improve financial reporting for your organization.
Highlights: * The value of summary financial data provided by digital dashboards, key performance indicators and other tools available; * The value of workflow and document integration; * Options for selecting and implementing new solutions; * Products in action; * Requirements of leading accounting products; and * Represented vendors and products include Microsoft Dynamics, Sage MAS 90 ERP and 500 ERP, Peachtree by Sage, Sage Accpac, Exact Macola ES, SAP Business One and SAP All-in-One, SYSPRO, Open Systems TRAVERSE, Open Systems Accounting Software, SouthWare, CYMA, Intuit QuickBooks and Softrak Adagio.
Prerequisite: None
Note: This seminar is a group-live demo and discussion using color computer projection. It is not a hands-on course.

Level: Intermediate
Recommended CPE credit: 8
Vendor: K2 Enterprises
Instructor: Brian Tankersley

Early Bird Rates:
Good through: 6/2/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $238
AICPA Member Only: $
Nonmember: $338

Standard Rates:
Effective: 6/3/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $263
AICPA Member Only: $
Nonmember: $363

Fields of Interest: Management, Information Technology, Practice Management, Industry

Strategic Banking Relationships: The CPA's Guide • 152

6/23/2010-6/23/2010 • OSCPA Offices, OKC

Learn how to prepare loan applications that win approval and how to advise clients on the best approach when seeking financial assistance.

Designed For: * CPAs in public practice; and * CPAs in industry.
Objectives: * Acquire a greater understanding of the banks policies, priorities, compliance and regulatory constraints; * Create presentations that make your client attractive to any bank; * Discover the specific risks inherent in borrowing; * Recognize red flags; and * Identify opportunities to offer additional advice regarding banking services.
Highlights: * CAMEL and the five Cs; * Why banks are not the same; * When to provide what information for quick loan approval; * How to control risk in a borrower/lender relationship; * The secrets of loan approvals; * Underwriting; * Local, state and federal loan programs at preferred rates available to clients; and * Turnaround financing.
Prerequisite: None
Advanced Preparation:
Note:

Level: Intermediate
Recommended CPE credit: 8
Vendor: Nichols Patrick CPE, Inc.
Instructor: Robert Koslow

Early Bird Rates:
Good through: 6/2/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 6/3/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Management, Banking, Specialized Knowledge, Industry

Paperless Office – Managing Documents in a Digital World • 158

6/24/2010-6/24/2010 • OSU-Tulsa, Tulsa

No one expects a completely paperless office, but everyone would like to have much less paper to manage. This course will use best practice methods and demonstrate proven processes for document management. The instructor will guide you through the file organization and retention process from simple, inexpensive systems costing a few hundred dollars to comprehensive options complete with workflow. Considerations for implementing paperless audits will be included. The course will present the best options for eliminating paper, what documents to maintain electronically and how to retire expired documents.

Designed For: * CFOs; * Controllers; * CEOs; * CIOs; and * Senior managers.
Objectives: * Handle unique issues that surround document imaging and image management for accounting applications; and * Make informed decisions when selecting a document imaging solution.
Highlights: * The real cost of paper; * Going digital, lost documents, filing expense and other issues; * Compliance with regulations in your document imaging system; * Organizing file rooms and electronic images; * Retrieval techniques including storage and indexing; * Electronic file cabinet solutions from off-the-shelf or grow-your-own; * The right mind-set in your office – coping with the cultural change; * The top vendors of paperless products; * Components of content management: acquisition, storage, retrieval, and workflow; * Why you should use production quality scanners; and * Protecting your system with the right storage, backup and other hardware changes.
Prerequisite: None
Advanced Preparation:
Note: This seminar is a group-live demo and discussion using color computer projection. It is not a hands-on course.

Level: Intermediate
Recommended CPE credit: 8
Vendor: K2 Enterprises
Instructor: Brian Tankersley

Early Bird Rates:
Good through: 6/3/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $238
AICPA Member Only: $
Nonmember: $338

Standard Rates:
Effective: 6/4/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $263
AICPA Member Only: $
Nonmember: $363

Fields of Interest: Information Technology, Specialized Knowledge

Tax Exempt Organizations – Basic Operating Issues and Preparation of Form 990 • 156

6/24/2010-6/24/2010 • OSCPA Offices, OKC

Exempt organizations have unique tax rules and special tax forms. The IRS is especially sensitive to abuses of exempt status. Learn what the informed CPA must know from the fundamentals needed to stay out of trouble, to preparation of the Form 990.

Designed For: * CPAs in public practice involved with tax-exempt organizations and the preparation of Form 990.
Objectives: * Understand special filing requirements of exempt entities; * Distinguish between charitable and other not-for-profit entities; * Recognize unrelated business income; * Prepare Form 990 and related schedules; and * Be aware of traps and pitfalls that can lead to penalties.
Highlights: * Proper preparation of Forms 990 and 990T; * What is an exempt organization?; * Special status of charitable organizations; * When and how to apply for exempt status; * Which organizations are required to file a Form 990?; * Unrelated Business Taxable Income – the fundamentals statutory exclusions under Sections 512, 513 and 514; * In-depth analysis of Form 990, Form 990EZ and public disclosure requirements; * Fundraising disclosure requirements of non-charitable exempt organizations; and * Introductions to unrelated business income, Form 990T, private inurement and intermediate sanctions.
Prerequisite: None
Advanced Preparation:
Note:

Level: Basic
Recommended CPE credit: 8
Vendor: Nichols Patrick CPE, Inc.
Instructor: Sharon Scott

Early Bird Rates:
Good through: 6/3/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 6/4/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Tax, Nonprofit

Excel Financial Reporting and Analysis • 162

6/25/2010-6/25/2010 • OSU-Tulsa, Tulsa

Microsoft Excel contains hidden features and functionality useful for analyzing financial data and preparing financial reports that are not obvious to users. Uncover these hidden features so that users may prepare reports in a more effective and efficient manner.

Designed For: * CPAs who use Excel for financial statement preparation and analysis.
Objectives: * Analyze financial information more effectively; * Prepare reports more effectively; * Apply and control underlining, spacing and label alignment with the accounting format; * Use Precision as Displayed to insure accuracy of footings and cross-footings and to eliminate positive and negative zeros in reports; * Select and act on multiple cells, ranges, rows, columns and sheets simultaneously; * Use custom number formats to report in thousands, millions or billions; * Customize your work environment by modifying the default workbook and worksheet templates; * Use Custom Views and the Report Manager to automate report printing; and * Integrate Excel with the G/L.
Highlights: * Linking Word documents to Excel data; * Importing or working with data stored in external databases such as the General Ledger using ODBC; * Advanced techniques, such as Text to Columns, Paste Special and Go-To Special; * Advanced data analysis using data tables, subtotals, filters, PivotTables and PivotCharts; * Using array formulas to round-off in totals and other useful tasks; * Conditional formatting in creating dynamic dashboard displays of tabular data; * Consolidating data using sum-through and wild-card formulas, the data consolidate command and consolidation PivotTables; * Rolling reports with formulas using end-point sheets or end-point columns; and * Much more.
Prerequisite: Working knowledge of Excel
Note: This seminar is a group-live demo and discussion using color computer projection. It is not a hands-on course.

Level: Advanced
Recommended CPE credit: 8
Vendor: K2 Enterprises
Instructor: Brian Tankersley

Early Bird Rates:
Good through: 6/4/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $238
AICPA Member Only: $
Nonmember: $338

Standard Rates:
Effective: 6/5/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $263
AICPA Member Only: $
Nonmember: $363

Fields of Interest: Information Technology, Accounting, Specialized Knowledge

Financial, Estate and Tax Planning for Individuals Over 55 • 160

6/25/2010-6/25/2010 • OSCPA Offices, OKC

Advise older clients about qualified plan and IRA distributions, use of trusts, Social Security, Medicare, Medicaid and taxation of pension distributions. You'll also learn to work with the changes to estate taxes and dealing with trusts.

Designed For: * CPAs in public practice who provide financial planning services.
Objectives: * Determine cash flow needs during retirement; * Establish accumulation goals; * Explain revocable living trust arrangements; * Explain Medicaid Trusts, Durable Powers of Attorney and living wills; * Offer advice on Social Security, Medicare supplement and prescription drug plans; * Use common planning tools to maximize IRA benefits; and * Provide tax-free wealth transfer planning opportunities.
Highlights: * Social Security benefits; * Medicare coverage and limitations; * Medicaid eligibility; * Revocable living trusts; * Charitable split-interest trusts; * Living wills, durable powers of attorney; * Estate planning; * Taxation of pension distributions; * Long-term care insurance; and * Estate and gift planning.
Prerequisite: None
Advanced Preparation:
Note:

Level: Intermediate
Recommended CPE credit: 8
Vendor: Nichols Patrick CPE, Inc.
Instructor: Sharon Scott

Early Bird Rates:
Good through: 6/4/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 6/5/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Financial Planning, Tax

Surviving and Growing Your Company in Difficult Times: Essential Skills for the Finance Team • 164

6/28/2010-6/28/2010 • OSCPA Offices, OKC

Today, the finance team is expected to address the challenges of a difficult economic environment. These changes will require responding to weakened economic conditions, establishing an innovative environment, managing the financial and cultural issues associated with long-term programs and acquisitions and improving the organization's competitive position. This course identifies and teaches the skills that will be required for success in today's business environment.

Designed For: * CPAs in industry; and * Owners; * Controllers; * Treasurers; * Financial officers; and * Other financial managers.
Objectives: * Identify the driving forces of behavior in an organization; * Explore the current economic and competitive environment; * Organize the finance function to meet current and future responsibilities; * Expand the role and impact of planning, budgeting, cash management and reporting; * Provide a process to prepare and introduce lean concepts into the finance function; and * Offer techniques to evaluate and manage capital investment programs.
Highlights: * Managing the finance function in a difficult economic environment; * Establishing and maintaining an innovative approach to financial problem solving; * Planning, budgeting and cash management techniques; * Evaluating capital investment and acquisition opportunities; and * Responding to the challenges of a global economic recession.
Prerequisite: Management experience in accounting, finance or operations
Advanced Preparation:
Note:

Level: Intermediate
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Anthony LaRusso

Early Bird Rates:
Good through: 6/7/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 6/8/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Management, Industry

Taxation of Construction Contractors • 166

6/28/2010-6/28/2010 • OSU-Tulsa, Tulsa

Explore the tax issues facing the construction industry as well as drilling into the intricacies of contractor tax law and regulations. Learn about specific tax issues related to construction contractors, including an overview of tax accounting for the contractor including SFAS No. 109, Deferred Income Taxes, AMT considerations for contractors, the look-back method and tax planning for the contractor.

Designed For: * CPAs in industry employed in construction; and * CPAs in public practice who have construction clients.
Objectives: * Handle income tax issues for the contractor including SFAS No. 109, Deferred Income Taxes; * Distinguish between taxation issues of small and large contractors; * Identify and apply key tax laws and regulations to the construction industry; * Apply the alternative minimum tax (AMT) and look-back method to the contractor; and * Capitalize on tax planning opportunities for the contractor.
Highlights: * Nature of the construction industry; * Foundation of tax accounting for the contractor SFAS No, 109, Deferred Income Taxes Tax laws and regulations applicable to contractors; * Taxation of small and large contractors; * AMT considerations; * Look-back issues, including available exceptions; and * Tax planning opportunities and approaches for the contractor.
Prerequisite: Experience in providing services for construction contractors
Advanced Preparation:
Note: Accepted for CMA and CFM credit

Level: Intermediate
Recommended CPE credit: 8
Vendor: AICPA
Instructor: William Murphy

Early Bird Rates:
Good through: 6/7/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 6/8/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Tax, Specialized Knowledge, Industry

Strategic Planning: A Simplified and Workable Approach for Private Companies • 168

6/29/2010-6/29/2010 • OSCPA Offices, OKC

Achieve your operational and financial goals for both the short term and the long term. Learn a simplified and workable approach to creating, implementing, monitoring and revising strategies to make your company more successful. Discover the major strategic management steps needed to run an organization. It will address issues related to overall strategic management, the business plan, the strategic plan, budgeting, corporate culture and review and monitoring of performance to plans.

Designed For: * CPAs in industry; and * Owners; * Controllers; * Treasurers; * Financial officers; and * Other financial managers.
Objectives: * Understand the overall strategic management process; * Create a workable and usable business plan; * Create a workable and usable strategic plan; and * Learn how corporate culture, leadership and staff development can energize or destroy strategic management principles.
Highlights: * Leading-edge management tools and techniques; * Strategic positioning of your organization; * Current strategic trends in budgeting that support the strategic plan; and * Current trends in leading and developing staff to increase productivity and profitability.
Prerequisite: Management experience in accounting, finance or operations
Advanced Preparation:
Note:

Level: Intermediate
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Anthony LaRusso

Early Bird Rates:
Good through: 6/8/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 6/9/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Management, Industry

Closely-Held Business Taxation: 49 Practical Ways to Cut Taxes • 170

6/29/2010-6/29/2010 • OSU-Tulsa, Tulsa

Walk away with 49 practical tax strategies and challenges facing your closely-held business clients. Employ business strategies that will minimize the tax burden not only on the business but on the owners as well. The tips and strategies are uniquely laid out in the course to allow you to easily and quickly identify tax savings strategies that fit your client's situation.

Designed For: * CPAs in public practice who have closely-held clients.
Objectives: * Recognize developing tax issues that are impacted by the business operations; * Explore strategies relating to depreciation, benefits, choice of entity, basis considerations, financing alternatives, compensation and accounting methods; * Implement strategies to reduce the taxes paid by the business; and * Recognize and plan for the impact of the business taxes upon the owners of the business.
Highlights: * Interrelationship of taxes paid by closely held businesses and those paid by their owners; * Recent developments impacting the taxes paid by closely held businesses and business owners; * The form of the business strategy for tax minimization; and * Unique checklist to focus on the tax savings strategies.
Prerequisite: Basic knowledge of business taxation
Advanced Preparation:
Note: Accepted for CFP®, CMA, CFM and EA credit.

Level: Intermediate
Recommended CPE credit: 8
Vendor: AICPA
Instructor: William Murphy

Early Bird Rates:
Good through: 6/8/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 6/9/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Tax

Accounting and Auditing Issues Unique to Health Care Organizations • 172

7/8/2010-7/8/2010 • OSCPA Offices, OKC

Health care organizations are subject to a variety of very specific accounting principles and disclosure requirements. Understand of the healthcare entity and its environment, including risks specific to healthcare organizations. Discuss accounting and auditing issues specific to hospital systems, nursing homes and health plans.

Designed For: * CPAs in public practice who audit healthcare organizations; and * CPAs in industry employed at healthcare organizations.
Objectives: * Understand and identify the risks of the healthcare industry; and * Understand and evaluate accounting and auditing issues specific to not-for-profit and investor-owned hospitals, nursing homes and physician practices.
Highlights: * Understanding the health care entity and its environment; * Reimbursement basics; * Financial statements of health care organizations; * Identifying significant systems of internal control; * Analytical procedures (preliminary and substantive); * Clinical coding validations; * Statutory reporting considerations for health plans; * Risk based capital requirements; and * Accounting and auditing of accounting estimates, revenue recognition, agency funds, investments, receivables, estimated final settlements, promises to give, premiums and stop loss insurance receivables, tax exempt entities and much, much more.
Prerequisite: Basic audit experience
Advanced Preparation:
Note: Recommended for Yellow Book credit.

Level: Intermediate
Recommended CPE credit: 8
Vendor: Loscalzo Associates
Instructor: Marci Thomas

Early Bird Rates:
Good through: 6/17/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 6/18/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Accounting and Auditing, Accounting, Audit, Specialized Knowledge, Health Care, Industry

Hands-on Guide to Understanding and Testing Internal Control • 174

7/9/2010-7/9/2010 • OSCPA Offices, OKC

With the issuance of the AICPA risk assessment SASs, auditors have no choice but to better understand internal controls in order to assess the design of controls and determine if they have been implemented. Learn the tips, tools and techniques to efficiently document your understanding of the clients' controls and to determine where it is either necessary or more efficient to test them. Discover how to test internal controls efficiently at the financial statement and assertion level.

Designed For: * CPAs in public practice who audit non-public companies; and * CPAs in industry who utilize internal controls.
Objectives: * Understand the five COSO elements of internal control; * Explore the difference between understanding and testing internal controls; * Document the understanding of internal controls at the appropriate level; * Test and document the results of tests of internal controls; and * Issue a SAS 115 report.
Highlights: * Introduction to the risk assessment audit approach; * COSO Framework; * Internal control over financial reporting; * Monitoring; * Understanding the design of controls at the entity level and at the activity level with an emphasis on manual control activities; * Determining whether controls have been implemented; * Effective and efficient tests of controls; * Multi-purpose tests; * Documentation techniques; * Use of service auditor reports; * SAS 115 reporting requirements; and * Sample SAS 115 and management letter comments and recommendations.
Prerequisite: None
Advanced Preparation:
Note:

Level: Intermediate
Recommended CPE credit: 8
Vendor: Loscalzo Associates
Instructor: Marci Thomas

Early Bird Rates:
Good through: 6/18/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 6/19/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Accounting and Auditing, Audit, Industry

GAAP Refresher • 176

7/12/2010-7/12/2010 • OSU-Tulsa, Tulsa

Get your arms around complex GAAP rules that result in financial statement restatements. Examine clear, concise, realistic examples of financial instruments, deferred taxes and uncertain tax positions, stock options, impairments and other troublesome issues.

Designed For: * CPAs in preparing financial statements.
Objectives: * Explain the accounting and disclosure requirements of specific recent pronouncements; and * Gain practical knowledge and proficiency in applying troublesome pronouncements.
Highlights: * FASB Codification; * Troublesome areas in accounting for income taxes, including uncertain tax positions; * Financial instruments and fair value; * Impairments, goodwill and intangibles, guarantees and liability recognition; * Economic downturn issues; * Frequent errors in the statement of cash flows; and * Problems in accounting for leases.
Prerequisite: Familiarity with GAAP.
Advanced Preparation:
Note: Recommended for Yellow Book credit.

Level: Basic
Recommended CPE credit: 8
Vendor: Loscalzo Associates
Instructor: Rebecca Lee

Early Bird Rates:
Good through: 6/21/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 6/22/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Accounting and Auditing, Accounting

Governmental Accounting and Auditing Update • 178

7/21/2010-7/21/2010 • East Central University, Ada

Satellite Broadcast: Stay updated on the latest GAA issues as you hear details about single audit issues, including implementation issues relating to SAS 117 on compliance audits, the American Recovery and Reinvestment Act, and more. Find out about how GAO's proposed changes to the Yellow Book and the clarity standards will affect your engagements. More details will be posted six weeks prior to course date.

Designed For: * CPAs in public practice.
Objectives:
Highlights: * The latest issues facing governments and their auditors as they implement new or recently effective GASB standards; * Crucial implementation issues; * Recent governmental accounting and auditing developments; * Single audit issues; * Yellow Book revisions; and * Upcoming audit issues.
Prerequisite: None
Advanced Preparation:
Note:

Level: Intermediate
Recommended CPE credit: 8
Vendor: ACPEN
Instructor: Group

Early Bird Rates:
Good through: 6/30/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $163
AICPA Member Only: $
Nonmember: $263

Standard Rates:
Effective: 7/1/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $188
AICPA Member Only: $
Nonmember: $288

Fields of Interest: GAA, Accounting and Auditing

Governmental Accounting and Auditing Update • 180

7/21/2010-7/21/2010 • Autry Technology Center, Enid

Satellite Broadcast: Stay updated on the latest GAA issues as you hear details about single audit issues, including implementation issues relating to SAS 117 on compliance audits, the American Recovery and Reinvestment Act, and more. Find out about how GAO's proposed changes to the Yellow Book and the clarity standards will affect your engagements. More details will be posted six weeks prior to course date.

Designed For: * CPAs in public practice.
Objectives:
Highlights: * The latest issues facing governments and their auditors as they implement new or recently effective GASB standards; * Crucial implementation issues; * Recent governmental accounting and auditing developments; * Single audit issues; * Yellow Book revisions; and * Upcoming audit issues.
Prerequisite: None
Advanced Preparation:
Note:

Level: Intermediate
Recommended CPE credit: 8
Vendor: ACPEN
Instructor: Group

Early Bird Rates:
Good through: 6/30/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $163
AICPA Member Only: $
Nonmember: $263

Standard Rates:
Effective: 7/1/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $188
AICPA Member Only: $
Nonmember: $288

Fields of Interest: GAA, Accounting and Auditing

Governmental Accounting and Auditing Update • 182

7/21/2010-7/21/2010 • Moore-Norman Technology Center, Norman

Satellite Broadcast: Stay updated on the latest GAA issues as you hear details about single audit issues, including implementation issues relating to SAS 117 on compliance audits, the American Recovery and Reinvestment Act, and more. Find out about how GAO's proposed changes to the Yellow Book and the clarity standards will affect your engagements. More details will be posted six weeks prior to course date.

Designed For: * CPAs in public practice.
Objectives:
Highlights: * The latest issues facing governments and their auditors as they implement new or recently effective GASB standards; * Crucial implementation issues; * Recent governmental accounting and auditing developments; * Single audit issues; * Yellow Book revisions; and * Upcoming audit issues.
Prerequisite: None
Advanced Preparation:
Note:

Level: Intermediate
Recommended CPE credit: 8
Vendor: ACPEN
Instructor: Group

Early Bird Rates:
Good through: 6/30/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $163
AICPA Member Only: $
Nonmember: $263

Standard Rates:
Effective: 7/1/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $188
AICPA Member Only: $
Nonmember: $288

Fields of Interest: GAA, Accounting and Auditing

Governmental Accounting and Auditing Update • 184

7/21/2010-7/21/2010 • Ardmore Conv. Center, Ardmore

Satellite Broadcast: Stay updated on the latest GAA issues as you hear details about single audit issues, including implementation issues relating to SAS 117 on compliance audits, the American Recovery and Reinvestment Act, and more. Find out about how GAO's proposed changes to the Yellow Book and the clarity standards will affect your engagements. More details will be posted six weeks prior to course date.

Designed For: * CPAs in public practice.
Objectives:
Highlights: * The latest issues facing governments and their auditors as they implement new or recently effective GASB standards; * Crucial implementation issues; * Recent governmental accounting and auditing developments; * Single audit issues; * Yellow Book revisions; and * Upcoming audit issues.
Prerequisite: None
Advanced Preparation:
Note:

Level: Intermediate
Recommended CPE credit: 8
Vendor: ACPEN
Instructor: Group

Early Bird Rates:
Good through: 6/30/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $163
AICPA Member Only: $
Nonmember: $263

Standard Rates:
Effective: 7/1/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $188
AICPA Member Only: $
Nonmember: $288

Fields of Interest: GAA, Accounting and Auditing

Governmental Accounting and Auditing Update • 186

7/21/2010-7/21/2010 • OSU-Tulsa, Tulsa

Satellite Broadcast: Stay updated on the latest GAA issues as you hear details about single audit issues, including implementation issues relating to SAS 117 on compliance audits, the American Recovery and Reinvestment Act, and more. Find out about how GAO's proposed changes to the Yellow Book and the clarity standards will affect your engagements. More details will be posted six weeks prior to course date.

Designed For: * CPAs in public practice.
Objectives:
Highlights: * The latest issues facing governments and their auditors as they implement new or recently effective GASB standards; * Crucial implementation issues; * Recent governmental accounting and auditing developments; * Single audit issues; * Yellow Book revisions; and * Upcoming audit issues.
Prerequisite: None
Advanced Preparation:
Note:

Level: Intermediate
Recommended CPE credit: 8
Vendor: ACPEN
Instructor: Group

Early Bird Rates:
Good through: 6/30/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $163
AICPA Member Only: $
Nonmember: $263

Standard Rates:
Effective: 7/1/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $188
AICPA Member Only: $
Nonmember: $288

Fields of Interest: GAA, Accounting and Auditing

Forensic Accounting: Fraudulent Reporting and Concealed Assets • 188

7/26/2010-7/26/2010 • OSU-Tulsa, Tulsa

Super-charge your forensic accounting techniques with this course. Detect fraudulent financial reporting and redesign internal controls to prevent misappropriation of assets. Sharpen your forensic skills through the use of analytical tools, learn to follow cash flows and uncover accounting schemes.

Designed For: * CPAs in industry responsible for designing control systems, forensic accounting and investigative activities; and * CPAs who testify as expert witnesses.
Objectives: * Recognize schemes and scams; * Detect fraud through the use of analytical tools and other techniques; * Develop approaches to detect under- or over-valued assets; * Find hidden assets and overstated damage claims; and * Prepare for the deposition phase and the witness stand.
Highlights: * Identifying inconsistent or unusual items or practices; * Financing arrangements; * Fictitious sales, receivables and fixed assets; * Related party transactions; * Conflicts of interest; * Sham transactions; * Premature revenue recognition; * Cost and expense shifting; * Common fraud scams, including Ponzi, asset flips, lapping, kiting, short shipments, ghosts, intellectual property theft and computer crime; * Analytical techniques; * Internal control examination; * Investigative techniques; * Preparing for the deposition and witness stand; and * Developing the written report.
Prerequisite: Experience in accounting and reporting
Advanced Preparation:
Note: Accepted for CMA and CFM credit.

Level: Intermediate
Recommended CPE credit: 8
Vendor: AICPA
Instructor: John Nugent

Early Bird Rates:
Good through: 7/5/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 7/6/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Accounting and Auditing, Fraud, Audit, Litigation Support

Internal Controls and IT: Reliable Reporting and Fraud Prevention • 190

7/27/2010-7/27/2010 • OSU-Tulsa, Tulsa

Recent headlines describing massive frauds have focused attention on internal controls. Most auditors are comfortable with documenting and performing walkthroughs of the accounting systems' manual processes, but few feel equally comfortable regarding the IT portion of the system. Get an overview of the key auditing standards, IT infrastructures and auditing issues you are likely to face on audits of small- to medium-sized private company computer systems.

Designed For: * CPAs in public practice who audit non-public companies.
Objectives: * Review applicable IT related auditing standards, COSO internal control concepts and IT frameworks such as CoBIT; and * Identify the steps in addressing control evaluation and audit issues arising from IT environments.
Highlights: * Financial reporting and fraud controls in small and mid-sized IT systems involving end-user computing, miniframes, LANs, data base management systems (DBMS) and/or telecommunications; * Basic understanding of business-to-business e-commerce, including preventing fraud; * How to audit in the electronic environment – what is evidence, testing IT controls and documentation issues; and * Emerging fraud and IT topics, including risks of outsourcing, wireless technology and assurance services.
Prerequisite: Prior auditing experience and familiarity with COSO
Advanced Preparation:
Note: Accepted for CMA and CFM credit.

Level: Intermediate
Recommended CPE credit: 8
Vendor: AICPA
Instructor: John Nugent

Early Bird Rates:
Good through: 7/6/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 7/7/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Accounting and Auditing, Fraud

Cost Allocation in Nonprofits: Who Gets It? • 194

8/16/2010-8/16/2010 • OSU-Tulsa, Tulsa

Learn proper cost allocation in the nonprofit environment, including issues related to GAAP reporting, IRS reporting and federal reporting. Address these problems and their impact on donors, the IRS and outside funding sources as you properly share costs within the nonprofit.

Designed For: * Financial managers responsible for accounting and reporting of nonprofit entities; and * CPAs in public practice who perform nonprofit engagements.
Objectives: * Apply the concepts of cost allocation to functional expense reporting; * Handle the challenges posed by SOP 98-2 relating to cost allocation for activities that include fundraising components; and * Understand key IRS and OMB guidance relating to cost allocation.
Highlights: * What requirements exist and who's setting them; * Key cost accounting concepts affecting nonprofits; * Cost allocation techniques used by nonprofits; * The relationship between cost allocation and functional expense reporting; * Cost allocation for activities that include fundraising; * Cost allocation for IRS reporting; and * Key OMB requirements relating to cost allocation.
Prerequisite: Experience with nonprofit organizations
Advanced Preparation:
Note: Accepted for Yellow Book, CMA and CFM credit.

Level: Intermediate
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Larry Perry

Early Bird Rates:
Good through: 7/26/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 7/27/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Not-for-Profit

Excel Budgeting and Forecasting Techniques • 192

8/16/2010-8/16/2010 • OSCPA Offices, OKC

Recent research reveals that nearly 75 percent of North American companies use Excel as their primary budgeting and forecasting tool. Develop the skills necessary to prepare budgets and forecasts more efficiently and with greater accuracy. It provides real-world examples developed by accountants for accountants in collaboration and workbook security, integrating and manipulating data from external sources, consolidating budgetary data, summarizing and analyzing data with PivotTables, forecasting revenues and expenses using linear regression. Participants will have access to sample data files.

