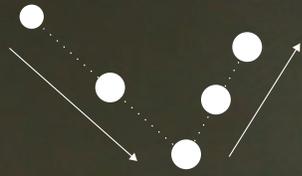


course catalog



The career paths of CPAs follow a path we call

the**BOUNCE**

For **EXECUTIVES AND PARTNERS** our competency-based approach helps you fill talent gaps by promoting, training, and growing the best talent.

For **YOUNG CPAS** The Bounce helps you establish a career path and teaches you how to get ahead.

See the video that explains how The Bounce can impact your organization's learning at:

bizlearning.net/thebounce



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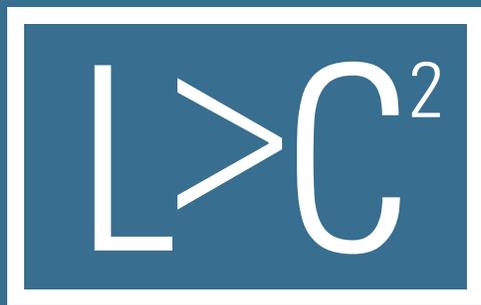
13 Business Learning Institute Instructors

63 Events by Topic

99 Events by Course Title



YOUR STRATEGIC LEARNING PARTNER.



“ In a period of rapid change and increasing complexity, the winners are going to be the people who can **LEARN** faster than the rate of **CHANGE** and faster than their **COMPETITION**. ”

Tom Hood, CPA, CITP, CGMA
CEO, Business Learning Institute

The two critical questions your top talent wants to know now:

1 What is my career path with your organization?

2 How are you going to help me develop and advance?

Let the Business Learning Institute help you answer these questions.

We develop **CUSTOMIZED** competency-based learning plans for firms and organizations worldwide. Let us map our catalog of technical skills training and leadership skills training to your learning strategy and help you get a bigger **BOUNCE**.

Return On People

- Superior learning strategy generates superior talent
- Superior talent generates results
- **FOR A RETURN ON INVESTMENT, INVEST IN PEOPLE**

R.O.P.=R.O.I.

OUR SERVICES

The Business Learning Institute offers services and content to help your organization maximize career trajectories. Our Customized Learning Solutions team guides you through these services:

STRATEGIC PLANNING

Using the proprietary i2a: Insights to Action process, we engage your team, create your strategy, and align your organization.

LEARNING ELEMENTS

Custom courses and content delivered in the best way for you. We offer:

Seminars

On-site training

Digital training: On-Demand
& Webcasts

Keynotes

Each learning element is tailored for each segment of the **BOUNCE**. This is where our thought leaders shine and where learning comes to life for your people and your organization.

LEARNING MANAGEMENT SYSTEMS

The Customized Learning Solutions team can utilize learning management systems (LMS) to improve the effectiveness of the **BOUNCE**. An LMS provides compliance tracking and allows your staff, leadership, HR, and training team to see exactly where everyone is in their learning process. It is a technology that reflects your learning architecture and curriculum design, and provides accountability to the people in your organization.

If your organization does not currently utilize an LMS, the Business Learning Institute can help you implement one. We typically suggest the Navigator LMS as a cutting edge product that we helped develop specifically for the methodology of the **BOUNCE**.

LEARNING ARCHITECTURE

We can assist you with identifying, charting, and designing the professional directions your staff members take.

LEADERSHIP TRAINING

CPA careers take off when CPAs learn to lead.

The Leadership Academy develops the full potential in the profession's best and brightest CPAsto accepted applicants. Help your staff make the "critical turn" of The Bounce by having them apply for the Leadership Academy.

CURRICULUM DESIGN

It is essential that your staff's career trajectories match with your organization's strategic priorities. We know the CPA profession inside and out so that we can tailor a learning plan just for you. The Business Learning Institute's team of instructors is comprised of subject matter thought leaders.

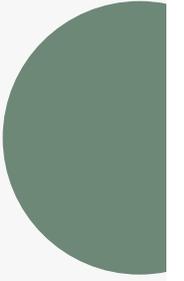
contact us

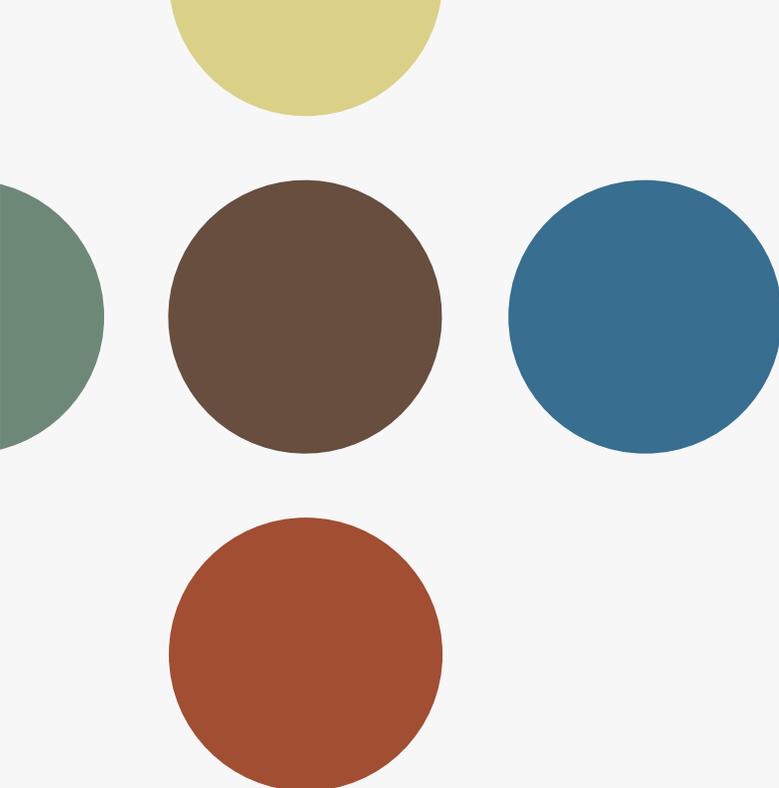
Contact a BLI consultant to see if a tailored-fit solution is right for you:

1-888-481-3500

www.bizlearning.net

twitter: **@bizlearn**



A decorative graphic consisting of five colored circles of varying sizes and colors: a yellow circle at the top, a green circle on the left, a brown circle in the middle, a blue circle to the right, and a red circle at the bottom.

Meet the team that can
help you create the best
custom learning solutions
for your organization.

Pam Devine

Director of Business Development/Manager of the Customized Learning Consultant team/ Certified i2a facilitator

Pam has been with the MACPA for 12 years and leads a team of 5 sales professionals. She is best known for her role in developing the On-Site training division of MACPA and the Business Learning Institute (BLI). Pam consults with the on-site sales teams of the AICPA and other State Societies. As the manager of the Customized Learning Consultant team she assists learning directors in designing comprehensive curriculum plans that combine technical (CPE compliance) topics with business performance (soft skills and technology). The key to the success of BLI has been its customer focus and its relationships with clients. Pam is a certified facilitator in BLI's i2a-Insights to Action Strategic Planning System and has used her facilitation skills to benefit many MACPA members and clients. She, along with the BLI team, has facilitated and taught the Major Firms Group (top 100 CPA firms) for the AICPA, the AICPA Leadership Academy and many other firms, corporations and Non-profits.

Pam is currently involved on several State Society, AICPA/CPA committees, and many others.



While she still considers Maine her home, she currently resides in Hunt Valley, Maryland, where she raised two daughters and has lived for 20 years. Pam enjoys being active and also loves the outdoors, skiing, running and biking and is currently training to run her first marathon.

Pamela C. Devine

443.632.2321
pam@macpa.org
@macpa

CONTACT ME IF YOU HAVE QUESTIONS ABOUT:

- Prospective Partnerships
- Comprehensive Learning Solutions
- General Questions
- On-site Learning
- Specific Learning Needs

Laura Dorsey-Shaner

Senior Customized Learning Consultant /
Firm Specialist / Certified i2a Facilitator



With over 20 years of experience at the Maryland Association of CPAs (MACPA), Laura Dorsey-Shaner is currently putting her extensive knowledge of the accounting profession to work as a Customized Learning Consultant / Firm Specialist and Certified i2a Facilitator for the Business Learning Institute (BLI).

As a Customized Learning Consultant, Laura focuses on the needs of accounting firms as she assists learning directors and teams to create effective, relevant and timely curriculum plans that combine a variety of learning essentials. Laura assists firms by researching and assessing current CPE practices, develops curriculum plans to meet the needs of an organization, and recommends learning topics and deep training formats, continually proving to be an invaluable resource.

Laura earned her BS degree in communication and speech from Towson University. She has significant experience in the profession, most recently as the manager of the MACPA's Member Service Center and as the Resource Liaison to its Maryland chapter

groups, working with volunteers across the state. In addition, Laura was one of the founders of the MACPA's New / Young Professional Network (NYPN).

☎ 443.632.2334

✉ laura@macpa.org

📱 @macpa

CONTACT ME IF YOU HAVE QUESTIONS ABOUT:

- Planning your firm's CPE curriculum
- MACPA or the Business Learning Institute
- On-site training options tailored to meet the firm's specific needs
- CPE options in general
- Saving time & money

Marybeth Drusano

Senior Customized Learning Consultant/
Corporate Specialist

With 8 years of experience at the Maryland Association of CPAs (MACPA), Marybeth Drusano is currently putting her extensive knowledge of the accounting profession to work as a Customized Learning Consultant / Corporate Learning Specialist for the MACPA and The Business Learning Institute (BLI).

As a Customized Learning Consultant, Marybeth focuses on the needs of corporate clients as she assists finance teams and learning directors in designing effective, comprehensive, relevant and timely curriculum plans that combine a variety of learning essentials, including CPE and compliance, management, and performance skills. With her corporate expertise and strong relationships with the finance team, Marybeth assists corporate clients by researching and assessing current CPE practices, and develops curriculum plans to meet the needs of an organization. In addition, Marybeth serves as the liaison to the MACPA Business and Industry committee working with the committee to develop the annual Business and Industry Conference and to



strengthen the involvement of the MACPA industry members.

Marybeth has an MBA and undergraduate business degree in Marketing from Loyola College. She resides in Phoenix, Maryland with her husband and three children.

Marybeth Drusano

443.632.2317

marybethd@macpa.org

@macpa

CONTACT ME IF YOU HAVE QUESTIONS ABOUT:

- On-site financial training
- Corporate ethics training
- Planning your financial team's annual training curriculum
- Financial and Leadership Training options
- MACPA or BLI questions

Amy Puente

Customized Learning Consultant/
National and State Society Specialist

With 4 years of experience at the Maryland Association of CPAs (MACPA), Amy Puente is currently a customized learning consultant and handles all out of State opportunities for the Business Learning Institute (BLI). As a Customized Learning Consultant, Amy focuses on the needs of out of state accounting firms and organizations. She works closely with learning directors in designing curriculum plans that combine a variety of learning essentials, including CPE compliance, executive leadership, management, and more. Amy also assists out of state firms and organizations by researching and assessing current CPE practices, develops curriculum plans to meet the needs of an organization, and recommends learning topics. Amy works closely with other State Societies to schedule their public seminar classes. She handles all out of state requests including scheduling both on-site and public seminar course requests. Through trusted relationships, Amy is able to recommend a variety of courses and topics to suit each state's specific requirements but also to ensure the most current and effective information is being delivered.



Amy earned her BS degree in English with a concentration in secondary education from Towson University. She has significant experience in relationship sales and helping to provide resources to clients. Prior to working at MACPA and BLI, Amy worked as a sales representative and manager in advertising sales.

Amy Puente

📞 443.632.2321

✉️ amyp@macpa.org

📱 @macpa

CONTACT ME IF YOU HAVE QUESTIONS ABOUT:

- Scheduling public seminars
- Curriculum Planning
- Choosing programs & instructors based on client needs and audience
- Insightful Program Offerings
- Course Scheduling

Rebekah Brown

Customized Learning Consultant/
Firm Specialist

Rebekah Brown is the newest and youngest customized learning consultant, but don't let that dictate her capability. Rebekah is a CPA with over three years of firm experience and brings this knowledge and experience to her new role. As a Customized Learning Consultant, Rebekah focuses on the learning needs of small to medium sized firms, assisting learning directors to create custom learning experiences that help their teams achieve. Rebekah helps to bring together the right curriculum and thought leaders to deliver high level customized learning.

Rebekah earned a BS in Business Administration dual specializing in Accounting and Sports Management from The Max M. Fisher School of Business at The Ohio State University. Rebekah earned her CPA in 2011. After two public accounting internships and three years as an Audit staff and senior at a mid-sized firm, Rebekah decided to leave Public Accounting and use her talents and experiences to work for the profession rather than in it.



She resides in Timonium, MD, is an avid sports fan and enjoys spending time with her family and dog Raleigh.

Rebekah Brown

 443.632.2320

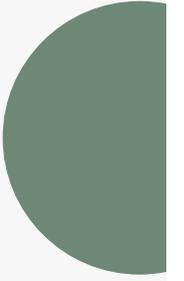
 Rebekah@macpa.org

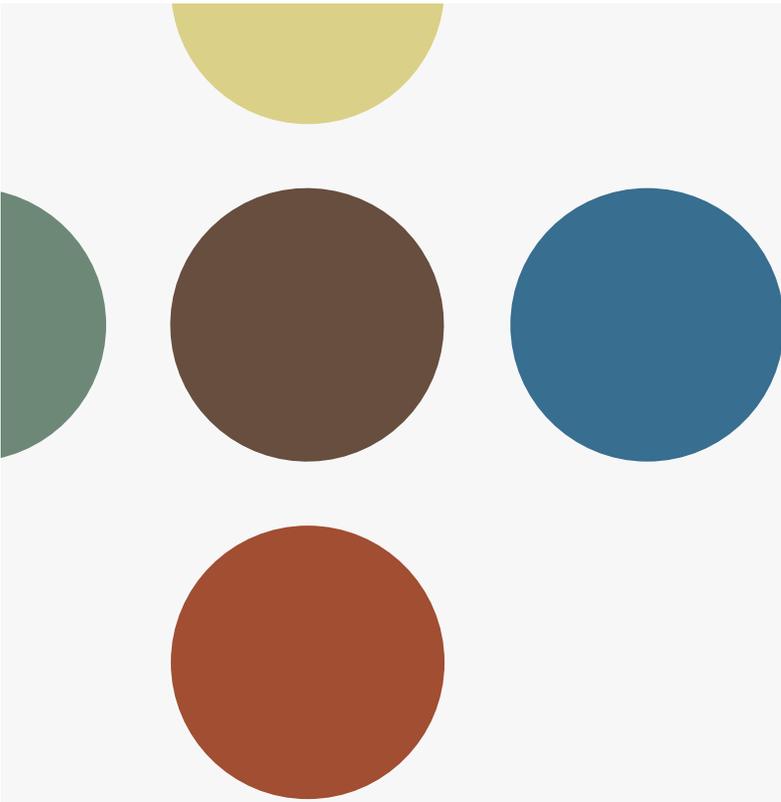
 @macpa

CONTACT ME IF YOU HAVE QUESTIONS ABOUT:

- Planning your firm's CPE curriculum
- On-site training options tailored to meet the firm's specific needs
- State Board questions
- Saving time & money







Meet the instructors who will
teach you everything you
want to know about being
the best CPA you can be.

