FEATURED

Fraud Case Studies: Schemes and Controls (FRD4)

Monday, October 26 8:30am - 12:00pm Online 4.00 Credits Member Price: $180

Recent fraud cases Common fraud schemes perpetrated by those within and outside victim organizations Consider the lessons learned Best practices to further our fraud prevention

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FEATURED

Buying and Selling a Business: Tax and Structuring Overview (SEL4)

Monday, November 2 8:30am - 12:00pm Online 4.00 Credits Member Price: $180

An overview of the beginning of the process and documents for preliminary tax planning Recognizing the need for due diligence in acquisitions, including checklists of important points Deemed asset sales - §338 and §338(h)(10) The impact of the §197 amortizable intangibles regulations on the acquisition and disposition of a business Allocating purchase price for tax advantage Planning to avoid double taxation under the repeal of the General Utilities doctrine Special problems and opportunities when an S corporation is the buyer or seller Installment sale and interest issues Avoiding tax pitfalls and recognizing tax planning opportunities Unique issues in buying and selling LLC/partnership interests Impact of the net investment income tax (NIIT) and the §199A pass-through deduction on the tax due on the sale of a pass-through entity Individually owned goodwill

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FEATURED

Top Business Tax Planning Strategies (BTPS)

Thursday, November 5 8:30am - 10:10am Online 2.00 Credits Member Price: $105

Lower marginal tax rates made permanent New, more generous depreciation rules for bonus and Section 179 Qualified production property and bonus depreciation Full expensing of domestic research and experimental expenditures Rev. Proc. 2025-28 and options for small taxpayers Taking advantage of the QBI deduction Taking advantage of the SALT cap and the pass-through entity tax Form 1099 reporting changes Deducting business interest and business losses Taking advantage of the new Section 1202 tax regime

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FEATURED

Virtual Currency: Keeping Up With the Tax Code (VCR2)

Friday, November 6 8:30am - 10:10am Online 2.00 Credits Member Price: $105

Overview of virtual currency Property transactions with virtual currency Receiving virtual currency as payment Paying using virtual currency Charitable donations with virtual currency Gifting of virtual currency Form 8300 reporting

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FEATURED

Schedules K-2 and K-3: Preparation of Forms (KPF2)

Monday, November 9 8:30am - 10:10am Online 2.00 Credits $ Member Price: $105

How to read and complete Parts II and III for Foreign Tax Credit Understand attachment requirements in Part I Practical tips on how to tackle Parts IV and IX for corporate partners How to correctly fill out Part X for foreign partners Comprehensive examples for operating, real estate rental, and investment partnerships with filled-in sample forms

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Tax Planning for Rental Real Estate

Monday, October 19 7:30am - 11:00am Online 4.00 Credits $ Member Price: $180

• Rental activities and passive activities • Material participation • Real estate professional status • Active participation status • Depreciation recapture - Sections 1245, 1250, and 291 • Vacation homes rented out • QBI deduction and rental properties • Section 1237 safe harbor for divided parcel sales • Practitioner considerations

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CFO Series: Decision Making in an Irrational World (Live Replay)

Monday, October 19 7:30am - 3:30pm Online 8.00 Credits $ Member Price: $330

Module 1: Acute Uncertainty Will Never Go Away: Can We Prevent Our Plans from Failing? • How and why ambiguity is good, and how certainty can be harmful. • How the past blinds us to the real future. • What is the difference between risk and uncertainty? • Managing measurable risk and unmeasurable risk. • We need to ask, "What could happen, not what will happen?" • Why have our current planning approaches failed? What can we do to improve? • The need to analyze decisions from multiple perspectives, why we must 'think twice'? • Probabilities are not necessarily predictive. How statistics can be misused and misunderstood - thus increasing risk. • Not everything can be anticipated, e.g., the success of Google. • We must focus on our goal. • Our plans must be flexible! Module 2: Decision Making in a Non-linear World: What They Did Not Teach in Management Accounting? • Better plans require more planning, what do we need to change in our decision process? o How to use the OODA loop and other decision models? o New lessons from the Judgement of Solomon • Why do the best performing organizations always plan for the unexpected? o Multiple scenarios always! • Experiments always lead to success. • Tools to deal with randomness, including: o The Scientific Method, re-framing, and periodic reality checks. • Choosing the right, relevant costs? o The sunk cost fallacy reexamined o Opportunity costs. o Relevant costs for responsibility accounting. o Product or process continuance or discontinuance. o Fixed costs vs avoidable costs. Short run and long run. • Decision dynamics: How can today's right decision turn sour tomorrow? o Unintended consequences o Selling surplus capacity • How can statistics be misused and misunderstood - thus increasing risk? • Harnessing sensitivity analysis, multiple scenarios, and other tools effectively. • Real options increase

certainty by making us more flexible. • All risks are subjective, but we futilely attempt to quantify the unquantifiable. Module 3: Advanced Financial Analysis: Choosing the Right Tools in a World Full of Randomness • Advanced financial analysis and modeling tools o Proper modeling of long-term decisions o Best practices in project analysis o Alternative evaluation methods o Why should you consider multiple metrics? o Capital rationing o Choosing the correct discount factor? o Year-end convention and other less understood assumptions o Sensitivity and scenario analysis o Monte Carlo Simulation in practice o Interpreting results properly? o NPV vs IRR vs MIRR vs ROI. o Considerations when metrics contradict other metrics. o Real options are hard to value but are invaluable. o Behavioral issues o Evaluating projects with no obvious return o Multiple numeric examples and work sheets Module 4: Diversification: A Risky or Risk Averse Strategy? • Does diversification truly reduce risk - or not? o Portfolio theory and how to use it properly? • The differences between specific risk and systematic risk and how can we reduce those risks? • The most common reasons why most organizations fail when attempting to diversify. • What happened to conglomerates? o Why conglomerates disappeared in the West? o Why are conglomerates in Korea and India successful? • Diversification via acquisitions o Is the control premium worthwhile? • Which cost of capital (WACC) should we employ? • What are the effective diversification methods and tactics that truly do reduce risk?