Designed For: * CPAs in public practice who use Excel; and * CPAs in industry who use Excel.
Objectives: * Save time and improve accuracy when preparing Excel budgets and forecasts; * Integrate Excel with the G/L; and * Manage budgets effectively with Excel.
Highlights: * Using password encryption or Information Rights Management; * Tracking changes in shared workbooks and merging data from multiple workbooks; * Importing or working with data stored in external databases such as the General Ledger using ODBC; * Advanced techniques, such as Text to Columns, Paste Special and Go-To Special; * Advanced data analysis with data tables, subtotals, filters, PivotTables and PivotCharts; * Formulas to round-off in totals and other useful tasks; * Advanced techniques, such as linear regression or moving averages in forecasting revenues and expenses; * Maximize the value of scarce production resources using Solver; * Make allocations and adjustments for business seasonality; * Manage multiple sets of budget assumptions using Scenario Manager; and * Much more.
Prerequisite: Basic understanding of Excel
Advanced Preparation:
Note: This seminar is a group-live demo and discussion using color computer projection. It is not a hands-on course.

Level: Intermediate
Recommended CPE credit: 8
Vendor: K2 Enterprises
Instructor: Mac McClelland

Early Bird Rates:
Good through: 7/26/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $238
AICPA Member Only: $
Nonmember: $338

Standard Rates:
Effective: 7/27/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $263
AICPA Member Only: $
Nonmember: $363

Fields of Interest: Management, Information Technology, Practice Management, Industry

Right the First Time: Cases in Not-For-Profit Accounting and Auditing • 198

8/17/2010-8/17/2010 • OSU-Tulsa, Tulsa

Accountants and auditors are expected to get it right the first time, especially in the not-for-profit environment where effective stewardship and public accountability are paramount. Utilizing a case study format, this course will ensure your not-for-profit accounting and auditing skills are both current and correct.

Designed For: * CPAs in public practice who have not-for-profit clients; and * CPAs who audit not-for-profits organizations.
Objectives: * Improve your understanding and application of key not-for-profit accounting and reporting requirements; and * Advance your auditing skills through increased knowledge of critical not-for-profit accounting and reporting issues.
Highlights: * Irrevocable and revocable promises; * Accounting for capital campaigns and special events; * Allocation of costs relating to fundraising; * Distinguishing between unrestricted, temporarily restricted and permanently restricted net assets; * Determining whether grants are contributions or exchange transactions; and * Assessing internal control deficiencies.
Prerequisite: Experience in the not-for-profit environment
Advanced Preparation:
Note: Accepted for Yellow Book credit. This is a new seminar from the AICPA.

Level: Intermediate
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Larry Perry

Early Bird Rates:
Good through: 7/27/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 7/28/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Nonprofit

QuickBooks Advanced Features, Tools and Techniques • 196

8/17/2010-8/17/2010 • OSCPA Offices, OKC

Learn how to deal with the more difficult issues that advanced QuickBooks users often face. Discover advanced techniques and features as well as useful workarounds for common problems. In addition, troubleshoot your QuickBooks performance to ensure that your installation is operating at peak performance.

Designed For: * CPAs in public practice who have clients using QuickBooks.
Objectives: * Resolve the more difficult accounting issues; * Use advanced QuickBooks features; and * Improve the quality of QuickBooks financial reports.
Highlights: * Using the Accountants Copy function, Remote Access and other tools for exchanging QuickBooks data with others; * Importing and exporting data and transactions (including ODBC); * Creating customized financial statements with QuickBooks Financial Statement Designer; * Using QuickBooks time and expense billing feature; * Working with advanced payroll issues including accruing workers compensation liabilities; * Understanding advanced job costing issues, including advanced job cost reporting; * Customizing forms; * Linking QuickBooks data to tax preparation; and * Solving advanced inventory issues such as fully-landed costing in QuickBooks.
Prerequisite: Experience with QuickBooks
Advanced Preparation:
Note: This seminar is a group-live demo and discussion using color computer projection. It is not a hands-on course.

Level: Advanced
Recommended CPE credit: 8
Vendor: K2 Enterprises
Instructor: Mac McClelland

Early Bird Rates:
Good through: 7/27/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $238
AICPA Member Only: $
Nonmember: $338

Standard Rates:
Effective: 7/28/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $263
AICPA Member Only: $
Nonmember: $363

Fields of Interest: Information Technology, Specialized Knowledge

Auditing Nonprofits: Tips and Traps • 202

8/18/2010-8/18/2010 • OSU-Tulsa, Tulsa

Nonprofits have inherent differences in structure, operation and reporting than for-profits. Auditors frequently encounter a variety of clients with limited resources, quirky terminology and unusual reporting. Tackle these challenges in the most effective and efficient manner as you gain practical tips on avoiding possible traps.

Designed For: * CPAs in public practice who audit nonprofit organizations; and * CPAs and financial managers of nonprofit organizations.
Objectives: * Recognize key issues that make nonprofit clients different from other entities and adjust the audit for them; * Avoid common traps encountered in nonprofit auditing; and * Apply proven tools and techniques used in nonprofit auditing.
Highlights: * Key dynamics of the nonprofit industry; * Tools to better understand your client; * Helpful audit procedures and time savers; * Significant issues that can arise in nonprofit auditing; and * Auditing revenues and expenses.
Prerequisite: General audit experience and knowledge of nonprofit accounting
Advanced Preparation:
Note: Accepted for Yellow Book, CMA and CFM credit.

Level: Intermediate
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Larry Perry

Early Bird Rates:
Good through: 7/28/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 7/29/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Not-for-Profit, Audit

PDF Documents: What CPAs Need to Know • 200

8/18/2010-8/18/2010 • OSCPA Offices, OKC

Understanding how to use PDFs effectively is rapidly becoming a necessary business skill, especially as more and more organizations migrate to paperless environments. Learn how to create and modify PDF documents.

Designed For: * CPAs in public practice; and * CPAs in industry.
Objectives: * Create and work with digital documents more effectively; * Understand PDF security and how to sign and secure digital documents; * Use secure PDF envelopes to transmit client, customer or vendor information; and * Learn how easy-to-create PDF forms can enhance staff productivity.
Highlights: * Available software tools for creating, modifying and using PDFs; * Using the Adobe print driver and the PDF Maker add-in for Office; * Creating PDFs by scanning documents; * Activating OCR during scanning or after the fact; * Split PDFs; * Headers and footers, watermarks and Bates numbers; * Comment and mark up with stamps, sticky notes, call-outs, the typewriter and highlighter; * Sending PDFs for review; * Collecting comments from all reviewers in a single document; * Creating a PDF summary of comments; * Archival storage and retrieval of PDFs; * Password protection and certificate encryption; and * Much more.
Prerequisite: None
Advanced Preparation:
Note: This seminar is a group-live demo and discussion using color computer projection. It is not a hands-on course.

Level: Intermediate
Recommended CPE credit: 8
Vendor: K2 Enterprises
Instructor: Mac McClelland

Early Bird Rates:
Good through: 7/28/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $238
AICPA Member Only: $
Nonmember: $338

Standard Rates:
Effective: 7/29/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $263
AICPA Member Only: $
Nonmember: $363

Fields of Interest: Information Technology, Specialized Knowledge, Industry, Practice Management

Mergers, Acquisitions and Sales of Closely Held Businesses: Advanced Case Analysis • 204

8/19/2010-8/19/2010 • OSU-Tulsa, Tulsa

This course offers key insights into the transaction marketplace. Business transactions are marquee events in the history of most closely held businesses. They demand inordinate attention to detail and process. Many skill sets are involved in this process and topics such as negotiations, business valuations, strategic thinking, finance, family businesses, accounting, taxes and group dynamics are covered. Follow real-life cases to gain strategic insights into the transaction marketplace.

Designed For: * CPAs who advise closely held businesses; and * CPAs in industry.
Objectives: * Understand transaction strategy and structure; * Apply an effective process to establish transaction price; * Master the common elements in negotiated transactions; * Get better results through comparing asset and stock transactions; and * Save a business for its employees or for the family.
Highlights: * Case analysis of deal structure, tax strategy and the why of transactions; * Transaction valuation fundamentals – determining price, transaction price versus fair market value, valuation techniques; * Dealmaking – the fluid nature of the deal environment, price versus terms, financial considerations; * Sale or purchase of assets or stock – C Corporation applications, S Corporation applications, allocation of purchase price, tax attributes; * Specialty transactions – industry rollups, who are the players, attributes of rollup candidates, historical perspective on pitfalls and lessons learned ESOPs as the most tax-efficient transaction for closely held businesses; * Keeping the business in the family – methods for passing wealth to the next generation; and * Tax preference reorganizations useful to a wider range of businesses with proper application.
Prerequisite: Experience in business taxation, mergers and acquisitions
Advanced Preparation:
Note: Accepted for CFP®, CMA, CFM and EA credit.

Level: Advanced
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Edgar Gee

Early Bird Rates:
Good through: 7/29/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 7/30/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Consulting Services, Tax, Business Valuations

Choice of Entity – Key Issues: S Corp, C Corp, Partnership, LLC and Sole Proprietorship • 206

8/20/2010-8/20/2010 • OSU-Tulsa, Tulsa

Choice of entity issues are relevant throughout the life of a business. This course targets the ever increasing tax advantages and disadvantages of general and limited partnerships, C and S Corporations, LLCs and LLPs, as well as individual proprietorships. Discover the key issues surrounding the myriad of factors that drive the optimal form of organization for a business.

Designed For: * CPAs in public practice who have business clients.
Objectives: * Make the best decision when forming a tax entity; * Know precisely when an entity change is needed to achieve business or tax advantages; * Avoid getting snared by the complex tax law provisions on the selection, organization, restructuring and liquidation of business forms; and * Match business and tax strategies to the appropriate business form.
Highlights: * Advantages and pitfalls of placing assets likely to appreciate into specific entity forms; * Retirement and fringe benefit opportunities; * Using multiple forms to accomplish business goals while protecting specific assets; * Introduction to business succession planning; * Protecting assets from creditors or family breakups and adding protection to UTMA accounts for minor children; * Controlled-entity sales to reduce the risk of dealer status for future real property development; * Selecting the right entity to avoid gain when assets are transferred with liabilities in excess of tax basis; * Advantages and disadvantages of asset versus ownership interest (stock) sales; * Which entity form can be used to elect to treat a stock purchase as an asset purchase; * Using an entity to allocate income and loss disproportionately to ownership capital; * Using an entity to allow an owner to receive a tax-free distribution of property; and * Techniques to consider in structuring a merger or sale of a disregarded entity.
Prerequisite: Experience in business taxation
Note: Accepted for CFP®, CMA, CFM and EA credit.

Level: Intermediate
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Edgar Gee

Early Bird Rates:
Good through: 7/30/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 7/31/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Tax

Auditor/Accountant Communications: SASs 112 and 115 and Other Critical Requirements • 208

8/23/2010-8/23/2010 • OSCPA Offices, OKC

With the recent release of SAS Nos. 112, 114 and 115, expectations have increased for auditors to openly communicate significant findings and issues related to the audit. This course will help you understand how to implement these standards. It also includes an overview of engagement and management representation letters, confirmations, auditor/accountant reports and other types of communications.

Designed For: * CPAs in public practice who provide audit services; * CPAs in industry who perform internal audits.
Objectives: * Understand and implement the requirements of SAS Nos. 112, 114 and 115; and * Review and understand other selected forms of auditor/accountant communications including engagement and management representation letters, confirmations and auditor/accountant reports and other types of communications.
Highlights: * Guidance on communicating matters related to an entity's internal control over financial reporting identified in an audit of financial statements under SAS Nos. 112 and 115; and * Guidance on matters to be communicated to those charged with governance under SAS No. 114.
Prerequisite: Experience with accounting processes, internal control and auditing standards
Advanced Preparation:
Note: Accepted for CMA and CFM credit.

Level: Intermediate
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Kurt Oestriecher

Early Bird Rates:
Good through: 8/2/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 8/3/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Accounting and Auditing, Internal Control, Audit

Troubled Times: Current Economic Crisis – Critical Accounting and Auditing Considerations • 210

8/23/2010-8/23/2010 • OSU-Tulsa, Tulsa

The current economic environment – unmatched since the Depression – is significantly impacting businesses of all sizes across the country. Understand the economic crisis and appropriately respond to your clients' and colleagues' concerns. Identify and react to the areas of increased audit risk that have developed along with the crisis. Extensively referenced, this course will direct you to the most up-to-date resources available to keep you on the cutting edge.

Designed For: * CPAs in public practice who provide auditing services.
Objectives: * Recognize the underlying causes of the current economic crisis and governmental responses; * Identify and respond to the increased audit and accounting risks that have emerged; * Focus on the likely increase in fraud and what you can do to reduce the possibility that you or a client will become a victim; * Obtain suggestions you can use, elaborate and pass on to your clients.
Highlights: * The causes and implications of the economic meltdown; * Fair value measurement; * Other-than-temporary impairments and other accounting issues; * PCAOB and ASB guidance; * Going concern issues fraud risk management; and * What to do to help your clients.
Prerequisite: Experience in accounting and auditing
Advanced Preparation:
Note: Accepted for CMA and CFM credit.

Level: Update
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Larry Perry

Early Bird Rates:
Good through: 8/2/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 8/3/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Accounting and Auditing, Audit, Fraud

Applying the Risk Assessment Standards Using a Case Study Approach • 212

8/24/2010-8/24/2010 • OSCPA Offices, OKC

Although auditors of non-public entities have been working with the risk assessment standards (SAS Nos. 104 through 111) for a couple of years now, they are still struggling with implementation standards. Focus on audits of entities with limited personnel and accounting resources, non-complex operations and financing structures and a governing body made up of an owner/manager or majority owner. This course presents examples and case studies demonstrating how the risk assessment standards may be practically implemented and documented.

Designed For: * CPAs in public practice who audit non-public companies.
Objectives: * Demonstrate compliance with the risk assessment standards effectively and efficiently; * Scale documentation to the smaller entity; * Establish a documentation foundation which may be expanded to larger entities; * Focus the audit effort; and * Better control audit hours.
Highlights: * Documenting nature of the entity and entity level controls; * Routine processes; * Financial statement closing process; * Risks that link to the audit response; and * Documenting required communications.
Prerequisite: Knowledge of the risk assessment standards
Advanced Preparation:
Note:

Level: Intermediate
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Kurt Oestriecher

Early Bird Rates:
Good through: 8/3/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 8/4/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Accounting and Auditing, Audit

Guide to Reporting and Disclosure Problems for Private Companies • 214

8/24/2010-8/24/2010 • OSU-Tulsa, Tulsa

Prepare yourself for accounting requirements in areas typically encountered by small businesses. Distinguish among error corrections, accounting changes and changes in estimates. Learn to evaluate related-party transactions, deal with going-concern issues and prepare proper and professional disclosures.

Designed For: * CPAs in public practice who have small business clients; and * CPAs in industry who work for small businesses.
Objectives: * Apply generally accepted accounting principles to specific problem areas in compilation, review or audit engagements; * Prepare appropriate footnote disclosures; and * Use OCBOA when appropriate.
Highlights: * Risks and uncertainties; * Commitments and contingencies; * Reporting cash flow information; * Related-party transactions; * Accounting for income taxes; * Reporting results of operations; * Going-concern problems; and * Other comprehensive basis of accounting.
Prerequisite: None
Advanced Preparation:
Note: Accepted for CMA and CFM credit.

Level: Basic
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Larry Perry

Early Bird Rates:
Good through: 8/3/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 8/4/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Accounting and Auditing, Accounting

Compilation and Review Update • 216

8/25/2010-8/25/2010 • East Central University, Ada

Satellite Broadcast: Learn the latest guidance on the performance of compilation and review engagements. Current practice issues and the more advanced compilation and review topics will be presented. In addition, you will receive information that will help reduce your liability risk, as well as help ensure that you comply with peer review requirements. More details will be posted six weeks prior to course date.

Designed For: * CPAs in public practice who provide compilation and review services.
Objectives:
Highlights: * Engagement administration and quality control issues such as determining whether SSARS No. 1 applies; * Engagement letters; * Independence issues; * Compilation and review performance and reporting requirements; * Financial statement preparation; and * Newly issued SSARS, SSARS Interpretations and other accounting guidance.
Prerequisite: None
Advanced Preparation:
Note:

Level: Update
Recommended CPE credit: 8
Vendor: ACPEN
Instructor: Group

Early Bird Rates:
Good through: 8/4/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $163
AICPA Member Only: $
Nonmember: $263

Standard Rates:
Effective: 8/5/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $188
AICPA Member Only: $
Nonmember: $288

Fields of Interest: Accounting & Auditing, Compilation & Review

Compilation and Review Update • 218

8/25/2010-8/25/2010 • Autry Technology Center, Enid

Satellite Broadcast: Learn the latest guidance on the performance of compilation and review engagements. Current practice issues and the more advanced compilation and review topics will be presented. In addition, you will receive information that will help reduce your liability risk, as well as help ensure that you comply with peer review requirements. More details will be posted six weeks prior to course date.

Designed For: * CPAs in public practice who provide compilation and review services.
Objectives:
Highlights: * Engagement administration and quality control issues such as determining whether SSARS No. 1 applies; * Engagement letters; * Independence issues; * Compilation and review performance and reporting requirements; * Financial statement preparation; and * Newly issued SSARS, SSARS Interpretations and other accounting guidance.
Prerequisite: None
Advanced Preparation:
Note:

Level: Update
Recommended CPE credit: 8
Vendor: ACPEN
Instructor: Group

Early Bird Rates:
Good through: 8/4/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $163
AICPA Member Only: $
Nonmember: $263

Standard Rates:
Effective: 8/5/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $188
AICPA Member Only: $
Nonmember: $288

Fields of Interest: Accounting & Auditing, Compilation & Review

Compilation and Review Update • 220

8/25/2010-8/25/2010 • Moore-Norman Technology Center, Norman

Satellite Broadcast: Learn the latest guidance on the performance of compilation and review engagements. Current practice issues and the more advanced compilation and review topics will be presented. In addition, you will receive information that will help reduce your liability risk, as well as help ensure that you comply with peer review requirements. More details will be posted six weeks prior to course date.

Designed For: * CPAs in public practice who provide compilation and review services.
Objectives:
Highlights: * Engagement administration and quality control issues such as determining whether SSARS No. 1 applies; * Engagement letters; * Independence issues; * Compilation and review performance and reporting requirements; * Financial statement preparation; and * Newly issued SSARS, SSARS Interpretations and other accounting guidance.
Prerequisite: None
Advanced Preparation:
Note:

Level: Update
Recommended CPE credit: 8
Vendor: ACPEN
Instructor: Group

Early Bird Rates:
Good through: 8/4/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $163
AICPA Member Only: $
Nonmember: $263

Standard Rates:
Effective: 8/5/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $188
AICPA Member Only: $
Nonmember: $288

Fields of Interest: Accounting & Auditing, Compilation & Review

Compilation and Review Update • 222

8/25/2010-8/25/2010 • Ardmore Conv. Center, Ardmore

Satellite Broadcast: Learn the latest guidance on the performance of compilation and review engagements. Current practice issues and the more advanced compilation and review topics will be presented. In addition, you will receive information that will help reduce your liability risk, as well as help ensure that you comply with peer review requirements. More details will be posted six weeks prior to course date.

Designed For: * CPAs in public practice who provide compilation and review services.
Objectives:
Highlights: * Engagement administration and quality control issues such as determining whether SSARS No. 1 applies; * Engagement letters; * Independence issues; * Compilation and review performance and reporting requirements; * Financial statement preparation; and * Newly issued SSARS, SSARS Interpretations and other accounting guidance.
Prerequisite: None
Advanced Preparation:
Note:

Level: Update
Recommended CPE credit: 8
Vendor: ACPEN
Instructor: Group

Early Bird Rates:
Good through: 8/4/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $163
AICPA Member Only: $
Nonmember: $263

Standard Rates:
Effective: 8/5/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $188
AICPA Member Only: $
Nonmember: $288

Fields of Interest: Accounting & Auditing, Compilation & Review

Compilation and Review Update • 224

8/25/2010-8/25/2010 • OSU-Tulsa, Tulsa

Satellite Broadcast: Learn the latest guidance on the performance of compilation and review engagements. Current practice issues and the more advanced compilation and review topics will be presented. In addition, you will receive information that will help reduce your liability risk, as well as help ensure that you comply with peer review requirements. More details will be posted six weeks prior to course date.

Designed For: * CPAs in public practice who provide compilation and review services.
Objectives:
Highlights: * Engagement administration and quality control issues such as determining whether SSARS No. 1 applies; * Engagement letters; * Independence issues; * Compilation and review performance and reporting requirements; * Financial statement preparation; and * Newly issued SSARS, SSARS Interpretations and other accounting guidance.
Prerequisite: None
Advanced Preparation:
Note:

Level: Update
Recommended CPE credit: 8
Vendor: ACPEN
Instructor: Group

Early Bird Rates:
Good through: 8/4/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $163
AICPA Member Only: $
Nonmember: $263

Standard Rates:
Effective: 8/5/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $188
AICPA Member Only: $
Nonmember: $288

Fields of Interest: Accounting & Auditing, Compilation & Review

Summer CPE • 2573

8/26/2010-8/26/2010 • Hard Rock Hotel & Casino, Tulsa

Designed For:
Objectives:
Highlights:
Prerequisite:
Advanced Preparation:
Note:

Level:
Recommended CPE credit: 8
Vendor: OSCPA
Instructor:

Early Bird Rates:
Good through: 8/5/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $91
AICPA Member Only: $
Nonmember: $141

Standard Rates:
Effective: 8/6/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $116
AICPA Member Only: $
Nonmember: $166

Fields of Interest:

Summer CPE • 2570

8/27/2010-8/27/2010 • Clarion Meridian Conv. Ctr., OKC

Designed For:
Objectives:
Highlights:
Prerequisite:
Advanced Preparation:
Note:

Level:
Recommended CPE credit: 8
Vendor: OSCPA
Instructor:

Early Bird Rates:
Good through: 8/6/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $91
AICPA Member Only: $
Nonmember: $141

Standard Rates:
Effective: 8/7/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $116
AICPA Member Only: $
Nonmember: $166

Fields of Interest:

Handbook for Mastering Basis, Distributions and Loss Limitation Issues for S Corporations, LLCs and Partnerships • 226

8/30/2010-8/30/2010 • OSCPA Offices, OKC

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

Designed For: * CPAs in public practice who have S corp clients.
Objectives:
Highlights: * Applicable coverage of the 2009 Tax Act and any new legislation enacted before the presentation; * Final IRS regulations regarding Open Debt of S Corporations; * The effect of stock basis and debt basis and IRS' recent focus on at-risk basis for shareholders; * How AAA applies or does not apply to certain S corporations; * Complex ordering rules and special elections that can have a big tax result; * K-1s and how to determine basis; * In-depth discussion of loss limitation rules; * Distributions of cash and property and post-termination transition rules; and * How the passive loss rules can create other problems LLCs and partnerships.
Prerequisite: None
Advanced Preparation:
Note: Worksheets are included.

Level: Intermediate
Recommended CPE credit: 8
Vendor: Surgent McCoy CPE, LLC
Instructor: Susan Smith

Early Bird Rates:
Good through: 8/9/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 8/10/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Tax

The Top 50 Mistakes Practitioners Make and How to Fix Them: Individual Tax and Financial Planning • 228

8/31/2010-8/31/2010 • OSCPA Offices, OKC

Every practitioner has a client who wants a different twist on a tax plan or idea. Examine the law in order to analyze the top 50 situations in which a taxpayer has attempted to push one of these plans or ideas.

Designed For: * CPAs in public practice who provide tax services.
Objectives: * Learn the major mistakes that can be made in individual tax and financial planning; and * Develop strategies to provide the best advice to your clients.
Highlights: * Complete coverage of the 2009 Tax Act and any new legislation enacted before presentation; * Chief Council attacks reimbursement plans; * AMT; * The consequences of not filing a TD F 90-22.1 Form; * Can a lottery winner buy a capital gain?; * Stock sold at loss and repurchased in IRA; * When a bad debt is really bad; * Estimated taxes, big penalties and planning; * S shareholder loans; * Knowing what passive income is and is not; * How a casual gambler should report winnings; * Miscues in rollovers and retirement plan distributions; * Early retirement SEPPs; * Taking social security early; * Making a tax-free annuity exchange taxable; and * Much more.
Prerequisite: A minimum of three years of tax experience
Advanced Preparation:
Note:

Level: Intermediate
Recommended CPE credit: 8
Vendor: Surgent McCoy CPE, LLC
Instructor: Susan Smith

Early Bird Rates:
Good through: 8/10/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 8/11/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Tax

Fair Value Accounting: A Critical New Skill for All CPAs • 234

9/16/2010-9/16/2010 • OSU-Tulsa, Tulsa

Fair value accounting is reshaping traditional financial statements. Gain insights into the conceptual and practical reasons for using fair value as measurement attribute for a number of new and existing accounting standards. Cover issues which arise when fair value measurement is implemented under existing FASB standards. The measurement and estimation challenges that confront preparers in making fair value measurements are presented. Related guidance is provided.

Designed For: * CPAs in public practice responsible for financial reporting; and * CPAs in industry responsible for financial reporting.
Objectives: * Understand key terminology in SFAS No. 157; * Apply the fair value hierarchy to appropriate approaches to measurement; * Identify the key aspects of the new fair value option in SFAS No. 159; * Identify and evaluate the impact of the key measurement components as they pertain to management's representations and auditors' responsibilities; and * Apply fair value accounting to certain FASB Statements and Interpretations that require measurements of assets or liabilities at fair value.
Highlights: * Basic concepts behind fair value accounting; * Conceptual guidance from SFAC No. 7 on using cash flow information and present value techniques in the measurement of fair value; * Managing audit costs and concerns; * Business combinations; * Goodwill and intangibles; and * Accounting for the impairment or disposal of long-lived assets.
Prerequisite: Experience with financial accounting and reporting
Advanced Preparation:
Note: Accepted for CMA and CFM credit.

Level: Intermediate
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Thomas Snell

Early Bird Rates:
Good through: 8/26/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 8/27/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Accounting and Auditing, Accounting

Automating Workflow to Improve Control and Profitability (8-11:30 a.m.) • 230

9/16/2010-9/16/2010 • OSCPA Offices, OKC

Is your organization's internal control structure as sound as it should be? Does your company or CPA firms profitability meet or exceed expectations? Are tasks and projects always completed on time? Most likely you are a candidate for automating workflow to improve control and profitability. Many experts agree that automating workflow is one of the best steps organizations of all sizes and in all industries can take to achieve peak operational and financial performance. Learn about the advantages of automating workflow, the processes for doing so, and specific software applications that may be right for you and your organization.

Designed For: * CPAs in industry.
Objectives: * Learning processes for optimizing workflow in any organization; * Recognizing which workflow tools may be suited best for particular applications; and * Identifying opportunities to improve control and profitability with automated workflow.
Highlights: * Concepts of automated workflow; * Flaws in current workflow practices; * Learning about which workflow tools may be appropriate for your business or CPA firm; * Integrating workflow tools with document management applications; and * Using common tools such as Outlook and Adobe to automate workflow.
Prerequisite: None
Advanced Preparation:
Note: This seminar is a group-live demo and discussion using color computer projection. It is not a hands-on course.

Level: Intermediate
Recommended CPE credit: 4
Vendor: K2 Enterprises
Instructor: Brian Tankersley

Early Bird Rates:
Good through: 8/26/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $91
AICPA Member Only: $
Nonmember: $141

Standard Rates:
Effective: 8/27/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $116
AICPA Member Only: $
Nonmember: $166

Fields of Interest: Information Technology, Management, Specialized Knowledge

Excel PivotTables for Accountants – Part I (12:30-4 p.m.) • 232

9/16/2010-9/16/2010 • OSCPA Offices, OKC

PivotTables are the most powerful feature in Excel, yet few accountants use them in their day-to-day activities. For some, PivotTables are too intimidating; for others, PivotTables are a foreign concept. Learn how to use PivotTables to accomplish routine analysis and reporting. This session will begin with basic PivotTables and progress to advanced topics. Participants will have access to sample data files.

Designed For: * CPAs in public practice who use Excel; and * CPAs in industry who use Excel.
Objectives: * Use PivotTables for analyzing and reporting accounting information; * Understand the limitations of PivotTables; and * Take advantage of the advanced features of PivotTables.
Highlights: * Basic and advanced Excel PivotTables; * Using advanced PivotTable options; * Performing calculations within PivotTables; * Customizing fields in a PivotTable; * Formatting a PivotTable report; * Creating PivotTables on multiple ranges; * Automating PivotTables by connecting them to external databases or financial accounting systems; * Understanding the limitations of PivotTables and PivotTable calculations; and * Much more.
Prerequisite: Working knowledge of Excel
Advanced Preparation:
Note: This seminar is a group-live demo and discussion using color computer projection. It is not a hands-on course.

Level: Advanced
Recommended CPE credit: 4
Vendor: K2 Enterprises
Instructor: Brian Tankersley

Early Bird Rates:
Good through: 8/26/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $91
AICPA Member Only: $
Nonmember: $141

Standard Rates:
Effective: 8/27/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $116
AICPA Member Only: $
Nonmember: $166

Fields of Interest: Information Technology, Specialized Knowledge

Accounting for Business Combinations Under New SFAS No. 141(R) • 238

9/17/2010-9/17/2010 • OSU-Tulsa, Tulsa

Accounting for Business Combinations has changed substantially with the issuance of SFAS No. 141(R), Business Combinations. Fully grasp the effects of SFAS No. 141(R) by using various case studies to show you how to implement these new requirements.