Karl Ahlrichs, SPHR

In a world of specialists, Karl Ahlrichs is first and foremost a Human Resource consultant and hiring process expert, but also has significant experience in a wide range of business roles.

People think Karl has been everywhere. He has run a career center in the swamps of Lake Charles, Louisiana, another in Appalachia, and helped restructure Apple computer in Silicon Valley. He has directed videos in Chicago, marketed software in Orlando, and launched an office of Right Management Consultants in San Diego.

He has presented complex subjects to tough audiences for decades, and enjoys the challenge of customizing his material for diverse audiences. He is an entertaining business generalist. He is in demand as a keynote presenter to conferences and organizational events, and can both entertain in a keynote environment, or as a trainer in an adult learning model.

He is very involved in the Society of Human Resource Management, having acted as conference chair for the Indiana State SHRM Conference, and has presented at 6 consecutive National SHRM Conferences. He is currently enrolled in Butler's MBA program, and is learning the language of finance. Karl is an SPHR (Senior Professional, Human Resources), is qualified to administer many assessment tools, and has a background with hiring, training, communications and writing as a focal point.

COURSES

Applying "Lean" Thinking to Making Employees Your Competitive Advantage (MECA)

Beyond the Buzzwords with Hiring: Apply "Lean" Processes and Fix the Way Your Organization Hires (BBWH)

CFO versus HR - Thinking Inside the Box (TITB)

Finally Fixing Performance Management Using New Tools (FIX)

Hire the Lucky Ones - How to Improve Retention and Productivity by Selecting Fortunate Employees (IRP)

Managing Multiple Generations: Next Steps and New Surprises (Available as a keynote) (MMG)

Next Steps in the New Normal World (1 hour webcast) (NEWNORM)

Talent Management - People as a Competitive Advantage in "Not Normal" Times (Keynote) (TALENT)

The New Workforce - New Data, New Ideas, Aging Baby Boomers (GRUMP)

Ronald Baker

Mission: "To, once and for all, bury the billable hour and timesheet in the professions"

Ronald J. Baker started his career in 1984 with KPMG's Private Business Advisory Services in San Francisco. Today, he is the founder of VeraSage Institute, the leading think tank dedicated to improving the professions for posterity.

As a frequent speaker, writer, and educator, his work takes him around the world. He has been an instructor with the California CPA Education Foundation since 1995 and has authored fifteen courses for them.

He is the author of the best-selling marketing book ever written specifically for the professions, *Professional's Guide to Value Pricing*, Sixth Edition, published by CCH (out of print). His book, *The Firm of the Future: A Guide for Accountants, Lawyers, and Other Professional Services*, co-authored with Paul

Dunn, was published in April 2003 by John Wiley & Sons, Inc., and was the 2003 Book of the Year on SmartPros.com and is in its sixth printing. His *Intellectual Capitalism Series* (John Wiley & Sons, Inc.) consists of three books so far: *Pricing on Purpose: Creating and Capturing Value*, published in February 2006; *Measure What Matters to Customers: Using Key Predictive Indicators*, released September 20, 2006; *Mind Over Matter: Why Intellectual Capital is the Chief Source of Wealth*, published in November 2007; and his latest book published in December 2010, *Implementing Value Pricing: A Radical Business Model for Professional Firms*.

Ron has toured the world, spreading his Value Pricing message to over 100,000 professionals. He has been appointed to the American Institute of Certified Public Accountant's Group of One Hundred, a think tank of leaders to address the future of the profession, named on *Accounting Today's* 2001, 2002, 2003, 2004, 2005, 2006, and

2007 Top 100 Most Influential People in the profession, and received the 2003 Award for Instructor Excellence from the California CPA Education Foundation.

He graduated in 1984 from San Francisco State University with a Bachelor of Science in accounting and a minor in economics. He is a graduate of Disney University, Cato University, and the University of Chicago Graduate School of Business course: *Pricing: Strategy and Tactics*. He is a member of the Professional Pricing Society and presently resides in Petaluma, California.

COURSES

Everyday Economics (EECON)

Everyday Ethics: Doing Well and Doing Good (EVRYDAY)

Measure What Matters to Customers: Using Key Predictive Indicators (MWMTC)

Pricing on Purpose (for Industry) (POPI)

Sole Proprietor's Retreat (SPRETRET)

Success Leaves Clues: Career Strategies for New Professionals (CLUE)

The Best Business Books Ever Written (BBBYSR)

The Business of the Future (for Industry) (BOFI)

When Debits Don't Equal Credits (for Professionals and Industry) (WDDEC)

Jahn Ballard

J.W. 'Jahn' Ballard, is the Principal of Performance Management Institute, Inc., a firm that uses the Financial Scoreboard and Dashboard as tools for creating financial measurement and reporting systems linked to operating plans for small and medium-sized businesses and business units. He also trains CFO's, Controllers and CPA's in Executive Finance and cash flow-focused business literacy for CPA societies and the Institute of Management Accounting.

COURSES

Executive Finance for Operating Leaders: Relating Numbers and Metrics to Reality (BGCF)

Anirban Basu, J.D.

Mr. Anirban Basu is Chairman & CEO of Sage Policy Group, Inc., and is one of the mid-Atlantic region's most recognizable economists. Mr. Basu has been active in the areas of real estate economics, economic development and economic forecasting. He has conducted numerous economic and fiscal impact analyses, conducted seminars on the economy, and has authored a number of high profile economic development strategies. Mr. Basu is also a Senior Lecturer at Towson University, and is host of the Maryland Economic Forecast radio spot on Baltimore's WYPR.

Mr. Basu holds a B.S. in Foreign Service from Georgetown University. He earned his master's in public policy from Harvard University's John F. Kennedy School of Government in 1992. He earned his master's in economics at University of Maryland, College Park in 1998. His J.D. from the University of Maryland School of Law was obtained in 2003.

COURSES

[Economic Update: The Slow, Winding Road to Recovery \(EU\)](#)

Sheila Birnbach

"I am one of the luckiest people I know. I love what I do. For more than 30 years, I have followed my passion of helping individuals and organizations to become more successful."

Birnbach Success Solutions (formerly G B Associates, Inc.) has become one of the foremost consulting firms enabling organizations and individuals achieve peak performance. Birnbach Success Solutions works with small- and mid-size organizations to enable them to attract and retain great employees, offer superior customer service that sets them apart from their competitors and build cohesive teams. Before beginning the company, Ms. Birnbach spent 10 years in banking, where she worked her way from an entry-level position to become the youngest Vice President in the bank's history. In that capacity, she managed an 82-person department, built a record of success in motivating and developing people and formulated her pioneering concepts of staff

development and human resource management. Since 1981, she has built an impressive career of entrepreneurial success.

She holds an M.B.A. in Personnel and Industrial Relations from the American University and an M.S.W. from the University of Maryland. She is a licensed clinical social worker and worked for more than 6 years as a family therapist in a juvenile court. She was named one of the "Outstanding Young Women of America" in 1980.

Sheila's combination of first-hand management experience, 30 years as a consultant to a variety of organizations and more than 10 years of experience as a family therapist have qualified her as a leading coach to executives and business owners who desire to excel in a competitive, challenging environment and realize their deepest visions.

Sheila has served on the faculty of the United States Chamber of

Commerce's Institute for Organization Management for 25 years. She has authored numerous articles and has been quoted in several professional journals and newsletters.

In addition to her involvement with the Society of Human Resource Management (SHRM), the National Association of Social Workers (NASW) and the Rockville, MD Chamber of Commerce, Sheila is a certified scuba diver who loves traveling, dancing and spending time with her family.

COURSES

Are Generational Differences Helping or Hindering Your Team? (GENDIF)

Creating a Respectful Workplace (CRW)

Delivering Credibility on the Phone - Conveying a "Can Do!" Attitude (CANDO)

Hiring Smart, Firing and Everything in Between (HIREFIRE)

Motivating and Retaining Your Top Performers (1-hour webcast) (MOTIVATE)

Strengthening Collaboration and Managing Conflict (SCMC)

To Terminate or Not to Terminate: That is the Question (TERM)

Transitions to Leadership (TRANLEAD)

When Disaster Strikes, Will You Be Ready? (DISASTER)

Wrongful Termination Claims are on the Rise - Are You Protected? (WTC)

Judith Borsher, CPA, MBA, CGMA, CITP

Judy Borsher, CPA, MBA, CITP, Microsoft Certified Trainer, is President of SCG Training and Consulting Corporation. Spanning over 20 years, she has presented more than 1,900 technology CPE programs with consistently high ratings. Judy is known for providing custom training solutions and consulting and programming services to help organizations attain core competencies in technology skills and achieve financial reporting goals.

Prior to establishing SCG, Borsher worked for KPMG, with a focus on small business information systems and advising nonprofit CFOs. She also worked with a national training company under contract with IBM and AT&T, where she developed,

managed, and presented technology training programs. Recent projects include creating Advanced Excel training customized to the specific needs of auditors; SharePoint 2010 and Microsoft Office 2010 integration; custom business graphics training for a Fortune 500 financial division; and design of multi-language forms for an international NGO.

She is a member of and instructs technology courses for the American Institute of CPAs (AICPA), Virginia Society of CPAs (VSCPA), Greater Washington Society of CPAs (GWSCPA) and the Maryland Association of CPAs (MACPA).

She earned both her MBA and BA from Cornell University.

COURSES

Adobe Acrobat Best Practices for CPAs (ADOBE-L)

Excel + Outlook + Word + Adobe Acrobat + Windows 7 - Improve Personal Productivity (OFADBWIN)

Excel + Word+ Adobe Acrobat Features and Productivity Tips (EXWDADOB)

Excel Advanced Productivity Features, Pivot Tables & Macro Recorder Tips (EXCELA-L)

Excel Boot Camp for CPAs (EXCLBOOT)

Excel Charts, Graphs and Diagram Features (EXCELC-L)

Excel Data Analysis Techniques and Business Graphics (EXCLDABG)

Excel for Auditors: Pivot Tables in- depth, Data Analysis Functions & Tips (EXCELPT)

Excel Power User: Macro Programming using Visual Basic for Applications (EXCELM-L)

Excel Refresher and Update (EXCEL-L)

Excel Worksheets for Beginners (EXCELBEG)

Information Security End User Training (INFOSECU)

Microsoft Excel: Data Analysis, New Table Features and New Pivot Table Enhancements (2-hour Webcast) (EXCLDATA)

Microsoft Office 2010 New Features Update with an Emphasis on Excel 2010 (OFFIC10)

MS Office 2007: Mastering the User Interface with Emphasis on Excel 2007 (2-hour Webcast) (OFFICE7)

Outlook 2010 Update and Best Practices for CPAs (OUTLK-L)

PowerPoint: Create Dynamic Financial Presentations with Business Graphics (BGRAPHIC)

Presentation Skills Workshop (PSW)

Word Document Formatting for Beginners (WORDBEG)

Word Productivity Features and Time-Saving Tips (WORD-L)

Gary Bulmash, CPA

Dr. Gary Bulmash, CPA, is currently a teaching professor at the Robert H. Smith School of Business, University of Maryland. He is also an emeritus faculty member of American University in Washington, D.C. He regularly conducts professional education seminars for AICPA and various state CPA societies as well as in-house programs for CPA firms. He has been recognized as outstanding discussion leader by the Maryland Association of CPAs and the Greater Washington Society of CPAs. In addition, he has written continuing education materials for the AICPA.

COURSES

Ethics (ETH)

International Financial Reporting Standards (IFRS) (IFRSB)

Various Accounting/Auditing - Selectives (VARAA)

Greg Conderacci

For more than three decades, Greg Conderacci has been using the magic of communication to help people lead happier, more productive and more rewarding lives.

A Senior Fellow with the Business Learning Institute, he is a marketing consultant specializing in helping professional and financial services firms answer clients' key questions like: "Why should I trust you?", "Why should I do business with you?" and

"How are you any different from the rest?".

At BLI, his training focuses on key success skills like ethics, leadership, business development, communication, and even time/personal energy management. He also teaches marketing at the Johns Hopkins University Business School.

He has more than 30 years of marketing (Deutsche Bank Alex. Brown, Prudential, Price Waterhouse,

and non-profit) and press (The Wall Street Journal) experience.

A magna cum laude graduate of Princeton University, he was Editor-in-Chief of The Daily Princetonian; he also holds a Masters in Public Policy from Harvard University. A registered representative and registered principal, he has completed the Securities Industry Institute at the Wharton School of the University of Pennsylvania. For his age, he is a fairly decent ultra-long-distance bicycle rider.