Don Farmer's Advanced Schedule A Planning: SALT Caps, AMT & Bunching Strategies

Monday, October 19 9:00am - 10:40am Online 2.00 Credits $ Member Price: $89

Schedule A planning considerations under current federal tax law SALT deduction limitation; application of the SALT cap Alternative minimum tax (AMT) implications Charitable contribution planning including timing and bunching strategies Medical expense deduction planning including threshold requirements Itemized deductions versus the standard deduction Compliance considerations and common pitfalls I advanced Schedule A planning

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Your Firm's Personal AI: Custom Copilots and GPTs That Know Your Business

Monday, October 19 9:00am - 11:00am Online 2.00 Credits $ Member Price: $105

Update this attribute value to the course major topic(s). , Beyond Generic Prompts: Achieving Hyper-Focused AI Outcomes, RAG and MCP: New Ways to Connect Your Data, The Privacy Spectrum: From GPT Store to Self-Hosted Ollama , Navigating the Landscape: Tools and APIs for Small Firms

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Outlook and Teams: Collaboration Champions

Monday, October 19 11:30am - 3:30pm Online 4.00 Credits $ Member Price: $180

Teams: Enhancing organizational communication and collaboration , Outlook: Optimizing email and calendar management , SharePoint: Integrating with Teams for file storage , Microsoft 365: Leveraging additional productivity tools

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Don Farmer's Passive Activity Losses: Navigating Real Estate & K-1 Limitations

Monday, October 19 12:00pm - 1:40pm Online 2.00 Credits Member Price: $89

Passive activity loss (PAL) rules under IRC §469 Passive versus nonpassive activity classification Material participation and real estate professional requirements Partnership K-1 reporting and common PAL pitfalls Coordination of PAL rules with basis, at-risk, and §461(l) limitations Disposition rules and strategies for utilizing suspended passive losses"

Construction Contractors: Accounting and Financial Reporting Issues

Tuesday, October 20 7:30am - 11:00am Online 4.00 Credits Member Price: $180

• Overall landscape of the construction industry • GAAP and recent changes affecting the construction industry • FASB ASC 606 and its impact on the construction industry • The unique relationship between the contractor and the surety • FASB ASC 842 and its impact on the construction industry

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Data and Statistical Analytics Using Microsoft Excel

Tuesday, October 20 9:00am - 12:00pm Online 3.00 Credits Member Price: $135

Statistical Foundations: Using the Analysis ToolPak for Insight, Modern Modeling: Leveraging Dynamic Arrays for Live Analytics, Predictive Budgeting: Applying Regression and Forecasting Functions, The 2026 Toolkit: AI Insights and Python Integration Basics

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Excel Accounting Tools: Most Useful Formulas and Pivot Tables

Tuesday, October 20 12:30pm - 5:30pm Online 4.00 Credits Member Price: $180

Excel Formula Solutions for Daily Accounting Tasks, Pivot Tables for Advanced Financial Reporting, Excel Productivity Tools for Financial Analysis

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Don Farmer's Section 1202 QSBS: Qualification, Planning & Exit Strategies

Tuesday, October 20 1:00pm - 2:40pm Online 2.00 Credits Member Price: $89

Overview of IRC §1202 Qualified Small Business Stock QSBS Eligibility and Qualification Requirements Holding Period and Gain Exclusion Rules Disqualifying Transactions and Compliance Risks to include common qualification failures and compliance considerations Redemptions, Partial Exits, and Planning Considerations Application of QSBS rules to multi-year sales and exit scenarios

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Surgent's Individual Tax Planning Ideas

Wednesday, October 21 7:30am - 11:00am Online 4.00 Credits Member Price: $180

• Comprehensive coverage of the One Big Beautiful Tax Bill Act • Reading a tax return for developing client-specific tax strategies • Changes to the lifetime estate tax exemption considering proposed regulations • Retirement planning in light of IRA and RMD changes • Review of pertinent changes from recent legislation • Reading a tax return for developing client-specific tax strategies • Identifying tax opportunities: reviewing the prior-year return to develop a plan for the future • Compensation and fringe benefit issues • Identify clients with net investment income tax problems and the potential ways to reduce or eliminate them • All in the family: Tax tactics for spouses, children, and parents

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K2's After QuickBooks, What's Next

Wednesday, October 21 9:00am - 11:00am Online 2.00 Credits Member Price: $105

Transitioning from QuickBooks Pro and Premier - challenges and opportunities , Overview and comparison of leading accounting software solutions , Implementation strategies and best practices for modern accounting platforms

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K2's Best Word, Outlook, and PowerPoint Features

Wednesday, October 21 11:30am - 3:30pm Online 4.00 Credits Member Price: $180

Creating Word and PowerPoint documents with greater ease and efficiency , Enabling critical Outlook options for improved productivity , Best practices for working with Word, Outlook, and PowerPoint

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Key Partnership and S Corporation Tax Planning Strategies

Wednesday, October 21 12:00pm - 3:30pm Online 4.00 Credits Member Price: $180

• Timely coverage of breaking tax legislation • Tax consequences of retiring partners seeking liquidating distributions/redemptions and S corporation shareholders seeking the redemption of their shares • At-risk and passive activity loss considerations • Basis planning • Related party transactions: making them work • Income splitting and shifting with family can create considerable benefits • Sale of ownership interest and NIIT considerations

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Fraud Case Studies: Schemes and Controls

Thursday, October 22 7:30am - 11:00am Online 4.00 Credits Member Price: $180

• Recent fraud cases • Common fraud schemes perpetrated by those within and outside victim organizations • Consider the lessons learned • Best practices to further our fraud prevention

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K2's Data Analytics For Accountants And Auditors

Thursday, October 22 9:00am - 1:00pm Online 4.00 Credits Member Price: $180

Understanding the importance of data analytics in modern business environments , Generating and interpreting data analytics using everyday applications such as Microsoft Excel and Microsoft's Power BI platform , Using regression analysis to create and validate forecasts and projections