Designed For: * CPAs in business and industry responsible for accounting and financial reporting; * CPAs providing business valuation services; and * CPAs in public practice involved in mergers and acquisitions.
Objectives: * Apply the significant provisions of SFAS No. 141(R) and the implications of the standard on the accounting for business combinations.
Highlights: * Overview of the key components of SFAS No. 141(R) and their implications; * Areas impacted by SFAS No. 141(R) on financial reporting and valuation affecting all industries; * how SFAS No. 141(R) broadens the application of fair value measurements; * Acquisition negotiations, deal structures and related costs; * Contingent consideration and its affects; * Balance sheet and income statement impacts; * Earnings forecasts and financial ratios; * Informative and expanded disclosures; and * Content, timing and method of communications to stakeholders.
Prerequisite: A basic understanding of SFAS No.141(R) and related U.S. GAAP
Advanced Preparation:
Note: Accepted for CMA and CFM credit.

Level: Advanced
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Thomas Snell

Early Bird Rates:
Good through: 8/27/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 8/28/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Accounting and Auditing, Accounting

Security for Accountants: New Legal Requirements and Practical Solutions • 236

9/17/2010-9/17/2010 • OSCPA Offices, OKC

Information security is a legal requirement for CPAs. Sarbanes-Oxley, HIPAA and state Security Breach Notification laws can result in criminal charges for CPAs who do not act with due diligence. It is imperative that accountants understand the security risks they face and adopt control procedures to ensure compliance with their legal and fiduciary responsibilities. Identify the security risks CPAs face and get cost-effective solutions, which provide reasonable assurance that you are acting with due diligence.

Designed For: * CPAs in public practice; and * CPAs in industry.
Objectives: * Understand the legal requirements for securing client information; * Secure remote connections, laptops, handheld devices and thumb drives; and * Create, store and use secure passwords.
Highlights: * Specific legal requirements for securing confidential information in your state; * Reducing the risk of e-mail viruses; * Securing laptops, handheld devices and thumb drives; * Creating, storing and using secure passwords; * Using Information Rights Management (IRM) and other techniques to secure documents; * Encrypting hard drives, removable disks, backups and e-mails; * Using portals to securely transmit documents to clients and customers; * Physical security, including biometric devices; * Wired and wireless network security issues; * Using secure, anonymous Web browsing; * Dos and donts of security for the traveler; and * Using VPNs, including SSL VPNs.
Prerequisite: None
Advanced Preparation:
Note: This seminar is a group-live demo and discussion using color computer projection. It is not a hands-on course.

Level: Intermediate
Recommended CPE credit: 8
Vendor: K2 Enterprises
Instructor: Brian Tankersley

Early Bird Rates:
Good through: 8/27/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $238
AICPA Member Only: $
Nonmember: $338

Standard Rates:
Effective: 8/28/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $263
AICPA Member Only: $
Nonmember: $363

Fields of Interest: Information Technology, Specialized Knowledge

Annual Update for Accountants and Auditors • 240

9/20/2010-9/20/2010 • OSCPA Offices, OKC

Keep abreast of the fast-paced changes in accounting and auditing. This comprehensive course covers all the relevant pronouncements, exposure drafts and recently issued consensus reports. Identify and apply recently issued FASB statements, interpretations and technical bulletins. Assess the effect of current auditing standards and standards on accounting and review services from coverage of the latest issues at the AICPA, EITF and FASB.

Designed For: * CPAs in public practice who provide auditing services.
Objectives: * Identify and apply recently issued FASB statements, interpretations and technical bulletins; * Assess the effect of recently issued auditing standards and standards on accounting and review services; * Utilize recently issued statements of position and industry accounting and auditing guides; * Apply Emerging Issues Task Force consensus reports; and * Anticipate forthcoming standards in accounting, auditing, compilation and review services.
Highlights: * Current issues at the AICPA and EITF; * Current FASB topics; * New developments in auditing and compilation and review services; * New SASs, PCAOB and SEC reporting requirements; * Share-based payments; * Attestation engagements; * Assurance services; and * Ethics pronouncements.
Prerequisite: Experience in accounting and auditing
Advanced Preparation:
Note: Accepted for CMA and CFM credit.

Level: Update
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Morris Hollander

Early Bird Rates:
Good through: 8/30/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 8/31/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Accounting and Auditing

Sales and Use Tax: Guide to Doing it Right • 242

9/20/2010-9/20/2010 • OSU-Tulsa, Tulsa

With the recent decline in state revenues and the accompanying increased audit activity by the states, increased opportunities and problems abound for tax practitioners. In addition, changes in technology, growth in multistate activity, increased e-commerce sales and a raised-level of state aggressiveness have made sales and use tax even more complex. Handling these situations incorrectly can result in lost sales and possible penalties.

Designed For: * CPAs in public practice who have business clients.
Objectives: * Understand the latest nexus controversies; * Identify the effect of interstate e-commerce; * Analyze state tax laws affecting specific industries; * Handle sales and use tax issues; and * Conduct sales and use tax assessments.
Highlights: * The latest tax nexus laws and regulations; * Sales tax issues for e-commerce with emphasis on the Streamlined Sales Tax Project Nexus and interstate sales; * Specific rules for retailers, manufacturers and the service industry; * Sales and use tax rules for four hypothetical states; * Sales and use tax assessments; * Exemptions and problem areas of sales and use tax; and * An update on current sales and use tax planning techniques.
Prerequisite: Experience in taxation
Advanced Preparation:
Note: Accepted for CMA and CFM credit.

Level: Intermediate
Recommended CPE credit: 8
Vendor: AICPA
Instructor: William Grooms

Early Bird Rates:
Good through: 8/30/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 8/31/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Tax

Revenue Recognition in Today's Business Climate • 244

9/21/2010-9/21/2010 • OSCPA Offices, OKC

To recognize or not to recognize, that is the question. Revenue recognition issues are often daily headlines. Review the current literature and look at the implications of premature recognition. You will also examine unique revenue recognition issues of specialized industries and current FASB projects which will impact financial statements.

Designed For: * CPAs in public practice with extensive experience; and * CPAs in industry with financial accounting experience.
Objectives: * Understand faulty revenue recognition; * Make appropriate revenue recognition decisions; * Deal with revenue recognition in specialized industries; and * Examine revenue recognition developments of the FASB and the IASB.
Highlights: * Revenue recognition issues overview; * FASB, SEC, ASB and IASB current developments; * Persuasive evidence of an arrangement; * Fixed or determinable sales price; * Income statement presentation and disclosure requirements; and * Industry-specific issues – software, high-technology manufacturing, construction contractors, auto dealerships, lending and depository institutions, health care organizations, insurance and real estate industries.
Prerequisite: Experience in financial accounting and reporting
Advanced Preparation:
Note: Accepted for CMA and CFM credit.

Level: Intermediate
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Morris Hollander

Early Bird Rates:
Good through: 8/31/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 9/1/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Accounting and Auditing, Fraud

Innovative Tax Planning for Small Businesses: Corporations, Partnerships and LLCs • 246

9/21/2010-9/21/2010 • OSU-Tulsa, Tulsa

Keep more profits in the pockets of your corporate and small business clients and their owners. Utilize state-of-the-art planning ideas and tax-saving devices. Understand the unique problems affecting corporations and other small business entities, identify savings opportunities and pinpoint tax traps.

Designed For: * CPAs in public practice who have small business clients.
Objectives: * Solve the unique tax problems affecting small businesses; * Identify savings opportunities and pinpoint tax traps; and * Substantially cut your small business clients' tax bills.
Highlights: * Tax law changes and developments; * Minimizing SE tax for LLC members; * Choice of entity considerations; * When to switch from C corporation to S corporation; * Life cycle approach to tax planning; * Start-up issues; * Planning and tax proofing shareholder-employee compensation; * Business exit strategies that save taxes, including family limited partnerships (FLPs) and family limited liability companies (FLLCs); * Corporate planning moves to make before individual tax rates go up; * Small business retirement plan opportunities; * Corporate tax trends; * Using disregarded entities to defeat unfavorable rules for business expansion expenses; * New 75-percent gain exclusion for qualified small business corporation stock; * Planning for S corporation shareholder-employee health insurance premiums; and * Buy-sell agreements.
Prerequisite: Basic knowledge of corporate income taxation
Advanced Preparation:
Note: Accepted for PFS, CFP®, CMA, CFM and EA credit.

Level: Intermediate
Recommended CPE credit: 8
Vendor: AICPA
Instructor: William Grooms

Early Bird Rates:
Good through: 8/31/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 9/1/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Tax

Representing Clients in the Marriage Dissolution Process: Accounting, Tax, Estate and Financial Planning Issues • 248

9/22/2010-9/22/2010 • East Central University, Ada

Satellite Broadcast: Today, most marriages are likely to end in divorce, which often occurs after a couple has substantial assets. Every marriage dissolution has important accounting and tax implications. Often a small business is involved and careful estate and financial planning efforts can be derailed. This all-new course will share the key issues and strategies for representing clients during this difficult process. More details will be posted six weeks prior to course date.

Designed For: * CPAs in public practice who provide taxation or financial planning services.
Objectives:
Highlights: * Types of marriage dissolution in use today in the United States and their legal implications; * Key aspects of defining the engagement; * Financial considerations in property settlement, including forensic accounting techniques; and * Tax considerations involving temporary support, alimony, child support and more.
Prerequisite: None
Advanced Preparation:
Note:

Level: Update
Recommended CPE credit: 8
Vendor: ACPEN
Instructor: Group

Early Bird Rates:
Good through: 9/1/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $163
AICPA Member Only: $
Nonmember: $263

Standard Rates:
Effective: 9/2/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $188
AICPA Member Only: $
Nonmember: $288

Fields of Interest: Accounting, Tax, Financial Planning, Specialized Knowledge, Business Law

Representing Clients in the Marriage Dissolution Process: Accounting, Tax, Estate and Financial Planning Issues • 250

9/22/2010-9/22/2010 • Autry Technology Center, Enid

Satellite Broadcast: Today, most marriages are likely to end in divorce, which often occurs after a couple has substantial assets. Every marriage dissolution has important accounting and tax implications. Often a small business is involved and careful estate and financial planning efforts can be derailed. This all-new course will share the key issues and strategies for representing clients during this difficult process. More details will be posted six weeks prior to course date.

Designed For: * CPAs in public practice who provide taxation or financial planning services.
Objectives:
Highlights: * Types of marriage dissolution in use today in the United States and their legal implications; * Key aspects of defining the engagement; * Financial considerations in property settlement, including forensic accounting techniques; and * Tax considerations involving temporary support, alimony, child support and more.
Prerequisite: None
Advanced Preparation:
Note:

Level: Update
Recommended CPE credit: 8
Vendor: ACPEN
Instructor: Group

Early Bird Rates:
Good through: 9/1/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $163
AICPA Member Only: $
Nonmember: $263

Standard Rates:
Effective: 9/2/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $188
AICPA Member Only: $
Nonmember: $288

Fields of Interest: Accounting, Tax, Financial Planning, Specialized Knowledge, Business Law

Representing Clients in the Marriage Dissolution Process: Accounting, Tax, Estate and Financial Planning Issues • 252

9/22/2010-9/22/2010 • Moore-Norman Technology Center, Norman

Satellite Broadcast: Today, most marriages are likely to end in divorce, which often occurs after a couple has substantial assets. Every marriage dissolution has important accounting and tax implications. Often a small business is involved and careful estate and financial planning efforts can be derailed. This all-new course will share the key issues and strategies for representing clients during this difficult process. More details will be posted six weeks prior to course date.

Designed For: * CPAs in public practice who provide taxation or financial planning services.
Objectives:
Highlights: * Types of marriage dissolution in use today in the United States and their legal implications; * Key aspects of defining the engagement; * Financial considerations in property settlement, including forensic accounting techniques; and * Tax considerations involving temporary support, alimony, child support and more.
Prerequisite: None
Advanced Preparation:
Note:

Level: Update
Recommended CPE credit: 8
Vendor: ACPEN
Instructor: Group

Early Bird Rates:
Good through: 9/1/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $163
AICPA Member Only: $
Nonmember: $263

Standard Rates:
Effective: 9/2/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $188
AICPA Member Only: $
Nonmember: $288

Fields of Interest: Accounting, Tax, Financial Planning, Specialized Knowledge, Business Law

Representing Clients in the Marriage Dissolution Process: Accounting, Tax, Estate and Financial Planning Issues • 254

9/22/2010-9/22/2010 • Ardmore Conv. Center, Ardmore

Satellite Broadcast: Today, most marriages are likely to end in divorce, which often occurs after a couple has substantial assets. Every marriage dissolution has important accounting and tax implications. Often a small business is involved and careful estate and financial planning efforts can be derailed. This all-new course will share the key issues and strategies for representing clients during this difficult process. More details will be posted six weeks prior to course date.

Designed For: * CPAs in public practice who provide taxation or financial planning services.
Objectives:
Highlights: * Types of marriage dissolution in use today in the United States and their legal implications; * Key aspects of defining the engagement; * Financial considerations in property settlement, including forensic accounting techniques; and * Tax considerations involving temporary support, alimony, child support and more.
Prerequisite: None
Advanced Preparation:
Note:

Level: Update
Recommended CPE credit: 8
Vendor: ACPEN
Instructor: Group

Early Bird Rates:
Good through: 9/1/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $163
AICPA Member Only: $
Nonmember: $263

Standard Rates:
Effective: 9/2/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $188
AICPA Member Only: $
Nonmember: $288

Fields of Interest: Accounting, Tax, Financial Planning, Specialized Knowledge, Business Law

Representing Clients in the Marriage Dissolution Process: Accounting, Tax, Estate and Financial Planning Issues • 256

9/22/2010-9/22/2010 • OSU-Tulsa, Tulsa

Satellite Broadcast: Today, most marriages are likely to end in divorce, which often occurs after a couple has substantial assets. Every marriage dissolution has important accounting and tax implications. Often a small business is involved and careful estate and financial planning efforts can be derailed. This all-new course will share the key issues and strategies for representing clients during this difficult process. More details will be posted six weeks prior to course date.

Designed For: * CPAs in public practice who provide taxation or financial planning services.
Objectives:
Highlights: * Types of marriage dissolution in use today in the United States and their legal implications; * Key aspects of defining the engagement; * Financial considerations in property settlement, including forensic accounting techniques; and * Tax considerations involving temporary support, alimony, child support and more.
Prerequisite: None
Advanced Preparation:
Note:

Level: Update
Recommended CPE credit: 8
Vendor: ACPEN
Instructor: Group

Early Bird Rates:
Good through: 9/1/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $163
AICPA Member Only: $
Nonmember: $263

Standard Rates:
Effective: 9/2/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $188
AICPA Member Only: $
Nonmember: $288

Fields of Interest: Accounting, Tax, Financial Planning, Specialized Knowledge, Business Law

AICPA's 2010 Individual Tax Review Series: Beyond the Basics • 258

9/22/2010-9/22/2010 • OSCPA Offices, OKC

This course covers the more difficult aspects of individual federal tax returns. It is the perfect follow up for the primer course.

Designed For: * CPAs in public practice.
Objectives: * Apply the latest changes when preparing federal individual income tax returns; and * Advise individual clients on developments and tax-saving ideas.
Highlights:
Prerequisite: None
Advanced Preparation:
Note:

Level: Update
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Michael Tucker

Early Bird Rates:
Good through: 9/1/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 9/2/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Tax

Advanced Auditing of HUD-assisted Projects • 260

9/22/2010-9/22/2010 • OSU-Tulsa, Tulsa

Learn to recognize and apply the latest changes in the federally-assisted housing industry and efficiently plan, perform and report a HUD-assisted engagement. Cover the Consolidated Audit Guide for Audits of HUD Programs and analyze the effects of OMB Circular A-133 on HUD-assisted nonprofit entities.

Designed For: * CPAs in public practice who audit HUD-assisted projects.
Objectives: * Recognize and apply the latest changes in the federally-assisted housing industry; and * Efficiently plan, perform and report a HUD-assisted engagement.
Highlights: * Coverage of the Consolidated Audit Guide for Audits of HUD Programs; * OMB Circular A-133 effect on HUD-assisted nonprofit entities; * HUD audit environment; * Field work standards; * Reporting standards; * Multifamily programs; and * Applying the Consolidated Audit Guide to HUD-Regulated Mortgages.
Prerequisite: Completion of the AICPA's course Audits of HUD-Assisted Projects, or equivalent knowledge
Advanced Preparation:
Note: Attendees will receive a copy of the Consolidated Audit Guide for Audits of HUD programs. Accepted for Yellow Book, CMA and CFM credit.

Level: Advanced
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Laura Lindal

Early Bird Rates:
Good through: 9/1/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 9/2/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: GAA, Audit, Yellow Book

LLC and Partnership Taxation: Beyond the Basics • 262

9/23/2010-9/23/2010 • OSCPA Offices, OKC

LLC and partnerships are based upon intricate rules and regulations. Recognize the provisions necessary in an LLC or partnership agreement to sustain special allocations of income or loss. When a partner or LLC member decides to withdraw some or all of his/her capital investment in the entity, the tax consequences can be complex. Move your working knowledge of partnership and LLC taxation beyond the basics and learn to handle these challenging situations.

Designed For: * CPAs in public practice who provide taxation services.
Objectives: * Assess the risks taken by investors with respect to their investment in a partnership or LLC and allocate the entity's liabilities accordingly; * Determine the consequences of selling a partnership or LLC interest; * Adjust the basis of partnership or LLC property following distributions of multiple properties; * Allocate income, gain, loss and deduction among partner/members; * Protect cash investors from unexpected tax costs associated with appreciated property; * Plan for the effects of a distribution of multiple properties; and * Make elections to protect partners and LLC members from unwelcome future consequences.
Highlights: * The ins and outs of special allocations; * Allocations with respect to contributed property; * Partnership liabilities among partners; * Environmental and other contingent liabilities of the partnership; * Avoiding unexpected gain on the distribution of property; * Adjusting basis to save future taxes; * Measuring the gain or loss on the sale of an interest in a partnership or LLC; and * Minimizing recognition of ordinary income on sale of an interest.
Prerequisite: Experience in taxation of LLCs, LLPs, LPs and other partnerships
Advanced Preparation:
Note: Accepted for CMA, CFM and EA credit.

Level: Intermediate
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Michael Tucker

Early Bird Rates:
Good through: 9/2/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 9/3/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Tax

Governmental and Nonprofit Annual Update • 264

9/23/2010-9/23/2010 • OSU-Tulsa, Tulsa

Be prepared for the latest GAA changes. Ensure that you are current in governmental and nonprofit accounting and auditing. Understand and apply the latest requirements in accounting and auditing for governments and nonprofits. Find out the latest issues on the horizon.

Designed For: * CPAs employed in government and nonprofit entities who are responsible for accounting and financial reporting; and * Auditors of government and nonprofit entities.
Objectives: * Apply the most recent requirements of the GASB and FASB directed towards governments and nonprofits; * Utilize a solid understanding of the latest developments in A-133 and Yellow Book requirements; and * Understand recent activities of the AICPA including GAAS requirements.
Highlights: * Yellow Book developments; * Latest A-133 and OMB compliance supplement developments; * Latest activities and standards issued by the AICPA relating to nonprofits and governments; and * New FASB and GASB requirements.
Prerequisite: Basic knowledge and experience in governmental and nonprofit accounting and auditing
Advanced Preparation:
Note: Accepted for Yellow Book, CMA and CFM credit.

Level: Update
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Laura Lindal

Early Bird Rates:
Good through: 9/2/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 9/3/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: GAA, Accounting, Audit, Yellow Book, Nonprofit

Fall Industry Conference • 2565

9/24/2010-9/24/2010 • Renaissance Hotel, Tulsa

Designed For:
Objectives:
Highlights:
Prerequisite:
Advanced Preparation:
Note:

Level:
Recommended CPE credit: 8
Vendor: OSCPA
Instructor:

Early Bird Rates:
Good through: 9/3/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $173
AICPA Member Only: $
Nonmember: $273

Standard Rates:
Effective: 9/4/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $198
AICPA Member Only: $
Nonmember: $298

Fields of Interest:

Analytical Procedures for Small Business Engagements • 266

9/27/2010-9/27/2010 • OSCPA Offices, OKC

Stay on the cutting edge of the profession by improving your skills in applying analytical procedures. Gain practical guidance in the application of analytical procedures throughout the audit process, with special attention to small business audit engagements. Learn to overcome practice problems in the application of analytical procedures and to document efficiently.

Designed For: * CPAs in public practice who provide auditing services.
Objectives: * Overcome practice problems in the application of analytical procedures; * Document analytical procedures efficiently; and * Understand how analytical procedures can and should be used.
Highlights: * Using analytical procedures in review engagements, in audit planning and as substantive tests and in the overall final review; * Common types of analytical procedures: comparisons to prior periods, to budgets, to industry and to non-financial data; * Using analytical procedures to evaluate a company as a going concern and the requirements of SAS 59; * Requirements for use of analytical procedures in accordance with SAS 56; * How analytical procedures fit into the assessment of the risk of fraud; and * Documentation requirements of SAS 96.
Prerequisite: None
Advanced Preparation:
Note: Accepted for CMA and CFM credit.

Level: Basic
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Thomas Newell

Early Bird Rates:
Good through: 9/6/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 9/7/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Accounting and Auditing, Audit

Tax Aspects of Bankruptcy: All Need Not Be Lost • 268

9/27/2010-9/27/2010 • OSU-Tulsa, Tulsa

When the economy falls on hard times, knowledge of both tax law and bankruptcy law is important. Learn how Title 11, U.S. Code (Bankruptcy) interacts with Title 26 (Income Tax). Review recent changes to both bankruptcy law and tax law that affect the insolvent taxpayer. Determine which bankruptcy provisions apply to common situations, the CPA's role in bankruptcy accounting and common issues arising before and during bankruptcy.

Designed For: * CPAs in public practice who provide taxation services.
Objectives: * How bankruptcy works; * Filing options for bankruptcy; * Optional tax reporting of debt forgiveness income; * Tax planning for bankruptcy and insolvency; * Tax compliance for the insolvent business enterprise; * Issues that failing business face; and * How to work with attorneys and bankruptcy courts when providing accounting services to insolvent taxpayers.
Highlights: * Different types of bankruptcy – Chapter 11, Chapter 7 and Chapter 13; * Who qualifies for bankruptcy; * What property is exempt from claims of creditors; * What special tax rules apply to the insolvent taxpayer; * What debts cannot be discharged; and * The CPA's role in bankruptcy.
Prerequisite: Experience with tax law and bankruptcy
Advanced Preparation:
Note:

Level: Advanced
Recommended CPE credit: 8
Vendor: Nichols Patrick CPE, Inc.
Instructor: Don Cochran

Early Bird Rates:
Good through: 9/6/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 9/7/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Tax

Common Frauds and Internal Controls for Revenue, Purchasing and Cash Receipts • 270

9/28/2010-9/28/2010 • OSCPA Offices, OKC

Transactions that occur within an entity's revenue cycle and the purchase cycle are common areas for misstatements, both unintentional and fraudulent. While business owners and managers instinctively know that controls are important, they often have a limited understanding of what controls are effective. Fill this knowledge gap and help establish a cost-effective system of controls to minimize fraud and other misstatements.

Designed For: * CPAs in public practice who provide auditing services; and * CPAs in industry.
Objectives: * Focus on common frauds in the revenue, purchasing, cash receipts and cash disbursements processes; * Identify areas of greatest risk; * Set up internal controls to mitigate various risks; and * Develop an analysis process to ensure efficient and effective risk management.
Highlights: * Common fraud risks within the revenue, purchasing, cash receipts and cash disbursements processes; * Analysis of controls for effectiveness and efficiency; * Estimating the cost/benefit of correcting a control weakness; and * Control implementation ideas.
Prerequisite: None
Advanced Preparation:
Note: Accepted for CMA and CFM credit.

Level: Basic
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Thomas Newell

Early Bird Rates:
Good through: 9/7/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 9/8/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Accounting and Auditing, Fraud

Physicians' Finances • 272

9/28/2010-9/28/2010 • OSU-Tulsa, Tulsa

Identify special MAS projects for physicians. Analyze opportunities with integration and practice management cost structure and collections. In addition, learn the ins and outs of physicians' revenue recognition and business operations.

Designed For: * CPAs in public practice who have healthcare clients; and * CPAs in industry who work for medical organizations.
Objectives: * Provide profitable consulting services to physicians; * Assist physicians in analyzing and negotiating managed care contracts; * Understand Medicare and its effect on a typical medical practice; * Analyze revenue coding and realization; * Avoid costly errors in personnel administration; * Advise physicians about business management strategies; and * Review typical medical practices business agreements.
Highlights: * The CPA's role in healthcare practice; * General overview of managed care; * Revenue and accounts receivable; Medicare – RBRVS impact; * Financial strategies; * Cost accounting benefits in medical practice; * Personnel compliance; * Full revenue review; * Typical HMO contracts with physicians; * Changes in physician compensation; and * Implementing compliance programs. current developments in managed care and dealing with tax-exempt hospital based medical practices.
Prerequisite: None
Advanced Preparation:
Note:

Level: Intermediate
Recommended CPE credit: 8
Vendor: Nichols Patrick CPE, Inc.
Instructor: Ron Antal

Early Bird Rates:
Good through: 9/7/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 9/8/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Financial Planning, Specialized Knowledge, Healthcare

Annual Update for State and Local Governments and Not-For-Profits (8-11:30 a.m.) • 274

9/29/2010-9/29/2010 • OSCPA Offices, OKC

Catch up on the latest developments in governmental accounting and auditing and not-for-profits. Review recent activities of the OMB, GAO, AICPA, GASB and FASB, and get a feel for these organizations' significant future projects.

Designed For: * CPAs in government and nonprofit entities who are responsible for accounting and financial reporting; and * Auditors of government and nonprofit entities.
Objectives: * Understand new pronouncements recently issued by the OMB, GAO, AICPA, GASB and FASB; and * Apply new requirements efficiently and effectively.
Highlights: * Latest single auditing developments; * Effects of recent Yellow Book activities; * Latest standards issued by the AICPA relating to not-for-profits and governments; and * New pronouncements issued or pending by the FASB and GASB.
Prerequisite: Basic knowledge and experience in governmental and not-for-profit accounting and auditing
Advanced Preparation:
Note: Accepted for Yellow Book, CMA and CFM credit.

Level: Update
Recommended CPE credit: 4
Vendor: AICPA
Instructor: William Wagner

Early Bird Rates:
Good through: 9/8/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $91
AICPA Member Only: $
Nonmember: $141

Standard Rates:
Effective: 9/9/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $116
AICPA Member Only: $
Nonmember: $166

Fields of Interest: GAA, Accounting, Audit, Yellow Book, Non-profit

Preventing Common OMB A-133 and Yellow Book Deficiencies: A Case Study Approach (12:30-4 p.m.) • 276

9/29/2010-9/29/2010 • OSCPA Offices, OKC

Recognize Single Audit and Yellow Book audit deficiencies and avoid them beforehand.

Designed For: * CPAs performing A-133 engagements; and * Internal financial staff of governments and not-for-profit entities interacting with them.
Objectives: * Apply selected key concepts in Yellow Book and A-133 audits; and * Utilize common sense solutions to common problems noted in Yellow Book and A-133 engagements.
Highlights: * A-133 major program determination; * Engagement letters and representation letters; * Documentation dilemmas; * Yellow Book reporting issues; and * Drafting audit findings SEFA presentation.
Prerequisite: Experience in the Yellow Book and A-133 environment
Advanced Preparation:
Note: Accepted for Yellow Book, CMA and CFM credit.

Level: Intermediate
Recommended CPE credit: 4
Vendor: AICPA
Instructor: William Wagner

Early Bird Rates:
Good through: 9/8/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $91
AICPA Member Only: $
Nonmember: $141

Standard Rates:
Effective: 9/9/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $118
AICPA Member Only: $
Nonmember: $166

Fields of Interest: GAA, Audit, Nonprofit

Tax Update for Financial Executives • 278

9/29/2010-9/29/2010 • OSU-Tulsa, Tulsa

Review the new tax developments most likely to affect CPAs in business and industry who deal with taxation issues. Learn how current issues affect your industry and your operations. Recent legislation will be included.

Designed For: * CPAs in industry who deal with taxation issues.
Objectives: * Maintain tax knowledge and awareness of tax changes that affect common business operations; * Establish practical approaches required to comply with changes in tax law; * Identify IRS audit issues; and * Avoid costly misunderstandings of tax law by learning from others' mistakes.
Highlights: * Recent tax law changes; * Court decisions of general interest and applicability; * How to comply with changing tax rules IRS regulations, rulings, notices and audit initiatives; * Sample compliance documents; * Quality control in the tax function; and * The responsibility of the CPA.
Prerequisite: None
Advanced Preparation:
Note:

Level: Update
Recommended CPE credit: 8
Vendor: Nichols Patrick CPE, Inc.
Instructor: Ron Antal

Early Bird Rates:
Good through: 9/8/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 9/9/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Tax

Accounting and Reporting Practices of Not-for-profit Organizations • 280

9/30/2010-9/30/2010 • OSCPA Offices, OKC

Learn from real-world financial statements, cases and problems faced by CPAs with not-for-profit clients and by executives of not-for-profit organizations. Develop a working knowledge of presentation requirements and choices allowed under GAAP and understand note disclosures unique to nonprofits. Study statement presentation flexibility and learn how to avoid common financial statement mistakes.