COURSES

- At the Helm in the Storm: Seven Survival Strategies for Leaders in Turbulent Times (FALTT)
- Build Your Book of Business with Better Brand Buzz (BUZZ)
- Business Development: Distinctions Between Marketing and Sales(1-hour Webcast) (DMBD)
- Champions of Trust (COT8)
- Creating Creativity: Outside - Outside the Box (CREATE)
- Ethics Can Be Habit-Forming: Good Habits, Bad Habits and Turning One into the Other (ETHHABIT)
- Ethics for People Who Don't Like Surprises: Why We Don't See It Coming Until It's Too Darn Late (ETHICSUR)
- Ethics: Caesar's Wife: Tipping the Delicate Balance of Leadership and Ethics(Also available as a 4-hour Webcast) (TDBL)
- Ethics: Confronting the Challenge of Integrity (BECCI)
- Ethics: Why We Stray: A Different Look at Ethical Decision-Making (STRAY)
- Find a Need and Fill It: Your Key to Business Development (Also available as a 2-hour Webcast) (FINDND)
- Finding Your Way Through Career Transitions (WHO)
- Five Smooth Stones - Facing Goliath and Winning (FSSF)
- Focus, Form and Flow: The Disciplines of the Elite Mind (ELITE)
- From Slow Death to Sweet Success: Seven Survival Strategies (SDSS)
- Great to Good: Using the Lessons of Good to Great AND How the Mighty Fall (GTOG)
- High Performance Time Management: Boosting Your Personal Energy (Also available as a 2-hour webcast) (ENERGY)
- Leadership Improv - Why "Fake It Until You Make It" Works (IMPROV)
- Leadership Inside Out: Discovering the Leader Within (LIO)
- Listening For Leaders: Ask the Question, Discover the Need, Win the Trust (LISTEN)
- MacGyvering: The Art of Being Resourceful in a Crisis (Also available as a 2-hour webcast) (MAGYV)
- On Good Ground: Creating A Personal Strategy for a Great Life (GOODGRN)
- Performance, Productivity and Profit: Creating the Higher Energy Organization (HEO)
- Selling for CPAs: Using Your Problem-Solving Skills to Promote Profitable Business Growth (UPSS)
- Seven Secrets of Successful Business Writing (SEVEN)
- Turning Trust into Value: Business Development Boot Camp (BDCAMP)
- What Next? Inventing a New Niche for Yourself (INVENT)
- Why Don't We Say Yes? 21st Century Negotiating (21CNEG)
- Why You? Positioning Yourself Ahead of the Pack (WHAT)

Robert “Hap” Cooper

Hap Cooper is the President and co-founder of Prospect Street Consulting, a research, consulting and training firm that works to make professional service organizations more productive.

Prior to becoming a consultant, Hap spent 15 years in a number of sales and management positions with several financial service firms, including Alex Brown and Mutual of Omaha. Before entering the financial services arena, Hap was an Army Intelligence Officer in Berlin, Germany and a graduate of Princeton University.

Hap is a prolific writer and speaker as well as a regular lecturer at the Columbia University and Johns Hopkins Schools of Business. He also teaches Client Skills at Penn State’s Smeal School of Business in Philadelphia.

COURSES

High Performance Time Management: Boosting Your Personal Energy (Also available as a 2-hour webcast) (ENERGY)

Producing Powerful Presentations: Performance and Profit (POWPRE)

Reading Clients Minds and Understanding How They’re Reading Yours (MINDB)

Winning New Business - It’s in the DNA (DNA)

Jean Cunningham

Jean Cunningham is co-author of Real Numbers: Management Accounting in a Lean Organization, 2004 Shingo Prize for Research recipient. Cunningham serves a number of clients with business strategy, process improvement, and growth and acquisition planning through out the U.S. She is the former Chief Financial Officer and Vice President of Company Services, responsible for Accounting, Human Resources, Information Systems and Telecommunications at both Lantech, LLC and Marshfield DoorSystems, Inc. Most recently, Cunningham authored her second book, Easier, Simpler, Faster; System Strategy for Lean IT, published by Productivity Press.

COURSES

Improve Cash Collections With Lean (ICCL)

Lean and Human Resources (HR) (LHR)

Operational Decision Making with Lean Accounting (ODM)

Real Numbers Through Lean Accounting (2-hour Webcast) (RNLA)

Anthony Cuzzo, CPA, CGFM

Tony is a Senior Vice President and Not-for-Profit Technical Principal with Councilor, Buchanan & Mitchell, P.C. (CBM). He has over 35 years of experience serving a variety of clients, including specialties in not-for-profit organizations and local governments. Tony currently serves as the principal in charge of both 501(c)(3) and 501(c)(6) organizations.

In addition, Tony is the Co-Chairman of CBM's Not-for-Profit Committee and is also a nationally recognized discussion leader for various accounting courses for CPA firms and various state CPA organizations. These teaching assignments keep him abreast of new developments in the accounting profession as well as in business.

Tony has conducted peer reviews of CPA firms across the country, and is a former member of the SEC Practice Section's Peer Review Committee of the AICPA's Division for firms.

His broad business experience and training has enabled him to be recognized as a registered investment advisor by the Financial Industry Regulatory Association.

PROFESSIONAL QUALIFICATIONS AND EDUCATION

- * Certified Public Accountant, Maryland
- * Certified Government Financial Manager
- * Licensed Insurance Agent, Life & Health Insurance, Maryland
- * Graduate, Strayer University

PROFESSIONAL ASSOCIATIONS AND ACTIVITIES

- * American Institute of CPAs
- * Maryland Association of CPAs
- * Greater Washington Society of CPAs
- * American Society of Association Executives
- * Maryland Association of Nonprofit Organizations

PRIOR AND CURRENT CIVIC AND BUSINESS ASSOCIATIONS

- * Finance and Administration Roundtable
- * Past President, Catholic Business Network of Montgomery County
- * Treasurer, Maryland Foundation of Dentistry for the Handicapped (recognized for Outstanding Service in 2006 by the Maryland State Legislature for outstanding service to the handicapped citizens of the State of Maryland)

COURSES

Navigating the New Accounting and Auditing Standards (NAVASTD)

Proposed Lease Accounting -How Do You Run an Airline Without Airplanes? (LEASACCT)

Michael Daigneault, Esq.

Michael Daigneault is an experienced consultant, facilitator and trainer. He is frequently asked to counsel boards of small and large nonprofits concerning vital governance challenges, and has particular experience working with nonprofit boards and chief executives on leadership, ethics, and strategic issues.

Based in the Washington, DC area, Michael has worked with clients such as the Corporation for Public Broadcasting, Target Corporation, Credit Suisse, Time Warner, Bank of America, Independent Sector, the Association of International Educators (NAFSA), the College of American Pathologists, the International Baccalaureate, NISH, the LAM Foundation, and many others. He is also a member of the United Way of America's Membership Appeals Panel.

Previously, Michael served as the ethics officer for the United Way of the National Capital Area. He also has hands-on experience in successfully running both for-profit and nonprofit institutions having some 20+ years' experience as President of the Ethics Resource Center, the Executive Director of the American Inns of Court Foundation, and the President of Ethics, Inc. He has published numerous articles on nonprofit governance topics for a wide variety of periodicals, journals, and magazines.

Michael is a 1981 graduate of Georgetown University with a degree in Philosophy. He is also a 1985 Graduate of Georgetown University Law Center with a Juris Doctor in law which he followed up with a Masters in Law in 1991.

COURSES

A Commitment to Community: Nonprofit Board Service and CPAs (NPG)

A Matter of Integrity (CELT)

Advanced Consulting for CPAs: Enhancing and Expanding Your Client Relationships (FCAS)

Brad Davidson

Brad Davidson is President of SPARDATA Business Valuation Experts of ElkrIDGE Maryland and is a recognized expert in the valuations field. Organizations which have invited Davidson to lecture include the Internal Revenue Service, the Securities and Exchange Commission, the North American Securities Administrators Association, the Department of Labor, the Federal Financial Institution Examination Council, the Federal Reserve, the Michigan Bankers Association, the Virginia Bankers Association and the American Society of Pension Actuaries. SPARDATA has been cited on numerous occasions by the Wall Street Journal, the Washington Post and other publications.

In 1980 Davidson began his career in the financial services industry when he became a financial advisor with Merrill Lynch, where he was a “rookie of the year” in 1981. In 1984 he joined Prudential-Bache Investments as a vice president, leaving in 1986 to run an investment fund that bought and sold real estate limited partnership interests in the secondary market. In 1990 he became president of

SPARDATA, a firm with experience valuing over 27,000 privately-held businesses. The firm’s clients include business owners; the advisors serving them (including financial advisors, trust officers, CPAs and attorneys) and government institutions. Financial service providers that have chosen SPARDATA to provide valuation services to their clients include New York Life, AXA Advisors, National City Bank, MassMutual, PNC Bank, Guardian and Morgan Stanley Trust.

Beyond financial analysis, Davidson has had a diverse array of work experiences. From 1977-1979 in his first job after college, he worked on Capitol Hill as a legislative assistant to a Texas Congressman from a rural district. (To this day he will discuss the Federal Insecticide, Fungicide and Rodenticide Act with anyone willing to listen.)

Working on the Hill infected him with the political bug so in 1979 Davidson enlisted in the Maryland Army National Guard and was ordered to Ft. Sill OK for basic training. (Later he attended Officer Candidate School, was commissioned an infantry officer

and retired in the late 1980s having achieved the rank of Captain in the United States Army Reserve.) Two years later Davidson became the “boy wonder” of Annapolis politics by becoming the youngest person ever elected to the Annapolis City Council; he was reelected without opposition in 1985. In 1987 Governor William Donald Schaefer appointed him Chairman of the State Commission on the Capital City, a position he held until 1996.

Today Davidson serves on the boards of St. John’s College of Annapolis Maryland and Santa Fe New Mexico; the Historic Annapolis Foundation and the J. M. Kaplan fund in New York City. From 1984 until 2002 Mr. Davidson was a Director of Microsemi Corporation of Santa Ana, California, a publicly-held manufacturer of electronic products where he served on the audit and compensation committees.

COURSES

Business Valuations in a SSVS* World (*Statement on Standards for Valuation Services) (SSVS)

Using Business Valuations to Keep Your Clients Loyal (LOYAL)

Bob Dean, CLO

Bob Dean has over 25 years experience focused on strategy and innovation in learning and talent development. Bob has served as a Chief Learning Officer and a global learning leader for the past decade and now serves as a trusted advisor to clients focused on learning and development and talent management strategy and solutions. Bob combines business experience with a passion for designing, developing, and delivering breakthrough learning and talent management experiences and driving business impact.

From 2007-2009 at Heidrick & Struggles, Bob focused on aligning learning and development with a global integrated talent management process. The Learning & Talent Development team was a catalyst for innovation in using learning and development as an enabler of business transformation.

From 2001-2006, Bob served as Grant Thornton's Chief Learning Officer,

responsible for the firm's learning vision and strategy, management of Grant Thornton University (GTU), and the Strategic Learning team. Bob joined Grant Thornton following many years with Ernst & Young LLP. At Ernst & Young, he served in the firm's Audit practice, was National Director of Audit and Industry Professional Development, and led several of the firm's learning innovation initiatives in the 1990s.

In 2006, Bob became a "Certified Experience Economy Expert"-- joining the first group of professionals certified by the book's authors, Joe Pine and Jim Gilmore.

Bob has been active in the learning and talent development community for many years, presenting in workshops and seminars sponsored by Linkage, the Chicagoland Executive Learning Exchange, The MASIE Center, the e-Learning Guild, ASTD, and CLO Magazine. In 2005, Bob Dean and Grant Thornton LLP were

presented with a Learning Pioneer Award at Elliott Masie's Learning 2005 Conference.

Specialties

- * Aligning Learning & Development with Talent Management
- * Learning and Business Transformation--The Progression of Learning Value
- * Role of Chief Learning/Talent Officer
- * Learning Experience Design
- * Leading Change
- * Communication Skills as a Leadership Competency
- * Differentiating a Business through the Customer and Employee Experience
- * Business and Learning Innovation linked to Collaboration

COURSES

Business Innovation in The Experience Economy (Also a 1-hour webcast) (BITEE)

Learning That Matters (1-hour webcast) (LTM)

Making Learning Stick (MLSFOUND)

Making Learning Stick: Immersion and Application (MLSIMMER)

Jennifer Elder, CPA

Jennifer Elder is a CPA, CMA, CIA, CFF with a Master's in Organizational Leadership. She has worked in accounting and finance for the past 25 years in a variety of industries including manufacturing, residential construction and development, and angel investing. She spent five years in public accounting, seven years as the Accounting Department Chair of a community college, and the previous ten years in the role of CFO.

Recently, Jennifer started her own business, The Sustainable CFO, providing business consulting, on-demand CFO services, and business coaching services. Their target market is small and medium-sized businesses looking to improve their bottom-line and overall performance. In addition Jennifer teaches finance in the Green MBA program at Antioch University New England.

She is also a contributing writer for the National Association of Home Builders and TriplePundit, and a frequent presenter for the Maryland Association of CPAs, the Institute of Management Accountants, and the Society for Human Resource Management.

COURSES

Applying Ethics in the Real World (AERW)

Awesome Financial Presentations (AWESOME)

Better Forecasting Using Backcasting (BACKCAST)

Ethics: It's Not Just What You Do, but How You Do It! (ETHICHOW)

Financial Statements Analysis (FSA)

Fraud: Detection and Prevention (FRAUD)

Lions, and Tigers, and Numbers Oh My! Finance for the Non-Financial Manager (LIONS)

Personality Styles in the Workplace (PERSTYLE)

Planning and Implementing the Balanced Scorecard (BALSCORE)

Preparing a Winning Business Plan (WINPLAN)

Risk Management - Disaster Recovery Planning (RMDRP)

Smarter Decision-Making (SMART)

Strategic Skills for Finance (SSF)

Successful Project Approval Using a Business Case (SUCSPROJ)

Sustainability Reporting (SR)

Sustainability: Using the "Triple Bottom Line" to Increase Your Success (TRIPLE)

The Eight Hour MBA (MBA)

William Eskin, CPA

William Eskin is the owner of a consulting group that provides assistance to surety and fidelity companies with their claim and recovery functions and profitability enhancement for small and medium-sized entities.

Previously, he was the Director of Financial Analysis & Investigation for the world's largest surety operation. There, he provided financial and accounting assistance to the underwriting and claims functions and performed forensic reviews related to employee dishonesty bonds and other defalcations.

Bill is a frequent speaker at the AICPA National Construction Conference, numerous state CPA societies, as well as many organizations related to construction and surety. He assists in the review of the AICPA annual

Construction Audit Guide Update and Construction Contractors Industry Developments.

Bill is a recipient of the 2008, 2009, 2010 and 2011 AICPA Outstanding Discussion Leader award.

COURSES

A "Real-Life" Look at Revenue Recognition in Today's GAAP & What May Lie Ahead (RRGAAP)

Accounting for Real Estate - The Critical Issues of GAAP Compliance (ACCREAL)

Accounting Services, Compilations, and Reviews - A "Real-Life" Look at Your Risks (ACCSERV)

Construction Accounting - A "Real-Life" Inside Look at Critical Issues (CONSTACC)

CPA Malpractice - Am I at Risk of a Lawsuit? (CPAMAL)

Deferred Income Taxes and FIN 48 (DITFIN48)

FIN 48 (FIN48)

Financial Statement Reporting - Select Problem Areas in Today's GAAP (FSRGAAP)

Liz Gantnier, CPA

Elizabeth S. Gantnier is a Certified Public Accountant and Director of Quality Control for Stegman & Company of Baltimore MD. She is a former Vice President - Finance for a publicly held manufacturing firm in Chesapeake Virginia after having spent ten years with KPMG in the Richmond, VA and Norfolk, VA offices where she was a statistical audit specialist, in-house professional development instructor, and EDP specialist.