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Fraud In Single Audits

Thursday, October 22 12:00pm - 3:30pm Online 4.00 Credits Member Price: $180

• Real-life misappropriations involving federal awards and how they were carried out • The backgrounds, motivations, and methodologies of the fraudsters • The problems that allowed the frauds to occur without prevention or detection

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Construction Industry - Financial Reporting, Audit/Review Procedures Internal Control Best Practices and Taxation - VIRTUAL

Thursday, October 22 1:00pm - 2:40pm Online 4.00 Credits Member Price: $210

Construction industry financial trends and developments Surety and other users reliance on financial statements Financial reporting issues Contractor financial disclosures Sample financial statement CFO and internal controls – best practices Contract audit and review analytical procedures and risk assessment Required contractor engagement documentation (and internal analytics/controls) New tax law applicable to construction contractors Contractor tax methods and strategies Code section 460 exemptions Review of differences in GAAP POC and IRS 460 POC Lookback calculation and strategies

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Don Farmer's Stock vs. Asset Sales: Tax Impact for Buyers & Sellers

Thursday, October 22 1:00pm - 2:40pm Online 2.00 Credits Member Price: $89

Overview of Stock and Asset Transaction Structures Buyer and Seller Tax Consequences Purchase Price Allocation and Basis Adjustments Elections Under IRC §§338 and 336(e) Negotiation and Planning Considerations Post-Transaction Compliance and Reporting

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K2's Understanding Your Ransomware Risk

Thursday, October 22 1:30pm - 3:30pm Online 2.00 Credits Member Price: $105

Understanding how ransomware can cripple a business , Trends in ransomware attacks , Best practices for minimizing ransomware risk

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Buying and Selling a Business: Tax and Structuring Overview

Friday, October 23 7:30am - 11:00am Online 4.00 Credits Member Price: $180

• An overview of the beginning of the process and documents for preliminary tax planning • Recognizing the need for due diligence in acquisitions, including checklists of important points • Deemed asset sales - §338 and §338(h)(10) • The impact of the §197 amortizable intangibles regulations on the acquisition and disposition of a business • Allocating purchase price for tax advantage • Planning to avoid double taxation under the repeal of the General Utilities doctrine • Special problems and opportunities when an S corporation is the buyer or seller • Installment sale and interest issues • Avoiding tax pitfalls and recognizing tax planning opportunities • Unique issues in buying and selling LLC/partnership interests • Impact of the net investment income tax (NIIT) and the §199A pass-through deduction on the tax due on the sale of a pass-through entity • Individually owned goodwill

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Winning Hearts and Minds: Building Future-Ready Businesses

Monday, October 26 9:00am - 11:00am Online 2.00 Credits Member Price: $105

Technology Infrastructure Assessment Through Organizational Case Studies, Practical Implementation Strategies for Hardware and Software Solutions, Change Management Techniques for Remote and In-Office Teams

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Excel Functionality That Every Accountant Should Know

Monday, October 26 11:30am - 1:30pm Online 2.00 Credits Member Price: $105

Review of Tables and how they improve virtually every operation in Excel. , Discuss essential Excel functions and features that every financial professional should know how to use. , Review how to collaborate with colleagues in real-time with OneDrive or SharePoint. , Review PivotTables and their significant features. , Take a detailed look at Power Query and how this tool can revolutionize your workflow.

Interpreting the New Revenue Recognition Standard

Tuesday, October 27 7:30am - 11:00am Online 4.00 Credits Member Price: $180

• Revenue recognition overview • Identifying the contract with a customer and performance obligations • Transaction price

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Personal Financial Planning Conference - VIRTUAL

Tuesday, October 27 7:30am - 3:30pm Online 8.00 Credits Member Price: $345

Innovations in AI tools Tax strategies Private equity and succession planning Investment strategies Economic update and tax implications for planning

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Don Farmer's Middle Class Tax Strategies

Tuesday, October 27 9:00am - 10:40am Online 2.00 Credits Member Price: $89

Principles of proactive tax planning Income-shifting and income-timing strategies Maximizing available deductions and tax credits Retirement plan contribution strategies and tax benefits Tax-efficient investment planning techniques Planning opportunities for small business owners and self-employed individuals Family tax planning considerations Education-related tax incentives and planning opportunities Strategies to reduce taxable income Common tax planning mistakes and how to avoid them Recent tax law developments affecting middle-income taxpayers Integrating tax planning into financial and advisory services

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K2's Ripped From The Headlines: Lessons From Interesting Tech Crimes

Tuesday, October 27 9:00am - 11:00am Online 2.00 Credits Member Price: $105

Common security weaknesses that occur with hardware and software at home and in the office , Malware, ransomware, data breach, and incident response tips , Internal control failures which result in the theft of assets or unauthorized manipulation of data

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K2's Harnessing ChatGPT

Tuesday, October 27 11:30am - 1:30pm Online 2.00 Credits Member Price: $105

Leveraging prompt engineering in ChatGPT for various accounting tasks , Exploring the applications and limitations of ChatGPT in accounting , Empowering efficiency for everyday accounting tasks

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The Bottom Line on the Lease Accounting Requirements

Tuesday, October 27 12:00pm - 3:30pm Online 4.00 Credits Member Price: $180

• Lease classification • Amortization of the leased asset • Derecognition of the underlying asset • Recognition of lease receivables • Lease modifocations • Sale and leaseback transactions

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Don Farmer's Hot Assets & IRC 751: Avoiding Surprises on Partnership Sales

Tuesday, October 27 1:00pm - 2:40pm Online 2.00 Credits Member Price: $89

Overview of Partnership Interest Sales General rule under IRC §741 Capital asset treatment of partnership interests Interaction with Subchapter K principles Definition and Scope of Hot Assets (IRC §751) Unrealized receivables Depreciation recapture (§1245 and §1250) Accounts receivable for cash-basis partnerships Ordinary income recapture items Inventory items Substantially appreciated inventory Determining fair market value Mechanics of §751 Recharacterization Allocation of gain between capital and ordinary income Determining a partner’s share of §751 property Impact of inside vs. outside basis Effect of liabilities under IRC §752 Distributions

and §751(b) Disproportionate distributions Exchanges of hot assets for other property Ordinary income recognition in rebalancing transactions Reporting and Compliance Considerations Form 4797 and Schedule D implications Partnership reporting responsibilities Disclosure considerations Documentation and valuation challenges Planning Considerations and Risk Management Transaction structuring strategies Timing considerations Due diligence in partnership interest acquisitions Common practitioner errors and audit risk areas