Designed For: * CPAs in public practice with not-for profit clients; and * CPAs in industry employed at not-for-profits.
Objectives: * Ascertain presentation requirements and choices allowed under GAAP; * Understand note disclosures unique to nonprofits; and * Solve problems involving content of financial statements and allocation of costs relating to fundraising.
Highlights: * Statement presentation flexibility; * Footnote disclosures; * Recognition of promises to give; * Classification of grants as contributions or exchange transactions; * Options for accounting for contributed services; * Statement of Activities options; and * Examination of real-world statements.
Prerequisite: Experience in the nonprofit environment
Advanced Preparation:
Note: Accepted for Yellow Book, CMA and CFM credit.

Level: Intermediate
Recommended CPE credit: 8
Vendor: AICPA
Instructor: William Wagner

Early Bird Rates:
Good through: 9/9/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 9/10/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Not-for-Profit, GO, Accounting

AICPA's Annual Accounting and Auditing Workshop • 282

9/30/2010-10/1/2010 • OSU-Tulsa, Tulsa

Make sure your accounting and auditing skills are on par with industry standards. This comprehensive, two-day course provides an update on all the new standards in accounting and auditing, compilation and review and other professional standards.

Designed For: * CPAs in public practice and industry.
Objectives: * Apply recently issued FASB Statements and Interpretations, AICPA Statements of Position, Statements on Auditing Standards, Statements on Standards for Accounting and Review Services and Statements on Standards for Attestation Engagements to accounting and auditing problems.
Highlights: * Practical applications of the pronouncements covered; * Compilation and review update; * Newly released AICPA audit and accounting guides; * PCAOB and SEC reporting requirements; * Latest issues such as variable interest entities; * Other FASB topics; * Assurance services; and * The risk assessment process.
Prerequisite: None
Advanced Preparation:
Note: Accepted for CMA and CFM credit.

Level: Update
Recommended CPE credit: 16
Vendor: AICPA
Instructor: Marty Van Wagoner

Early Bird Rates:
Good through: 9/9/2010
OSCPA & AICPA Member: $297
OSCPA Member Only: $327
AICPA Member Only: $397
Nonmember: $427

Standard Rates:
Effective: 9/10/2010
OSCPA & AICPA Member: $322
OSCPA Member Only: $352
AICPA Member Only: $422
Nonmember: $452

Fields of Interest: Accounting and Auditing, Compilation and Review

International Taxation: To and From the United States • 286

10/18/2010-10/18/2010 • OSU-Tulsa, Tulsa

Gain an understanding of tax advantages and traps of global business operations. Get the knowledge you need to intelligently advise your clients or businesses on taxation of both inbound and outbound transactions and operations. Focus on inbound U.S. operations by foreign businesses and outbound foreign operations, by U.S. businesses through a representative office, manufacturing branch, incorporation of a U.S. or foreign subsidiary, or use of a U.S. or foreign joint venture, partnership or LLC.

Designed For: * CPAs in industry who are engaged or employed by foreign entities doing business in the U.S. or whose companies do business abroad; * CPA firm tax seniors, managers and partners.
Objectives: * Comply with U.S. tax reporting requirements for inbound and outbound transactions and operations.
Highlights: * U.S. international taxation rules, the latest planning techniques and legislative changes; * Initiation of U.S. or foreign operations through a representative office, branch, incorporated subsidiary or joint venture, partnership or limited liability company; * Transfer pricing, Subpart F, export incentive rules, U.S. trade or business effectively connected income and branch profits tax rules; * Alternative means of capitalizing a U.S. or foreign start-up business; * Working with foreign taxation and tax treaties, foreign bank accounts, international boycotts and transportation of currency; * U.S. foreign tax credit rules: determining whether foreign taxes are creditable, sourcing income and expenses and calculating the U.S. foreign tax credit limitation; * Managing an overall foreign loss U.S. Customs reporting; and * Much more.
Prerequisite: A working knowledge of U.S. business and corporate taxation
Advanced Preparation:
Note: Accepted for PFS, CFP®, CMA, CFM and EA credit.

Level: Basic
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Susan Sorensen

Early Bird Rates:
Good through: 9/27/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 9/28/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Tax

Advanced Partnership/LLC Workshop: How to Do Optional Step-Up in Basis Under Section 754 and Related Provisions • 284

10/18/2010-10/18/2010 • OSCPA Offices, OKC

Changes in tax law require more complex planning. Explore the practical issues which a step-up in basis can create tax advantages for partners and members. Review case studies to illustrate the critical points.

Designed For: * CPAs in public practice.
Objectives: * Distinguish the tax consequences of a partnership interest sale and of a partnership asset distribution with and without a §754 election; * Identify circumstances where a §754 election may be beneficial; and * Calculate the basis adjustments to individual partnership properties when a §754 election is made.
Highlights: * Identifying when an election will be available; * Making the calculations to determine a step-up and allocating that step-up among partnership assets; * Practical examples dealing with a sale of a partnership interest and the effects of §734(b); * Alternatives to making a step-up; * Distribution of property and when step-up can be considered; * Examples dealing with sale of assets versus sale of partnership interests; * Issues with hot assets; * Keeping track of the books for tax preparers when step-up is made; and * Flowing through adjustments through a tax return and K-1; and * Much more.
Prerequisite: Experience in dealing with partnership and LLCs and at least one intermediate course on partnerships and LLCs
Advanced Preparation:
Note:

Level: Advanced
Recommended CPE credit: 8
Vendor: Surgent McCoy CPE, LLC
Instructor: Pamela Davis-Vaughn

Early Bird Rates:
Good through: 9/27/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 9/28/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Tax

2010 Tax Review Series: S Corps, LLCs and Other Pass-through Entities • 290

10/19/2010-10/19/2010 • OSU-Tulsa, Tulsa

Focus on key tax issues impacting S Corps and other pass-through entities with this course, which is the perfect companion to the related C Corp course. Both will tackle key business tax issues using a hands-on approach as well as cover the related latest business tax developments. Reinforce your understanding of frequently used principles and receive a wealth of tax planning tips and strategies. Apply the latest changes when preparing federal income tax returns and advise clients on new developments and tax-saving ideas for pass-through entities.

Designed For: * CPAs in public practice.
Objectives: * Apply the latest changes when preparing federal pass-through income tax returns; and * Advise individual clients on latest developments and tax-saving ideas.
Highlights: * Key COLA figures; * Mileage rates; * Business travel; * Depreciation caps; * Qualified plan contributions; * S corporation elections; * Advantages versus disadvantages; * Eligibility and elections; * Compensation; * Shareholders; * Corporate-level taxes; * Passive investment income; * Built-in gains; * LIFO recapture tax; * Estimated tax; * Pass-through treatment; * Shareholder deductions and basis; * Distributions; * Depreciation and amortization; * Sec. 179; * First-year depreciation; * Leasehold improvements; * Accounting methods; * Expensing versus capitalization; * Compensation; * Reasonable compensation; * Life insurance; * Medical plans; * Deductions; * Credits; * Compliance issues; * Sec. 1244 stock; * Formation of a corporation; * Personal service corporations; and * LLCs.
Prerequisite: Knowledge of pass-through entities income taxation
Advanced Preparation:
Note:

Level: Update
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Stephen Renberg

Early Bird Rates:
Good through: 9/28/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 9/29/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Tax

Multistate Tax Update • 288

10/19/2010-10/19/2010 • OSCPA Offices, OKC

Even tax-savvy businesses, and their advisers, often neglect to consider the consequences of state and local taxes. States are imposing new taxes, and their courts are enforcing nexus even when taxpayers are not physically present in a state. It is now more important than ever to focus on issues confronting small and middle market companies.

Designed For: * CPAs in public practice.
Objectives:
Highlights: * Economic nexus; * Attributional nexus; * Agency nexus; * Telecommuting employees; * Recent state and U.S. Supreme Court rulings in state and U.S. Supreme Court; * Using P.L. 86-272; * State apportionment issues trending towards the single sales factor apportionment; * Combined reporting; * Sourcing receipts from intangibles and services; * Changes in state methods; * Planning opportunities; * Pass through entities; * Sourcing income; * Entity taxation; * Withholding issues; * Nexus questionnaires; * Sales tax updates; * Updates on audit related issues including disclosure for Fin 48 and FAS 5; * Federal legislative updates; * Planning opportunities to minimize tax; and * Opportunities to grow your practice.
Prerequisite: None
Advanced Preparation:
Note:

Level: Update
Recommended CPE credit: 8
Vendor: Surgent McCoy CPE, LLC
Instructor: Pamela Davis-Vaughn

Early Bird Rates:
Good through: 9/28/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 9/29/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Tax

Accounting and Auditing Update • 292

10/20/2010-10/20/2010 • East Central University, Ada

Satellite Broadcast: Analyze the most recent pronouncements from the FASB, AICPA Auditing Standards Board, Professional Ethics Executive Committee and Accounting and Review Services Committee and learn how they will affect financial statement preparers and auditors. Get an inside look at the technical and practical issues that must be addressed in 2010 and beyond. More details will be posted six weeks prior to course date.

Designed For: * CPAs in public practice and industry.
Objectives:
Highlights: * The latest accounting, auditing, compilation and review standards; * Exposure drafts that will dramatically change the performance of audits, compilations and reviews; and * Revisions to ethical rules.
Prerequisite: None
Advanced Preparation:
Note:

Level: Update
Recommended CPE credit: 8
Vendor: ACPEN
Instructor: Group

Early Bird Rates:
Good through: 9/29/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $163
AICPA Member Only: $
Nonmember: $263

Standard Rates:
Effective: 9/30/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $188
AICPA Member Only: $
Nonmember: $288

Fields of Interest: Accounting & Auditing

Accounting and Auditing Update • 294

10/20/2010-10/20/2010 • Autry Technology Center, Enid

Satellite Broadcast: Analyze the most recent pronouncements from the FASB, AICPA Auditing Standards Board, Professional Ethics Executive Committee and Accounting and Review Services Committee and learn how they will affect financial statement preparers and auditors. Get an inside look at the technical and practical issues that must be addressed in 2010 and beyond. More details will be posted six weeks prior to course date.

Designed For: * CPAs in public practice and industry.
Objectives:
Highlights: * The latest accounting, auditing, compilation and review standards; * Exposure drafts that will dramatically change the performance of audits, compilations and reviews; and * Revisions to ethical rules.
Prerequisite: None
Advanced Preparation:
Note:

Level: Update
Recommended CPE credit: 8
Vendor: ACPEN
Instructor: Group

Early Bird Rates:
Good through: 9/29/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $163
AICPA Member Only: $
Nonmember: $263

Standard Rates:
Effective: 9/30/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $188
AICPA Member Only: $
Nonmember: $288

Fields of Interest: Accounting & Auditing

Accounting and Auditing Update • 296

10/20/2010-10/20/2010 • Moore-Norman Technology Center, Norman

Satellite Broadcast: Analyze the most recent pronouncements from the FASB, AICPA Auditing Standards Board, Professional Ethics Executive Committee and Accounting and Review Services Committee and learn how they will affect financial statement preparers and auditors. Get an inside look at the technical and practical issues that must be addressed in 2010 and beyond. More details will be posted six weeks prior to course date.

Designed For: * CPAs in public practice and industry.
Objectives:
Highlights: * The latest accounting, auditing, compilation and review standards; * Exposure drafts that will dramatically change the performance of audits, compilations and reviews; and * Revisions to ethical rules.
Prerequisite: None
Advanced Preparation:
Note:

Level: Update
Recommended CPE credit: 8
Vendor: ACPEN
Instructor: Group

Early Bird Rates:
Good through: 9/29/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $163
AICPA Member Only: $
Nonmember: $263

Standard Rates:
Effective: 9/30/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $188
AICPA Member Only: $
Nonmember: $288

Fields of Interest: Accounting & Auditing

Accounting and Auditing Update • 298

10/20/2010-10/20/2010 • Ardmore Conv. Center, Ardmore

Satellite Broadcast: Analyze the most recent pronouncements from the FASB, AICPA Auditing Standards Board, Professional Ethics Executive Committee and Accounting and Review Services Committee and learn how they will affect financial statement preparers and auditors. Get an inside look at the technical and practical issues that must be addressed in 2010 and beyond. More details will be posted six weeks prior to course date.

Designed For: * CPAs in public practice and industry.
Objectives:
Highlights: * The latest accounting, auditing, compilation and review standards; * Exposure drafts that will dramatically change the performance of audits, compilations and reviews; and * Revisions to ethical rules.
Prerequisite: None
Advanced Preparation:
Note:

Level: Update
Recommended CPE credit: 8
Vendor: ACPEN
Instructor: Group

Early Bird Rates:
Good through: 9/29/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $163
AICPA Member Only: $
Nonmember: $263

Standard Rates:
Effective: 9/30/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $188
AICPA Member Only: $
Nonmember: $288

Fields of Interest: Accounting & Auditing

Accounting and Auditing Update • 300

10/20/2010-10/20/2010 • OSU-Tulsa, Tulsa

Satellite Broadcast: Analyze the most recent pronouncements from the FASB, AICPA Auditing Standards Board, Professional Ethics Executive Committee and Accounting and Review Services Committee and learn how they will affect financial statement preparers and auditors. Get an inside look at the technical and practical issues that must be addressed in 2010 and beyond. More details will be posted six weeks prior to course date.

Designed For: * CPAs in public practice and industry.
Objectives:
Highlights: * The latest accounting, auditing, compilation and review standards; * Exposure drafts that will dramatically change the performance of audits, compilations and reviews; and * Revisions to ethical rules.
Prerequisite: None
Advanced Preparation:
Note:

Level: Update
Recommended CPE credit: 8
Vendor: ACPEN
Instructor: Group

Early Bird Rates:
Good through: 9/29/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $163
AICPA Member Only: $
Nonmember: $263

Standard Rates:
Effective: 9/30/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $188
AICPA Member Only: $
Nonmember: $288

Fields of Interest: Accounting & Auditing

Introduction to Business Valuation: Critical Skill Set in Today's Fair Value Accounting World • 302

10/20/2010-10/20/2010 • OSCPA Offices, OKC

This course provides an introduction to business valuation for the individual that either knows nothing or very little about business valuation. Learn basic business valuation concepts, theory and application. Find out whether business valuation is right for you.

Designed For: * CPAs in public practice.
Objectives: * Decide if business valuation is something you wish to pursue; * Understand the basics of valuation theory; * Learn the three approaches to value; and * Begin to recognize what is involved in performing a business valuation.
Highlights: * Items necessary to prepare an engagement letter; * The underlying theory that is required to perform a business valuation; * Steps of a valuation using all three approaches to value; * Standard of value, company history, general economic and industry data; and * Analyzing and adjusting financial statements and compensation.
Prerequisite: None
Advanced Preparation:
Note: This seminar is a new program from the AICPA.

Level: Basic
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Ronald DiMattia

Early Bird Rates:
Good through: 9/29/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 9/30/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Consulting Services, Business Valuation, Management

Buying and Selling Businesses: The CPA's Role • 304

10/20/2010-10/20/2010 • OSU-Tulsa, Tulsa

Become the key advisor to your clients or employers who are buying or selling a business. Lead the team with a keen overview of the transaction process in addition to specific tax and accounting technical advice.

Designed For: * CPAs in public practice.
Objectives: * Understand deal factors; * Become acquainted with the transaction's team of advisors; * Learn due diligence procedures and transaction documentation; * Understand the basics of alternative valuation methodologies; * Analyze the gain/loss of asset-based or stock-based transactions; * Identify key buyer groups and the impact of a sale on them; and * Structure compensation alternatives for buyers and sellers.
Highlights: * Familiarization with the team of advisors involved in the sale of a business and their respective roles; * The key role of "due diligence" as a thorough review of the company with accompanying checklist for reference; * Key legal and transaction documents; * Key valuation concepts and the impact of cash flows on fair market determination; * Evaluation of asset based transactions and purchase price allocations; * Tax preferences and pitfalls of stock transactions and the consideration of the carryover of tax attributes; * Recognition of key sellers and buyer groups and their motivations; and * Structuring of compensation and payout alternatives.
Prerequisite: Experience in business taxation
Advanced Preparation:
Note: Accepted for CFP®, CMA, CFM and EA credit.

Level: Intermediate
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Stephen Renberg

Early Bird Rates:
Good through: 9/29/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 9/30/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Consulting Services, Tax

Effectively and Efficiently Reviewing Audit Workpapers: The Line of Defense Against Deficient Audits • 306

10/21/2010-10/21/2010 • OSU-Tulsa, Tulsa

Reviewing workpapers is a critical internal quality control safeguard. It ensures issued audit reports are appropriate to the specific engagement's circumstances. As part of these quality procedures, experienced engagement team members are often in a position to review work performed by less experienced staff.

Designed For: * CPAs in public practice.
Objectives: * Provide tips and techniques for effective and efficient review of audit workpapers.
Highlights: * Quality control standards and guidance related to a CPA firm's responsibilities for its system of quality control over the audit practice; * The primary purpose of audit documentation and minimum documentation requirements; * Tips for an efficient workpaper review process complying with relevant standards; * Emphasizing common significant judgments or conclusions that require strong supporting documentation, including when consultations may be appropriate; * Considering ethics as a critical element of high-quality workpaper reviews; * The critical role of the engagement partner related to the overall quality of an engagement; * The responsibilities of the engagement quality control reviewer in evaluating the significant judgments of the engagement team; * Tips for handling differences of opinion; and * The importance of monitoring compliance with engagement quality control policies and procedures.
Prerequisite: None
Advanced Preparation:
Note:

Level: Intermediate
Recommended CPE credit: 8
Vendor: Surgent McCoy CPE, LLC
Instructor: Jennifer Louis

Early Bird Rates:
Good through: 9/30/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 10/1/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Accounting and Auditing

Audits of Banks, Savings Institutions, Credit Unions and Other Financial Institutions • 308

10/22/2010-10/22/2010 • OSCPA Offices, OKC

Financial institutions are specialized and one of, if not the most, regulated industries in the world. Learn the accounting and auditing fundamentals of banks, savings institutions, credit unions and other financial institutions. Examine the applicable metrics that create value for financial institutions. Comparisons to commercial audits efficiently and effectively make the transition to financial institution audits.

Designed For: * CPAs who audit financial institutions; and * Accountants, bankers and financial industry personnel.
Objectives: * Understand the current metrics that create value for financial institutions; * Discover the significant regulatory structure and laws for the financial institution industry; * Apply efficient audit procedures for specific balance sheet, income statement and cash flow statement accounts; * Assess the effects of the most important accounting pronouncements on the financial institution industry; * Apply auditing literature such as appropriate sampling and confirmation considerations for the critical loans receivable and deposit accounts; and * Understand additional audit procedures necessary when material investments are held by brokers or other third parties.
Highlights: * Accounting pronouncements applicable to financial institutions; * Auditing standards and procedures applicable to financial institutions; * Role of financial institution Board of Directors and Audit Committee concerning risk management; * How financial institutions make critical business decisions; and * Regulatory structure for financial institutions.
Prerequisite: General audit knowledge and/or experience
Advanced Preparation:
Note: Accepted for CMA and CFM credit.

Level: Intermediate
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Jacqueline Taylor

Early Bird Rates:
Good through: 10/1/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 10/2/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Accounting and Auditing, Banking

IFRS for Smaller Entities versus U.S. GAAP: A Study in How the Financial Statements Look and Feel Different • 310

10/22/2010-10/22/2010 • OSU-Tulsa, Tulsa

Did you know that small and medium-sized entities represent more than 95 percent of all companies? IFRS for SMEs was released in final form in July 2009 as an accepted modification and simplification of full IFRS. IFRS for SMEs is aimed at meeting the needs of smaller entity financial statement users, while easing the financial reporting burden on private companies that do not have public accountability. It is important for CPAs providing accounting, reporting or attest services for private entities when private company stakeholders and financial statement users focus on asking questions about how the two sets of standards actually differ. Extensive case studies and exercises will be used to show the actual impact of variations between the two sets of accounting and reporting standards.

Designed For: * CPAs in public practice and industry.
Objectives: * Demonstrate how financial statements prepared under IFRS for SMEs differ in both look and feel from those prepared under U.S. GAAP.
Highlights: * Why and how IFRS for SMEs emerged as a viable option for financial accounting and reporting for private entities worldwide; * Circumstances under which U.S. entities may find it necessary and/or desirable to implement IFRS for SMEs over U.S. GAAP; * How IFRS for SMEs is organized to meet the primary objectives of financial statements for small and medium-sized entities without public accountability; * Comparing and contrasting financial statement recognition and presentation under the two acceptable sets of standards; and * Sample financial statements prepared under IFRS for SMEs, how they look and feel different from the same financial statements prepared under U.S. GAAP.
Prerequisite: None

Level: Basic
Recommended CPE credit: 8
Vendor: Surgent McCoy CPE, LLC
Instructor: Jennifer Louis

Early Bird Rates:
Good through: 10/1/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 10/2/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Accounting and Auditing, Specialized Knowledge

CPA's Guide to Fraud in Compilations/Reviews/Audits • 312

10/25/2010-10/25/2010 • OSCPA Offices, OKC

Undetected fraud is always a lawsuit waiting to happen when financial statements are wrong. CPAs are often the scapegoats. Review actual fraud cases to gain a better understanding of fraud techniques and internal controls.

Designed For: * CPAs in public practice and industry; and * CFEs, controllers, CFOs, senior management and board members.
Objectives:
Highlights: * CPAs recently convicted of fraud; * Liability exposure for each type of service; * Are you positive your client is legal?; * Deceptive revenue techniques; * Operational techniques to manipulate financial statements; * Manipulating estimates; * Why confirmations aren't reliable; * Related party misstatements; * Expenditure fraud; * Manipulating GAAP; * High-risk engagements; * Cash receipts fraud; * Conflicts of interest; and * Why traditional controls fail to deter and detect fraud.
Prerequisite: At least 10 years of experience as a CPA
Advanced Preparation:
Note:

Level: Advanced
Recommended CPE credit: 8
Vendor: Gary Zeune & Associates
Instructor: Gary Zeune

Early Bird Rates:
Good through: 10/4/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 10/5/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Accounting and Auditing, Fraud, Accounting

Multiplying Your Tax and Business Benefits Using Multiple Business Entities • 314

10/25/2010-10/25/2010 • OSU-Tulsa, Tulsa

In this litigious climate, business owners need to consider methods of reducing their exposure to legal liability. Further, states are much more aggressive in pursuing nexus tax liability. Exploring when to run a business as a single entity or when to step up to multiple entities is a growing area of business and tax planning.

Designed For: * CPAs in public practice and industry.
Objectives: * Identify circumstances where multiple business entity structures could be appropriate; * Discuss the pros and cons of various business structures; and * Understand the related tax issues.
Highlights: * Identification of different types of structures such as subsidiaries, brother/sister companies, tax disregarded entities and joint ventures; * Maximizing the benefits and minimizing the problems in using Qualified Subchapter S Subsidiaries versus Single Member Limited Liability Companies; * Legal liability protection benefits in using multiple business entities; * State tax law and nexus issues; * Using multiple business entities to diversify business ownership as incentives for management teams; * Holding companies; * Using different methods of accounting for different related entities; and * Related issues, including using common paymasters, related party issues and much more.
Prerequisite: A strong knowledge of general tax law related to business entities
Advanced Preparation:
Note:

Level: Advanced
Recommended CPE credit: 8
Vendor: Surgent McCoy CPE, LLC
Instructor: William Grooms

Early Bird Rates:
Good through: 10/4/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 10/5/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Tax

Auditing: What's New for 2010 Engagements • 316

10/26/2010-10/26/2010 • OSCPA Offices, OKC

Audit standards and the public's expectations change every year. Fine tune your audits to comply with the most recent requirements. Get the information you need to know to protect yourself, do better audits, retain your clients and boost engagement profitability.

Designed For: * CPAs in public practice and industry; and * Auditors, CFEs, controllers, CFOs, senior management and board members.
Objectives:
Highlights: * AICPA's new and pending auditing standards; * AICPA's auditing standards interpretations; * Technical practice aids; * Practice alerts; * Best audit practices; * Current practical studies and surveys; * Highlights of Auditing Standards Board meetings; * How SEC developments affect GAAS; * Applying these new and pending standards to your audits; * SAS 116 Interim Financial Information effective for 2010 audits; * Redrafted Risk Assessment Standards; * A Firms System of Quality Control (Redrafted); * Quality Control for an Audit of Financial Statements; * External Confirmations; and * Much more.
Prerequisite: At least 10 years of experience as an auditor
Advanced Preparation:
Note:

Level: Intermediate
Recommended CPE credit: 8
Vendor: Gary Zeune & Associates
Instructor: Gary Zeune

Early Bird Rates:
Good through: 10/5/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 10/6/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Accounting and Auditing, Audit

The Best Individual Income Tax Update Course • 318

10/26/2010-10/26/2010 • OSU-Tulsa, Tulsa

The year 2010 will be one of biggest years in the past 20 for individual tax planning in light of tax reform and changes in tax rates. This highly informative course responds to the latest in tax law developments, including discussions of the planning opportunities available to your individual tax clients. This up-to-date knowledge will enable you to further discuss new developments and tax-saving ideas applicable to your clients and their growing needs in light of post-election developments.

Designed For: * CPAs in public practice and industry.
Objectives: * Understand strategies and tactics to use in light of tax rate changes; * Understand the most current guidance on retirement planning and Social Security; and * Find out how to nail down valuable deductions and other reductions to the tax base.
Highlights: * Impact of tax rate changes on individuals under tax reform; * Year-end tax planning: What should be accelerated and what should be deferred; * Coverage of the American Recovery and Reinvestment Act of 2009; * Planning in a bad economy; * Minimum required distributions; * Converting a traditional IRA to a Roth IRA; * Return preparer penalties; * Estate and gift tax reform – proposed and enacted legislation; * Schedule E rental real estate and other investments; * Kiddie Tax; * Travel and entertainment; * Retirement planning strategies – qualified plans and IRAs, traditional and Roth; * Medical expenses – examining the alternatives; * Charitable contributions; * Education expenses, credits and funding – recent developments; * AMT issues; * Practice aids, including 2010 inflation-adjusted amounts, mileage rates and more; * Complete coverage of all the latest IRS rulings and procedures affecting individuals in general, along with an up-to-date summary of the most important tax court decisions and tax law changes in this area; and * Other late-breaking tax law changes.
Prerequisite: Experience in individual tax planning

Level: Update
Recommended CPE credit: 8
Vendor: Surgent McCoy CPE, LLC
Instructor: William Grooms

Early Bird Rates:
Good through: 10/5/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 10/6/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Tax

Delving into the Top 12 Issues for Partnerships, LLCs and S Corps • 320

10/27/2010-10/27/2010 • OSCPA Offices, OKC

Review 12 specialized issues in the taxation of partnerships, LLCs and S corps. Each issue provides significant tax planning opportunities or potential traps. Explore the tax consequences associated with different types of pass-through entities. Case studies are included with each issue to illustrate how routine transactions often trigger complex or unexpected tax provisions.

Designed For: * CPAs in public practice.
Objectives: * Analyze pass-through entity balance sheets to recognize potential tax opportunities or costs; * Consider and evaluate alternative approaches to common transactions to take advantage of opportunities or minimize costs; * Recognize how multiple provisions of the tax law are applied to complex transactions; and * Evaluate the impact of entity choice on different types of transactions, including debt instruments, liquidating distributions to owners and self-employment taxes.
Highlights: * Tax implications of different options for restructuring troubled debt; * Protecting LLC members' at-risk amounts for tax purposes; * Estate tax planning using family limited partnerships; * Properly structuring distributions to retiring or expelled partners to maximize tax benefits to the partnership/LLC and the departing partner/member; * Planning for compensatory transfers of partnership interests, including issuance of partnership options; * Partnerships in planning Sec. 1031 exchanges; * Potential application of Sec. 704(c) following partnership capital account book-ups and partnership mergers; * Application of self-employment tax rules to partnerships and LLCs, including application to Sec. 1402 retirement distributions to partners or LLC members; * Assessing the character of pass-through items to non-participatory partners (including LLC members); and * Using single-member LLCs in tax planning.
Prerequisite: AICPA's Taxation of Partnerships and LLCs and Taxation of S Corps, or equivalent knowledge or experience
Note: This seminar is a new program from the AICPA.

Level: Advanced
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Steven Lustig

Early Bird Rates:
Good through: 10/6/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 10/7/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Tax

Controller to CFO: 11 Skills to Make the Trip • 322

10/27/2010-10/27/2010 • OSU-Tulsa, Tulsa

Learn the skills needed to make your move from controller to world-class small business CFO.