Ms. Gantnier is a national instructor for the AICPA on topics including fraud, accounting and auditing as well as SEC related topics and internal control. Additionally, she has been a nationally recognized CPA Review instructor. Ms. Gantnier is a frequent panelist in the national AICPA continuing education videos on SEC Reporting, Forensic Accounting and Understanding the New Statements on Auditing Standards as well as the quarterly SEC Update Webcasts. She is a member of the PCAOB's Standing

Advisory Group and the Center for Audit Quality's Professional Practice Executive Committee.

Ms. Gantnier has expertise with audits of publicly held companies, governments and construction contractors, financial institutions, manufacturers, employee benefit plans and not-for-profit entities. She is the author of the AICPA's programs on benchmarking, inventory valuation, auditing in a paperless society and auditing electronic evidence.

Ms. Gantnier was recently a recipient of the 2009 AICPA Outstanding Discussion Leader award.

COURSES

Annual Accounting Update for Industry (AAUI)

Customized Annual Update for Accountants and Auditors (LGAA)

Sarah Gershman

Sarah Gershman is a communications trainer with more than 10 years of teaching experience. Sarah specializes in helping clients clarify their message in order to cultivate stage presence and inspire an audience.

Sarah's passion for training leaders how to communicate stems from her classroom and theater experience. Prior to founding Green Room Speakers, Sarah served as Dean of Students and Faculty at the Jewish Community High School of the Bay in San Francisco and the Drama Director at an Oakland independent school. Sarah is the author and producer of the musical, Notes in a Different Key, performed at the Thalia Theater in New York City, and has recently directed productions of Joseph and the Amazing Technicolor Dreamcoat and The Wizard of Oz.

Sarah has a Masters in Social Work from Columbia University and a Masters in Judaic Studies from the Jewish Theological Seminary. She

is a Wexner Graduate Alumni and graduated Phi Beta Kappa from Johns Hopkins University with a BA in Literature. Founder and Coach at Green Room Speakers. "Sarah is an outstanding trainer. Her workshops are sharp, relevant, and fun. She has an amazing ability to both build participants' self-confidence, while at the same time challenge them to reach past their comfort level.

COURSES

Exceptional Customer Service - Effective Communication (EXCEPCUS)

Public Speaking: How to Speak with Presence (Also available as a 1-hr webcast) (SPKPRES)

The Power of Successful Conversations (POWRCONV)

Emmanuel Gobillot

Recognized as one of Europe's most sought after and engaging business speakers, Emmanuel has made a name for himself challenging the most conference weary of audiences.

Delivering high-paced, engaging, entertaining and thought-provoking speeches is what all conferences, events and workshop organizers ask of their speakers. If you want a guarantee that Emmanuel delivers all these characteristics please visit our contact page, we can put you in touch with satisfied clients.

But be warned: with satisfaction ratings from audiences averaging 90% of highly satisfied you may just find that one speech is only the beginning!

To find out more visit
www.emmanuelgobillot.com/

COURSES

[Goodbye Leadership. Hello Leadershift! \(1-hour Webcast\) \(LSHIFT\)](#)

Carol Haislip & Cathleen Hanson

During her years in the corporate world as a vice president for a major corporation, Carol Haislip, Director, interviewed thousands of prospective employees. She knows firsthand that first impressions really do last a lifetime. Through her dynamic teaching techniques, she illustrates that an effective professional image is critical for success on the job, in school or in any other social or business environment. Ms. Haislip holds a Masters of Business Administration with a concentration in International Business.

Cathleen Hanson, Director of the International School of Protocol, is an award winning writer whose syndicated columns appear in over 30 publications nationwide. Ms. Hanson served as a university professor of communication, teaching courses in the areas of public speaking, business communication, interpersonal communication, group communication, and nonverbal communication. As a fully engaging top-notch teacher, her emphasis is on teaching adults, teens and children what she considers to be skills for life. Ms. Hanson holds a Masters in Communication Theory.

COURSES

Better Business Writing (BBW)

Business Dining Etiquette (BDE)

Maintaining a Professional Image in a Business Casual World (MPI)

Mingling for Professionals (Mingle, Mingle) (MP)

Professionalism, Civility and Business Etiquette (PCBE)

Tom Hood, CPA, CITP, CGMA

Thought Leader in Leadership - Learning - Technology

Named as one of the "elite thirteen", the top 13 thought leaders in the CPA Profession in Accounting Today's list of the Top 100 Most Influential People in the CPA profession (his seventh time). Tom stands out in three areas, leadership, learning, and technology.

He was recently named as one of the Top 25 Thought Leaders in Public Accounting by CPA Practice Advisor and Top 25 Thought Leaders in Public Accounting Technology by CPA Technology Advisor, one of the Top 25 Online Influencers in Talent Management by HR Examiner and as one of the Top 100 Most Influential People in the CPA Profession by Accounting Today Magazine (seventh time in 2011).

These awards and recognition reflect Tom's leadership in helping CPAs "shape their future" through his work at the Maryland Association of CPAs and the Business Learning Institute, a center for the development of leadership and strategic thinking skills for CPAs.

Tom and his team have facilitated and taught the Major Firms Group (Top 100 CPA firms) for the AICPA, the AICPA Leadership Academy and

lead strategic planning sessions with leading CPA firms from all over the US, along with corporations and non-profits. Tom also co-authored BLI's i2a - Insights to Action a strategic thinking system that is used to cultivate leaders and a strategic planning process to help organizations navigate today's permanent whitewater environment. The i2a process was customized to meet the needs of the national CPA Horizons 2025 project where Tom and his team ran thirty future forums that engaged thousands of participants in a conversation about the future.

He is a nationally recognized author, speaker, and consultant. Tom has been featured in the Journal of Accountancy, Accounting Today magazine, and AccountingWeb. He also won the AICPA Special Recognition Award for his contributions to the profession leading the CPA Vision Project in 2003. He is also considered as a thought leader in the Association Community speaking at the DigitalNow Conference and the ASAE (American Society of Association Executives)

Tom likes to say much of his success as a CPA is due to membership in associations. He has been an active volunteer since starting his career. He has been past-president of the Maryland Association of CPAs (1993-

1994) and currently on the AICPA CPE Advisory Committee. He has served on several key national committees - the AICPA Enhanced Business Reporting Committee and AICPA Special Committee on Mobility. He is also a member of the ASAE, World Future Society in addition to the AICPA & MACPA.

In addition to his history as an association executive and CEO, Hood has experience as a high level executive in industry, specifically as treasurer and CFO of Bryn Awel Corporation, a privately owned \$75 million highway construction company.

He is a graduate of Loyola College (B.A. in Accounting) and has a Master's in Finance (Real Estate) from Johns Hopkins University and a Master's equivalent in Information Systems from the University of Baltimore. He also obtained the Certified Information Technology Professional (CITP) certification and the Certified Global Management Accountant (CGMA) certification from the AICPA.

COURSES

I2A: Strategic Thinking that takes Insights to Actions (I2A)

CPAs & Social Media: Passing Fad or Valuable Tool (2-hour webcast) (CSM)

MACPA Leadership Academy (LEADACAD)

Professional Issues Update (PIU)

Social Media Strategy & Quick Start: Developing and Implementing a Social Media Strategy for CPA Firms & Organizations (SOCMED)

Strategic Planning Facilitation: Developing the High Performance Organization (SPF)

Mark Jankowski

Mark Jankowski co-founded Shapiro Negotiations Institute (SNI) in 1995 to help individuals and organizations realize their fullest potential by building stronger relationships and improving their Negotiation and Influencing skills. Drawing on his experiences as an attorney, investment banker, sales manager, and entrepreneur, Mark empowers clients to connect SNI's systematic approach to Negotiation and Influencing to their real life endeavors.

As an expert on Negotiation and Influencing, Mark has lectured at the Wharton School of Business at the University of Pennsylvania, Case Western Reserve University, and Johns Hopkins University. Over the past 15 years as President of SNI, Mark has developed highly customized training programs for a wide variety of public and private organizations in the Financial Services, Insurance, Entertainment, Telecommunications, Automotive, and Health Care industries, just to name a few. Mark's tenure at SNI has been highlighted by extensive programming delivered on six continents and in 15 countries.

Mark graduated with a Bachelor of Arts degree (magna cum laude) from Harvard University, and he received a J.D. from the University of Virginia School of Law where he was a

member of the University of Virginia Law Review. He is also a member of the Mensa Society for intellectual exchange.

In his community, Mark is a co-founder of "Hands on Baltimore," which matches young adult volunteers with charities throughout the Baltimore area. He has also served on the Board of the Living Classrooms Foundation, which focuses on providing entrepreneurial alternatives for inner-city residents. Mark was also on the Board of the University of Maryland Medical Center, where he helped to raise over \$750,000.

COURSES

The Power to Influence and Connect (INFL)

Michael Kraten, PhD

Michael Kraten, PhD, CPA is the President and co-founder of Enterprise Management Corporation (EMC), a strategic management consulting firm. He is also a member of the Accountancy faculty at Providence College.

Dr. Kraten teaches the capstone course in accounting policy at Providence College. He has also taught ethics, leadership, and cost accounting in the executive education, graduate, and undergraduate programs of Maastricht University, Suffolk University, the University of Massachusetts, and the University of Connecticut.

Dr. Kraten has authored articles in the academic and practitioner literature, including the Journal of Banking and Finance, Accounting and the Public Interest, Journal of Digital Business, Journal of Theoretical Accounting Research, and CPA Journal. He has presented research studies at conferences sponsored by the

American Accounting Association, the Institute of Management Accountants, and other organizations. One such study, an analysis of Libor interest rate quotations, was cited by a member of the British House of Commons in 2012 during a parliamentary debate.

Dr. Kraten has worked at EMC since 1995; previously, he was a management consulting partner at BDO Seidman (the fifth largest global accounting firm), and he spent eight years in the consulting, accounting, and audit divisions of Deloitte & Touche (the second largest firm).

Dr. Kraten has earned a Ph.D. in behavioral accounting from the University of Connecticut. He has also earned an M.P.P.M. in management from Yale University and a B.B.A. in public accounting from Baruch College of the City University of New York.

Dr. Kraten is a management accounting educator and researcher

who specializes in behavioral factors impacting issues of negotiation, entrepreneurship, and social policy.

COURSES

Business Planning: A Managerial Accounting Approach - Basic Level (BPLAN-1)

Business Planning: A Managerial Accounting Approach - Intermediate Level (BPLAN-2)

Business Planning: A Managerial Accounting Approach - Advanced Level (BPLAN-3)

Enterprise Risk Management: A Pragmatic Approach - Basic Level (NRISK-1)

Enterprise Risk Management: A Pragmatic Approach - Intermediate Level (NRISK-2)

Enterprise Risk Management: A Pragmatic Approach - Advanced Level (NRISK-3)

Executive Presence: An Experiential Approach to Networking & Negotiation (EPRES)

Lin Kroeger, CMC

Lin Kroeger, Senior Fellow, Business Learning Institute, has been a management consultant for 30 years, focusing on strategic communication and its role in leadership, management, and employee capability. Known for being practical and for providing custom consulting, Kroeger designs and delivers programs on leadership, organizational and interpersonal communication, change management, and team dynamics.

Recent projects include assess the effectiveness of performance management within a Fortune 500 financial division; designing an organization re-structuring transition process and communication

strategy; designing and facilitating leadership off-site meetings; designing a communication strategy and plan for the launch of a major new management process and its related tools.

Formerly president of The Communication Link Co., Inc., a management consulting firm specializing in strategic communication, a primary tool of change management, Kroeger provided services in executive and management coaching, development of ownership strategies, custom training, facilitation, and coaching teams on team dynamics and collaboration. Having taught management writing at the Graduate School of Business, Cornell

University, and having acted as the in-house writing expert at Arthur Andersen, Kroeger has guided the strategic re-design of audit and financial reports.

Clients have included Fortune 500 and Fortune 10 companies in financial services, pharmaceuticals, and consumer products. She has also worked with not-for-profit/ education and government groups and for both regional and national accounting firms.

A speaker and writer, Kroeger holds a B.A. from The College of William and Mary, a Master's Degree from Villanova University, and a Master's Degree from Cornell University.

COURSES

Best Practices in Accounting and Finance Writing: Being Clear and Accurate (2-hour Webcast) (BPAFW)

Best Practices in Accounting and Finance Writing: Putting Ideas in Order (2-hour Webcast) (BPAFPIO)

Best Practices in Writing -for the Financial Services Professional (MBW)

Build a Team by Teambuilding! (TCPC)

Building a Culture of Conversation: Communication with a Purpose, For Results (BCCC)

Challenge Thinking to Succeed (LUAC)

Creative Problem Solving (CPS)

Dealing with Difficult People (DDP)

Developing a Communication Strategy (DCS)

Developing and Retaining Talent -- an Organization Imperative (RTMC)

Emotional Intelligence and Personal Leadership (EI)

Getting Things Done - Engaging People to Execute Effectively (Also available as a 2-hour Webcast) (LEAF)

I Said, You Said: 3 Steps to Effective Communication (C3E)

It's All in the Presentation: Designing Presentations to Sell Ideas Effectively (DPSI)

Leader vs. Manager vs. Facilitator: When, Why, How? (Also available as a 2-hour Webcast) (LMF)

Lin Kroeger's Leadership Courses

Managing Performance to Implement Strategy (PMIFC)

Message-Based Communication (MBC)

Presentation Skills: Message Based Presentations (MBP)

Presenting Financial Data to Non- Financial Audiences -Avoiding Over-simplification (PFDNFA)

Presenting Financial Information Clearly and Effectively (PFICE)

Project Management: Get the Buy-In to Get Results (PMIP)

Sharing Skills Between Generations (RM)

Skillful Coaching: Careers and Performance Matter (SCCPM)

SMART Goal Setting: Setting Goals to Achieve and Contribute (SGS)

Special Delivery: Delivering Presentations to Sell Ideas Effectively (PSIE)

Strategic Uses of Social Networks and Blogs (SUSN)

Your Strengths, Your Management Talent, Your Leadership: Making a Difference for You and Others (SMLT)

Brian Kush, CPA, CISA, CITP

Brian has experience as a financial and IT auditor, a consultant and trainer serving the accounting profession, and as a coach.