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K2's Excel PivotTables for Accountants

Wednesday, October 28 9:00am - 1:00pm Online 4.00 Credits $ Member Price: $180

PivotTable fundamentals, including Recommended PivotTables and the six elements of PivotTables , Formatting PivotTables , Advanced PivotTable techniques and options, including consolidation PivotTables, Power Pivot, and Power Query , Analytical techniques available in PivotTables

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K2's Securing Your Data – Practical Tools for Protecting Information

Wednesday, October 28 1:30pm - 5:30pm Online 4.00 Credits $ Member Price: $180

Understanding today's cybersecurity risks , Identifying significant cybersecurity risks , Implementing specific steps to reduce risk

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Don Farmer's Foreign Trusts & Accounting Method Changes for Forms

Thursday, October 29 9:00am - 10:40am Online 2.00 Credits $ Member Price: $89

Overview of foreign trust reporting framework Form 3520 reporting requirements Transfers to foreign trusts Ownership and distribution reporting Form 3520-A filing obligations and related disclosures Penalty provisions and documentation considerations Overview of accounting method change procedures Form 3115 filing mechanics Automatic versus nonautomatic method changes §481(a) adjustment principles Common compliance errors and IRS examination focus areas

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K2's Small Business Internal Controls, Security, and Fraud Prevention and Detection

Thursday, October 29 9:00am - 5:00pm Online 8.00 Credits $ Member Price: $330

Common challenges associated with implementing appropriate internal controls in small business environments , Fraud in small business environments , Internal control options in small business accounting software , Understanding the need for application controls and general controls

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K2's Top PDF Features You Should Know

Monday, November 2 9:00am - 11:00am Online 2.00 Credits Member Price: $105

Best practices for creating, editing, and managing PDFs , The process for creating and distributing PDF forms , Integrating PDFs with other applications , Securing your PDFs

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Essential Data Backup Strategies

Monday, November 2 11:30am - 1:30pm Online 2.00 Credits Member Price: $105

Preventing data breaches in your organization, Major security and privacy issues for 2025 and beyond., Counteracting Ransomware and Phishing in Finance, Crafting Cybersecurity Policies for Regulatory Compliance

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Demystifying Accounting for Blockchain, Cryptocurrency, and NFTs

Monday, November 2 2:00pm - 6:00pm Online 4.00 Credits Member Price: $180

Understanding Blockchain and Cryptocurrency, Major Features, Benefits and Risks of Blockchain and Cryptocurrency, Tax Strategies for Cryptocurrency Transactions and Compliance, Implementing Blockchain in Business Accounting Systems, Navigating Estate Planning with Digital Assets

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Automation For Increasing Personal Efficiency and Effectiveness

Tuesday, November 3 9:00am - 12:00pm Online 3.00 Credits Member Price: $135

What are integration and automation?, Exploring Integration Platform as a Service (iPaaS) tools and services, Automation within tools you're already using today, Intelligent virtual assistants (IVAs) for automation around the house

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Efficient Automation Solutions Using QuickBooks Online Advanced

Tuesday, November 3 12:30pm - 3:30pm Online 3.00 Credits Member Price: $135

QuickBooks Online Advanced Workflow Automation Systems, Advanced Reporting and Scheduling Solutions, Integration Platforms and Business Process Automation, Custom Workflow Design and Implementation

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K2's Case Studies In Fraud And Technology Controls

Wednesday, November 4 1:30pm - 9:30pm Online 8.00 Credits Member Price: $330

Key fraud risks impacting businesses today , Examples of fraud and the monetary impact on victims , How to create, implement, and assess technology-based internal controls to reduce the probability of becoming a fraud victim

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K2's Six Essential Teams Features

Thursday, November 5 9:00am - 11:00am Online 2.00 Credits Member Price: $105

Learn how to set up Teams for successful collaboration , Create a filing system that does not include endless sub-folders , Manage staff delegation and follow-ups with ease , Define what Lists need to be available to your Team , Discover how to create automatic Flows that can notify others of update , Utilize survey Forms or questionnaires from within Teams

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K2's Implementing Internal Controls in QuickBooks Environments

Thursday, November 5 11:30am - 3:30pm Online 4.00 Credits Member Price: $180

Critical risks in QuickBooks environments , Internal control options that can mitigate risk to prudently acceptable levels , Enabling alternative control measures to improve internal controls in QuickBooks environments

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Case Studies in Business Valuation: Developing Defensible Conclusions

Friday, November 6 8:30am - 4:30pm Online 8.00 Credits Member Price: $375

Valuation engagement decisions and professional standards. Development of valuation analyses. Reasonableness testing and reconciliation. Levels of value, discounts, and premiums. Documentation, reporting and professional practice. Practical uses and limitations of AI in valuation practice.

CFO Series: AI in the Digital World (Live Replay)

Monday, November 9 7:30am - 3:30pm Online 8.00 Credits Member Price: $330

Module 1: Living in the World of AI - How AI Has Changed Ethics • Is it ethical to use AI, or not? • What is ethical AI? Why it matters for finance and business professionals? • Understanding and managing AI hallucinations and misinformation. • Addressing bias in AI tools—even when you didn't build them. • Internal friction: navigating fear, resistance, and cultural challenges. • Guidelines for responsible AI use in your organization. • Accountability and transparency: who is responsible for AI outcomes? • Real-world use cases and what we can learn from them? • Creating sustainable, people-focused AI practices that build trust. Module 2: Accounting in the Age of AI: What Every Leader Must Know About Using AI • What are autonomous general ledgers: what are they and how much can you depend upon them? • Financial statement analysis using AI. • AI use in Budgeting and Forecasting. • Using AI for research and planning (tax and GAAP), e.g. o AI-driven fraud detection tools: capabilities and limits. o What to automate and what to leave alone? • Evaluating vendor claims and setting reasonable expectations. • What to automate, and what to leave alone. • AI ramification on staffing and hiring. • The impact of self-serve AI research on your relationship with your CPA firm Module 3: AI Is Not the Enemy: Practical Tools to Harness Technology • Common AI use cases in accounting and finance • Fraud, deepfakes, data abuse and related risks • Governance frameworks and oversight responsibilities • The EU AI Act and regulatory developments in the U.S. • AI bias, discrimination, and transparency concerns • Internal control and documentation challenges • Questions finance leaders should ask before adopting AI • Aligning AI oversight with your audit and compliance functions