Designed For: * CPAs in public practice; and * Controllers, CFOs, CEOs and business owners.
Objectives:
Highlights: * Why isn't the controller having the desired impact; * How do you decide if you want to work for someone; * How to get your staff to understand their impact on the bottom line; * How to use different situational leadership styles to accomplish what needs to get done; * How to get employees to take bold risks and solve their own problems; * How to brand yourself and maximize your value; * How to manage employee conflict, anger and emotions; * How to cultivate finance talent from bottom to top; * How to get that open CFO job; * How to get customers, employees, vendors and management to trust you; and * How to use business intelligence to build the bottom line.
Prerequisite: None
Advanced Preparation:
Note:

Level: Advanced
Recommended CPE credit: 8
Vendor: Gary Zeune & Associates
Instructor: Gary Zeune

Early Bird Rates:
Good through: 10/6/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 10/7/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Management, Industry

Advanced Tax Strategies for S Corporations • 324

10/28/2010-10/28/2010 • OSCPA Offices, OKC

Understand the intricacies of the ever-popular S Corporation form of doing business. The ins and outs of planning and reporting successful complex transactions are set out in this course. Cover the latest tax rules that govern the taxation of S Corps and minimize your client's tax bill with winning strategies.

Designed For: * CPAs in public practice.
Objectives: * Apply the rules related to acquisitions and liquidations of S corporations; * Explain the uses of trusts as S corporation shareholders; * Understand the complex rules of basis and distributions; and * Explore the use of redemptions in S corporations.
Highlights: * The latest S corp tax rules; * Applying compensation planning; * Tax considerations in the acquisition process; * Applying the S corporation rules related to the timing of distributions; and * Planning for loss limitations and stock basis rules.
Prerequisite: Completion of S Corporations: The Ins and Outs of Tax Reporting and Planning or equivalent knowledge and experience
Advanced Preparation:
Note: Accepted for CFP®, CMA, CFM and EA credit.

Level: Advanced
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Steven Lustig

Early Bird Rates:
Good through: 10/7/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 10/8/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Tax

Auditing: Complying with the Risk Assessments Standards for 2010 Engagements • 326

10/28/2010-10/28/2010 • OSU-Tulsa, Tulsa

The Risk Assessment Standards require auditors to understand the entity and its environment, including the risk of industry, regulatory, legal, political and environmental issues. Examine the 25 new risks and learn how to identify the specific risks related to private companies, non-profits and government entities.

Designed For: * CPAs in public practice; and * Auditors, board members, senior management, risk officers, CFEs, controllers and CFOs.
Objectives: * Learn the issues associated with the Risk Assessment Standards; and * What procedures you should use to comply with these standards.
Highlights: * Management behaviors and actions that create risk; * How maintaining the trend creates risk; * How immaterial amounts create material risk; * How compensation systems cause financial reporting risk; * Dysfunctional management decision systems risk; * How operations create financial statement risk; * Industry and economic risk; * Disruptive technology risks; * Credit and loan covenant risks; * Directed donor agreement risk; * Legal, regulatory and statutory risks; * Risks created by the standards themselves; * How you can be liable even if you comply; * One simple audit procedure to protect yourself; * Two major changes to traditional audits; * Why you can't rely on management; and * Much more.
Prerequisite: At least 10 years of experience as a CPA
Advanced Preparation:
Note:

Level: Advanced
Recommended CPE credit: 8
Vendor: Gary Zeune & Associates
Instructor: Gary Zeune

Early Bird Rates:
Good through: 10/7/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 10/8/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Accounting and Auditing, Audit

MBA in a Day! • 330

11/1/2010-11/1/2010 • OSU-Tulsa, Tulsa

Develop a complete business finance and management background to better manage all aspects of your own business. CPAs in public practice can use this knowledge to help their clients make more informed business and financial decisions.

Designed For: * CPAs in public practice and industry.
Objectives: * Develop a complete business finance and management background; and * Help your clients make more informed business and financial decisions.
Highlights: * Fundamentals of organization behavior; * Gathering statistical information, interpretation and methods of forecasting; * Risk and return; * Portfolio management theories; * Asset allocation; * Capital asset pricing models; * Financial management; * The mathematics of tax leverage and tax planning; * Cash flow analysis; * Marketing principles and concepts including consumer analysis, market segmentation, distribution channels and much more; * Capital budgeting and marginal investment analysis; * Production management – capacity, scheduling and inventory control issues; and * Macroeconomic and microeconomic concepts.
Prerequisite: At least three years of experience in the field of study
Advanced Preparation:
Note:

Level: Intermediate
Recommended CPE credit: 8
Vendor: Surgent McCoy CPE, LLC
Instructor: Rebecca Whitener

Early Bird Rates:
Good through: 10/11/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 10/12/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Management, Industry

Is There a Gap in Your GAAP? – Part 1 • 328

11/1/2010-11/1/2010 • OSCPA Offices, OKC

Unlike accounting and auditing updates and recent GAAP seminars, which focus upon the most recently issued, current U.S. accounting and auditing pronouncements and literature, this course will refresh and update the seminar attendees knowledge of all U.S. GAAP topics. Since a significant number of seminar attendees tend not to be practicing in public accounting, this topical seminar will re-familiarize the attendees with knowledge that they may not have seen in quite some time. Yet, as they advance in their corporate environments and careers, their need to know even the basics of these topics becomes important, especially in light of the forthcoming convergence of U.S. accounting principles and standards with international accounting principles and reporting standards. This seminar is part one of a two-part series.

Designed For: * CPAs in public practice and industry.
Objectives: * Review specific accounting standards and interpretations; * Follow concise, practical examples of how these standards and interpretations are applied, including related footnote disclosures; and * Cross-reference standards and interpretations to either existing or proposed international accounting standards.
Highlights: * Comprehensive income; * Pensions and post-retirement benefit obligations; * Capitalization and imputation of interest; * Amortization of definite and indefinite lived assets and goodwill; * Foreign currency translations; * Marketable securities; * Accounting changes; * Non-monetary transactions; and * Commitments and contingencies.
Prerequisite: None
Advanced Preparation:
Note:

Level: Basic
Recommended CPE credit: 8
Vendor: Surgent McCoy CPE, LLC
Instructor: David Dube

Early Bird Rates:
Good through: 10/11/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 10/12/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Accounting and Auditing

Social Security, Medicare and Prescription Drug Retirement Benefits: What Every Baby Boomer Needs to Know Now • 334

11/2/2010-11/2/2010 • OSU-Tulsa, Tulsa

As the baby boomer generation approaches retirement, financial and tax planners will face a greater demand for strategies that dovetail Social Security with other retirement objectives. Learn important strategies for dealing with Social Security.

Designed For: * CPAs in public practice.
Objectives: * Identify who is entitled to retirement benefits and in what amounts; * Determine what factors must be considered in determining when to take benefits; * Understand the taxation of Social Security benefits and how this impacts other income tax planning; and * Factor in Medicare and prescription drugs.
Highlights: * Legislative developments; * Determining the best new planning options for maximizing joint Social Security benefits; * Retirement benefits; * Qualifications for Social Security; * Income taxation of Social Security; * Spousal benefits; * When it is effective to hire the spouse; * Disability benefits; * Advantages and disadvantages of going on Social Security at ages 62, 66 and 70; * Coordinating benefits; * Distribution strategies when pensions are involved; * When to convert to a Roth IRA; and * Medicare and Part D prescription drugs.
Prerequisite: None
Advanced Preparation:
Note:

Level: Basic
Recommended CPE credit: 8
Vendor: Surgent McCoy CPE, LLC
Instructor: Rebecca Whitener

Early Bird Rates:
Good through: 10/12/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 10/13/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Financial Planning, Tax

Is There a Gap in Your GAAP? – Part 2 • 332

11/2/2010-11/2/2010 • OSCPA Offices, OKC

Unlike accounting and auditing updates and recent GAAP seminars, which focus upon the most recently issued, current U.S. accounting and auditing pronouncements and literature, this course will refresh and update the seminar attendees knowledge of all U.S. GAAP topics. Since a significant number of seminar attendees tend not to be practicing in public accounting, this topical seminar will re-familiarize the attendees with knowledge that they may not have seen in quite some time. Yet, as they advance in their corporate environments and careers, their need to know even the basics of these topics becomes important, especially in light of the forthcoming convergence of U.S. accounting principles and standards with international accounting principles and reporting standards. This seminar is part two of a two-part series.

Designed For: * CPAs in public practice and industry.
Objectives: * Review specific accounting standards and interpretations; * Follow concise, practical examples of how these standards and interpretations are applied, including related footnote disclosures; and * Cross-reference standards and interpretations to either existing or proposed international accounting standards.
Highlights: * Stock-based compensation; * Asset retirement obligations; * Research and development costs; * Leases; * Deferred income taxes; * Segment reporting; * Accounting for long-lived assets and impairment; * Earnings per share; and * Business combinations.
Prerequisite: None
Advanced Preparation:
Note:

Level: Basic
Recommended CPE credit: 8
Vendor: Surgent McCoy CPE, LLC
Instructor: David Dube

Early Bird Rates:
Good through: 10/12/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 10/13/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Accounting and Auditing

Professional Ethics (9-11 a.m.) • 336

11/3/2010-11/3/2010 • OSCPA Offices, OKC

Explore the reasoning and purposes behind ethical behavior in the CPA profession. Develop the insight and background necessary to help you implement practical measures to assist in your compliance with ethical requirements of the profession.

Designed For: * CPAs in public practice and industry.
Objectives:
Highlights:
Prerequisite: None
Advanced Preparation:
Note: This seminar is recommended for two hours toward the Oklahoma ethics requirement.

Level: Update
Recommended CPE credit: 2
Vendor: OSCPA
Instructor:

Early Bird Rates:
Good through: 10/13/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $51
AICPA Member Only: $
Nonmember: $64

Standard Rates:
Effective: 10/14/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $64
AICPA Member Only: $
Nonmember: $77

Fields of Interest: Ethics

Professional Ethics (1-3 p.m.) • 338

11/3/2010-11/3/2010 • OSCPA Offices, OKC

Explore the reasoning and purposes behind ethical behavior in the CPA profession. Develop the insight and background necessary to help you implement practical measures to assist in your compliance with ethical requirements of the profession.

Designed For: * CPAs in public practice and industry.
Objectives:
Highlights:
Prerequisite: None
Advanced Preparation:
Note: This seminar is recommended for two hours toward the Oklahoma ethics requirement.

Level: Update
Recommended CPE credit: 2
Vendor: OSCPA
Instructor:

Early Bird Rates:
Good through: 10/13/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $51
AICPA Member Only: $
Nonmember: $64

Standard Rates:
Effective: 10/14/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $64
AICPA Member Only: $
Nonmember: $77

Fields of Interest: Ethics

FASB Review for Industry • 340

11/4/2010-11/4/2010 • OSCPA Offices, OKC

CPAs in corporate management will benefit from this comprehensive coverage of recent FASB, AcSEC, IASB and EITF pronouncements. Gain expertise from a high-level approach to financial reporting issues backed by detailed descriptions and examples of the implementation of new standards. Your training will guide you in assessing recent FASB and AICPA standards that have a major effect on all industries and provide an understanding of the latest pronouncements and exposure drafts to enable you to develop implementation strategies.

Designed For: * CPAs in industry.
Objectives: * Analyze recent FASB and AICPA standards that have a major effect on all industries; * Review recent pronouncement and exposure drafts to develop implementation strategies; and * Apply standards for financial instruments, investments in securities and impaired loans, complex equity transactions, debt and asset impairment, consolidations, earnings per share and hedge accounting.
Highlights: * Recent FASB, AICPA, EITF and FASB; * Staff position pronouncements and exposure drafts; * Major trends in financial reporting; * PCAOB and SEC reporting requirements; * Business combinations, goodwill and variable interest entities; * Impairment issues; * Complex equity transactions, stock compensation, SARs and earnings per share; * International accounting and reporting standards; and * Comparative accounting for selected countries.
Prerequisite: Experience in financial reporting
Advanced Preparation:
Note:

Level: Intermediate
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Mark Dauberman

Early Bird Rates:
Good through: 10/14/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 10/15/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Accounting and Auditing

Advanced Federal Income Taxation of Estates, Trusts and Beneficiaries, and Advanced 1041 Return Preparation Issues • 342

11/4/2010-11/4/2010 • OSU-Tulsa, Tulsa

Reform of the estate and gift tax has impacted the use of trusts and changed estate administration. This program is designed to provide comprehensive coverage of federal income tax provisions for estates, trusts and beneficiaries. The in-depth presentation includes a concise and practical explanation of Subchapter J and related sections in the Internal Revenue Code.

Designed For: * CPAs in public practice.
Objectives: * Complete Form 1041 for trusts or estates with depreciation, alternative minimum tax and capital gains; * Understand the special issues in preparing Form 1041 for charitable trusts; and * Be aware of the tax consequences and planning attending a termination.
Highlights: * Depreciation and depletion deductions for estates and trusts, and state law nuances, fully explained and illustrated; * The significant tax attributes of charitable remainder annuity trusts and charitable remainder unitrusts; * The alternative minimum tax as it applies to estates and trusts; * The significant tax attributes that flow out to beneficiaries on termination of an estate and trust; * The five-step approach to complete a fiduciary tax return for a complex trust and/or estate using flowcharts and examples; * Generation-skipping transfers; * The use of the charitable lead trust; * Asset protection and tax reduction; and * Inclusion of current tax changes.
Prerequisite: Experience in preparing Form 1041
Advanced Preparation:
Note:

Level: Advanced
Recommended CPE credit: 8
Vendor: Surgent McCoy CPE, LLC
Instructor: Ted Englebrecht

Early Bird Rates:
Good through: 10/14/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 10/15/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Tax, Financial Planning

Advanced Income Tax Accounting – Including Practical Application Exercises • 344

11/5/2010-11/5/2010 • OSCPA Offices, OKC

Get updated on the latest issues regarding accounting for income taxes. Apply FAS 109 and FIN 48 to most real-life situations and participate in practical exercises illustrating the theory. Learn the IFRS impact on accounting for income taxes as well as the impact when dealing with other accounting standards in conjunction with FAS 109 and FIN 48.

Designed For: * CPAs in industry; and * CPA firm audit or tax managers.
Objectives: * Apply the complex rules of SFAS 109 and FIN 48 to new and challenging situations; * Identify the similarities and differences between U.S. GAAP and IFRS with deferred tax implications; * Apply FAS 109 and FIN 48 to state and local income tax complexities; * Determine the applicable tax rate for complex situations; * Schedule temporary differences in various complex situations; * Apply FAS 109 to changes in tax laws or rates, accounting methods and tax status; * Apply FAS No. 109 and FIN 48 to interim periods; * Apply FAS No. 109 and FIN 48 to FAS 141(R), Business Combinations, and FAS 160, Noncontrolling Interests in Consolidated Financial Statements; * Apply intraperiod tax allocation with a five-step approach for more complex situations; and * Much more.
Highlights: * Comparison of SFAS No.109 to IAS 12; * FIN 48 application for various complex situations; * New preparer penalty standard and their interplay with FIN 48; * Business combinations and fair value issues; * Application of a worksheet approach to advanced applications of SFAS 109 and FIN 48; * Intraperiod tax allocation; * Implications of convergence of GAAP and IFRS, regulated enterprises, leveraged leases and quasi-reorganizations.
Prerequisite: Experience in financial reporting and basic knowledge of FAS 109 and FIN 48
Advanced Preparation:
Note:

Level: Advanced
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Mark Dauberman

Early Bird Rates:
Good through: 10/15/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 10/16/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Tax

Federal Estate and Gift Tax Returns – Forms 706 and 709 Workshop • 346

11/5/2010-11/5/2010 • OSU-Tulsa, Tulsa

Changes in the transfer tax under new law are mirrored in the compliance requirements. Learn how to prepare Forms 706 and 709 in these circumstances. Get guidance with the complex issues in completing these forms.

Designed For: * CPAs in public practice.
Objectives: * Complete an estate tax return (Form 706) and accompanying schedules; * Identify elections on the estate tax as they relate to valuation and timing of payments; * Complete a gift tax return (Form 709); and * Identify how the annual exclusion, gift-splitting and certain transfers are properly scheduled.
Highlights: * How proposed and enacted legislation affects estates of decedents dying in 2010 and gifts made after Dec. 31, 2009; * Gift tax return basics – Form 709; * Special gift circumstances annual exclusion, gift-splitting, gifts to minors and gifts for educational and medical benefits; * Overview of estate tax concepts; * What triggers an estate tax audit and how to handle it; * Trusts, wills and state laws and how they affect Form 706; * Form 706 preparation issues – determining includable property, determining deductions from the gross estate, credits against federal estate tax and calculating the federal estate tax; * Elections you need to know: alternate valuation, special-use valuation and deferred payments; * How state death taxes affect federal estate tax return; * Filing Form 706; * Comprehensive case study with filled-in forms; and * New, more complicated compliance in the future.
Prerequisite: A basic knowledge of estate planning
Advanced Preparation:
Note:

Level: Intermediate
Recommended CPE credit: 8
Vendor: Surgent McCoy CPE, LLC
Instructor: Ted Englebrecht

Early Bird Rates:
Good through: 10/15/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 10/16/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Financial Planning, Tax

Planning for Profits – How to Develop and Execute an Effective Business Plan • 350

11/8/2010-11/8/2010 • OSU-Tulsa, Tulsa

How many organizations would be far more successful if they simply planned their future? Business planning is a process by which an organization envisions its future and develops the required plans and procedures to accomplish that vision. Developing this unified sense of direction is essential for success, yet it is frequently overlooked. Focus on both the development and execution of the plan and how the organization can change its future.

Designed For: * CPAs in industry.
Objectives: * Obtain a working knowledge of strategic thinking, strategic planning, operations planning and financial planning; * Use Business Process Management to properly link these four planning segments; * Identify key results areas and analyze critical issues; * Effectively lead the business planning process; and * Use project management as a tool for proper execution of the plan.
Highlights: * How the CPA/financial leader effectively leads the business planning process; * Determining the direction the organization has decided to pursue; * Addressing the organization's vision, values and mission; * Strategic planning – a dynamic process of deciding what products and/or services to provide, what markets to pursue and what processes to improve; * Implementation of the strategic plan; * Identifying specific results to be achieved within a given period, and the actions and resources necessary to achieve these results; * Using project management as a tool for successful execution; * Describing in financial terms the organization's projected performance; and * Much more.
Prerequisite: None
Advanced Preparation:
Note:

Level: Basic
Recommended CPE credit: 8
Vendor: Financial Insights
Instructor: Jack Park

Early Bird Rates:
Good through: 10/18/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 10/19/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Management, Industry, Practice Management

Fiduciary Income Tax Returns – Form 1041 Workshop • 348

11/8/2010-11/8/2010 • OSCPA Offices, OKC

How does the new law on transfer tax affect the income tax law? Learn the complicated income tax rules of estates and trusts, fiduciary accounting and how to prepare Form 1041. The 250-page manual attendees will receive is an excellent reference source for your practice.

Designed For: * CPAs in public practice.
Objectives: * Be aware of fiduciary accounting principles; * Calculate Distributable Net Income and the income distribution deduction; and * Prepare Form 1041 and Schedule K-1.
Highlights: * Dividing income in the year of death; * Overview of Subchapter J; * Income tax issues of estates and trusts; * Form preparation issues; * Merging estate and trusts for income tax purposes; * Taxable income of estates and trusts and expense allocation issues; * Specific deductions and miscellaneous itemized deductions; * Pension plan issues and income in respect of a decedent; * Distributable net income (DNI) and the income distribution deduction; * Calculation of DNI and computation of distribution deduction on Schedule B; * Relation of principal and income law to DNI; * Understanding how to handle capital gains and losses under final regulations; * Principal and Income Act of 1997; * Tax-planning concerns and special issues; * Making sense of the AMT on Schedule I; * Allocating tax items to beneficiaries; and * Comprehensive estate case study.
Prerequisite: A basic knowledge in estates and trusts and experience preparing income tax returns
Advanced Preparation:
Note:

Level: Intermediate
Recommended CPE credit: 8
Vendor: Surgent McCoy CPE, LLC
Instructor: Robert Barnhill

Early Bird Rates:
Good through: 10/18/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 10/19/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Financial Planning, Tax

How to Identify, Explain and Present Pertinent Financial Information to Non-Accountants • 354

11/9/2010-11/9/2010 • OSU-Tulsa, Tulsa

Do your business associates and/or clients have difficulty understanding the financials? Are they making decisions without comprehending the financial impact of their actions? Learn practical ideas and techniques to help associates and clients make better business decisions. This seminar is especially beneficial with today's emphasis upon teambuilding, total quality management and employee involvement, where responsibility, authority and decision-making are shifting to lower organization levels.

Designed For: * CPAs in public practice and industry.
Objectives: * Identify an organization's key financial metrics; * Determine the drivers that impact the metrics; * Present the metrics and drivers to non-accountants in understandable patterns; and * Increase your confidence and effectiveness with making presentations to large and small groups.
Highlights: * The three-step process for gaining insight; * Identifying the key financial metrics – Key Results Indicators (KRIs); * Determining the drivers that impact the metrics – Key Performance Indicators (KPIs); * Presenting the metrics and drivers in understandable patterns; * Developing understandable internal and external financial statements; * The six-step process for high-impact presentations; * How financial understanding will enhance decision-making for both strategic and operational objectives; * Getting stakeholders to better understand the financial aspects of business and make better decisions; * Positioning the CPA as a financial leader within the organization and with your clients; and * Feeling more confident and comfortable explaining financial information.
Prerequisite: None
Advanced Preparation:
Note:

Level: Basic
Recommended CPE credit: 8
Vendor: Financial Insights
Instructor: Jack Park

Early Bird Rates:
Good through: 10/19/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 10/20/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Management, Practice Management, Industry

Converting Your Pension and IRAs to Roth IRAs: A Major New Strategy Your Clients Must Consider • 352

11/9/2010-11/9/2010 • OSCPA Offices, OKC

In 2010, anyone can convert their IRA money to a Roth IRA, regardless of income. Now, all clients will need to explore the pros and cons of converting part or all of their IRA proceeds. Understand this complex analysis in order to effectively seek out the best possible solution for clients.

Designed For: * CPAs in public practice.
Objectives:
Highlights: * Understanding all of the options; * Determining by age group the mathematical benefit of leaving your money in a traditional IRA or rolling to a Roth and accelerating income taxes; * Understanding in-depth distribution planning for IRAs and Roth IRAs and maximizing the final results; * Estate planning implementation of large balance in IRAs versus Roth IRAs; * Using trusts to the best results for estate and income tax planning; * Beneficiary considerations and stretching out the benefits; * In-depth analysis of when to claim Social Security, and consideration of deferring benefits for Social Security and taking money out of your IRA; * Pros and cons of rolling over 401(k) and Roth 401(k) to IRAs versus taking distribution directly from the 401(k); * How income tax rate changes can dramatically affect the decision; * How some clients, regardless of income, can make a Roth IRA contribution in 2010 and beyond; and * Much more.
Prerequisite: At least three years of experience in the area of study is recommended
Advanced Preparation:
Note:

Level: Intermediate
Recommended CPE credit: 8
Vendor: Surgent McCoy CPE, LLC
Instructor: Robert Barnhill

Early Bird Rates:
Good through: 10/19/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 10/20/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Financial Planning, Tax

Business Fraud, Internal Controls and Forensic Analysis for the Accountability Professional • 356

11/10/2010-11/10/2010 • East Central University, Ada

Satellite Broadcast: Business fraud is a problem that can affect every organization. Fraud is serious business and its effects can be devastating. Take a comprehensive look at fraud from both the technical, legal and operational perspectives. Particular attention will be directed to best practices in implementing SAS 99 and ways management can limit opportunities to commit fraud by establishing and monitoring appropriate controls. More details will be posted six weeks prior to course date.

Designed For: * CPAs and auditors in public practice and industry.
Objectives:
Highlights: * Internal control problems of smaller organizations with limited staff and resources; * Techniques for conducting inquiries of management; * Audit team brainstorming sessions and interview techniques; and * Common types of fraud and the steps that can be taken to protect assets and financial statements.
Prerequisite: None
Advanced Preparation:
Note:

Level: Intermediate
Recommended CPE credit: 8
Vendor: ACPEN
Instructor: Group

Early Bird Rates:
Good through: 10/20/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $163
AICPA Member Only: $
Nonmember: $263

Standard Rates:
Effective: 10/21/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $188
AICPA Member Only: $
Nonmember: $288

Fields of Interest: Accounting & Auditing, Fraud

Business Fraud, Internal Controls and Forensic Analysis for the Accountability Professional • 358

11/10/2010-11/10/2010 • Autry Technology Center, Enid

Satellite Broadcast: Business fraud is a problem that can affect every organization. Fraud is serious business and its effects can be devastating. Take a comprehensive look at fraud from both the technical, legal and operational perspectives. Particular attention will be directed to best practices in implementing SAS 99 and ways management can limit opportunities to commit fraud by establishing and monitoring appropriate controls. More details will be posted six weeks prior to course date.

Designed For: * CPAs and auditors in public practice and industry.
Objectives:
Highlights: * Internal control problems of smaller organizations with limited staff and resources; * Techniques for conducting inquiries of management; * Audit team brainstorming sessions and interview techniques; and * Common types of fraud and the steps that can be taken to protect assets and financial statements.
Prerequisite: None
Advanced Preparation:
Note:

Level: Intermediate
Recommended CPE credit: 8
Vendor: ACPEN
Instructor: Group

Early Bird Rates:
Good through: 10/20/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $163
AICPA Member Only: $
Nonmember: $263

Standard Rates:
Effective: 10/21/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $188
AICPA Member Only: $
Nonmember: $288

Fields of Interest: Accounting & Auditing, Fraud

Business Fraud, Internal Controls and Forensic Analysis for the Accountability Professional • 360

11/10/2010-11/10/2010 • Moore-Norman Technology Center, Norman

Satellite Broadcast: Business fraud is a problem that can affect every organization. Fraud is serious business and its effects can be devastating. Take a comprehensive look at fraud from both the technical, legal and operational perspectives. Particular attention will be directed to best practices in implementing SAS 99 and ways management can limit opportunities to commit fraud by establishing and monitoring appropriate controls. More details will be posted six weeks prior to course date.

Designed For: * CPAs and auditors in public practice and industry.
Objectives:
Highlights: * Internal control problems of smaller organizations with limited staff and resources; * Techniques for conducting inquiries of management; * Audit team brainstorming sessions and interview techniques; and * Common types of fraud and the steps that can be taken to protect assets and financial statements.
Prerequisite: None
Advanced Preparation:
Note:

Level: Intermediate
Recommended CPE credit: 8
Vendor: ACPEN
Instructor: Group

Early Bird Rates:
Good through: 10/20/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $163
AICPA Member Only: $
Nonmember: $263

Standard Rates:
Effective: 10/21/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $188
AICPA Member Only: $
Nonmember: $288

Fields of Interest: Accounting & Auditing, Fraud

Business Fraud, Internal Controls and Forensic Analysis for the Accountability Professional • 364

11/10/2010-11/10/2010 • OSU-Tulsa, Tulsa

Satellite Broadcast: Business fraud is a problem that can affect every organization. Fraud is serious business and its effects can be devastating. Take a comprehensive look at fraud from both the technical, legal and operational perspectives. Particular attention will be directed to best practices in implementing SAS 99 and ways management can limit opportunities to commit fraud by establishing and monitoring appropriate controls. More details will be posted six weeks prior to course date.

Designed For: * CPAs and auditors in public practice and industry.
Objectives:
Highlights: * Internal control problems of smaller organizations with limited staff and resources; * Techniques for conducting inquiries of management; * Audit team brainstorming sessions and interview techniques; and * Common types of fraud and the steps that can be taken to protect assets and financial statements.
Prerequisite: None
Advanced Preparation:
Note:

Level: Intermediate
Recommended CPE credit: 8
Vendor: ACPEN
Instructor: Group

Early Bird Rates:
Good through: 10/20/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $163
AICPA Member Only: $
Nonmember: $263

Standard Rates:
Effective: 10/21/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $188
AICPA Member Only: $
Nonmember: $288

Fields of Interest: Accounting & Auditing, Fraud

Professional Ethics (9-11 a.m.) • 368

11/10/2010-11/10/2010 • OSU-Tulsa, Tulsa

Explore the reasoning and purposes behind ethical behavior in the CPA profession. Develop the insight and background necessary to help you implement practical measures to assist in your compliance with ethical requirements of the profession.

Designed For: * CPAs in public practice and industry.
Objectives:
Highlights:
Prerequisite: None
Advanced Preparation:
Note: This seminar is recommended for two hours toward the Oklahoma ethics requirement.

Level: Update
Recommended CPE credit: 2
Vendor: OSCPA
Instructor:

Early Bird Rates:
Good through: 10/20/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $51
AICPA Member Only: $
Nonmember: $64

Standard Rates:
Effective: 10/21/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $64
AICPA Member Only: $
Nonmember: $77

Fields of Interest: Ethics

Professional Ethics (1-3 p.m.) • 370

11/10/2010-11/10/2010 • OSU-Tulsa, Tulsa

Explore the reasoning and purposes behind ethical behavior in the CPA profession. Develop the insight and background necessary to help you implement practical measures to assist in your compliance with ethical requirements of the profession.