He is a Certified Public Accountant, a Certified Information Systems Auditor, and a Chartered Information Technology Professional. He worked at a Big 4 accounting firm for five years and at a leading consulting firm that served the audit industry for eight years. During those experiences, Brian has worked with hundreds of CPA firms, and trained and consulted with thousands of accountants and IT professionals on process reengineering and utilizing technology tools. He has worked intimately with all levels of professionals, from partners and executives to level one employees.

While at his former employer, he was fortunate enough to create and lead a great team that provided an innovative service to accountants. This service provides accounting firms with

outsourced data analysis reporting capabilities. It was a unique position because Brian was able to work with clients and professional colleagues of different experience levels and from across the country, virtually.

Brian has worked under an executive master certified coach for over four years and has been coaching individuals to success, whether formally or informally, for years.

His unique experience puts him in position to coach and work with your professionals while having lived the lives on both sides, as an accountant and IT professional, and as a coach. It also has provided him a great learning perspective on how the different workforce generations interact, struggle, and flourish.

But those are his technical skills. It's the passion and desire to push others to achieve, and share in the actualization of that achievement, that makes him unique.

COURSES

It's not Just the Question: Using Effective Communication Skills and Professional Skepticism while Gathering Information and Evidence (NJQUEST)

Norman Lorch, CPA

As an executive consultant, Norman J. Lorch has more than 33 years of experience in the field of financial management and administration of government contracts. Mr. Lorch is the principal of Norman J. Lorch, Chartered, a CPA firm that specializes in assisting clients and their accountants in the areas unique to government contracts. He is a former division accounting manager with a major defense contractor and a former supervisory auditor with the Defense Contract Audit Agency.

Mr. Lorch has prepared and evaluated claims and successfully defended contractors from allegations by the Defense Contract Audit Agency on such matters as defective pricing and time-keeping policies and practices. In addition, he has been the interface and liaison with DCAA and has negotiated contracts and agreements with contracting officers, customers and the DCAA.

Mr. Lorch is a CPA in Maryland and a

member of the Maryland Association of CPAs, the American Institute of CPAs and the Greater Washington Society of CPAs; an associate member of the American Bar Association, Public Contracts Sections; and a member of the National Defense Industrial Association, Contract Finance Committee, and the National Contracts Management Association.

Mr. Lorch is the author of the AICPA course entitled "An Introduction to the Accounting Requirements of Government Contracts" and co-author of "Cost Principles for Non-Profit Organizations Covered By OMB Circular A-133." He also is the author of the course entitled "Government Contractor's Indirect Cost Rates: Preparation of the Proposal and Surviving The Government's Audit."

He holds a B.S. degree in accounting from the University of Baltimore.

COURSES

Accounting Systems for Government Contractors (ASGC)

Government Contractors and Indirect Cost Rates: Preparation and Surviving the Government Audit (GCIC)

Introduction to the Accounting Requirements of Government Contracts (IARG)

Jennifer Louis, CPA

Jennifer F. Louis, CPA, has more than 18 years of experience in designing and instructing high-quality training programs. In 2003 she formed Emergent Solutions Group, LLC, serving organizations by providing training services on a project-specific or part-time basis.

Most recently, Ms. Louis was executive vice president / director of training

services at AuditWatch, Inc., a premier training and consulting firm serving the audit profession. She began her career at AuditWatch as vice president of product development. Before joining AuditWatch, Ms. Louis was the financial / operational audit manager at AARP.

Ms. Louis also was an audit manager for Deloitte & Touche LLP. During her

years at Deloitte & Touche's Washington D.C. office, she was a frequent local and national instructor. She also served as an instructor for the firm's national "Train the Trainers" program.

Ms. Louis graduated summa cum laude from Marymount University with a BBA in accounting. She is a member of the American Institute of CPAs and is licensed to practice in the Commonwealth of Virginia.

COURSES

A Basic Overview for Non-CPAs & Those Charged with Governance of the Most Critical Issues Faced by the Accounting & Auditing Profession Today NTAA

Auditing Bits in Bytes (Also available in eight 2-hour webcast sessions) (ABB)

Audits in Accordance with Yellow Book (A133)

Best Practices for Audits in Compliance with Government Auditing Standards and OMB Circular A-133 (AWAC)

Coaching Staff to Stay on the Right Track (Also available as a 2-hour Webcast) (CYS)

Critical Performance Measures: Useful Tools for Gauging Success (CPM)

Critical Performance Measures: Useful Tools for Gauging Success (2-hour Webcast) (CPM-W)

Effective and Efficient Risk-Based Financial Statement Audits in Compliance with Yellow Book (Also a 2-hour Webcast) (RAS)

Employee Benefit Plan Auditing (EBPA)

Essential Skills for CPA Firm Managers (ESTM)

Executive Summary Accounting & Auditing for Industry (EXESUMAA)

How Audited Entity Mngmnt. and Governance Can Influence a More Effective & Efficient Finan'l Stmt Audit (Also available as a 4-hour webcast) (NSFSA-W)

Independence & Objectivity for Attest Service Providers (IND)

Internal Controls for Smaller Entities - Practical Case Studies in Design, Evaluation and Communication (Also available as a 2-hour Webcast) (CDEC)

International Financial Reporting Standards: An Overview of the Looming Change to Global Standards (IFRS3)

Interviewing to Avoid Costly Mistakes in Hiring (Also available as a 2-hour Webcast) (IACM)

Make it Happen! The Art of Discipline and Getting Things Done (Also available as a 2-hour webcast) (MIH)

Making Rain: Strategies for Client Service, Selling and Negotiating (Also available as a 2-hour Webcast) (MRS)

Mastering the Standards Related to Compilation & Review Engagements (SSARS)

Performing Research Using the Codification (RSRCHCOD)

Personality Styles: What You Absolutely Should Know About Yourself & Others (PSWY)

Practical Accounting and Auditing Issues Facing Nonprofit Entities (PAANFP)

Practical Accounting and Auditing Update for Governmental and Nonprofit Entities (PAAUGNE)

Practical Explanations of Accounting & Auditing Updates for Industry (PEXAAI)

Sarbanes-Oxley Section 404: What Everyone Needs to Know About Internal Controls (SOXW)

Strengthen the Inquiry Skills You Need to Gather Evidence (Also available as a 2-hour webcast) (INO)

The Balanced Leader-Manager: Using the Right Leadership Style (BLM)

The Impact of IFRS and Other Global Standards on Private Entities (Also available as a 2 hour webcast) (IFRSJL)

Top 5 Ways to Get the Most Value for Your Audit Fees (2-hour Webcast) (TOP5-W)

Value-Added Internal Control Communications that Comply with the Standards - Detailed Analysis and Case Studies (4-hr Overview available) (MLC8)

Dr. Jeffrey Magee

Dr. Jeffrey Magee has been called one of today's leading "Leadership & Marketing Strategists." Many of the Fortune 100 firms today use Jeff for Performance Execution® in the areas of managerial-leadership effectiveness and sales training and coaching. He also been invited to keynote at many major associations in America and speak at West Point Military Academy on leadership.

Magee was commissioned to design, train, and present a new series of national leadership and sales recruitment programs for more than the 5,000 professional sales recruiters and sales managers with the U.S. Army National Guard. For this he has subsequently received the prestigious Commander's Coin of Excellence.

Jeff has been recognized as one of the "Ten Outstanding Young Americans" (TOYA) by the U.S. Junior Chamber of Commerce. A three-term President of the Oklahoma Speakers Association and twice awarded their Professional Speaker Member of the Year, today,

the Chapter's outstanding member of the year is awarded the "Jeff Magee Member of the Year Award.

Magee is the author of a nationally syndicated "Leadership" column, publisher of Professional Performance Magazine, and is the author of more than 20 books that have been transcribed into multiple languages, including four best-sellers. In fact, his text, "Yield Management" (also known as "The Managerial-Leadership Bible") was the #1 selling graduate management school textbook in 2000.

In 2010 while merging his business JEFF MAGEE INTERNATIONAL (Tulsa, OK) of 20 years with WesternCPE (Bozeman, MT), he simultaneously was recognized as The Small Business Commerce Association (SBCA) 2010 Best of Business Award in the Lecture bureau category. In 2011 Magee unmerged from WesternCPE to continue with his own firm JeffreyMagee.com (Leadership Training & Technology/ What You need To Succeed!).

COURSES

Coaching for Impact - Generational Diversity (IMPACT)

Fundamentals of Strategic Management (FSM)

Performance Execution: Long-Term Planning in a Short-Term World (PELTPSTW)

Performance Execution: Succession Planning and Mentoring (PESPM)

Peter Margaritis, CPA, MAcc

Peter Margaritis, CPA, MAcc, is president of Margaritis Financial Services, LLC D/B/A The Accidental Accountant that is an education and training business focused on the accounting profession.

Peter came up with the name The Accidental Accountant because he is right-brain person living in a left-brain business world. That's right, an accountant who sees the world creatively. He even performs stand-up and improvisational comedy.

His educational background includes a bachelor's degree in Business Administration from the University of Kentucky, and a master's degree in Accountancy from Case Western Reserve University.

In addition to running his own business, he is on faculty at Ohio Dominican University, Columbus State Community College, and the University of Maryland at University College. He has worked for companies

such as Price Waterhouse, Victoria's Secret Catalogue, Gap Inc. Direct, GBQ Partners, Barnett Bank, and C & S National Bank. For the past ten years he has worked in higher education, teaching accounting to both undergraduate and graduate college students.

Peter is a member of the American Institute of CPAs, Ohio Society of CPAs, and the Institute of Management Accountants. He is currently a member of the Ohio Society of CPAs' executive board of directors and has served on the board of trustees of the Ohio CPA Foundation.

COURSES

Advanced IFRS Update (ADVIFRS)

Building Stronger Teams by Using Improvisational Comedy (COMEDY)

Business Development Skills for Accountants (BDS)

Career Management: What's Next for You? (CAREER)

Convergence: Changes Coming to US GAAP (CONVGAAP)

IFRS Update (IFRSUPDT)

IFRS vs. US GAAP: Is there an App That? (IFRSGAAP)

International Financial Reporting Standards (IFRS) From 5,000 Feet (IFRS5000)

Leadership from a Slightly Different Perspective (LEADDIFF)

Measurement of Major Assets and Impairment (IFRSASET)

Networking: Even Accountants Can Mingle (NETMING)

Public Speaking and Presentational Skills for Accountants (SPEAK)

Things That Every CPA Need to Know About IFRS (NEEDIFRS)

Steve McClatchy

Steve McClatchy is an international speaker, trainer, consultant, writer and entrepreneur who has spoken before thousands of audiences who have been delighted with his entertaining style and powerful stories. He leaves each and every participant with a wealth of knowledge delivered in a fun and interactive fashion. Steve founded Alleer Training and Consulting out of his passion for adult learning and for the field of training and development. He has worked in sales, sales management, training and consulting for such organizations as The Pillsbury Company, Broderbund Software, Franklin Covey and Forte Systems.

Alleer has worked with Fortune 500 companies, small to mid-size firms, associations, universities, government agencies, unions, non-profits and more. Alleer's client list includes Major League Baseball, Microsoft, Merck, Disney, Ikea Nestle/Purina, Independence Blue Cross, State Farm Insurance, Wawa, American Cancer Society, Terminix, The

National Basketball Association (NBA) University of Pennsylvania Health System, Nissan, LF Driscoll and Hewlett Packard to name a few.

Steve's presentations are not lectured. The ideas and strategies are facilitated with interaction, exercises, videos and real world examples. His presentations are lively, energetic and filled with his dynamic personality. Thousands of hours of research, testing and design have gone into each topic. The results are programs extremely rich in content and balanced with real world examples.

Steve explains what to do and how to do it in plain English so that participants can apply the concepts and ideas the very same day. Participants walk away from his presentations with knowledge, skills and strategies that put them in greater control and make them more productive.

Steve is one of twelve children and

grew up outside of Philadelphia. He lives with his wife and four kids in Malvern, Pa. He has his BA in both Finance and Economics from the Catholic University of America in Washington DC. He has been involved in the Big Brother/Big Sister program for over twenty years.

COURSES

Effective Consulting Skills - Moving From Subject Matter Expert to Business Consultant (CONSULT)

Interpersonal Leadership - Building Trust and Resolving Conflict (BTRC)

Team Leadership & Leading Change - Get it Right & Make it Last (TLLC)

Time Management and Personal Leadership (TMPL)

R. Donald McDaniel

Don McDaniel is a founder, and President and CEO of Sage Growth Partners (SGP), a health care strategy and technology firm specializing in creating value for organizations in the health care industry and related industries. McDaniel is also a member of the faculty of the Carey Business School of the Johns Hopkins University, teaching health economics and competitive strategy. Prior to his role at SGP, McDaniel has held a series of leadership positions with a variety of health care, technology and insurance organizations, and has served on a number of proprietary and not-for-profit boards.

COURSES

Blue Ocean Innovation: Market-Taker to Market-Maker (2-hour Webcast) (BOI)

The Economics of Health Reform: Implications for Industry & Society (2-hour Webcast) (EHRIIS)

Jody Padar, CPA, MST

Over the past few years, Jody Padar has emerged as a thought leader in the profession—with several educational presentations, webcasts, by-lined articles, and blog posts to her credit. Having successfully transformed her own firm into a technologically advanced, paperless work environment, she is now dedicated to educating her fellow colleagues on how to make the same transition. Jody is a regular contributor to the Accounting Tomorrow blog, where she offers practical tips and advice on running a next-generation firm. She is a key presenter numerous accounting conferences around the country and continues to develop other educational content for the profession. Jody also won back-to-back (2009 & 2010) 40 under 40 awards. This accolade is presented by The CPA Technology Advisor and recognizes accounting professionals who are emerging into leadership roles and are poised to help shape the profession in years to come.

Jody earned her BBA from Saint Mary's College and MST from Northern Illinois University. Jody is also an adjunct professor at Oakton Community College and a contributing member of the Intuit Trainer Writer Network.

Specialties:

Masters of Science in Taxation.
Certified Quickbooks ProAdvisor.