Module 4: Beyond Likes and Shares: Can Social Media Really Work at Work? • The huge scale of social media. o What are the many issues? • The impact on trust, reputation, our workforce, and confidentiality • The legal and ethical impact of social media o Examples of firings, dismissals, and silly blunders. • How to develop a marvelous Policy for social media at work o Reduce risk o Advance preparation for crisis management

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Ethical Considerations for CPAs

Tuesday, November 10 7:30am - 11:00am Online 4.00 Credits Member Price: $180

• The CPA's role in today's economy • The similarities and differences between individual and business ethics • The link between ethics, integrity and scruples • The basic attributes of ethics and professional conduct • The history of the CPA profession and the CPA's requirement to adhere to ethics policies and codes of conduct • The AICPA's Code of Professional Conduct and a CPA's responsibility to the public, clients, and colleagues • The common rules and statutes faced daily in the CPA profession. Case studies may also be utilized to present potential ethical dilemmas CPAs may face during their careers

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Introduction to Forensic Accounting

Tuesday, November 10 7:30am - 11:00am Online 4.00 Credits Member Price: $180

• Review of the different aspects of forensic accounting • The civil litigation process as it relates to forensic accounting • Litigation services provided by forensic accountants • Fraud detection and prevention • Various types of fraud • Training and certifications in forensic accounting • Forensic accounting in bankruptcy proceedings • Forensic accounting in family law proceedings • Calculating damages for use in litigation • Valuations • Ethical issues pertinent to forensic accounting

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Don Farmer's Rental Property

Tuesday, November 10 9:00am - 10:40am Online 2.00 Credits Member Price: $89

Federal tax treatment of rental real estate activities Reporting rental income and deductible expenses Depreciation methods, recovery periods, and cost recovery strategies Repairs versus capital improvements Passive activity loss rules and exceptions At-risk limitations and participation requirements Qualified Business Income (QBI) considerations for rental activities Recordkeeping and documentation requirements Tax planning strategies for rental property owners Like-kind exchange considerations and related planning opportunities Sale, disposition, and depreciation recapture rules Federal tax treatment of rental real estate activities Reporting rental income and deductible expenses Depreciation methods, recovery periods, and cost recovery strategies Repairs versus capital improvements Passive activity loss rules and exceptions

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K2's Tech Update

Wednesday, November 11 9:00am - 11:00am Online 2.00 Credits Member Price: $105

AI and machine learning trends , Quantum computing in finance , Understanding the growing impact of blockchain and digital currencies in accounting , Software and hardware innovations

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K2's Taking A Fresh Look At Teams

Wednesday, November 11 11:30am - 1:30pm Online 2.00 Credits $ Member Price: $105

How Teams got to where it is today , Major components in Teams , Collaboration options , Extending Teams functionality

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K2's CPA Firm Update

Wednesday, November 11 2:00pm - 4:00pm Online 2.00 Credits $ Member Price: $105

Emerging trends like changes in client expectations, supplier strategies, and competitive dynamics , AI and advanced software innovations with tailored solutions for service lines like tax, audit, advisory, and niche industries , Next-gen automation tools, including the role of machine learning, RPA, and advanced analytics in streamlining operations , Optimal technology stacks to enhance firm productivity, efficiency, and profitability , Cybersecurity advancements. Proactive approaches to safeguarding client and firm data

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Federal Tax Update - Business and Individual with Ron Roberson - VIRTUAL

Thursday, November 12 8:00am - 4:00pm Online 8.00 Credits $ Member Price: $430

K2's Office Scripts – The New Macros

Thursday, November 12 9:00am - 11:00am Online 2.00 Credits $ Member Price: $105

Introduction to Office Scripts , Recording your first script , Integration with Power Automate

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K2's Automation - Beyond The Basics With The Microsoft Power Platform

Thursday, November 12 11:30am - 1:30pm Online 2.00 Credits $ Member Price: $105

Explanation and demonstration of the use of a wide range of automation tools with a focus on "low-code/no-code , Practical examples of real-world applications for Power Platform tools - such as Power Apps and Power Automate, as well as integration into Microsoft Fabric and other solutions , Challenges and risks of automating business processes

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Adapting to OBBBA Changes: A Strategic Review

Friday, November 13 7:30am - 9:10am Online 2.00 Credits Member Price: $105

• Business losses • The SALT cap • Implementing Section 1202 changes • Form 1099 reporting changes • Business meals • Health care-related issues • Family and medical leave • Other crucial OBBBA provisions

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OSCPA's 2026 Federal Tax Update - Oklahoma City

Friday, November 13 8:00am - 4:00pm Oklahoma City 8.00 Credits Member Price: $330

The impact of OBBA and the latest tax developments for individuals and businesses Major tax court cases impacting both individuals and businesses Tax credits update Partnership and S-corporation tax matters Tax numbers update for 2025 & 2026

OSCPA's 2026 Federal Tax Update - VIRTUAL

Friday, November 13 8:00am - 4:00pm Online 8.00 Credits Member Price: $330

The impact of OBBA and the latest tax developments for individuals and businesses Major tax court cases impacting both individuals and businesses Tax credits update Partnership and S-corporation tax matters Tax numbers update for 2025 & 2026

Mastering the Offer in Compromise: Strategies for Preparation and Negotiation (MOC2)