Designed For: * CPAs in public practice and industry.
Objectives:
Highlights:
Prerequisite: None
Advanced Preparation:
Note: This seminar is recommended for two hours toward the Oklahoma ethics requirement.

Level: Update
Recommended CPE credit: 2
Vendor: OSCPA
Instructor:

Early Bird Rates:
Good through: 10/20/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $51
AICPA Member Only: $
Nonmember: $64

Standard Rates:
Effective: 10/21/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $64
AICPA Member Only: $
Nonmember: $77

Fields of Interest: Ethics

The Top 50 Mistakes Practitioners Make and How to Fix Them: Estate Planning and Administration • 366

11/10/2010-11/10/2010 • OSCPA Offices, OKC

Estate planning and administration is one of the most complicated areas in the tax law. The liability for making a mistake can be huge. Learn what not to do by discovering what others have done before. See the key areas to watch out for and how to prevent mistakes, particularly in light of estate planning tax reform.

Designed For: * CPAs in public practice.
Objectives: * Acquire an awareness of and sensitivity to the major mistakes that can be made in dealing with this unique area; and * Develop an eye for the subtle missteps that are too often taken.
Highlights: * Irrevocable life insurance trusts; * What happens if Crummey letters are not sent?; * Does irrevocable really mean irrevocable?; * Who applies for the insurance, and how is it done?; * Present interest, future interest and exclusion issues; * Valuation issues and statute of limitations; * Failure to allocate the GST exemption; * What is a completed gift before death?; * Failure to deed or transfer property to a trust; * What is income and what is principal?; * How to get rid of the trustee and the use of protectors; * Beneficiaries, specific bequests and bonding issues; * Picking the wrong executor; * Dealing with property that passes by contract or operation of law; * Equalizing the estate of the married couple; * Beneficiary designations and options in retirement plans; * Maximizing the use of disclaimers; and * Much, much more.
Prerequisite: At least three years of experience in the area of study is recommended
Advanced Preparation:
Note:

Level: Intermediate
Recommended CPE credit: 8
Vendor: Surgent McCoy CPE, LLC
Instructor: Robert Barnhill

Early Bird Rates:
Good through: 10/20/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 10/21/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Financial Planning, Taxes

Technology Conference • 2580

11/11/2010-11/12/2010 • Hard Rock Hotel & Casino, Tulsa

Designed For:
Objectives:
Highlights:
Prerequisite:
Advanced Preparation:
Note:

Level:
Recommended CPE credit: 16
Vendor: K2 Enterprises
Instructor:

Early Bird Rates:
Good through: 10/21/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $367
AICPA Member Only: $
Nonmember: $467

Standard Rates:
Effective: 10/22/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $392
AICPA Member Only: $
Nonmember: $492

Fields of Interest:

The Complete Trust Workshop • 372

11/11/2010-11/11/2010 • OSCPA Offices, OKC

With major changes in the estate and gift tax, the role of trusts changes as well. Explore the many beneficial uses of trusts, an essential element in estate planning. Discover practical pointers for trusts of every shape and size after tax reform.

Designed For: * CPAs in public practice.
Objectives: * Identify the areas of trust in connection with disability, charity, life insurance, leveraging gifts, principal residences and minors; * Understand the role played by a marital deduction trust and a credit shelter bypass trust; and * Explain how trusts may protect assets and perpetuate family wealth over multiple generations.
Highlights: * Guide to legislative changes and their impact on trust planning; * Introduction to trusts with emphasis on typical provisions; * Revocable living trusts; * Common testamentary trust arrangements – bypass trusts, QTIP trusts and other marital trusts; * Asset protection trusts; * Sophisticated trusts for estate planning and asset transfer – GRATs, GRUTs, QPRTs and IDGTs; * Charitable trusts – Charitable remainder trusts, charitable lead trusts and pooled income funds; * Irrevocable life insurance trusts; * Medicaid trusts; * Trusts for minors – Sections 2503(b) and 2503(c) and other trusts; * Dynasty trusts; * Trusts to hold S corporation stock; and * Impact of historically low APRs on various trust arrangements.
Prerequisite: A basic knowledge of estate and gift tax and a basic course on estate and trust income taxation (Form 1041)
Advanced Preparation:
Note:

Level: Intermediate
Recommended CPE credit: 8
Vendor: Surgent McCoy CPE, LLC
Instructor: Robert Barnhill

Early Bird Rates:
Good through: 10/21/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 10/22/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Financial Planning, Tax

Professional Ethics (9-11 a.m.) • 374

11/15/2010-11/15/2010 • OSCPA Offices, OKC

Explore the reasoning and purposes behind ethical behavior in the CPA profession. Develop the insight and background necessary to help you implement practical measures to assist in your compliance with ethical requirements of the profession.

Designed For: * CPAs in public practice and industry.
Objectives:
Highlights:
Prerequisite: None
Advanced Preparation:
Note: This seminar is recommended for two hours toward the Oklahoma ethics requirement.

Level: Update
Recommended CPE credit: 2
Vendor: OSCPA
Instructor:

Early Bird Rates:
Good through: 10/25/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $51
AICPA Member Only: $
Nonmember: $64

Standard Rates:
Effective: 10/26/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $64
AICPA Member Only: $
Nonmember: $77

Fields of Interest: Ethics

Professional Ethics (1-3 p.m.) • 376

11/15/2010-11/15/2010 • OSCPA Offices, OKC

Explore the reasoning and purposes behind ethical behavior in the CPA profession. Develop the insight and background necessary to help you implement practical measures to assist in your compliance with ethical requirements of the profession.

Designed For: * CPAs in public practice and industry.
Objectives:
Highlights:
Prerequisite: None
Advanced Preparation:
Note: This seminar is recommended for two hours toward the Oklahoma ethics requirement.

Level: Update
Recommended CPE credit: 2
Vendor: OSCPA
Instructor:

Early Bird Rates:
Good through: 10/25/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $51
AICPA Member Only: $
Nonmember: $64

Standard Rates:
Effective: 10/26/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $64
AICPA Member Only: $
Nonmember: $77

Fields of Interest: Ethics

Vern Hoven's One-Day Federal Tax Update for the Year 2010-2011: Individual, Business and Corporate • 378

11/15/2010-11/15/2010 • Renaissance Hotel, Tulsa

Practicing CPAs Vern Hoven and Ron Roberson return to present latest tax updates. Join them as they combine real-life experiences with essential down-to-earth tax materials and respond to fast-breaking new tax developments that affect individuals, estates, businesses, partnerships and corporations. Course materials contain numerous practical examples, flowcharts, editorial planning tips and other helpful information to aid in your understanding of new developments. Complete course highlights will be available approximately eight weeks prior to course date.

Designed For: * CPAs in public practice who provide tax services.
Objectives: * Identify and solve client tax problems before tax season starts.
Highlights: * Legislative changes impacting 2010 and 2011 returns; * Potential tax changes; * Individual changes; * Real estate changes; * Passive loss update; * Individual retirement plans; * Estate/gift taxation; * Business changes; * Federal payroll changes; * Business retirement plans; * Corporate changes; * Partnership changes; and * IRS audit issues.
Prerequisite: None
Advanced Preparation:
Note:

Level: Update
Recommended CPE credit: 8
Vendor: Vern Hoven Tax Seminars
Instructor: Vern Hoven

Early Bird Rates:
Good through: 10/25/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $238
AICPA Member Only: $
Nonmember: $338

Standard Rates:
Effective: 10/26/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $263
AICPA Member Only: $
Nonmember: $363

Fields of Interest: Tax

Tax, Cash and Modified Cash Basis Financial Statements and Other Alternatives to GAAP (OCBOA) • 382

11/16/2010-11/16/2010 • OSU-Tulsa, Tulsa

Find some relief from GAAP standards that are costly to implement and incomprehensible to financial statement users. Explore other forms of professional presentations that don't cut corners but are also cost efficient. Illustrate exactly what is necessary when preparing tax, cash or modified cash basis financial statements and provide hard to find report, presentations and disclosure examples.

Designed For: * CPAs in public practice and industry who are responsible for the preparation of non-public, financial statements.
Objectives: * Understand the issues unique to OCBOA presentations; * Determine when OCBOA or special presentations are appropriate; * Distinguish between circumstances when OCBOA or GAAP departures are the most appropriate; * Prepare financial statements on another comprehensive basis of accounting; and * Prepare special purpose presentations.
Highlights: * When is a presentation an OCBOA or a GAAP departure; * Differences between cash and modified cash; * Common book versus tax differences; * What to do with non-taxable and non-deductible items on tax basis financials; * Which GAAP disclosures apply and which can be omitted; * How to treat an OCBOA presentation; * Using special purpose presentations; * Reporting considerations; * Using GAAP departures; and * Practice aid on OCBOA.
Prerequisite: None
Advanced Preparation:
Note:

Level: Basic
Recommended CPE credit: 8
Vendor: Loscalzo Associates
Instructor: Rebecca Lee

Early Bird Rates:
Good through: 10/26/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 10/27/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Accounting and Auditing

Vern Hoven's One-Day Federal Tax Update for the Year 2010-2011: Individual, Business and Corporate • 380

11/16/2010-11/16/2010 • Clarion Meridian Conv. Ctr., OKC

Practicing CPAs Vern Hoven and Ron Roberson return to present latest tax updates. Join them as they combine real-life experiences with essential down-to-earth tax materials and respond to fast-breaking new tax developments that affect individuals, estates, businesses, partnerships and corporations. Course materials contain numerous practical examples, flowcharts, editorial planning tips and other helpful information to aid in your understanding of new developments. Complete course highlights will be available approximately eight weeks prior to course date.

Designed For: * CPAs in public practice who provide tax services.
Objectives: * Identify and solve client tax problems before tax season starts.
Highlights: * Legislative changes impacting 2010 and 2011 returns; * Potential tax changes; * Individual changes; * Real estate changes; * Passive loss update; * Individual retirement plans; * Estate/gift taxation; * Business changes; * Federal payroll changes; * Business retirement plans; * Corporate changes; * Partnership changes; and * IRS audit issues.
Prerequisite: None
Advanced Preparation:
Note:

Level: Update
Recommended CPE credit: 8
Vendor: Vern Hoven Tax Seminars
Instructor: Vern Hoven

Early Bird Rates:
Good through: 10/26/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $238
AICPA Member Only: $
Nonmember: $338

Standard Rates:
Effective: 10/27/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $263
AICPA Member Only: $
Nonmember: $363

Fields of Interest: Tax

How to Succeed as a Part-Time or Contract Controller • 384

11/17/2010-11/17/2010 • OSCPA Offices, OKC

The number of openings for part-time and contract controllers and CFOs continues to grow. Get answers and guidance to many of the questions raised with being asked to serve as an acting controller for a client or becoming a controller under contract. Find out about the eight skills you need to make intelligent choices and fully understand the controller's position as it relates to a less than full-time, or non-permanent position. Learn how to employ the two attitudes required of the part-time or contract financial executive.

Designed For: * CPAs in industry.
Objectives: * Understand the issues surrounding the part-time or contract controller's position; * Apply the five best practices you will need to be successful; * Develop a position description for a contract and part-time financial executive; * Market your skills as a part-time or contract controller; and * Understand the role the contract controller plays.
Highlights: * What the best controller candidate needs to bring to the job; * How to develop the controller's position description; * Benefits and pitfalls of a part-time or contract controller's position; and * Resources needed for the part-time or contract controller to be successful.
Prerequisite: Experience in financial management of a medium or small company
Advanced Preparation:
Note: Accepted for CMA and CFM credit.

Level: Intermediate
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Ron Rael

Early Bird Rates:
Good through: 10/27/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 10/28/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Management, Industry

Tax Practitioner's Guide to Accounting and Reporting Issues • 386

11/17/2010-11/17/2010 • OSU-Tulsa, Tulsa

Learn why a tax return and a tax basis financial statement are not the same as you determine what book versus tax differences need to be disclosed in tax basis financial statements. Address frequently encountered accounting and performance issues by tax practitioners and uncertain tax positions.

Designed For: * CPAs in public practice.
Objectives: * Identify differences between GAAP requirements and the tax return; * Recognize problems in compilations and reviews; and * Understand the provisions of recent accounting pronouncements.
Highlights: * New and troublesome issues for those tax practitioners who are responsible for issuing compilation and review reports; * Examination of book versus tax differences; * Changes needed to the body of the statements when tax basis financials are presented; * What disclosures are really necessary in tax basis financial; * Revised deferred tax requirements, including uncertain tax positions; * Problems and issues in compilations and reviews, including an update of recent SSARS standards and interpretations and the reliability project; and * An overview of recent relevant accounting pronouncements.
Prerequisite: None
Advanced Preparation:
Note:

Level: Basic
Recommended CPE credit: 8
Vendor: Loscalzo Associates
Instructor: Rebecca Lee

Early Bird Rates:
Good through: 10/27/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 10/28/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Accounting and Auditing

Controllership: Leading Edge of Corporate Performance • 388

11/18/2010-11/18/2010 • OSCPA Offices, OKC

As a controller in this fast changing world, you have the unique responsibility of having to carefully balance both your technical financial skills along with the skills of modern leadership. Reshape the role of the controller and apply quantitative and non-quantitative techniques to financing transactions, cash management, planning and budgeting. Develop ways to lead people to get the job done and master the intricacies of profit center accountability and incentive compensation.

Designed For: * CFOs, controllers, managers and others with financial responsibilities; and * CPAs acting as controllers for their clients.
Objectives: * Redesign the role of the controller; * Apply quantitative and non-quantitative techniques to financing transactions, cash management, planning and budgeting; * Understand corporate cultures; * Build a power base of knowledge; * Design adaptive policies, procedures and structure; and * Utilize style to enhance productivity and compensation.
Highlights: * Leading people to get the job done; * Profit center accountability and incentive compensation; * Role of the controller; * Controllership and corporate fit; * Future work environment; * Driving efficiency and productivity while maintaining customer satisfaction; * Policy, procedure and organization structure; * Creating and maintaining a team culture; * Financing responsibilities; * The latest cash management techniques; and * Budgeting, forecasting and control systems.
Prerequisite: Responsibility for financial issues
Advanced Preparation:
Note: Accepted for CMA and CFM credit.

Level: Intermediate
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Ron Rael

Early Bird Rates:
Good through: 10/28/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 10/29/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Accounting and Auditing, Industry, Management

Advanced Critical Tax Issues for S Corporations • 390

11/18/2010-11/18/2010 • OSU-Tulsa, Tulsa

How do S corporations fare following tax reform? Address important practical issues that even the most experienced practitioners must know.

Designed For: * CPAs in public practice.
Objectives: * Understand how stock basis, AAA and other limitations are determined; * Appreciate how corporation planning can be used in an S corporation to change the effects of the one-class-of-stock rule; and * Learn what S corporation issues are being debated with the service, settled in courts and guided by administrative decisions.
Highlights: * Cases, rulings and tax law changes affecting S corporations; * Compensation planning in S corporations, including limitations in a family-controlled business; * Use of redemptions; * Planning for the liquidation of an S corporation; * Tax issues for family ownership of S corporation stock; * Stock basis – loss limitations, AAA and distribution issues in depth; * Estate planning for S corporation shareholders, including buy-sell agreements, QSubs, ESBTs and uses of life insurance; * Built-in gains related to tax valuation issues and estate planning; * Timing of cash and property distributions; * Related party rules for capital gain and sale of property transactions; * Subsidiary operations; and * Any major changes coming to Subchapter S.
Prerequisite: A basic knowledge in S corporations and some experience in advising S corporations and their shareholders
Advanced Preparation:
Note:

Level: Advanced
Recommended CPE credit: 8
Vendor: Surgent McCoy CPE, LLC
Instructor: Susan Smith

Early Bird Rates:
Good through: 10/28/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 10/29/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Tax

That's Not What I Said! – Effective Workplace Communication • 392

11/19/2010-11/19/2010 • OSCPA Offices, OKC

How you communicate with bosses, subordinates, colleagues, clients and the opposite gender can make or break your career. See how blending a mix of communication styles can turn communication breakdowns into breakthroughs. Learn how to speak so that you are heard and listen so you understand the real message. Discover how to open lines of communication, conduct productive meetings, make persuasive presentations and more.

Designed For: * CPAs in public practice and industry.
Objectives: * Understand the impact of your communication style in the workplace; * Learn the factors that influence communication at work; * Make communication differences a plus rather than a problem; * Match the message with the audience; * Persuade and prevent conflicts through effective communication; * Develop a leadership message and become a leadership communicator; and * Evaluate difficult communication patterns.
Highlights: * Opening lines of communication; * Understanding workplace communication styles; * Gaining credibility and be taken seriously; * Setting the boundaries for workplace communication; * Effectively communicating with others verbally and nonverbally; and * Decoding team and group communication patterns.
Prerequisite: Experience in a supervisory position
Advanced Preparation:
Note: Accepted for CMA and CFM credit.

Level: Basic
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Ron Rael

Early Bird Rates:
Good through: 10/29/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 10/30/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Personal Development, Industry, Practice Management

Advanced Technical Tax Forms Training – Form 1040 Issues • 394

11/19/2010-11/19/2010 • OSU-Tulsa, Tulsa

Experienced staff can get bogged down in busy season with difficult tax returns that have multiple K-1s, AMT, at-risk basis and passive activity loss issues. Cover the practical and complex issues in dealing with these most difficult matters. Ensure that your firm can increase planning effectiveness and productivity in these areas and avoid costly mistakes when facing complicated 1040 issues.

Designed For: * CPAs in public practice who prepare or review complex 1040 returns.
Objectives:
Highlights: * Form 6198, at-risk basis – detailed case study and in-depth discussion; * Form 982, reduction of tax attributes due to discharge of indebtedness (and §1082 basis adjustment); * Form 6252, installment sale income; * Schedule SE (Form 1040) – advanced study of what constitutes self-employment income, including current developments regarding independent contractors and a discussion of possible future developments under President Obama; * Form 6251 or 8801, detailed case study and discussion to understand AMT, when the minimum tax credit is created and when it can be utilized; * K-1 issues, the problems of reporting issues for complex K-1s, such as hedge funds and when hidden taxable income can arise; * Creating and maintaining basis worksheets for S corporations, shareholders, LLC members and partners in partnerships; * Form 8582, understanding passive activity losses; and * New forms released in light of recent legislation.
Prerequisite: At least five years of experience in the area of study is recommended
Advanced Preparation:
Note:

Level: Advanced
Recommended CPE credit: 8
Vendor: Surgent McCoy CPE, LLC
Instructor: Susan Smith

Early Bird Rates:
Good through: 10/29/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 10/30/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Tax

Applying A-133 to Nonprofit and Governmental Organizations • 396

11/22/2010-11/22/2010 • OSCPA Offices, OKC

Does Circular A-133 have you running in circles? Become more efficient and effective at planning and performing audits in accordance with the requirements of Circular A-133 and the Single Audit Act Amendments. Learn the best ways to apply the latest requirements of A-133 auditing.

Designed For: * CPAs performing A-133 engagement; and * Internal financial staff of governments and not-for-profit entities interacting with auditors
Objectives: * Apply the audit requirements of OMB Circular A-133; * Understand the relationship of these requirements to GAAS, Government Auditing Standards and the Single Audit Act Amendments; and * Plan for audits of governmental and nonprofit entities under A-133.
Highlights: * How to effectively plan and perform audits in accordance with the audit requirements; * Detailed analysis of on-going issues concerning OMB Circular A-133; * Comprehensive explanation of OMB Circular A-133 requirements; and * Complete overview of the effect of this circular on the audit of not-for-profit and governmental entities.
Prerequisite: A background in not-for-profit or governmental accounting and auditing recommended
Advanced Preparation:
Note: Accepted for Yellow Book, CMA and CFM credit.

Level: Intermediate
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Lee Klumpp

Early Bird Rates:
Good through: 11/1/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 11/2/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: GAA, Audit, NP

FASB Standards Update and Review • 398

11/22/2010-11/23/2010 • OSU-Tulsa, Tulsa

This broad-ranging course covers FASB Statements and Interpretations, Accounting Research Bulletins and APB Opinions that apply to all companies. Focus on financial statement disclosures in addition to accounting methods. You'll also examine implementation guidelines and disclosure illustrations from actual financial statements. Review reporting standards for balance sheets, income statements and the statement of cash flow and understand FASB standards that have the greatest impact on accounting and financial reporting.

Designed For: * CPAs in public practice and industry.
Objectives: * Understand FASB standards that have the greatest effect on accounting and financial reporting; * Apply recent FASB pronouncements for non-specialized companies; and * Prepare disclosures.
Highlights: * Recent FASB pronouncements and exposure drafts; * Business combinations; * Goodwill; * Financial instruments; * Derivatives; * Fair value; * Hedge accounting; * Operating assets; * Investments; * Intangible assets; * Impaired assets; * Leases; * Contingencies; * Debt; * Other liabilities; * Complex equity transactions; * Share-based payments/stock options, quasi-reorganization, ESOPs and hybrid securities; * Earnings per share; * Pensions; * Post-retirement benefits; * Post-employment benefits; * Impaired assets and corporate restructuring; * International accounting; * Income statement disclosures; * Cash flow statements; * Comprehensive income; * Interim reporting; and * Segment reporting.
Prerequisite: Experience in application of accounting standards
Advanced Preparation:
Note: Accepted for CMA and CFM credit.

Level: Intermediate
Recommended CPE credit: 16
Vendor: AICPA
Instructor: Richard Townsend

Early Bird Rates:
Good through: 11/1/2010
OSCPA & AICPA Member: $297
OSCPA Member Only: $327
AICPA Member Only: $397
Nonmember: $427

Standard Rates:
Effective: 11/2/2010
OSCPA & AICPA Member: $322
OSCPA Member Only: $352
AICPA Member Only: $422
Nonmember: $452

Fields of Interest: Accounting and Auditing

Frequent Frauds Found in Governments and Not-for-profits • 400

11/23/2010-11/23/2010 • OSCPA Offices, OKC

What common frauds occur in governments and not-for-profits and how could they have been avoided? Through an informative case study approach, this course illustrates common frauds that make headlines and damage the reputations of government and not-for-profit organizations. Avoid the theory and confront the reality.

Designed For: * Auditors and financial staff of governmental and not-for-profit organizations.
Objectives: * Find out how common frauds are committed in the government and not-for-profit sectors; and * Improve your fraud prevention and detection skills.
Highlights: * Personnel frauds; * Fraudulent charging of expenses to grants; * Overriding purchasing controls; * Personal use of governmental and not-for-profit assets; * Kickbacks related to construction projects; and * Fictitious pledges and contributions receivable.
Prerequisite: Knowledge of government and not-for-profit sectors
Advanced Preparation:
Note: Accepted for Yellow Book, CMA and CFM credit.

Level: Intermediate
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Lee Klumpp

Early Bird Rates:
Good through: 11/2/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 11/3/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Fraud, Government, Nonprofit

Basis/Distributions for Pass-through Entities: An IRS Hot Spot • 402

11/29/2010-11/29/2010 • OSCPA Offices, OKC

With the advent of the electronic matching of K-1 information with items on partners' and S corporation shareholders' returns, the IRS is scrutinizing the basis that owners have in these entities, and the transactions in which the computation of basis is required, more closely than ever. Address the rules that are used to determine basis for partnerships and S corporations.

Designed For: * CPAs in public practice who serve in managerial roles.
Objectives: * Compute the basis of a partnership interest or S corporation stockholding; * Determine the amount and the character of income or loss the partner or shareholder should recognize because of distributions of property or money; * Apply the basis, at-risk and passive activity loss limitations to pass-through losses from partnerships, LLCs and S corporations; * Evaluate the tax treatment of sales of either partnership interests or S corporation stock; and * Adjust the basis of partnership or LLC property following certain distributions and transfers of interests in the entity.
Highlights: * Structuring cash and property distributions to avoid unexpected tax consequences; * Adjusting basis in partnership assets to save future taxes; * Measuring the gain or loss on the sale of an interest in a partnership or S corporation; * Minimizing recognition of ordinary income on sale of an interest; and * Maximizing the amount of the pass-through losses deductible by the partner/shareholder.
Prerequisite: Experience in business taxation
Advanced Preparation:
Note: Accepted for CFP®, CMA and CFM credit.

Level: Intermediate
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Charles Borek

Early Bird Rates:
Good through: 11/8/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 11/9/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Tax

Annual Business Tax Update: A Unique Focus for Business and Industry CPAs • 404

11/30/2010-11/30/2010 • OSCPA Offices, OKC

Get the latest information on tax developments impacting your company. Recent tax legislation, regulations, cases and rulings will be presented from the internal management perspective. Stay on top of hard-to-handle issues facing members in industry, such as reasonable compensation for shareholders, payroll taxes and worker classification, depreciation, UNICAP rules and travel and entertainment, as well as current multi-state tax issues such as nexus.

Designed For: * CPAs in industry.
Objectives: * Comply with the latest tax changes affecting businesses; * Improve tax reporting, compliance and recordkeeping in your company.
Highlights: * Accounting periods and method requirements – latest information impacting changes in accounting method, expensing versus capitalization, cash versus accrual and UNICAP rules; * Developing a tax administration system; * Tax issues and tax planning tips from the most recent Tax Acts; * Updates on payroll taxes, fringe benefits and travel and entertainment rules; * Multi-state tax issues and common pitfalls to avoid; * How nexus is established for sales and income tax; and * Deferred taxes and FIN 48, reporting and controls.
Prerequisite: A working knowledge of business taxation
Advanced Preparation:
Note: Accepted for PFS, CFP®, CMA, CFM and EA credit.

Level: Update
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Charles Borek

Early Bird Rates:
Good through: 11/9/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 11/10/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Tax

Audit Workshop: Best Practices for Audits in Compliance with Government Auditing Standards and OMB Circular A-133 • 406

11/30/2010-11/30/2010 • OSU-Tulsa, Tulsa

Entities that require A-133 audits are often the least-profitable clients for CPA firms, which results from engagement teams being less familiar with the compliance and testing requirements for these types of engagements. Learn proven tips and techniques for performing a more effective and efficient audit of federal financial awards, as well as best practices for boosting quality and profitability.

Designed For: * CPAs in public practice who wish to learn how to perform a better audit.
Objectives: * Discover the difference between GAAS and GAS/GAGAS audits; * Understand risk-assessment requirements beyond the financial-statement audit; * Learn what must be done beyond the financial statement audit in order to issue reports on internal controls and compliance for major programs; * Master designing and documenting effective and efficient tests of the A-133 compliance requirements; and * Practice considering, documenting and communicating the impact of internal-control deficiencies and compliance audit findings to the client.
Highlights:
Prerequisite: At least three years of experience in the area of study is recommended
Advanced Preparation:
Note:

Level: Intermediate
Recommended CPE credit: 8
Vendor: Surgent McCoy CPE, LLC
Instructor: John Laschenski

Early Bird Rates:
Good through: 11/9/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 11/10/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: GAA

Pass Through Entities: Advanced Tax Issues • 408

12/1/2010-12/1/2010 • OSCPA Offices, OKC

Answer the difficult questions related to pass through entities. Examine partnerships and LLCs allocation of basis in debt. Handle partnership tax complexities. Determine shareholder basis and address tough S corporation issues. Review C corporation earnings and profits, calculations when terminating or revoking elections and the complexities of AAA.

Designed For: * CPAs in public practice who advise clients on pass-through entity transactions and tax compliance.
Objectives: * Recognize tax traps unique to pass-through entities; * Understand differences between partnerships, LLCs and S corporations; * Deal with common ownership changes; * Plan for unique S corporation and/or partnership and LLC transactions; * Apply rules properly when reporting income and other items to owners; * Properly account for tax adjustments; and * Determine reasonable compensation and guaranteed payments for SE or FICA tax.
Highlights: * Contributions of property in exchange for ownership interest; * Liabilities and their effect on owners basis; * Final "open account debt" regulations; * Mergers, split-ups and liquidations; * Owners' distributive share special allocations; * How to calculate and plan for built-in gain; * Excess passive investment income what it is and isn't; * Optional adjustments to the basis of entity property; * Distributions and payments to a retiring owner; and * New laws, cases and rulings.
Prerequisite: None
Advanced Preparation:
Note:

Level: Advanced
Recommended CPE credit: 8
Vendor: Nichols Patrick CPE, Inc.
Instructor: Ed Zollars

Early Bird Rates:
Good through: 11/10/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 11/11/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Tax

IFRS in a Day • 410

12/1/2010-12/1/2010 • OSU-Tulsa, Tulsa

Get a concise overview of the nature and content of IFRS. Examine actual financial statements prepared in accordance with IFRS to identify and discuss the principal differences between IFRS and U.S. GAAP. The structure and operations of the source of these standards will be explained, and the international and U.S. impact will be discussed.