COURSES

Have the Idea and Have the Guts (IDEAGUTS)

Welcome to the Twitterverse, from a CPA Perspective (1-hour webcast) (TWITTER)

You've Got to Move it, Move it! Workflow Un-conference (WORKFLOW)

You Thought it was the Future, It's Now (FUTURNOW)

Dr. Alan Patterson

Dr. Alan Patterson has guided more than a dozen Fortune 500 companies in re-thinking how best to elevate their talent and driving effective organizational change. He has 27 years of international consulting experience in change management, leadership development, and executive coaching. In 2006 he formed Mentoré, a consulting organization that focuses on aligning leadership, strategy, roles, and skill sets to major shifts in the business. Prior to Mentoré Alan worked as a Partner for 20 years at Bryan Associates, Inc., a consulting group specializing in competency-based talent development initiatives.

Alan's expertise has been tapped by many global and national

organizations, including Anheuser-Busch, CVS, Entergy, Federal Reserve Bank, Johnson & Johnson, Hewlett-Packard, Major League Baseball, Merck, Sea World, United States Navy, and Williams Sonoma.

A published author, Alan has been a featured speaker and workshop leader for several national associations, including serving as a national expert resource for the American Institute for CPAs (AICPA) and many state CPA associations. He holds a BA from the University of Wisconsin-Madison, an MA from University of North Carolina-Chapel Hill, and an Ed.D. from Boston University.

COURSES

Building an Adaptive Organization (BAO)

Business Strategy Development: More Than Operational Planning (BSD)

Elevating Team Performance (ETP)

Emerging CFOs and Financial Executives: One on One Assessment and Coaching (EMERGE)

From Controller to CFO: How to Acquire the Skills Needed to Make the Leap (FCCFO)

From Technical Expert to Financial Leader: How to Make a Critical Leap in Your Career Development (2-hour webcast) (FCCFO-W)

From Technical Expert to Financial Leader: How to Manage and Broaden Your Career (BROADEN)

From Technical Expert to Financial Leadership (FINANLDR)

How the Best Financial Executives Create High Performance Organizations (Also available as a 2-hour Webcast) (HPO)

How to Build a Culture that Maximizes Trust, Accountability, and Performance (Available in 4 or 8-hour format) (CNCC)

How to Hire the Right Candidate: A Selection and Interview Process That Gets You What You Need (HIRE)

Identifying, Developing, and Hanging on to Talent (Also available as a 2-hour Webcast) (IDHT)

Integrating Organizations, Blending Values (IOBV)

Leaders as Coaches: Techniques for Maximizing the Development and Retention of Talent (COACH)

Managing Strategic Business Partners (2-hour webcast) (MSBP)

New Leader Development (NLD)

Succession Planning: Developing Tomorrow's Leaders Today (2-hour Webcast) (DTLT)

The Customer Map: A Critical Tool for Developing Business Acumen (CCFO)

The Finance & Accounting Organization as Strategist and Partner to the Business (Also available as a 2-hr webcast) (DICM)

Ray Perry

The founder and president of Skill Track, Ray Perry is a trusted adviser, speaker and coach in the areas of performance management, leadership development, and strategic planning. Leveraging more than 25 years of unique management insight and experience, he has inspired some of America's industry-leading organizations to take action and realize the type of lasting change that unlocks greater performance, morale, and retention (PMR).

Ray consistently brings the same commitment to each client engagement – a genuine interest in helping clients to reach new performance levels, which in turn strengthens the organization's ability to achieve the kind of bottom-line results that stakeholders expect in today's efficiency-minded business culture.

This commitment has earned Ray a stellar record of customer satisfaction while guiding executives, managers

and professionals from hundreds of organizations based in the United States, Europe, Africa, Asia, and the Middle East.

Among the clients Ray has worked with are: American Institute of Certified Public Accountants, Johns Hopkins University and Medical Institutions, Northrop Grumman, Accenture, Lowe's, The National Academy of Sciences, Association of American Medical Colleges, Institute of Medicine, Dartmouth College, Black and Decker, IBM, American Express, Federal Express, and Disney Imagineering.

Prior to Skill Track, Ray served in a variety of management positions for more than 12 years with Nissan North America, where he helped lead numerous affiliate organizations, teams and individuals in achieving their best-ever performance levels.

A native of Rhode Island, Ray earned a BA in psychology and business

administration from Roger Williams University. He is featured in the book, *Leadership: Helping Others to Succeed*, and is a contributing author for the book, *101 Great Ways to Enhance Your Career*.

In addition to being a senior fellow at the Business Learning Institute, Ray also is a member of the National Speakers Association, the International Federation for Professional Speakers, the Society for Human Resource Management, and American Independent Writers.

COURSES

- Employee Motivation and Engagement: Driving Results Without Driving Your (EMPMOTI)
- Managing Multiple Priorities - The Discipline of Getting Things Done (TMIP)
- Organizational Productivity - Practical Strategies for Getting and Staying Organized (GSO)
- Project Management - Delivering Results On Time and Within Budget (OTPM)
- Situational Communication: How to Connect with More People More Often (BGC)
- Situational Delegation - Inspiring Accountability in Your Employees (DFR)
- Strategic Coaching - Growing Top-Notch Performers (SC)
- Strategies for Delivering Exceptional Customer Service More Often (DGCS)
- Team Development - Secrets Behind Building an Award-Winning Team (TBEL)
- The Communication Challenge: Disarming Difficult People (CC)

Gretchen Pisano

Gretchen Pisano is the owner of Sounding Board Ink, LLC, a coaching and consulting practice founded on using the best verbal and visual techniques available to drive positive change in individuals and organizations.

A source of both information and inspiration, Gretchen elicits one's best thinking - facilitating the process of connecting insight to action. Her energy, enthusiasm and expertise creates momentum and enables fresh thinking; her processes equip her clients with the tools and skills to implement their best ideas and replicate the methodologies in other settings.

Described by some as tough-minded and tender-hearted, Gretchen is fluent in strategic thinking, applied positive psychology, and motivating people to change by tapping both their intellect and their emotion. Her skills enable her to simplify complexity and allow her clients to focus on what really

matters.

The results? Her clients gain new insights about their why, what and how and build their skills in communicating those things to others in a way that is easily grasped. The point is to create a better reality, to have fun doing it, and to stay flexible and future-minded in a time of rapid change.

What - Strategy sessions, leadership academies, worldwide annual meetings, national conferences, think tanks, large-scale corporate initiatives, and executive development - essentially, anywhere it matters that the people who are leading are thinking broadly and deeply.

Who With - A sample of the hard-working groups within corporate, government and not-forprofit sectors that she's had the privilege of working with:

-Corporate: Intel, FedEx, Hewlett Packard, Arthur Anderson, Liz Claiborne, Altria Corporation/Philip Morris, Nestle, Royal Dutch Shell,

Quaker, Clos du Bois, Nokia...

-Government: Secretary General's Cabinet of the United Nations, The World Bank, International Finance Corporation, Air and Army National Guard...

-Not-for-Profit: American Institute of CPAs, Richmond Public School System, Administration for Children & Families and the Ocean Conservancy...

How - Master of Applied Positive Psychology, University of Pennsylvania; BS in Business Administration/ Marketing, University of Southern California; Master Certified Coach, Martha Beck Inc., and sixteen years of practical experience.

COURSES

10 Things I Learned from Mothering that Every Executive Should Know (MLW)

Calm in the Midst of Chaos: Techniques & Tips for Managing Stress Levels During Busy Times (CALM)

Change Efforts that Stick (CES)

Coming Home: Strengths-based Leadership for Personal and Organizational Prosperity (COMEHOME)

Embrace Your Inner Superhero (EYIS)

Energy Rich Leadership: The Competitive of the 21st Century (ERL21ST)

I2A: Strategic Thinking that takes Insights to Actions (I2A)

Leadership in the New Normal (LNN)

Learn to Communicate in Ways that Others Can Easily Grasp (GRASP)

MACPA Leadership Academy (LEADACAD)

Personal Leadership in the New Normal (M2M)

The Accidental Alpha: Building Resiliency in Women Leaders (ALPHA)

The Five Doorways of Health and Well-Being (FIVEDOOR)

The Well Compensated Mother: Strength-based Leadership Strategies for the Working Mother (WORKMOM)

The Positivity Link Series (PLINK 1-8)

Andrew Rose

Andrew Rose is the Director of Marketing and Business Development with Naden/Lean, LLC. Andrew oversees the marketing, business development, strategic alliances/alternate channel distribution, and direct sales. An innovative marketing authority, Andrew is frequently asked to speak to groups about Cold-Calling Techniques, Vertical Marketing Strategies, Marketing without a Budget, Tactical Joint Marketing, Business Development, Search Engine Optimization (SEO), Search Engine Marketing (SEM) and Networking.

Andrew is also deeply involved in the non-profit community, sitting on or advising several non-profit boards. Andrew has had excellent results in founding and chairing various peer support and networking/referral based groups. He founded the Marketing Director's Support Group in 2003, a well-respected, educational forum for marketing directors of professional firms in the Baltimore region.

Andrew is a dedicated outdoor enthusiast who currently relishes in summiting 14ers in Colorado.

Member of: AAM, AMA, LMA and founder of MDSG.

COURSES

Best Practices for Facebook – Professionals (FACEBOOK)

Best Practices for LinkedIn – Professionals (LINKEDIN)

Practical Networking and Business Development for CPAs (NETBD)

Social Media Bootcamp for Professional Service Firms (BASECAMP)

Using Social Media for Lead Generation (SOMELEAD)

Francis Ryan, MBA, CPA, CGMA

Frank is president of a management consulting firm specializing in turnarounds, workouts, crisis management, strategic planning and working capital management. He has extensive experience working with banks in negotiating forbearance agreements, loan workouts, capital restructuring, vendor negotiations and bank lending requirements. Frank is a leading expert in Lean Operations and Management and has implemented numerous lean applications for organizations.

Prior to his consulting business, Mr. Ryan was the chief operating officer of a mid-sized manufacturing company. Additionally, he has served as the chairman of the Audit Committees of two publicly traded companies and has extensive board level experience in for profit and non-profit arenas.

Frank is currently President of the Board of Directors of the Good Shepherd Center in Maryland as well as on the Audit Committee of the Archdioceses of Baltimore.

He is a retired Colonel in the United States Marine Corps and has served in numerous contingency operations to include Haiti, Afghanistan and Iraq. He received the "Outstanding AICPA Instructor" award in 1994-95, & again since 2005 when the award was reactivated.

Frank is a recipient of the AICPA Outstanding Discussion Leader Award for 2010.

COURSES

Activity Based Costing for Accounting and Finance Professionals: A case study approach (ABCFR)

Avoiding Bankruptcy - Surviving the Recession (A Case Study Approach) (ABSR)

Challenges for Financial Professionals (CHALCFO)

Critical Performance Measures - Useful Tools for Gauging Success (CPMUT)

Current Economic Issues and Their Impact on the Financial Professional (CEICFO)

Dealing with Economic Uncertainty: The Recession (DEU)

Economic Value Added - Maximizing Shareholder Value (Frank Ryan) (EVAMS)

Effective Communications (ECFR)

Enterprise Risk Management and Forecasting (ERMF)

Ethics: Principles, Case Studies & Fraud (ETHCASES)

Ethics Principles and Applications (Also available as a 4-hour Webcast) (EPA)

Ethics, Leadership and the Role of the CPA (Also available as a 4-hour Webcast) (EAA1)

Ethics, Leadership and the Role of the Financial Professional (EAA2)

Financial and Accounting Decision Making in a Slowly Recovering Economy (Also available as a 2-hour Webcast) (STR)

Financial Warfare (FINWAR)

It Cost What! A Practical Approach to Implementing Activity Based Costing (COSTWHAT)

Key Financial and Economic Issues Facing the Financial Executive (KEYFINAN)

Leading, Mentoring and Team Building (LMTB-4)

Lean Management in a Lean Economy (LMLE)

Providing Your Own Bailout (PYOB)

Strategic and Operational Planning and Forecasting (SOPF)

Matthew Ryan, CFE

Matt currently works in the audit & assurance division of a Pittsburgh-based public accounting firm, with experience in financial, transportation, and defense/manufacturing company audits. He also has extensive experience in agreed upon procedures testing and, in early 2012, served as an auditor in support of a Department of Justice investigation into the Gulf Coast Claims Facility, a multi-billion dollar facility created by British Petroleum (BP) following the Deepwater Horizon incident in April 2010.

In addition to public accounting, Matt works with his father, Frank Ryan, as a co-owner of a management consulting firm specializing in turnarounds, workouts, crisis management, strategic planning and due diligence research.

Outside of his work in public accounting and consulting, Matt has served for over 10 years in the Pennsylvania Army National Guard. In 2009, then-First Lieutenant Ryan

deployed to Iraq as a Company Executive Officer and Brigade Medical Logistics Officer, key roles in the overall medical operations of the 56th Stryker Brigade Combat Team. Still a member of the National Guard, Matt holds the rank of Captain and serves as Company Commander for a 160-soldier Distribution/Logistics unit based in Lebanon, PA.

Matt earned his B.S. in Finance from The Pennsylvania State University and is currently an MBA candidate at The Wharton School, University of Pennsylvania (Class of 2013). He earned his Certified Fraud Examiner license in 2012 and is currently working on earning his CPA license.

COURSES

Ethics: Principles, Case Studies and Fraud (ETHCASES)

It Cost What! A Practical Approach to Implementing Activity Based Costing (COSTWHAT)

Key Financial and Economic Issues Facing the Financial Executive (KEYFINAN)

Thomas Selling, Ph.D., CPA

Tom Selling is the author of the Accounting Onion (www.accountingonion.com), one of the most popular weblogs providing investor-oriented commentary on current financial reporting issues that affect public companies. He has produced and led over 150 executive and professional courses on finance, U.S. accounting standards, international accounting standards and the SEC in sixteen countries; and he frequently serves as an expert witness and consultant on accounting matters.

Prior to joining the Thunderbird School of Global Management in 1992, where Tom is now an emeritus professor, he served a one-year term as the Academic Fellow in the Office of the Chief Accountant of the U.S. Securities & Exchange Commission (SEC). He also served on the faculties of the Tuck School at Dartmouth College, Sloan School at MIT, and the Babcock School at Wake Forest University. He has a Ph.D.

in Accounting from the Ohio State University, and a B.S. and MBA from Cornell University.

In the area of financial reporting, Tom has published numerous articles in academic and professional journals including *The Accounting Review*, *Accounting Horizons* and *Financial Analysts' Journal*. He is a co-author of the textbook, *International Financial Reporting and Analysis* (McGraw-Hill Publishing Company), and for the past year has been a co-author of *SEC Compliance: Financial Reporting and Forms*, a monthly loose leaf and online service published by Thomson Reuters.