Monday, November 16 8:30am - 10:10am Online 2.00 Credits Member Price: $105

Introduction to the OIC program Types of OICs Eligibility criteria Financial analysis Offer amount calculation Preparing Forms 656 and 433-A(OIC)/433-B(OIC) Supporting documentation and strategy OIC submission and IRS review process Appeals and negotiation techniques Best practices and common pitfalls Real-world scenarios and case studies

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What's Coming Next: Technology Strategies for CPAs

Monday, November 16 9:00am - 11:00am Online 2.00 Credits Member Price: $105

The 2026 Market Outlook: Big-Picture Trends and Technology Forecasts, The Best of 2026: Top Hardware and Software Picks for Professionals, The Intelligence Evolution: Transitioning to Real-World Agentic Workflows, Ecosystem Excellence: Maximizing Your Existing Cloud and Mobile Platforms

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K2's The New World of Expense Management: Smart Cards, Real-Time Tracking

Monday, November 16 11:30am - 2:30pm Online 3.00 Credits Member Price: $135

Modernizing Expense Capture: Utilizing Dext and Mobile App Workflows , Virtual Cards and Bill Pay: Balancing High-Efficiency Automation with Oversight , Integration Strategies: Connecting Spend Management Tools to Leading Accounting Solutions , Feature Comparison: Selecting the Right Expense and Payment Platforms for Your Needs

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Charting, Graphing, and Mapping Data Made Easy!

Monday, November 16 3:00pm - 5:00pm Online 2.00 Credits $ Member Price: $105

Crafting Visuals: Selecting the Right Chart Type, Excel Charting: From Basic to Advanced Techniques, Integrating Charts: Microsoft Office Suite Mastery, Data Storytelling: Converting Numbers into Narratives

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Mastering Accounting for Income Taxes

Tuesday, November 17 7:30am - 11:00am Online 4.00 Credits $ Member Price: $180

• The sources of deferred tax assets and liabilities • Calculating the deferred tax asset or liability • Reporting income-tax expense and balance sheet items • Defining, analyzing, and reporting uncertain tax positions • Classification of deferred tax assets and liabilities • Disclosure requirements • Finalized and proposed changes to ASC 740, including ASU 2023-09, CAMT, and global tax transparency initiatives

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Compilation Engagements Under the SSARS (PCE4)

Tuesday, November 17 8:30am - 12:00pm Online 4.00 Credits $ Member Price: $180

Relevant sections of SSARS No. 21, Clarification and Recodification SSARS No. 21, Clarification and Recodification, and updates to SSARS No. 21 due to the issuance of SSARS No. 23, Omnibus Statement on Standards for Accounting and Review Services SSARS No. 22, Compilation of Pro Forma Financial Information SSARS No. 24, Omnibus Statement on Standards for Accounting and Review Services - 2018 SSARS No. 26, Quality Management for an Engagement Conducted in Accordance With Statements on Standards for Accounting and Review Services SSARS No. 27, Applicability of AR-C Section 70 to Financial Statements Prepared as Part of a Consulting Services Engagement Comprehensive sample engagement work programs for preparation and compilation engagements Prescribed form, specified line item, pro forma, and other engagement variations Complete illustrations of relevant engagement letters, reporting, and other required communications for preparation and compilation engagements

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Accounting for Revenue under ASC 606 and Final PIR Report Findings

Tuesday, November 17 12:00pm - 1:40pm Online 2.00 Credits $ Member Price: $105

• Topic 606, Revenue from Contracts with Customers, including recently issued ASUs impacting Topic 606 • The FASB's five-step revenue recognition model, including hands-on examples and illustrations of the guidance • Presentation and disclosure requirements • Lessons learned and best practices for improving business processes

related to revenue recognition going forward • Results of the FASB's Stage 3 Post-Implementation Review (PIR) report

Leveraging Microsoft Teams Effectively For Your Organization

Tuesday, November 17 1:30pm - 4:30pm Online 3.00 Credits Member Price: $135

Overview of Microsoft Teams. The purpose and intent of the application. Why you should consider it for your organization, The best features of Teams and how they are used every day. Additionally, some hidden gems of Teams that you should know about, Some fantastic 3rd party and external tools which easily integrate into Teams, Methods for automating business practices in Teams using Approvals and Power Automate, A brief discussion of administration, security, and privacy in Teams

Multistate Income Tax Issues

Wednesday, November 18 7:30am - 11:00am Online 4.00 Credits Member Price: $180

• Elimination of the physical presence standard in determining nexus (Wayfair case); economic nexus for remote sellers; assisting remote sellers in determining a plan of action in states that enforce economic nexus • Emerging compliance issues in the new sales tax economy • Income tax (and other forms of tax); economic nexus (taxation without physical presence) • Attributional and agency nexus; presence of intangible property • Is P.L. 86-272 still valid? • When to consider voluntary compliance even though the laws do not dictate a sales tax responsibility

Tax Research - Intermediate Concepts

Wednesday, November 18 12:00pm - 1:40pm Online 2.00 Credits Member Price: $105

• Tax code hierarchy • Organization of an Internal Revenue Code section • Special rules for IRC citation • Citing other primary authorities • Private letter rulings • Primary vs. secondary authority • Secondary sources of authority • Steps in the tax research process • Research memoranda

K2's Technology for CPAs - Don't Get Left Behind

Wednesday, November 18 1:30pm - 9:30pm Online 8.00 Credits Member Price: $330

Emerging technologies all business professionals should know , Considerations associated with upgrading to a newer version of Windows and why that might be advised , Practical options for protecting your data , New features in commonly used applications such as Excel and Adobe Acrobat DC

Select Estate and Life Planning Issues for the Middle-Income Client

Thursday, November 19 7:30am - 11:00am Online 4.00 Credits Member Price: $180

• Changes to the lifetime estate tax exemption in light of proposed regulations • More than 20 documents that should be reviewed that are neither a will nor trust • Provisions you need in a will • Trusts and other arrangements for children • Durable powers of attorney for healthcare and for financial matters • Realistic retirement goals • Developments relative to estate tax, and the implications for planning

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Government and Nonprofit Frauds and Controls to Stop Them (FCS4)