Designed For: * CPAs in public practice.
Objectives: * Explain the importance of IFRS on the world stage and in the United States; * List the principal differences between IFRS and U.S. GAAP; * Understand how the International Accounting Standards Board operates; and * Discuss FASB's and the SEC's divergent approaches to IFRS.
Highlights: * The International Accounting Standards, International Financial Reporting Standards, Standards Interpretation Committee Interpretations and International Financial Reporting Interpretations Committee Interpretations; * The structure and operation of the International Accounting Standards Board; * A detailed study of current IFRS statements from three European companies; * The principal differences between IFRS and U.S. GAAP; * Other differences between IFRS and U.S. GAAP; * The extent of international adoption of IFRS; * The current status of IFRS in the United States; * FASB versus the SEC; and * The SEC's roadmap for IFRS and its potential impact on all companies.
Prerequisite: None
Advanced Preparation:
Note:

Level: Intermediate
Recommended CPE credit: 8
Vendor: Surgent McCoy CPE, LLC
Instructor: John Laschenski

Early Bird Rates:
Good through: 11/10/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 11/11/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Accounting and Auditing, Specialized Knowledge

The Top 50 Nonpublic Audit Mistakes Practitioners Make and How to Fix Them • 412

12/2/2010-12/2/2010 • OSU-Tulsa, Tulsa

The business risk to auditors of nonpublic entities is greater now more than ever. Making a major error on engagements can mean bad publicity, loss of reputation and clients, significant lawsuit settlements and potential revocation of your professional license. Protect yourself and avoid common slip-ups by learning from real-life mistakes. Gain a greater awareness of common deficiencies and significant peer review comments in audits of nonpublic companies. Learn tips and techniques to help you avoid making major mistakes that could result in peer review comments or legal liability.

Designed For: * CPAs who wish to get a broader insight into nonpublic company auditing.
Objectives:
Highlights: * Minimizing the risk of violating independence and ethics rules; * Gaining an appropriate understanding with the client regarding the scope and terms of the engagement, including responsibilities of both parties; * Assessing the risk of fraud particularly fraudulent financial reporting and management override of controls; * Gaining an understanding of the client and its industry, including internal controls; * Understanding the impact of ignoring the significant risks on engagements and failure to adequately alter detailed audit plans; * Evaluating the underlying business purpose of related-party transactions; * Making sound judgments about gaining sufficient and appropriate audit evidence, and meeting the minimum workpaper standards; * Properly designing, documenting and evaluating the results of analytical procedures; * Avoiding confirmation gaffes; * Properly applying the concept of materiality and tolerable misstatement to design and evaluate the results of audit procedures; * Understanding the implications of communication miscues with the Board of Directors and those charged with corporate governance; and * Improving quality control reviews for small firms and sole practitioners.
Prerequisite: At least three years of experience in the area of study is recommended
Note:

Level: Intermediate
Recommended CPE credit: 8
Vendor: Surgent McCoy CPE, LLC
Instructor: John Laschenski

Early Bird Rates:
Good through: 11/11/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 11/12/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Accounting and Auditing, Audit

Practical Guide to Better Substantive Testing and Auditing of Internal Controls • 414

12/3/2010-12/3/2010 • OSU-Tulsa, Tulsa

A fresh approach to auditing could result in a stronger, more effective and more profitable audit. Learn proven best practices for testing internal controls and performing substantive fieldwork for all your audit clients, including for-profit business enterprises, nonprofits and local governments.

Designed For: * CPAs in public practice who provide auditing.
Objectives: * Understand the impact on internal control and substantive testing resulting from recent SASs related to risk assessment and communicating internal control matters; * Discover what you should know about internal controls, including the necessary components of a sound internal-control system; * Compare internal control considerations between various types of audit clients (including Sarbanes-Oxley Section 404 and Yellow Book); * Identify the most effective and efficient controls to test in order to reduce substantive testing on a financial-statement audit; * Discover best practices to better design and document tests of internal controls; * Maximize the use of strong analytic procedures in order to reduce other substantive testing; * Develop appropriate expectations to use for substantive analytic tests, regardless of type of entity being audited; * Resolve differences between expected and actual financial results when performing analytic procedures; * Understand the proper way to plan and perform sampling techniques; * Use technology to perform better and faster audit procedures; * Consider, document and communicate the impact of internal-control deficiencies and financial-statement errors to the client.
Highlights:
Prerequisite: At least three years of experience in the area of study is recommended

Level: Intermediate
Recommended CPE credit: 8
Vendor: Surgent McCoy CPE, LLC
Instructor: John Laschenski

Early Bird Rates:
Good through: 11/12/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 11/13/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Accounting and Auditing, Audit

Accounting for Goodwill and Other Intangibles: Fair Value Measurements • 418

12/6/2010-12/6/2010 • OSU-Tulsa, Tulsa

FASB is increasingly recognizing the value that intangible assets contribute to a business enterprise. Whether you are valuing intangible assets in a business combination or assessing impairment, learn to value intangible assets for financial reporting purposes and actively manage them for the maximum benefit of the company.

Designed For: * CPAs in industry conducting or reviewing fair value measurements.
Objectives: * Apply SFAS No. 157, Fair Value Measurements to estimate the fair value of specific intangible assets; * Perform the basic steps in identifying and valuing intangible assets acquired as part of a business combination under SFAS No. 141(R); * Amortize intangibles and test for impairment under SFAS Nos. 142 and 144; * Perform useful life analysis; and * Prepare appropriate financial statement disclosures.
Highlights: * Fair values determined under SFAS Nos. 141(R),142, 144 and 157; * The relationship of the value of intangible assets to the value of the business as a whole; * Alternative valuation approaches and real life methods to value unseen assets; * Adding hidden intangible assets and intellectual property to create the economic balance sheet; * Applying the market, cost and income; * Methods to the valuation of intangible assets; * Introduction to the real option method of valuing intangible assets with contingent value; * Valuation tips and practical real life examples; and * Case study valuation of patented technology.
Prerequisite: Basic experience in business valuation engagements
Advanced Preparation:
Note: Accepted for CMA and CFM credit.

Level: Intermediate
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Michael Hamilton

Early Bird Rates:
Good through: 11/15/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 11/16/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Accounting and Auditing

Preparing the Form 990 for Nonprofit Organizations • 416

12/6/2010-12/6/2010 • OSCPA Offices, OKC

This course offers a practical, hands-on approach to completing one of the most difficult tax forms, Form 990. Both new and experienced staff accountants will learn how to deal with the challenging aspects relating to the filing of the Form 990 series.

Designed For: * CPAs in public practice who work with Form 990.
Objectives: * Develop strategies to expedite the preparation of the return; * Effectively market the organization through the creation of strong narratives which are positively read by foundations, donors, government agencies, media and others; * Understand the more complex issues dealing with nonprofit taxation which are reported on the Form 990; * Examine IRS and state controversy issues including penalties, dissolution, examinations and improper classification of tax exempt status; and * Identify planning strategies for clients to improve in the future.
Highlights: * Filing requirements for Forms 990 and 990EZ with phased in thresholds; * Electronic filing requirements; * Preparation of the required summary of the organization's mission, activities and current and prior year's financial results; * Statement of program service accomplishments reporting of new, ongoing and discontinued achievements and their related revenue and expenses; * Statements regarding other IRS filings and tax compliance; * Governance, management and disclosure information regarding governing body and its management, policies and disclosure; * Compensation schedules for officers, directors and key employees; * Supplemental financial statements support balance sheets, endowments and donor advised funds; * Schedule of activities outside of U.S. breakdowns; * Supplemental information relating to fundraising or gaming activities; * Grants or other assistance to organizations, governments and individuals; * Transactions with interested persons that engage in certain relationships or transactions; * Non-cash contributions; * Political expenditures and lobbying restrictions; * Reconciliations between book and tax returns; and * Much more.
Prerequisite: None

Level: Intermediate
Recommended CPE credit: 8
Vendor: Surgent McCoy CPE, LLC
Instructor: Stuart Sobel

Early Bird Rates:
Good through: 11/15/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 11/16/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Tax, Nonprofit

FIN 46R Variable Interest Entity Consolidation Rules: Not Just a Big Company Issue • 422

12/7/2010-12/7/2010 • OSU-Tulsa, Tulsa

FIN 46R is not just an Enron, big-company issue; it is also a major area of concern for private and small companies. Review the complex consolidation rules for off-balance sheet entities now known as variable interest entities (VIEs). Learn how to determine whether an entity, regardless of its size, is a VIE, what are the types of variable interests and how to identify the primary beneficiary that consolidates the VIE. Cover common areas that companies need to consider, including the consolidation of real estate entities.

Designed For: * CPAs in industry.
Objectives: * Cover the VIE consolidation rules; * Understand the variable interests in the VIE; * Determine the primary beneficiary of the VIE; * Review the rules for testing VIEs; * Uncover the background of consolidations.
Highlights: * Determining whether an entity is a VIE; * Types of variable interests; * Identifying the primary beneficiary that consolidates the VIE; * Consolidation of real estate entities; * Implementing the VIE rules; and * Financial statement display of the consolidated entity.
Prerequisite: None
Advanced Preparation:
Note: Accepted for CMA and CFM credit.

Level: Basic
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Michael Hamilton

Early Bird Rates:
Good through: 11/16/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 11/17/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Accounting and Auditing

The Top 50 Mistakes Practitioners Make and How to Fix Them: Dealing with the Internal Revenue Service • 420

12/7/2010-12/7/2010 • OSCPA Offices, OKC

Tax practice and the resolution of tax problems with the Internal Revenue Service can be tedious and challenging. Learn techniques and tips to navigate through the confusing IRS system and enable your clients of all the rights to which they are entitled.

Designed For: * CPAs in public practice.
Objectives: * Gain a better understanding of IRS procedures; * Understand how to avoid major mistakes in dealing with the IRS; and * Provide the best advice for clients.
Highlights: * Mistakes in handling IRS liens, levies and installment agreements; * Statutes of limitation on collection; * Audit reconsideration after assessment; * Innocent spouse relief; * Offers in compromise; * Preparing IRS financial statements for clients; * Collection due process hearings; * Claims for refund; * Return selection process for examination; * Avoiding unnecessary audits; * Burden of proof – substantiation and use of oral testimony to substantiate expenses; * Setting the scope of examination with the IRS examiner; * Determining what the IRS is looking for; * Dealing with IRS correspondence exams; * Partnership/S corporation/LLC audits; * Failure to file situations; * IRS summonses and enforcement procedures; * Statute of limitations issues; * Circular 230 guidelines for practice before the Internal Revenue Service; * Avoiding abusive tax shelters and pre-filing notification letters; * Preparing protests to the IRS 30-day letter; * Working and resolving issues with the IRS Appeals Office; * Negotiating settlement agreements and closing agreements; * Technical assistance; * Requesting a private letter ruling or technical advice memorandum; * Securing IRS §444 elections for S corporations; * Exempt organization determinations; * Abating penalties failure to file, pay, estimate, deposit and others; * Avoiding substantial underpayment of tax and valuation misstatement penalties; * Avoiding return preparer penalties; * Abatement of interest; and * Much more.
Prerequisite: None

Level: Intermediate
Recommended CPE credit: 8
Vendor: Surgent McCoy CPE, LLC
Instructor: Stuart Sobel

Early Bird Rates:
Good through: 11/16/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 11/17/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Tax

Annual Tax Update • 424

12/8/2010-12/8/2010 • East Central University, Ada

Satellite Broadcast: Review the latest federal tax acts enacted during 2010, affecting individuals, corporations and other business entities. This year's update promises to be important because of the unsettled situation in Congress, mid-term elections scheduled for 2010, the enormous deficit and newly proposed programs requiring additional funding, a slowly rebounding economy and the financial bailouts and stimulus programs.Learn the latest IRS initiatives under the new administration, new regulations, revenue rulings and court decisions that impact the way you advise your clients. Review the tax law changes that have expiration and phase out dates and the affect that the changes will have on clients. More details will be posted six weeks prior to course date.

Designed For: * CPAs in public practice and industry.
Objectives:
Highlights:
Prerequisite: None
Advanced Preparation:
Note:

Level: Intermediate
Recommended CPE credit: 8
Vendor: ACPEN
Instructor: Group

Early Bird Rates:
Good through: 11/17/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $163
AICPA Member Only: $
Nonmember: $263

Standard Rates:
Effective: 11/18/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $188
AICPA Member Only: $
Nonmember: $288

Fields of Interest: Tax

Annual Tax Update • 426

12/8/2010-12/8/2010 • Autry Technology Center, Enid

Satellite Broadcast: Review the latest federal tax acts enacted during 2010, affecting individuals, corporations and other business entities. This year's update promises to be important because of the unsettled situation in Congress, mid-term elections scheduled for 2010, the enormous deficit and newly proposed programs requiring additional funding, a slowly rebounding economy and the financial bailouts and stimulus programs.Learn the latest IRS initiatives under the new administration, new regulations, revenue rulings and court decisions that impact the way you advise your clients. Review the tax law changes that have expiration and phase out dates and the affect that the changes will have on clients. More details will be posted six weeks prior to course date.

Designed For: * CPAs in public practice and industry.
Objectives:
Highlights:
Prerequisite: None
Advanced Preparation:
Note:

Level: Intermediate
Recommended CPE credit: 8
Vendor: ACPEN
Instructor: Group

Early Bird Rates:
Good through: 11/17/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $163
AICPA Member Only: $
Nonmember: $263

Standard Rates:
Effective: 11/18/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $188
AICPA Member Only: $
Nonmember: $288

Fields of Interest: Tax

Annual Tax Update • 428

12/8/2010-12/8/2010 • Moore-Norman Technology Center, Norman

Satellite Broadcast: Review the latest federal tax acts enacted during 2010, affecting individuals, corporations and other business entities. This year's update promises to be important because of the unsettled situation in Congress, mid-term elections scheduled for 2010, the enormous deficit and newly proposed programs requiring additional funding, a slowly rebounding economy and the financial bailouts and stimulus programs.Learn the latest IRS initiatives under the new administration, new regulations, revenue rulings and court decisions that impact the way you advise your clients. Review the tax law changes that have expiration and phase out dates and the affect that the changes will have on clients. More details will be posted six weeks prior to course date.

Designed For: * CPAs in public practice and industry.
Objectives:
Highlights:
Prerequisite: None
Advanced Preparation:
Note:

Level: Intermediate
Recommended CPE credit: 8
Vendor: ACPEN
Instructor: Group

Early Bird Rates:
Good through: 11/17/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $163
AICPA Member Only: $
Nonmember: $263

Standard Rates:
Effective: 11/18/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $188
AICPA Member Only: $
Nonmember: $288

Fields of Interest: Tax

Annual Tax Update • 430

12/8/2010-12/8/2010 • Ardmore Conv. Center, Ardmore

Satellite Broadcast: Review the latest federal tax acts enacted during 2010, affecting individuals, corporations and other business entities. This year's update promises to be important because of the unsettled situation in Congress, mid-term elections scheduled for 2010, the enormous deficit and newly proposed programs requiring additional funding, a slowly rebounding economy and the financial bailouts and stimulus programs.Learn the latest IRS initiatives under the new administration, new regulations, revenue rulings and court decisions that impact the way you advise your clients. Review the tax law changes that have expiration and phase out dates and the affect that the changes will have on clients. More details will be posted six weeks prior to course date.

Designed For: * CPAs in public practice and industry.
Objectives:
Highlights:
Prerequisite: None
Advanced Preparation:
Note:

Level: Intermediate
Recommended CPE credit: 8
Vendor: ACPEN
Instructor: Group

Early Bird Rates:
Good through: 11/17/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $163
AICPA Member Only: $
Nonmember: $263

Standard Rates:
Effective: 11/18/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $188
AICPA Member Only: $
Nonmember: $288

Fields of Interest: Tax

Annual Tax Update • 432

12/8/2010-12/8/2010 • OSU-Tulsa, Tulsa

Satellite Broadcast: Review the latest federal tax acts enacted during 2010, affecting individuals, corporations and other business entities. This year's update promises to be important because of the unsettled situation in Congress, mid-term elections scheduled for 2010, the enormous deficit and newly proposed programs requiring additional funding, a slowly rebounding economy and the financial bailouts and stimulus programs.Learn the latest IRS initiatives under the new administration, new regulations, revenue rulings and court decisions that impact the way you advise your clients. Review the tax law changes that have expiration and phase out dates and the affect that the changes will have on clients. More details will be posted six weeks prior to course date.

Designed For: * CPAs in public practice and industry.
Objectives:
Highlights:
Prerequisite: None
Advanced Preparation:
Note:

Level: Intermediate
Recommended CPE credit: 8
Vendor: ACPEN
Instructor: Group

Early Bird Rates:
Good through: 11/17/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $163
AICPA Member Only: $
Nonmember: $263

Standard Rates:
Effective: 11/18/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $188
AICPA Member Only: $
Nonmember: $288

Fields of Interest: Tax

Disclosure – The Key to Financial Statements • 434

12/9/2010-12/9/2010 • OSCPA Offices, OKC

Make sure your financial statements are up-to-speed. Examine disclosure requirements, clear up misconceptions on practice problems such as lease accounting and correct disclosure deficiencies most frequently cited by peer reviewers. The course manual includes numerous real-world examples, a complete disclosure checklist and pro forma financial statements.

Designed For: * CPAs in public practice and industry who are responsible for the preparation of non-public financial statements.
Objectives: * Prepare disclosures necessary for privately-held companies.
Highlights: * SEC requirements; * Common disclosure deficiencies noted in practice and in peer reviews; * Recent changes in subsequent events, going concern and fair value; * Contingencies, risks and uncertainties, accounting policies; * How debt violations impact liability classification; * Deferred taxes and uncertain tax positions; * Accounting changes, error corrections and other categories in the income statement; and * Cash flow statements.
Prerequisite: Familiarity with the accounting issues included in the FASB codification
Advanced Preparation:
Note: Recommended for Yellow Book credit.

Level: Basic
Recommended CPE credit: 8
Vendor: Loscalzo Associates
Instructor: Ralph Nach

Early Bird Rates:
Good through: 11/18/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 11/19/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Accounting and Auditing

What You Need to Do Now in Estate Planning Under the New Tax Law • 436

12/9/2010-12/9/2010 • OSU-Tulsa, Tulsa

With major changes in the estate and gift tax law starting in 2010, it is time to rethink your strategies and tactics. Understand these changes and new strategies to be employed so that practitioners can meet with clients to provide your clients with new options.

Designed For: * CPAs in public practice.
Objectives: * Understand the new tax law changes in the estate area; * Recognize which planning strategies should be considered; and * Understand what revisions might be needed in clients' wills.
Highlights: * A complete analysis of legislation with an eye towards planning issues and pitfalls to avoid; * What needs to be reviewed and revised in clients' wills; * Gifting strategies in light of tax reform; * What estate planners should do or undo in a troubled economy; * Using discounts; * Converting or not converting IRAs to Roth IRAs as an estate planning issue; * Winners and losers in various estate planning strategies; and * Much more.
Prerequisite: Knowledge in estate or gift tax planning
Advanced Preparation:
Note:

Level: Update
Recommended CPE credit: 8
Vendor: Surgent McCoy CPE, LLC
Instructor: Dorita Estes

Early Bird Rates:
Good through: 11/18/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 11/19/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Financial Planning, Tax

Annual FASB and AICPA Update • 438

12/10/2010-12/10/2010 • OSCPA Offices, OKC

Stay on top of the regulatory changes you need to know to be effective. Evaluate and emphasize only those standards that affect the small- and medium-sized entity. Develop detailed practical guidance and illustrations.

Designed For: * CPAs in public practice and industry.
Objectives: * Apply the provisions of recently issued accounting and auditing pronouncements.
Highlights: * Special emphasis is placed on those pronouncements impacting small- and medium-sized companies; * Relevant pronouncements issued since June 2009; * FASB Codification; * Fair value; * Uncertain tax position changes; * Reconsideration of variable interest entities; * Contingency disclosures; * Going concern; * Subsequent events; * Mergers and acquisitions of not-for-profit organizations; * Changes in auditing standards clarity project; and * Compilation and review update, including the reliability project.
Prerequisite: None
Advanced Preparation: Participants are asked to read the pronouncements before attending the session.
Note: Recommended for Yellow Book credit.

Level: Update
Recommended CPE credit: 8
Vendor: Loscalzo Associates
Instructor: Ralph Nach

Early Bird Rates:
Good through: 11/19/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 11/20/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Accounting and Auditing, Audit, Compilation and Review

The Complete Guide to Fringe Benefits • 440

12/10/2010-12/10/2010 • OSU-Tulsa, Tulsa

Increases in tax rates and potential surtaxes are giving fringe benefits greater consideration. Explore the tax advantages and potential pitfalls of providing fringe benefits to employees. Get a clear and concise overview of this specialized area of tax law.

Designed For: * CPAs in public practice and industry who want to understand the area of fringe benefits; and * Controllers who manage employee benefits issues.
Objectives: * Identify various statutory and nonstatutory fringe benefits that have favorable tax benefits and the limitations applicable to each; * Distinguish various health care arrangements and the requirements they place on the employer; * Understand how packages can be put together in a cafeteria plan; and * Distinguish accountable and nonaccountable reimbursement plans.
Highlights: * Cafeteria plans; * Employee business reimbursements; * The reporting and record keeping for W-2 purposes in accountable and nonaccountable plans; * Medical plans; * The new HSA planning in light of tax law changes; * Automobile and aircraft income inclusion issues for the employee; * COBRA coverage and the Family Medical Leave Act; * Group term life insurance, including nondiscrimination, split-dollar and permanent insurance; * Education expense reimbursement plans versus education assistance plans; * An analysis of Section 132: no additional cost services, qualified employee discounts, working condition fringe benefits and de minimus fringe benefits; and * Opportunities under the transportation regulations.
Prerequisite: None
Advanced Preparation:
Note:

Level: Basic
Recommended CPE credit: 8
Vendor: Surgent McCoy CPE, LLC
Instructor: Dorita Estes

Early Bird Rates:
Good through: 11/19/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 11/20/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Financial Planning, Benefit Plans, Tax

Studies on Single Audit and Yellow Book Deficiencies • 444

12/13/2010-12/13/2010 • OSU-Tulsa, Tulsa

Avoid Single Audit and Yellow Book audit deficiencies by recognizing them beforehand. Learn how to avoid the common pitfalls miring these audits.

Designed For: * CPAs performing A-133 engagements.
Objectives: * Learn from the mistakes of others; * Utilize common sense solutions to common problems noted in Yellow Book and A-133 engagements; and * Perform higher quality engagements.
Highlights: * Engagement letter efficiencies; * Major program determination in A-133 audits; * Avoiding documentation dilemmas; * Avoiding management representation letter mishaps; * Drafting audit findings; * Reporting issues; * Effectively meeting CPE and independence requirements; and * Preventing deficiencies in SEFA presentation.
Prerequisite: Experience in the Yellow Book and A-133 environment
Advanced Preparation:
Note: Accepted for Yellow Book, CMA and CFM credit.

Level: Intermediate
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Jeanette Bax-Kurtz

Early Bird Rates:
Good through: 11/22/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 11/23/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: GAA. Nonprofit, Audit

2010 Top 10 Tax Topics • 442

12/13/2010-12/13/2010 • OSCPA Offices, OKC

Identify the most important tax topics for 2010, including recent tax legislation in detail. Increase billings and help meet client demands by exploring practical solutions.

Designed For: * CPAs in public practice who provide tax services.
Objectives: * Understand all of the implications of tax legislation taking effect in 2011 concerning individual and business income tax; * Identify clients whose estate plans may need to be reviewed; and * Distinguish what strategies no longer work and what strategies and tactics may be effective in a changed environment.
Highlights: * Year-end tax planning in light of changing tax rates; * Tax reform fully covered – selected issues that impact planning and practice; * Picking the right retirement plan; * Recognizing and avoiding the complicated issues of related party transactions; * Current estate planning issues; * Basis, at-risk and passive losses; * The changing landscape of Social Security; * Latest cases and rulings that have an impact; * Late-breaking tax legislation; and * What's hot for individual clients and small businesses.
Prerequisite: At least three years of experience in planning for individual and business clients
Advanced Preparation:
Note:

Level: Intermediate
Recommended CPE credit: 8
Vendor: Surgent McCoy CPE, LLC
Instructor: Robert Henkels

Early Bird Rates:
Good through: 11/22/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 11/23/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Tax

Analytical Procedures for Nonprofit Organizations • 448

12/14/2010-12/14/2010 • OSU-Tulsa, Tulsa

If an organization isn't efficient, it isn't going to succeed. Learn how to measure a nonprofit organization's strength and efficiency as well as its effectiveness of mission accomplishment. Receive guidance in the application and interpretation of analytical procedures to a nonprofit organization's financial statements. Use analytical procedures in planning the nature, timing and extent of auditing procedures and use the results to design value-added services.

Designed For: * CPAs in public practice and industry who perform audits of nonprofits.
Objectives: * Develop quantitative and qualitative performance measures; * Report results of analytical procedures to the board, to donors and other funding sources and to the public; and * Design unique analytical procedures for nonprofit organizations.
Highlights: * Development and application of unique methods of analysis for nonprofits; * Evaluating and reporting results of analytical procedures; * Ratio, trend and financial statement analysis; * Practical problems and case studies; * Measuring outcomes; and * Ratios unique to the statement of activities and the cash flow statement.
Prerequisite: Experience in management of, or accounting and reporting for, exempt organizations
Advanced Preparation:
Note: Accepted for Yellow Book, CMA and CFM credit.

Level: Intermediate
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Jeanette Bax-Kurtz

Early Bird Rates:
Good through: 11/23/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 11/24/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Not-for-Profit, Audit, GAA

Comprehensive Guide to Tax Depreciation, Amortization and Property Transactions: From Acquisition to Exchange or Disposition • 446

12/14/2010-12/14/2010 • OSCPA Offices, OKC

Get an in-depth analysis of the complex maze of rules dealing with depreciation, amortization and sale of property, with an emphasis on identifying special planning opportunities and pitfalls. Review examples and cases to illustrate the most important points.

Designed For: * CPAs in public practice who provide tax services.
Objectives:
Highlights: * Complete coverage of the tax acts of 2009 and any new legislation enacted before presentation; * Detailed coverage of the greatly increased §179 expense election; * Proposed regulations; * Correctly handling depreciation on purchases and trade-ins of business vehicles; * Luxury auto depreciation limitations and phantom income inclusion amounts and tables for leased luxury autos; * How to calculate depreciation in a short tax year and start-ups of businesses; * Accounting for a change in use; * Are we correctly handling depreciation write-offs for retail, restaurant and personal service industries?; * Understanding §197 amortization issues – how to handle software and other intangible asset costs; * AMT depreciation adjustments and how to avoid them; * ACE depreciation and earnings and profits (E&P) depreciation rules; * Sale of property and the depreciation recapture rules (§§1245, 1250, unrecognized §1250 gain for real estate, §291); * Advanced depreciation issues, tax-deferred exchanges, personal property converted to business property and an overview of home sale exclusion; * Complete reference guide for compliance and planning issues from Pre-ACRS, ACRS, MACRS and GO Zone depreciation and amortization rules; and * The latest cases and rulings involving depreciation and amortization issues and how they impact clients.
Prerequisite: None

Level: Intermediate
Recommended CPE credit: 8
Vendor: Surgent McCoy CPE, LLC
Instructor: Robert Henkels

Early Bird Rates:
Good through: 11/23/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 11/24/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Tax

CPE Blowout • 2571

12/15/2010-12/16/2010 • Marriott Southern Hills Hotel, Tulsa

Designed For:
Objectives:
Highlights:
Prerequisite:
Advanced Preparation:
Note:

Level:
Recommended CPE credit: 16
Vendor: OSCPA
Instructor:

Early Bird Rates:
Good through: 11/24/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $91
AICPA Member Only: $
Nonmember: $141

Standard Rates:
Effective: 11/25/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $116
AICPA Member Only: $
Nonmember: $166

Fields of Interest:

CPE Blowout • 2572

12/16/2010-12/17/2010 • Clarion Meridian Conv. Ctr., OKC

Designed For:
Objectives:
Highlights:
Prerequisite:
Advanced Preparation:
Note:

Level:
Recommended CPE credit: 16
Vendor: OSCPA
Instructor:

Early Bird Rates:
Good through: 11/25/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $91
AICPA Member Only: $
Nonmember: $141

Standard Rates:
Effective: 11/26/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $116
AICPA Member Only: $
Nonmember: $166

Fields of Interest:

Advanced Update for Compilation, Review and Accounting Services • 450

12/20/2010-12/20/2010 • OSCPA Offices, OKC

Ensure that current year engagements conform to all applicable professional standards. Cover the entire spectrum of partner concerns, including current professional standards, independence rules, engagement and representation letters, field work, disclosure, reporting, documentation, quality control, engagement administration, specialty engagements and peer review.

Designed For: * CPAs in public practice managing compilation, review and accounting services.
Objectives: * Identify responses to compilation, review and accounting service practice issues that conform to all current professional standards.
Highlights: * What the engagement team really needs to know to correctly plan, review and report this year's engagements; * Where the firm's responsibility regarding fraud begins and ends; * Hands-on practice in case studies applying recent SSARSs pronouncements, interpretations and technical practice aids; * The most common deficiencies found by peer reviewers; * Proposed standards and other developments on the horizon that may affect compilation, review or accounting service practices.
Prerequisite: Management of a compilation, review or accounting service practice
Advanced Preparation:
Note: Accepted for CMA and CFM credit.