Tom is also President (and a co-founder) of Grove Technologies LLC, producer of hosted web-based collaboration software marketed as GroveSite (www.grovesite.com). GroveSite's enrolled users number approximately 20,000 worldwide.

COURSES

Accounting Considerations for Mergers and Acquisitions, Including Business Combinations (ACM)

Accounting for International Operations (AIOPS)

Derivatives and Hedge Accounting: The Essentials (HEDGE)

The Essentials of SEC Financial Reporting (ESEC)

Understanding International Financial Reporting Standards (IFRS) From a U.S. GAAP Perspective (UIFRSGAA)

William Sheridan, CAE

Bill is the Maryland Association of CPAs' e-communications manager and editor and one of the CPA profession's most enthusiastic social media cheerleaders.

A member of the MACPA team since 2000, he is creator and co-writer of CPA Success (www.CPASuccess.com), the MACPA's daily blog and one of the profession's leading voices in the blogosphere. He also is creator, writer and producer of CPA Spotlight, a weekly podcast that examines issues of importance to CPAs; and creator of a series of electronic newsletters that provide MACPA members with headlines and resources in four subject areas (taxation, technology, resources for CPA firms, and resources for CPAs in business and industry).

Bill has built a blog called CPA Learning 2.0, designed to help teach CPAs and staffers at state CPA societies more about social media tools. Modeled after a similar program developed by the Public Library of Charlotte and Mecklenburg County

in North Carolina, the blog and its 34 social media assignments are open to the public at www.CPALearning2.com.

As editor, Bill oversees content for both the MACPA's Web site and its quarterly member magazine, the Statement. His articles about the MACPA and the CPA profession have appeared in Association Management and SmartCEO magazines and have been distributed nationally by the American Institute of CPAs.

Before joining the MACPA, Bill spent more than a decade as both a print and online journalist. He also is a freelance writer and holds a bachelor's degree in communication from the State University of New York at Buffalo.

Follow him on:

Twitter: [Twitter.com/BillSheridan](https://twitter.com/BillSheridan)

Facebook: [Facebook.com/BillSheridan](https://facebook.com/BillSheridan)

LinkedIn: [LinkedIn.com/in/BillDSheridan](https://linkedin.com/in/BillDSheridan)

FriendFeed: [FriendFeed.com/BillSheridan](https://friendfeed.com/BillSheridan)

COURSES

Blog 101: First Steps to Stardom (1-hour Webcast) (BLOG101)

Brand You: How to Be a Leader and Boost Your Career - With a Little Help From Social Media (1-hour Webcast) (BRANDYOU)

CPAs and Social Media: Passing Fad or Valuable Tool? (2-hour Webcast) (CSM)

LinkedIn 101: The Basics - and Beyond (1-hour Webcast) (LINK101)

Twitter 101: Changing Your World 140 Characters at a Time (1-hour Webcast) (TWIT101)

Web 2.0: Less Hype, More Help (WEB20)

Mark Slatin

Mark has a passion for helping clients who love what they do but are struggling to grow their revenues. He believes that his client's success directly depends on the confidence their clients have in them. Mark brings over 20 years of experience growing multi-million dollar teams in the Fortune 100. He has generated consistent results as VP Sales and Marketing for a variety of organizations as an outsourced consultant, and been a member of Trusted Advisor Associates, certified to deliver training on trusted advisor principles and has been a senior BLI Instructor since 2009.

Most recently Mark worked for EntreQuest a consulting firm that specialized on corporate visioning, strategy and execution of that strategy in various business sectors. Mark founded True Colors Consulting in 2007 and served as President until it was acquired by EntreQuest in March, 2010. His clients come from a variety of industries including

computer hardware, accounting and financial services, legal, office products and furniture, marketing and other professional services. He was a Trusted Advisor Associate, part of a select group of consultants licensed to deliver programs based on best-selling author Charles H. Green's books, *The Trusted Advisor* and *Trust-Based Selling*.

In his role as a Contributing Editor for *OnPoint Magazine* (a trade publication for the office products industry) and for *The Independent Dealer Magazine* (in the same industry), he writes about topics that provide readers with valuable selling insights en route to higher profits.

He serves as an Adjunct Professor at Loyola University in Maryland teaching Sales Management and Strategies to MBA students.

In his 25 years in sales and sales management at Fortune 500 companies, he has always had a

passion to serve people. During his 13 year career at Boise Cascade/OfficeMax, he led a sales organization serving the mid-Atlantic from \$27 million to \$50 million while achieving record profits.

Mark has served as a Co-Chairperson of the Small Business Council of the Howard County Chamber of Commerce and Vice President of Public Relations for Toastmasters International's Johns Hopkins University APL Chapter.

He holds a Bachelor of Science in Marketing from the University of Maryland, and a MBA from Loyola University in Maryland.

COURSES

Growing Your Business: (Session 1) "The Power of Trusting Relationships" (1-hour Webcast) (TCSWEB1)

Growing Your Business: (session 2) "The 4 Components of Trust" (1-hour Webcast) (TCSWEB2)

Growing Your Business: (Session 3) "Creating Client Value" (1-hour Webcast) (TCSWEB3)

Growing Your Business: (Session 4) "Listening to Build Trust" (1-hour Webcast) (TCSWEB4)

Growing Your Business (Session 5) "The Trust Selling Cycle" (1-hour Webcast) (TCSWEB5)

Listening to Build Trust (LBT)

Trust Centered Selling: How to Attract and Retain Loyal Clients through Trusting Relationships (Also available in a series of five 1-hour webcasts) (TCS)

Stuart Sobel

Stuart P. Sobel is the President of Tax Media Network, Inc., which is located in Indianapolis, Indiana. He has many years of unique experience and wisdom which can be shared with audiences

His firm Stuart Sobel Consulting, Inc. provided tax consulting in many areas including tax planning, business creation, tax-exempt filing, strategic planning, charitable giving, employee benefits, and tax-free exchanges. He has helped to create thousands of diverse businesses and nonprofit organizations including public charities, trade associations, and athletic organizations worldwide. Stuart has helped to form international entities in a number of countries including Belize, Senegal, Central African Republic, El Salvador, Mexico, Lebanon, Suriname, Guinea, Sierra Leone, Ghana, Cameroon, Bulgaria, Romania, Zimbabwe, Iraq, Philippines, Romania, Kenya, Congo, Zambia, and Nicaragua.

During his 30 years working for the Internal Revenue Service, Stuart held a number of positions including Internal Revenue Agent, Chief Examination Branch, Chief Review Staff, and Group Manager. His responsibilities

included oversight of the audit selections, examination of tax returns, and technical approval of completed cases. Stuart has served on the board of the Indianapolis Small Business Administration Service Corps of Retired Executives (SCORE) where he holds "Emeritus" status. He is a retired member of the board of the Central Indiana Better Business Bureau which covers 46 counties and where he served as both treasurer and chairman of the Charities Program.

Stuart has taught numerous workshops for organizations such as the United Autoworkers Union, AT&T, General Motors, and the National Treasury Employees Union. The organizations provided these workshops for their employees who were contemplating starting a business upon their retirement or displacement from employment.

Stuart taught business startup, nonprofit management, accounting and several tax courses as a member of the adjunct faculty of Indiana University – Bloomington, Indiana University Southeast – New Albany, and Indiana University/Purdue University of Indianapolis. He is on contract with and teaches CPAs

and other financial professionals tax planning throughout the United States for Surgent McCoy CPE, LLC and Western CPE, Inc. He also conducts training programs for a myriad of other groups such as trade associations, community foundations, government agencies, and private businesses.

For eight years Stuart was the producer and host of his own radio program called Wise Choices: Taxes and Charity Today, which aired weekly on radio stations throughout the United States. He has often appeared as a charity and tax expert on Indianapolis Fox television channel WXIN 59's AM News and CBS channel WISH 8's Religion in Indiana. The media has referred to him as the "Guru of Giving".

He is the author of four books dealing with taxation and nonprofit issues. He loves to make taxation less "taxing" for the mind and wallet.

COURSES

The Complete Guide to Understanding Challenging Nonprofit Tax and Form 990 Issues (F990)

The Top 50 Mistakes Practitioners Make and How to Fix Them: Dealing with the Internal Revenue Service (IRSM)

The Top 50 Mistakes Practitioners Make in Nonprofit Taxation & Governance Issues and How to Fix Them (GIBB)

Jerry Solomon

As a practitioner, Jerry Solomon has had a unique opportunity to implement Lean enterprise techniques as he's held the positions of Chief Financial Officer and Vice President of Manufacturing simultaneously at three middle market manufacturing companies. In his dual role he was able to cast aside traditional departmental barriers and galvanize the accounting and manufacturing areas during the Lean journey.

While Chief Financial Officer of Vermont Castings Inc., Mr. Solomon redesigned the accounting procedures and teamed with the operating folks to provide user friendly reporting that facilitated the improvement process taking place on the production floor.

Mr. Solomon then became the CFO and VP of Manufacturing at PACE, Inc., an electronics manufacturing firm providing equipment to the telecommunications, consumer electronics, automotive, computer and medical industries. Mr. Solomon led the Lean transformation that resulted in customer lead-time reductions of 75%, productivity improvements

of 64%, space reductions of 50%, quality improvements of 100%, and a doubling of inventory turns. In addition to the improvements taking place on the plant floor, the cost accounting system was simplified and the use of MRP for executing the production plan was eliminated in favor of a pull system with electronic links to all suppliers. As a result of these efforts, PACE, Inc. was certified as a World-Class company by the Maryland World Class Manufacturing Consortium, the first and only company awarded this distinction in the Consortium's ten-year history.

Currently Mr. Solomon is the VP of Operations - Hunt Valley, for MarquipWardUnited, the largest division of the Barry-Wehmiller Companies Inc., the Western Hemisphere's leading packaging automation and converting group. Mr. Solomon is leading the Lean transformation efforts in both the manufacturing and financial areas.

Mr. Solomon has a B. S. degree from Clarkson University, an M. S. degree from Michigan Technological

University and an M. B. A. degree from the University of Chicago. He's served on the Board of Directors of Vermont Castings Inc. as well as the Green Mountain Economic Development Corporation. He's been an instructor in Lean Accounting, is on the Board of Directors of the Maryland World Class Manufacturing Consortium as well as serves as the Chairman of the Vendor Certification Committee. Mr. Solomon is the author of the Shingo Award winning book, *Who's Counting?*, a highly acclaimed business novel focusing on the interaction of manufacturing and accounting during a Lean transformation, and *Leading Lean*, a novel about a three day Lean event. Mr. Solomon brings a unique perspective to the requirements of manufacturers in their quest to achieve World Class performance.

COURSES

Lean Accounting for the Lean Enterprise (LEAN)

Robert Tarola, CPA

Robert M. Tarola, CPA, president of Right Advisory LLC, offers a unique perspective to address business and professional challenges of accountants, auditors, attorneys, governance bodies and finance professionals.

He has extensive experience as a public company director, public company CFO and public company auditor. He is a former Chief Financial Officer of W. R. Grace & Co. (NYSE: GRA) and MedStar Health, Inc. both of which are multi-billion dollar businesses with complex multinational operations. In these positions he had responsibility for worldwide financial services, which included financial accounting and reporting, treasury and taxation, financial planning, investor relations, internal auditing, and investment management.

Prior to serving 12 years as a CFO, Mr. Tarola was a partner with Price Waterhouse LLP. During his 22 year tenure with Price Waterhouse, he

served in a variety of capacities, including regional managing partner for a strategic industry segment, a partner in its National SEC Services Group and an engagement partner for major client accounts.

Mr. Tarola is a director of public mutual funds sponsored by Legg Mason, Inc.; a director of publicly traded TeleTech Holdings Inc. (NASDAQ: TTEC), a director of the American Kidney Fund, and has served on the boards of directors of several health and community organizations. Mr. Tarola holds a Bachelor of Business Administration degree from Temple University and has chaired the Advisory Board to the President of the University.

Mr. Tarola is an at-large member of the governing council of the American Institute of Certified Public Accountants, a member of its Assurance Services Executive Committee, a past member of the Board of Directors of the Maryland

Association of Certified Public Accountants, and holds licenses to practice accountancy in four states. He is a member of the Standing Advisory Group of the Public Company Accounting Oversight Board for the 2006-2008 Term, a member of the Advisory Board of the School of Accountancy of the University of Denver and of the Merrick School of Business of the University of Baltimore, and is listed in the International Who's Who of Professionals.

COURSES

Audit Risk - Beyond the Balance Sheet (ARBBS)

Enterprise Risk Management - Accountability Framework (ERMAF)

Ethics in Accounting (EIA)

Insights From The C-Suite (IFCS)

Ray Thompson, CMA, CFM, CBA

Dr. Ray Thompson is Emeritus Associate Professor of Accounting & Finance at the University of Pittsburgh. He served as department head at the UPJ campus for over 25 years. He was also Associate Director of UPJ's Entrepreneurial Development Assistance Project, where he was involved in financial consulting and assisting in preparing loan proposals for small business start-ups.

He has taught in graduate and undergraduate business programs in Europe, Africa and the US. He received his B.S. and M.S. degrees in Economics and Systems Dynamics from the University of Bradford in the United Kingdom, his

M.B.A. in Accounting from Xavier University of Ohio, and his Doctor of Business Administration from Nova University. Ray is also certified in Financial Management and is a Certified Management Accountant and Certified Business Appraiser. He recently became certified in International Financial Reporting Standards through the Institute of Chartered Accountants in England and Wales.

Ray is a professional educator and writer. He authors and conducts professional development seminars for Fortune 500 and international corporations, multinational financial institutions, State CPA Societies, and

CPA firms throughout the US. In addition to these live seminars, he also produces both recorded and written courses for self study. He also provides business valuation services and consults with accounting firms and sole practitioners on a range of accounting issues in the area of valuation. Ray was part of the George & Ray team which offered Accounting & Auditing courses for over 20 years.

Ray is a member of the Institute of Management Accountants and the Institute of Business Appraisers. He is also a faculty associate member of AICPA and PICPA, and is a member of the Financial Reporting Faculty of ICAEW.