Thursday, November 19 8:30am - 12:00pm Online 4.00 Credits Member Price: $180

Examine real-world misappropriations of cash, check frauds, vendor scams, credit card abuse, grant frauds, benefit schemes, inventory thefts, and payroll frauds Identify and develop practical controls to prevent and detect fraud Tailor controls to the size and fit of the government or nonprofit

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The K2 Team's Top Tech Productivity Tips And Tricks

Thursday, November 19 9:00am - 11:00am Online 2.00 Credits Member Price: $105

Microsoft 365 Optimization: Proven shortcuts and high-efficiency hacks for core applications including Excel, Outlook, and Teams., Virtual Collaboration and Meeting Excellence: Strategies for navigating the "new normal" of remote work, including constructing Teams sites and mastering virtual meeting tools., Automated Data Collection and Workflows: Utilizing templates and forms to streamline routine tasks and eliminate manual data entry., Technology Trap Mitigation and Efficiency: Strategies for identifying and avoiding common digital bottlenecks while implementing time-saving hacks to maximize output across various business applications.

K2's What's New With QuickBooks

Thursday, November 19 11:30am - 1:30pm Online 2.00 Credits Member Price: $105

Licensing issues , Pricing updates , New and improved features , Transitioning from QuickBooks Desktop to QuickBooks Online

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K2's Excel Charting and Visualizations

Thursday, November 19 2:00pm - 6:00pm Online 4.00 Credits Member Price: $180

Understanding the best types of visualizations to use in specific situations , Creating compelling visualizations using Excel , Adding interactivity to your Excel-based visualizations

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Guide to Payroll Taxes and 1099 Issues

Friday, November 20 7:30am - 11:00am Online 4.00 Credits Member Price: $180

• Statutory employees, independent contractors, and possible changes to §530 relief • Using SS-8 • Payroll Tax Penalties -- Who is a responsible person? • Forms W-2, 1099, 1099-NEC, SS-8, W-4, 941, and Form 940 reporting/deposit requirements and due dates • Understanding payroll tax responsibilities in the gig economy

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CFO Series: Driving Efficiency (Live Replay)

Monday, November 23 7:30am - 3:30pm Online 8.00 Credits Member Price: $330

Module 1: Audit Survival Toolkit: Tactics to Reduce Stress and Get Through Audits with Confidence • Types of audits: external, internal, compliance, regulatory o Objectives of each audit type and how they differ • Aligning management's role with auditor expectations • What to expect in the planning phase • Fieldwork survival tips and communication best practices • Documentation dos and don'ts • Responding to findings and building effective action plans • Avoiding common audit pitfalls Module 2: Internal Controls That Matter: Protection with Simple, Smart, and Scalable Practices • What internal controls are—and what they are not. • Why do even small organizations need controls. • COSO and the five core components of a sound internal control system. • Common control failures and real-world consequences. • Examples of scalable financial, operational, and compliance controls. • How to tailor controls to your organization's size and risk profile. • Embedding internal controls into daily operations. • How to monitor, evaluate, and adapt controls over time. Module 3: Cash Flow Clarity: Effectively Communicate Cash Flows to Drive Better Decisions • The importance and structure of the cash flow statement • Understanding operating, investing, and financing activities • Presenting the statement using the "Sources and Uses" approach • How to tell the business story through cash flows and alternative reporting methods • Identifying key drivers of cash and liquidity • Bridging the gap between accrual accounting and understanding cash • Communicating effectively with CEOs, boards, and non-financial stakeholders Module 4: Amazingly Crazy Fraud Cases - Fraud So Wild It Shouldn't Be Real • Psychological tricks and tactics used by fraudsters o How fraudsters avoid detection • Red flags that were missed, and why? • Cultural and organizational blind spots • How internal controls failed or were bypassed • Lessons learned from each case—and how to apply them • How to strengthen fraud awareness without creating fear • Key questions auditors and leaders should ask earlier

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K2’s Improving Productivity With Microsoft 365/Office 365 Cloud Applications

Monday, November 23 9:00am - 1:00pm Online 4.00 Credits Member Price: $180

Understanding the Cloud-based options available in a Microsoft 365/Office 365 environment , How to use tools such as Teams, Planner, and Power Automate , Storing data in SharePoint Online and OneDrive for Business

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K2's Formatting Excel Spreadsheets The Right Way

Monday, November 23 1:30pm - 3:30pm Online 2.00 Credits Member Price: $105

Creating and using Styles in Excel , The Accounting Format and why you should use it, How to Create Custom Formats , Formatting dates for maximum impact , The advantages of storing formats in templates

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Best Practices in Not-for-Profit Accounting and Reporting

Tuesday, November 24 7:30am - 11:00am Online 4.00 Credits Member Price: $180

• The key requirements, options, and best practices seen in each of the basic financial statements • Today's core accounting and reporting requirements related to contributions and how to apply them effectively and efficiently • How to analyze and incorporate the needs of financial statement users into a not-for-profit's financial statements and disclosures

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K2’s Excel’s Best New Features

Tuesday, November 24 9:00am - 11:00am Online 2.00 Credits Member Price: $105

Learn how to work with Dynamic Arrays , Using Excel's new XLOOKUP and XMATCH feature , Improvements to Power Query and why they matter to you , New collaboration and commenting options in Excel

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K2's Mastering Advanced Excel Functions

Tuesday, November 24 11:30am - 3:30pm Online 4.00 Credits Member Price: $180

Powerful new functions and features in Excel, such as XLOOKUP and Dynamic Arrays , How to use "legacy" features and functions such as AGGREGATE , Creating effective forecasts in Excel

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The Most Critical Challenges in Not-for-Profit Accounting Today

Tuesday, November 24 12:00pm - 3:30pm Online 4.00 Credits Member Price: $180

• The essential disclosure requirements specific to not-for-profit organizations and strategies for enhancing clarity and value • Practical insights into the accounting for conditional and restricted contributions, membership dues, contributed services, and noncash contributions • The advantages, challenges, and best practices for effectively presenting a measure of operations

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K2's Ten PDF Tips You Need To Know