Level: Advanced
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Anne Oestriecher

Early Bird Rates:
Good through: 11/29/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 11/30/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Accounting and Auditing, Compilation and Review, Peer Review

AICPA's Hottest Tax Topics for 2010 • 452

12/20/2010-12/20/2010 • OSU-Tulsa, Tulsa

New tax developments and economic, social and demographic trends turn out to have important tax implications. Discover the hottest tax topics, those that affect many of your individual, small business and corporate clients.

Designed For: * CPAs in public practice who provide tax services.
Objectives: * Increase client wealth with timely, proactive advice; and * Take advantage of new planning opportunities created or enhanced by recent developments.
Highlights: * Real estate market; * Maximum mileage from Sec. 121 gain exclusion, premature home sales, home sale strategies; * Hybrid vehicles: above-the-line deduction (no business use required); * Tax-smart loans between family members; * Fees for Continuing Care Retirement Communities (CCRC); * Liberalized flexible spending account rules; * Bankruptcy – retirement accounts and rollovers, insolvency; * Using SMLLCs to avoid new capitalization rules for start-up costs, like-kind exchanges and other real estate transactions; * Business vehicles: depreciation rules, leased autos; * Real estate development tax strategies: passive loss exception for clients active in real estate; * Choosing the right legal entity for the very small business; * Long-term care insurance premiums as a business expense; * Section 263 regulations ("INDOPCO regs"); * Reasonable compensation issues for both C and S corporations; * When paying taxable dividends can actually reduce taxes; * Locking in debt treatment for shareholder advances to C corporations; * Converting corporations into LLCs and LLPs; * Divorce – when corporation redeems spouse's stock; and * Employer stock options and deferred comp benefits transferred in divorce.
Prerequisite: Basic understanding of individual and business taxation
Advanced Preparation:
Note: Accepted for CFP®, CMA, CFM and EA credit.

Level: Intermediate
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Peter Towle

Early Bird Rates:
Good through: 11/29/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 11/30/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Tax

Internal Control Essentials for Financial Managers, Accountants and Auditors • 454

12/21/2010-12/21/2010 • OSCPA Offices, OKC

Develop a solid understanding of systems and control documentation. After an overview of the latest COSO guidance on the components and principles of effective internal control, learn the basic tools used to document an accounting process. Identify the risks of errors and fraud in the accounting system and the presence or absence of compensating controls. Practice identifying key controls and control weaknesses.

Designed For: * CPAs, managers, supervisors and others with duties critical to the system of internal control.
Objectives: * Interpret basic documentation of a significant accounting process; * Recognize the significant risks of fraud and errors; * Locate the presence or absence of compensating controls; and * Identify key controls and control weaknesses.
Highlights: * Fundamental components and principles of internal control from the COSO Integrated Framework and Small Business Tools reports; * Management responsibilities versus auditor responsibilities for system documentation and detection of errors and fraud; * Common significant accounting processes; * Common fraud risks for major classes of transactions/significant processes and the controls to prevent or detect them; * Introduction to current tools and techniques used in internal control documentation; * Interpreting documentation of the accounting and control system; * Identifying key controls and combination of controls; and * Estimating the cost/benefit of remedying a control weakness.
Prerequisite: Experience with transaction workflows
Advanced Preparation:
Note: Accepted for CMA and CFM credit.

Level: Basic
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Anne Oestriecher

Early Bird Rates:
Good through: 11/30/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 12/1/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Accounting and Auditing

Advanced Estate Planning: Practical Strategies for Your Clients • 456

12/21/2010-12/21/2010 • OSU-Tulsa, Tulsa

Help your clients protect their estates' assets from the 45 percent estate tax. Utilize techniques with wills, foundations and trusts to minimize or completely eliminate transfer taxes and generate current tax deductions. Employ a variety of these planning devices to help your clients meet their family planning and charitable contribution goals.

Designed For: * CPAs in public practice who advise clients on complex estate plans.
Objectives: * Understand various types of trusts and life insurance used in an effective estate plan; * Utilize credits and deductions available to reduce estate and gift taxes; * Minimize estate and gift transfer taxes by advising your clients on planning techniques and opportunities; and * Consider the latest developments surrounding scheduled elimination of estate taxes scheduled for 2010.
Highlights: * Valuation of assets transferred by gift or in estates; * Valuation discounts for closely held businesses and family limited partnerships; * Deductions and credits allowable in calculating estate and gift taxes; * Various trusts and life insurance products that may be employed to minimize transfer taxes; and * Legislative options affecting the estate tax during the pending 2010 phase-out/phase-in period.
Prerequisite: Basic knowledge of estate and gift taxation (e.g., EPE)
Advanced Preparation:
Note: Accepted for PFS, CFP®, CMA, CFM and EA.

Level: Advanced
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Peter Towle

Early Bird Rates:
Good through: 11/30/2010
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 12/1/2010
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Financial Planning,Taxes

Preparing Corporate Tax Returns for New Staff and Para-Professionals • 458

1/10/2011-1/10/2011 • OSCPA Offices, OKC

Train new staff accountants, data processing employees, para-professionals and bookkeepers to prepare a complicated federal corporate income tax return. This hands-on, practical course provides new staff coverage of tax areas affecting all business entities, including the sale of assets used in any trade or business (Form 4797), depreciation (Form 4562), deductible verses non-deductible items and the basics of uniform capitalization.

Designed For: * New staff and para-professionals involved in return preparation.
Objectives: * Train new staff accountants, data processing employees, para-professionals and bookkeepers to prepare a complicated federal corporate income tax return; * Cover tax areas affecting all business entities; and * Address the sale of assets used in any trade or business (Form 4797), depreciation (Form 4562), deductible verses non-deductible items and the basics of uniform capitalization.
Highlights: * Preparation of a reasonably complicated Form 1120 U.S. corporate income tax return from trial balance to completed return; * Numerous M-1 adjustments in reconciling from book to tax; * Handling uniform capitalization and inventory accounting for a small manufacturing concern; * New tax-planning strategies for depreciation deductions, including changes to §179 as a result of the American Recovery and Reinvestment Act of 2009; * Application and choices regarding methods of accounting; * In-depth analysis of Form 4797 dealing with depreciation recapture; * Deductible expenses; * Computation of tax liability, including AMT; * M-3; and * Much more.
Prerequisite: None
Advanced Preparation:
Note:

Level: Basic
Recommended CPE credit: 8
Vendor: Surgent McCoy CPE, LLC
Instructor: David Jarmusz

Early Bird Rates:
Good through: 12/20/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 12/21/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Tax

Preparing Individual Tax Returns for New Staff and Para-Professionals • 460

1/11/2011-1/11/2011 • OSCPA Offices, OKC

Train new staff accountants, data processing employees, para-professionals and bookkeepers how to prepare a complicated federal individual income tax return. Your staff will receive practical, hands-on experience to become familiar with most tax forms and the latest tax law changes.

Designed For: * New staff and para-professionals who prepare individual returns.
Objectives: * Train new staff accountants, data processing employees, para-professionals and bookkeepers to prepare a complicated federal individual income tax return; and * Cover the latest tax law changes.
Highlights: * Preparation of various Form 1040 individual tax returns and schedules; * First-time homebuyer tax credits; * Tax filing status – rules for filing status and planning opportunities and pitfalls; * Dividends and interest – ordinary, return of capital and capital gain distribution dividends; * Security transactions – how to handle mutual fund sales and related basis issues; * Self-employed person issues; * Sale and exchange of property – understanding Form 4797 and depreciation recapture; * Schedule C deductions; * Passive losses – how to handle rental property and a working understanding of how the passive loss rules flow to the tax forms; * Itemized deductions – a thorough understanding of what's deductible and what's not; * Interest deductions – limitations and timing problems; * Retirement contributions and education credits and deductions; * Tax computation – the Kiddie Tax, AMT, regular tax, tax credits, etc.; * Individual problems illustrating form preparation for various items; and * Impact of recent legislation on the 1040.
Prerequisite: None
Advanced Preparation:
Note:

Level: Basic
Recommended CPE credit: 8
Vendor: Surgent McCoy CPE, LLC
Instructor: David Jarmusz

Early Bird Rates:
Good through: 12/21/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 12/22/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Tax

The Complete Guide to Preparing Limited Liability Company, Partnership and S Corporation Federal Income Tax Returns • 462

1/12/2011-1/12/2011 • OSCPA Offices, OKC

Your staff will learn how to prepare S corporation, LLC and partnership tax returns. Focus on an identical trial-balance-to-completed tax return case study prepared on both Form 1120S and Form 1065 and explore the similarities and differences of these popular entity structures.

Designed For: * All levels of staff and company controllers responsible for filing these forms.
Objectives: * Learn in one day how to prepare S corporation, LLC and partnership tax returns; and * Focus on an identical trial-balance-to-completed tax-return case study prepared on both Form 1120S and Form 1065 and explore the similarities and differences of these entity structures.
Highlights: * The important practical issues in filing Form 1120S; * Six step guide to preparing perfect S returns; * Basis and distribution issues of S corporation shareholders; * Preparation of Form 1065 for partnerships, LLCs and LLPs, and understanding the important differences between these entity structures; * Eight step guide to preparing perfect partnership and LLC returns; * Understanding the significant tax benefits and complications of using partnerships, LLCs and LLPs; * Filling in K-1s correctly for S corporations, partnerships, LLCs and LLPs; * Tax-planning strategies for depreciation deductions; * Problems and issues relating to §199 deduction data on the K-1; * Practical tips and planning issues; and * Most frequently used forms and schedules.
Prerequisite: None
Advanced Preparation:
Note:

Level: Basic
Recommended CPE credit: 8
Vendor: Surgent McCoy CPE, LLC
Instructor: David Jarmusz

Early Bird Rates:
Good through: 12/22/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 12/23/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Tax

Two-Day Federal Tax Update for the Year 2010-2011: Individual, Business and Corporate • 464

1/17/2011-1/18/2011 • Clarion Meridian Conv. Ctr., OKC

This two-day seminar, led by practicing CPAs Vern Hoven and Ron Roberson, covers fast-breaking new tax developments with an emphasis on cutting-edge tax planning opportunities.

Designed For: * CPAs in both public practice and industry, who need the latest tax changes for their individual, partnership, corporate and estate clients.
Objectives: * Provide tax planning strategies for clients; and * Identify and solve client tax problems before tax season starts.
Highlights: * Tax planning ideas and strategies; * Legislative changes impacting 2010 and 2011 returns; * Potential tax changes; * Individual changes; * Real estate changes; * Passive loss update; * Individual retirment plans; * Estate/gift taxation; * Business changes; * Federal payroll changes; * Business retirement plans; * Corporate changes; * Partnership changes; and * IRS audit issues.
Prerequisite: None
Advanced Preparation:
Note:

Level: Update
Recommended CPE credit: 16
Vendor: Vern Hoven Tax Seminars
Instructor: Vern Hoven and Ron Roberson

Early Bird Rates:
Good through: 1/3/2011
OSCPA & AICPA Member: $
OSCPA Member Only: $342
AICPA Member Only: $
Nonmember: $442

Standard Rates:
Effective: 1/4/2011
OSCPA & AICPA Member: $
OSCPA Member Only: $367
AICPA Member Only: $
Nonmember: $467

Fields of Interest: Tax

Federal Income Taxation of Upstream Oil and Gas Operations – Fundamentals • 466

1/19/2011-1/19/2011 • OSCPA Offices, OKC

The taxation of the exploration and development of natural resources is very specific to the industry and very different from regular tax accounting rules. Learn the fundamental concepts of income taxation of the oil and gas industry with a primary emphasis on the oil and gas producer. Understand the tax treatment of costs incurred in the exploration, acquisition, development and production of oil and gas. Any new industry rules promulgated during President Obama's administration will be covered in detail.

Designed For: * CPAs in industry involved in oil and gas upstream operations; and * CPAs in public practice whose clients own oil and gas mineral interests.
Objectives: * Gain an understanding of the upstream operations of the oil and gas industry; * Understand the nomenclature used to describe oil and gas mineral interests and their economic characteristics; * Understand the basic conveyancing transactions common in the oil and gas industry and the tax implications arising from those conveyances; * Identify and determine the proper tax treatment for geological and geophysical expenditures; * Compute depreciation on lease and well equipment under MACRS rules or the units of production method; * Identify intangible drilling and development costs (IDCs); and * Explore the requirements that must be met in order to take a current deduction for IDCs.
Highlights: * Working definitions for oil and gas mineral interests and other industry terminology, including the unit of property and an economic interest; * Geological and geophysical costs; * Proper tax accounting for the leasing transaction, the subleasing transaction, including lease bonus, sublease bonus and delay rental payments; * Depreciation issues specific to oil and gas exploration and production companies; and * Proper tax treatment of IDCs, including what they are, the election to currently expense, and an election to capitalize IDCs under section 59(e).
Prerequisite: None
Note: Attendees will receive a copy the IRS MSSP on the Oil and Gas Industry.

Level: Basic
Recommended CPE credit: 8
Vendor: PDI
Instructor: John Tripp

Early Bird Rates:
Good through: 12/29/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 12/30/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Tax, Industry, Oil and Gas

Preparing Corporate Tax Returns for New Staff and Para-Professionals • 468

1/19/2011-1/19/2011 • OSU-Tulsa, Tulsa

Train new staff accountants, data processing employees, para-professionals and bookkeepers to prepare a complicated federal corporate income tax return. This hands-on, practical course provides new staff coverage of tax areas affecting all business entities, including the sale of assets used in any trade or business (Form 4797), depreciation (Form 4562), deductible verses non-deductible items and the basics of uniform capitalization.

Designed For: * New staff and para-professionals involved in return preparation.
Objectives: * Train new staff accountants, data processing employees, para-professionals and bookkeepers to prepare a complicated federal corporate income tax return; * Cover tax areas affecting all business entities; and * Cover the sale of assets used in any trade or business (Form 4797), depreciation (Form 4562), deductible verses non-deductible items and the basics of uniform capitalization.
Highlights: * Preparation of a reasonably complicated Form 1120 U.S. corporate income tax return from trial balance to completed return; * Numerous M-1 adjustments in reconciling from book to tax; * How to practically handle uniform capitalization and inventory accounting for a small manufacturing concern; * New tax-planning strategies for depreciation deductions, including changes to §179 as a result of the American Recovery and Reinvestment Act of 2009; * Methods of accounting – application and choices; * In-depth analysis of Form 4797 dealing with depreciation recapture; * Deductible expenses – a laundry list including rules on meals and entertainment; * Computation of tax liability, including alternative minimum tax (AMT); * What about M-3?; and * Much more.
Prerequisite: None

Level: Basic
Recommended CPE credit: 8
Vendor: Surgent McCoy CPE, LLC
Instructor: Susan Smith

Early Bird Rates:
Good through: 12/29/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 12/30/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Tax

Advanced Oil and Gas Federal Income Taxation • 470

1/20/2011-1/20/2011 • OSCPA Offices, OKC

Discover the complex issues encountered in the acquisition, operation and disposition of oil and gas properties. Focus on current developments relating to the major tax principles applicable to upstream operations.

Designed For: * CPAs in industry involved in oil and gas upstream operations; and * CPAs in public practice whose clients own oil and gas mineral interests.
Objectives: * Determine the proper cost depletion and percentage depletion for each unit of property, including barrel limitations, taxable income from the property limitations, and the 65 percent of the taxpayer's taxable income limitation and the use of depletion carryovers; * Understand the proper tax treatment of sharing arrangements and carried interests; * Determine the proper tax consequences upon the sale or abandonment of an oil and gas mineral interest; * Understand the AMT issues relating to the IDC tax preference item and the election to capitalize IDCs under section 59(e) to help ameliorate the AMT burden; and * Apply the like kind exchange rules regarding exchanges of oil and gas properties, including the Section 1254 recapture provisions.
Highlights: * Complex percentage depletion calculations, limitations, and the use of depletion carryovers; * Sales of oil and gas properties with an emphasis on current deal structures; * Sharing arrangements, carried interests and other “pool of capital” transactions; * AMT issues, including the Section 59(e) election; * Like kind exchanges of oil and gas properties; and * Electing out of subchapter K and gas balancing agreements.
Prerequisite: Completion of the OiI and Gas Taxation: Fundamentals course or similar knowledge and experience.
Advanced Preparation:
Note: Attendees will receive a copy the IRS MSSP on the Oil and Gas Industry.

Level: Advanced
Recommended CPE credit: 8
Vendor: PDI
Instructor: John Tripp

Early Bird Rates:
Good through: 12/30/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 12/31/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Tax, Industry, Oil and Gas

Preparing Individual Tax Returns for New Staff and Para-Professionals • 472

1/20/2011-1/20/2011 • OSU-Tulsa, Tulsa

Train new staff accountants, data processing employees, para-professionals and bookkeepers how to prepare a complicated federal individual income tax return. Your staff will receive practical, hands-on experience to become familiar with most tax forms and the latest tax law changes.

Designed For: * New staff and para-professionals who prepare individual returns.
Objectives: * Train new staff accountants, data processing employees, para-professionals and bookkeepers to prepare a complicated federal individual income tax return; and * Cover the latest tax law changes.
Highlights: * Preparation of various Form 1040 individual tax returns and schedules; * First-time homebuyer tax credits; * Tax filing status – rules for filing status and planning opportunities and pitfalls; * Dividends and interest – ordinary, return of capital and capital gain distribution dividends; * Security transactions – how to handle mutual fund sales and related basis issues; * Self-employed person issues; * Sale and exchange of property – understanding Form 4797 and depreciation recapture; * Schedule C deductions; * Passive losses – how to handle rental property and a working understanding of how the passive loss rules flow to the tax forms; * Itemized deductions – a thorough understanding of what's deductible and what's not; * Interest deductions – limitations and timing problems; * Retirement contributions and education credits and deductions; * Tax computation – the Kiddie Tax, AMT, regular tax, tax credits, etc.; * Individual problems illustrating form preparation for various items; and * Impact of recent legislation on the 1040.
Prerequisite: None
Advanced Preparation:
Note:

Level: Basic
Recommended CPE credit: 8
Vendor: Surgent McCoy CPE, LLC
Instructor: Susan Smith

Early Bird Rates:
Good through: 12/30/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 12/31/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Tax

Oil and Gas Tax Partnership Issues • 474

1/21/2011-1/21/2011 • OSCPA Offices, OKC

Cover the complex issues encountered in Subchapter K when using a tax partnership in the development of oil and gas properties. Emphasis will be placed on current legislation, rulings and cases.

Designed For: * CPAs in industry involved in oil and gas upstream operations; and * CPAs in public practice who are involved in structuring and accounting for partnerships and LLCs involved in the development of oil and gas properties.
Objectives: * Identify joint ventures that can elect out of subchapter K and making the election out of subchapter K; * Understand carried interests, a third for a quarter deal, payout, and Rev. Rul. 77-176 issues; * Determine the tax consequences of forming partnerships as a result of contributions of property or contributions of services; * Review section 704(b) special allocations, capital accounts and simulated depletion deduction; * Study mandatory allocations under section 704(c) including the traditional, curative and remedial methods required to equalize capital accounts; * Review partnership transfers; and * Review the limitations on partnership losses.
Highlights: * Joint ventures and election out of subchapter K; * Partnership formations, including contribution of services for a net profits interest; * Allocation of depletable basis to partners; * Section 704(b) special allocations, capital account accounting and simulated depletion; * Section 704(c) mandatory allocations; and * Partnership transfers and limitations on partnership losses.
Prerequisite: None
Advanced Preparation:
Note:

Level: Advanced
Recommended CPE credit: 8
Vendor: PDI
Instructor: John Tripp

Early Bird Rates:
Good through: 12/31/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 1/1/2011
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Tax, Industry, Oil and Gas

The Complete Guide to Preparing Limited Liability Company, Partnership and S Corporation Federal Income Tax Returns • 476

1/21/2011-1/21/2011 • OSU-Tulsa, Tulsa

Your staff will learn how to prepare S corporation, LLC and partnership tax returns. Focus on an identical trial-balance-to-completed tax return case study prepared on both Form 1120S and Form 1065 and explore the similarities and differences of these popular entity structures.

Designed For: * All levels of staff and company controllers responsible for filing these forms.
Objectives: * Learn in one day how to prepare S corporation, LLC and partnership tax returns; and * Focus on an identical trial-balance-to-completed tax-return case study prepared on both Form 1120S and Form 1065 and explore the similarities and differences of these entity structures.
Highlights: * The important practical issues in filing Form 1120S; * Six step guide to preparing perfect S returns; * Basis and distribution issues of S corporation shareholders; * Preparation of Form 1065 for partnerships, LLCs and LLPs, and understanding the important differences between these entity structures; * Eight step guide to preparing perfect partnership and LLC returns; * Understanding the significant tax benefits and complications of using partnerships, LLCs and LLPs; * Filling in K-1s correctly for S corporations, partnerships, LLCs and LLPs; * Tax-planning strategies for depreciation deductions; * Problems and issues relating to §199 deduction data on the K-1; * Practical tips and planning issues; and * Most frequently used forms and schedules.
Prerequisite: None
Advanced Preparation:
Note:

Level: Basic
Recommended CPE credit: 8
Vendor: Surgent McCoy CPE, LLC
Instructor: Susan Smith

Early Bird Rates:
Good through: 12/31/2010
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 1/1/2011
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Tax

Advanced Controller and CFO Skills • 478

2/24/2011-2/24/2011 • OSU-Tulsa, Tulsa

Experience the ten critical skills that will help you add value to your company and boost your career so you quickly advance. Learn how to translate your firm's strategies with key performance and improve your skills in the five key areas needed for success.

Designed For: * CPAs in industry; and * Controllers and CFOs.
Objectives: * Display best practices of leading edge controllers and CFOs; * Employ a balanced approach to your firm's measures of success; * Develop into a powerful agent or catalyst for positive change; * Ensure that your strategies are in alignment with the organization's mission; * Translate your firm's strategies with key performance metrics; * Employ the balanced performance measuring scorecard; * Become an advocate and coach for your team; and * Develop a tailored action plan suitable for your specific needs.
Highlights: * Developing measurable mission and strategies; * Applying the Balanced Scorecard; * Aligning your firm's strategies with its internal reporting system; * Selling your ideas in a way that generates buy-in by others; * Recognizing and responding to the need for constant change and adaptation; and * The six key steps that you will find invaluable to your employer.
Prerequisite: Basic or beginning controller's course in lieu of experience
Advanced Preparation:
Note:

Level: Advanced
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Arthur Pulis

Early Bird Rates:
Good through: 2/3/2011
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 2/4/2011
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Management, Personal Development

Bottom Line Management Accounting: Practical Solutions to Real-World Problems • 480

2/25/2011-2/25/2011 • OSU-Tulsa, Tulsa

The success of any business is grounded in the basics of profitability and cash (liquidity) availability. Revisit and evaluate traditional and new approaches to cost control and profitability analysis. Develop project management skills and increase productivity by appropriate use of information technology. Understand the importance, variety and sensitivity of needs with these tools and techniques. Help improve profitability, liquidity, project management and overall finance and accounting services.

Designed For: * CPAs in industry responsible for management information systems.
Objectives: * Apply tested and new approaches to profitability and liquidity management; * Enhance information technology understanding and user skills; * Learn effective project management skills and tools; and * Understand techniques to obtain competitive intelligence.
Highlights: * Understanding the changing business environment and its implications for practicing accountants as well as for clients; * New business performance measures to maximize profitability and liquidity; * Learning successful negotiation strategies; * Project management and business re-engineering; * Analyzing your competition through competitive intelligence; and * Understanding IT trends and ways to streamline and improve.
Prerequisite: Management responsibility in finance, operations and accounting
Advanced Preparation:
Note: Accepted for CMA and CFM credit.

Level: Intermediate
Recommended CPE credit: 8
Vendor: AICPA
Instructor: Arthur Pulis

Early Bird Rates:
Good through: 2/4/2011
OSCPA & AICPA Member: $193
OSCPA Member Only: $223
AICPA Member Only: $293
Nonmember: $323

Standard Rates:
Effective: 2/5/2011
OSCPA & AICPA Member: $218
OSCPA Member Only: $248
AICPA Member Only: $318
Nonmember: $348

Fields of Interest: Management

Professional Ethics (9-11 a.m.) • 482

4/22/2011-4/22/2011 • OSCPA Offices, OKC

Explore the reasoning and purposes behind ethical behavior in the CPA profession. Develop the insight and background necessary to help you implement practical measures to assist in your compliance with ethical requirements of the profession.

Designed For: * CPAs in public practice and industry.
Objectives:
Highlights:
Prerequisite: None
Advanced Preparation:
Note: This seminar is recommended for two hours toward the Oklahoma ethics requirement.

Level: Update
Recommended CPE credit: 2
Vendor: OSCPA
Instructor:

Early Bird Rates:
Good through: 4/1/2011
OSCPA & AICPA Member: $
OSCPA Member Only: $51
AICPA Member Only: $
Nonmember: $64

Standard Rates:
Effective: 4/2/2011
OSCPA & AICPA Member: $
OSCPA Member Only: $64
AICPA Member Only: $
Nonmember: $77

Fields of Interest: Ethics

Professional Ethics (1-3 p.m.) • 484

4/22/2011-4/22/2011 • OSCPA Offices, OKC

Explore the reasoning and purposes behind ethical behavior in the CPA profession. Develop the insight and background necessary to help you implement practical measures to assist in your compliance with ethical requirements of the profession.

Designed For: * CPAs in public practice and industry.
Objectives:
Highlights:
Prerequisite: None
Advanced Preparation:
Note: This seminar is recommended for two hours toward the Oklahoma ethics requirement.

Level: Update
Recommended CPE credit: 2
Vendor: OSCPA
Instructor:

Early Bird Rates:
Good through: 4/1/2011
OSCPA & AICPA Member: $
OSCPA Member Only: $51
AICPA Member Only: $
Nonmember: $64

Standard Rates:
Effective: 4/2/2011
OSCPA & AICPA Member: $
OSCPA Member Only: $64
AICPA Member Only: $
Nonmember: $77

Fields of Interest: Ethics

How to Buy or Sell a Business • 486

4/28/2011-4/28/2011 • OSCPA Offices, OKC

Mergers and acquisitions are not just about tax considerations. Take a practical look at the management and ownership aspects of business purchases and sales, including pricing and negotiating strategy. Apply what you have learned in a competitive business environment with a case study.

Designed For: * CPAs in consulting roles and management positions.
Objectives: * Set the right starting price for negotiating; * Structure the transaction for best tax advantage; * Negotiate more effectively, avoiding tricks the opposition will use to gain advantage; and * Make a thorough investigation of the transaction.
Highlights: * Elements and structure of buy/sell opportunities; * Matching buyers and sellers; * Working with brokers and commission pricing; * How to investigate the market place using available data sources; * Valuation methods; * Terms of purchase and sale; * Three phases of negotiation and techniques, preparation, dealing with deadlock and dealing with walkouts; * Investigating the purchase; * Transaction documents and techniques; * Accounting and tax considerations; and * Much more.
Prerequisite: None
Advanced Preparation:
Note:

Level: Intermediate
Recommended CPE credit: 8
Vendor: Purtill Seminars
Instructor:

Early Bird Rates:
Good through: 4/7/2011
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 4/8/2011
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Consulting Services

Controller or HR Director: Personnel and Regulatory Issues • 488

4/29/2011-4/29/2011 • OSCPA Offices, OKC

Modern financial managers know that their people management skills are as important as their finance and technology skills. Today's regulatory environment contains many traps for today's controllers. Get practical guidance and resources through discussions of EEO, ADA, sexual harassment and other regulatory issues. You will also gain vital first-hand experience in employee recruitment, interviewing and training.

Designed For: * CPAs in industry provide human resources services; and * CPAs who provide top management consulting.
Objectives: * Reduce EEO and personnel claims and litigation; * Develop a proactive HR system; * Use modern tools to handle HR responsibilities; and * Recruit more effectively.
Highlights: * Americans with Disabilities Act; * USERRA – re-employment rights for returning veterans; * EEO and dealing with the EEOC; * Who is exempt and isn't in today's rules; * Family Leave Act of 1993; * Hiring employees without risking lawsuits; * Independent contractors; * Developing an effective legal position description; * Creating employee handbooks; * Checking references, credit and criminal records; and * Avoiding lawsuits in personnel actions.
Prerequisite: None
Advanced Preparation:
Note:

Level: Intermediate
Recommended CPE credit: 8
Vendor: Purtill Seminars
Instructor:

Early Bird Rates:
Good through: 4/8/2011
OSCPA & AICPA Member: $
OSCPA Member Only: $223
AICPA Member Only: $
Nonmember: $323

Standard Rates:
Effective: 4/9/2011
OSCPA & AICPA Member: $
OSCPA Member Only: $248
AICPA Member Only: $
Nonmember: $348

Fields of Interest: Not-for-Profit, Business Law, HR