Wednesday, November 25 9:00am - 11:00am Online 2.00 Credits Member Price: $105

Converting documents to the PDF format , Editing PDF documents , Securing PDF documents , Extracting data from PDFs

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K2's Excel Best Practices

Wednesday, November 25 1:30pm - 9:30pm Online 8.00 Credits Member Price: $330

Best practices associated with creating Excel workbooks, including managing workbooks , How to secure Excel workbooks , Collaboration options and best practices in Excel , Effective reporting techniques in Excel

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Construction Contractors: Accounting, Auditing, and Tax

Tuesday, December 1 7:30am - 3:30pm Online 8.00 Credits Member Price: $330

• The nature of the construction industry FASB *Accounting Standards Codification*® (ASC) 606, *Revenue from Contracts with Customers* • FASB Accounting Standards Update (ASU) No. 2016-02, *Leases (Topic 842)* • Construction cost allocation • Financial statements • Working with a surety • Audit risks, planning and procedures • Controls

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Avoiding Deficiencies in Peer Reviews: Focus on Engagement Quality (ENQ4)

Tuesday, December 1 8:30am - 12:00pm Online 4.00 Credits Member Price: $180

AICPA's Enhancing Audit Quality initiative Recent revisions to Quality Management standards Feedback from peer reviews, including areas driving deficiencies in audit Elements of an effective risk assessment and how to link to audit procedures performed Understanding internal controls and making the decision whether or not to test them Best practices in documentation

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Don Farmer's Repair Regulations in Practice: Capitalization vs. Expense

Tuesday, December 1 1:00pm - 2:40pm Online 2.00 Credits Member Price: $89

Overview of Tangible Property Regulations Unit of Property Rules Repair vs. Capital Improvements Betterment, Restoration, and Adaptation Standards Safe Harbors and Elections Examination and Audit Risk Considerations

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Tax Implications of Name, Image & Likeness (NIL) for NCAA Student Athletes - VIRTUAL

Wednesday, December 2 10:00am - 10:50am Online 1.00 Credits Member Price: $59

Federal income tax treatment of NIL and revenue-sharing payments. Income reporting requirements and deductible business expenses. Estimated tax obligations and tax-planning considerations. Entity structure considerations for NIL activities. State and local tax reporting, multistate income sourcing and "jock tax" considerations. Tax and reporting issues affecting international student-athletes.

Harnessing ChatGPT – Unlocking Professional Efficiency

Wednesday, December 2 2:00pm - 6:00pm Online 4.00 Credits Member Price: $180

Empowering efficiency for everyday accounting tasks, Leveraging prompt engineering in ChatGPT for various accounting tasks, Exploring the applications and limitations of ChatGPT in accounting

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Oklahoma Tax Institute - Oklahoma City

Thursday, December 3 8:00am - Friday, December 4 4:15pm Oklahoma City 16.00 Credits

Member Price: $480

Oklahoma Tax Institute - VIRTUAL

Thursday, December 3 8:00am - Friday, December 4 4:15pm Online 16.00 Credits Member Price: $480

K2's Taking Another Look At Power BI

Thursday, December 3 9:00am - 11:00am Online 2.00 Credits Member Price: $105

Getting started with Power BI , Creating effective visualizations in Power BI , Publishing Power BI reports to dashboards , Optimizing dashboards for viewing on mobile devices

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K2's CRM - The Ultimate Business Automation Tool

Thursday, December 3 11:30am - 1:30pm Online 2.00 Credits Member Price: $105

Overview of CRM functionalities tailored to accounting, including customizations and integrations , Integrated tools that leverage CRM data for automating tasks and improving efficiency , Strategies for successfully adopting a CRM platform and solutions to overcome common challenges

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K2's Microsoft Teams

Thursday, December 3 2:00pm - 6:00pm Online 4.00 Credits Member Price: $180

Understanding the Teams platform , Communicating and collaborating in Teams , Adding applications and services to Teams , Extending Teams to individuals outside your organization

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CFO Series: Indispensable Skills (Live Replay)

Monday, December 7 7:30am - 3:30pm Online 8.00 Credits Member Price: $330

Module 1: Raising Capital: How to Execute the Leaders' Most Crucial Responsibility • Understanding the need o How much is needed, when, what will it be used for, etc.? • Keys to success: o Planning o Understand how the use, stage, amount, how and when - impacts the decision o Unintended consequences to avoid • Low cost is not necessarily a sound option. • What are the non-quantifiable factors that can change the financing decision? • Details on the time-intensive processes • Common blunders when raising financing o The perils of choosing the wrong alternative or wrong investor! Module 2: Accounting for People: Workforce Trends and Talent to Add Value • Trends in the modern workforce: demographics, generational shifts, remote work, and engagement • The true cost of talent: hiring, retention, and turnover • People as assets versus people as liabilities • The varied challenges in accounting for human capital • Metrics that matter: KPIs for employee performance and value • Integrating people costs into financial strategy • Navigating compliance, risk, and benefits Module 3: Rethinking Your Customers to Maximize Profitability: Identifying the Right Clients • Who is your customer? o How to segment your customers o Identifying and understanding your most valuable customers • What is solution-based planning for customer value? • Recognizing internal customers (e.g., departments served by finance) • Exploring profitability differences between customers with similar revenue • Creating and sustaining a customer value pyramid Module 4: Activate and Execute Your Strategy: Turn Planning into Results • The strategy-execution gap: common reasons why most strategic plans fail • Why should financial planning lead strategy? • Evaluating the lifespan and relevance of your strategic plan • Building your strategy to include risk management • Building an adaptive, finance-focused strategic approach • What we should learn from the rise and fall of major companies • How to align financial metrics with strategy

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OSCPA's CPE Blowout - Virtual

Monday, December 7 8:30am - Friday, December 11 4:30pm Online 34.00 Credits

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Are You Really Ready? Effective Disaster Recovery & Business Continuity Planning

Monday, December 7 9:00am - 11:00am Online 2.00 Credits $ Member Price: $105

Importance of Data Loss, Benefits of Cloud Technology, Disaster Planning Resources, Overall Security Recommendations