COURSES

A Practical Guide to Business Combination Standards: Coming to Terms with FASB Statements 141, 142 & 146 [ASC 805] (BUSCOMB)

Accounting & Auditing Current Developments (PAAA)

Accounting Standards Review for Controllers and Finance Professionals (Latest Edition) (FRI)

AICPA's Financial Reporting Framework for Small-to-Medium-Sized Entities: What You Need to Know Right Now (FRF)

Big GAAP, Little GAAP, and AICPA's Framework for Small-to-Medium-sized Entities Compared – What Direction Should We Take with Financial Reporting? (BLO)

BLI's Ethics Update for CPAs in Business & Industry (EUBI)

Ethics and the Attest Function: A Practical Update for CPAs in Public Practice (PEU)

FASB / SAS Update (Latest Edition) (FSU)

Guide to Compilation, Review and the Cash and Tax Basis of Accounting (Latest Edition) (CRO)

Hot Topics in Accounting & Auditing (HTAA)

Lease Accounting - Overview & Implementation Issues (LEASE)

Preparing for the Coming Wave of Accounting Standards (WAVE)

Preparing for the Coming Wave of Accounting Standards: Financial Instruments, Debt & Equity Accounting and Comprehensive Income (WAVEFINS)

Preparing for the Coming Wave of Accounting Standards: IFRS GAAP Convergence (WAVEIFRS)

Preparing for the Coming Wave of Accounting Standards: Lease Accounting (WAVELEAS)

Preparing for the Coming Wave of Accounting Standards: Fair Value Measurement (WAVEFVM)

Revenue Recognition - Overview & Implementation Issues (REVREC)

Understanding IFRS 2012: A Hands-On, How to Approach (UIFRS)

Kelly Watkins

Kelly J. Watkins, MBA, is an international speaker with 20 years of speaking experience. She is the author of five books and 135+ articles. Kelly is president of Expressive Concepts, a company which specializes in Motivational Keynotes and customized Communication Training. Kelly has an MBA in Marketing and International Business and a B.S. with Distinction in Marketing.

Kelly is an adjunct college instructor. She is a regular columnist for two magazines on communication-related topics. She has been quoted by Gannett News Service (100+ newspapers) as an email expert. One of Kelly's books is Email Etiquette Made Easy.

Kelly has been a course facilitator for the AICPA since 2001, has written two full-day courses for the AICPA and has created 14 on-line courses for the AICPA. She has written a feature article for the Journal of Accountancy

and has served as Consultant to the state societies of the AICPA for 18 months. She has facilitated 17 Forums for State CPA Societies.

Kelly is Chair-elect, International Forum, National Association of Women Business Owners, Past President of the National Speakers Association/KY(Board of Directors for 10 years), a member of the American Society for Training and Development and a member of Business and Professional Women. She has fulfilled a life-long dream by traveling to all 50 US states and all seven continents. Kelly was selected as one of only 100 US delegates to attend the Canada/US Trade Summit.

Kelly Watkins has witnessed communication and leadership from awesome to awful - all over the planet (on all seven continents).

COURSES

ABC's: Above and Beyond Customer Service - Improving Service Improves Your Bottom Line (ABCSI)

E-Talk: Tips for Using Email Efficiently & Effectively (ETALK)

How to Communicate Like a Leader (CLL)

How to Survive Negative Times by Using Positive Communication - Your key to Increased Productivity and Profitability (POSCOM)

Improve Productivity by Avoiding Conflict & Miscommunication (PACM)

It's Not What You Say, It's How You Say It (ITSNOT)

Meetings Made Easy (and Effective) (MME)

Training: How to Effectively (and Painlessly) Teach Your Staff (TRAIN)

Will the Audience Throw Eggs? - How to Present with Professionalism & Pizzazz (PIZZAZ)

Curtis Zimmerman

Both as a speaker and as an author, Curtis Zimmerman has impacted over one million people throughout the nation with his life-changing messages and award winning programs. Audiences connect with Curtis through his interactive style and approachable manner. He incorporates the skills he gained from over twenty-five years in the entertainment industry into his powerful programs, cleverly balancing the connection between education and entertainment. Curtis is an expert at transforming organizations by inspiring individuals to live their life at a higher level of performance.

His deeply profound insight and perspective coupled with his high energy presentations have made him a highly sought after speaker among such notable companies as Walt Disney Entertainment, Swiss Army Brands, Luxottica Retail and Procter and Gamble.

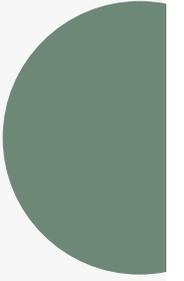
Curtis is the author of I Believe...What do you Believe?, Keys to Success in

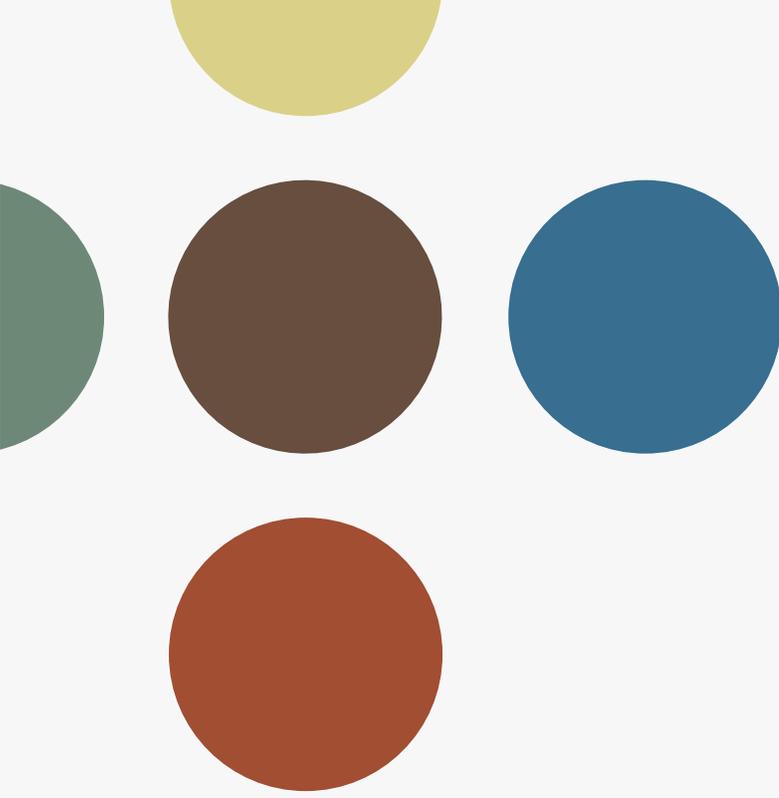
College and Life, and a contributing author to Pillars of Success and Lessons from the Road. He was honored to share his message with more than 14,000 Airmen for the United States Air Force and received the prestigious National Leadership Award for outstanding service from United States Congressman Tom Reynolds and is a member of the National Speakers Association.

COURSES

[Living Life at Performance Level \(keynote\) \(LIVELIFE\)](#)







ALL EVENTS
BY **TOPIC**

Accounting

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|----------|--|
| RRGAAP | A “Real-Life” Look at Revenue Recognition in Today’s GAAP & What May Lie Ahead new |
| NTAA | A Basic Overview for Non-CPAs and Those Charged with Governance of the Most Critical Issues Faced by the Accounting & Auditing Profession Today |
| BUSCOMB | A Practical Guide to Business Combination Standards: Coming to Terms With FASB Statements 141, 142 & 146 (ASC 805) new |
| FRF | AICPA’s Financial Reporting Framework for Small-to-Medium-Sized Entities: What You Need to Know Right Now new |
| PAAA | Accounting and Auditing Current Developments 2012 |
| ACM | Accounting Considerations for Mergers and Acquisitions, Including Business Combinations |
| AIOPS | Accounting for International Operations |
| ACCREAL | Accounting for Real Estate - The Critical Issues of GAAP Compliance new |
| ACCSERV | Accounting Services, Compilations, and Reviews - A “Real-Life” Look at Your Risks |
| FRI | Accounting Standards Review for Controllers and Finance Professionals (Latest Edition) |
| ASGC | Accounting Systems for Government Contractors |
| ADVIFRS | Advanced IFRS Update new |
| AAUI | Annual Accounting Update for Industry |
| BLO | Big GAAP, Little GAAP, and AICPA’s Framework for Small-to-Medium-sized Entities Compared – What Direction Should We Take with Financial Reporting? |
| CONSTACC | Construction Accounting - A “Real-Life” Inside Look at Critical Issues new |
| CONVGAAP | Convergence: Changes Coming to US GAAP new |
| CPAMAL | CPA Malpractice - Am I at Risk of a Lawsuit? new |
| LGAA | Customized Annual Update for Accountants and Auditors |
| DITFIN48 | Deferred Income Taxes and FIN 48 new |
| HEDGE | Derivatives and Hedge Accounting: The Essentials |
| EXESUMAA | Executive Summary Accounting & Auditing for Industry |
| FSU | FASB / SAS Update (Latest Edition) |
| FIN48 | FIN 48 new |
| FSRGAAP | Financial Statement Reporting - Select Problem Areas in Today’s GAAP new |
| CRO | Guide to Compilation, Review and the Cash and Tax Basis of Accounting (Latest Edition) |
| IFRSUPDT | IFRS Update |
| IFRSGAAP | IFRS vs. US GAAP: Is there an App That? |
| IFRSB | International Financial Reporting Standards (IFRS) |
| IFRS5000 | International Financial Reporting Standards (IFRS) From 5,000 Feet |

Accounting CONT.

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| IARG | Introduction to the Accounting Requirements of Government Contracts new |
| COSTWHAT | It Cost What! A Practical Approach to Implementing Activity Based Costing |
| LEASE | Lease Accounting - Big Changes Ahead new |
| SSARS | Mastering the Standards Related to Compilation & Review Engagements new |
| IFRSASET | Measurement of Major Assets and Impairment new |
| NAVAASTD | Navigating the New Accounting and Auditing Standards |
| RSRCHCOD | Performing Research Using the Codification |
| PAANFP | Practical Accounting and Auditing Issues Facing Nonprofit Entities |
| PAAUGNE | Practical Accounting and Auditing Update for Governmental and Nonprofit Entities |
| PEXAAI | Practical Explanations of Accounting & Auditing Updates for Industry new |
| WAVE | Preparing for the Coming Wave of Accounting Standards |
| WAVEFINS | Preparing for the Coming Wave of Accounting Standards: Financial Instruments, Debt & Equity Accounting and Comprehensive Income |
| WAVEIFRS | Preparing for the Coming Wave of Accounting Standards: IFRS GAAP Convergence |
| WAVELEAS | Preparing for the Coming Wave of Accounting Standards: Lease Accounting |
| REVREC | Preparing for the Coming Wave of Accounting Standards: Revenue Recognition |
| WAVEFVM | Preparing for the Coming Wave of Accounting Standards: Fair Value Measurement |
| PIU | Professional Issues Update |
| LEASACCT | Proposed Lease Accounting -How Do You Run an Airline Without Airplanes? |
| IFRSJL | The Impact of IFRS and Other Global Standards on Private Entities (Also available as a 2 hour webcast) |
| NEEDIFRS | Things That Every CPA Need to Know About IFRS |
| UIFRS | Understanding IFRS 2012: A Hands-On, How to Approach |
| VARAA | Various Accounting/Auditing - Selectives |

Audit

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| BUSCOMB | A Practical Guide to Business Combination Standards: Coming to Terms With FASB Statements 141, 142 & 146 (ASC 805) new |
| PAAA | Accounting and Auditing Current Developments 2012 |
| ACCREAL | Accounting for Real Estate - The Critical Issues of GAAP Compliance new |
| ABB | Auditing Bits in Bytes (Also available in eight 2-hour webcast sessions) (ABB) |
| A133 | Audits in Accordance with Yellow Book |
| AWAC | Best Practices for Audits in Compliance with Government Auditing Standards and OMB Circular A-133 |
| CPAMAL | CPA Malpractice - Am I at Risk of a Lawsuit? new |
| LGAA | Customized Annual Update for Accountants and Auditors |
| DITFIN48 | Deferred Income Taxes and FIN 48 new |
| RAS | Effective and Efficient Risk-Based Financial Statement Audit in Compliance with Yellow Book (Also a 2-hour Webcast) |
| EXESUMAA | Executive Summary Accounting & Auditing for Industry |
| FSU | FASB / SAS Update (Latest Edition) |
| GCIC | Government Contractors and Indirect Cost Rates: Preparation and Surviving the Government Audit new |
| INFSFA-W | How Audited Entity Mngmnt. and Governance Can Influence a More Effective & Efficient Finan'l Stmtnt Audit (Also available as a 4-hour webcast) |
| IND | Independence & Objectivity for Attest Service Providers |
| NJQUEST | It's not Just the Question: Using Effective Communication Skills and Professional Skepticism while Gathering Information and Evidence |
| LEASE | Lease Accounting - Big Changes Ahead new |
| NAVAASTD | Navigating the New Accounting and Auditing Standards |
| PAANFP | Practical Accounting and Auditing Issues Facing Nonprofit Entities |
| PAAUGNE | Practical Accounting and Auditing Update for Governmental and Nonprofit Entities |
| PEXAAI | Practical Explanations of Accounting & Auditing Updates for Industry new |
| WAVE | Preparing for the Coming Wave of Accounting Standards |
| WAVEFINS | Preparing for the Coming Wave of Accounting Standards: Financial Instruments, Debt & Equity Accounting and Comprehensive Income |
| WAVEIFRS | Preparing for the Coming Wave of Accounting Standards: IFRS GAAP Convergence |
| WAVELEAS | Preparing for the Coming Wave of Accounting Standards: Lease Accounting |
| WAVEFVM | Preparing for the Coming Wave of Accounting Standards: Fair Value Measurement new |
| TOP5-W | Top 5 Ways to Get the Most Value for Your Audit Fees (2-hour Webcast) |
| MLC8 | Value-Added Internal Control Communications that Comply with the Standards - Detailed Analysis and Case Studies (4-hr Overview available) |
| VARAA | Various Accounting/Auditing - Selectives |

Balanced Scorecard

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| CPM-W | Critical Performance Measures: Useful Tools for Gauging Success (2-hour Webcast) |
| CPM | Critical Performance Measures: Useful Tools for Gauging Success |
| BALSCORE | Planning and Implementing the Balanced Scorecard |
| SR | Sustainability Reporting |
| TRIPLE | Sustainability: Using the "Triple Bottom Line" to Increase Your Success |

Banking / Financial Institutions

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| CONSTACC | Construction Accounting - A "Real-Life" Inside Look at Critical Issues new |
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Business Development

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| BUZZ | Build Your Book of Business with Better Brand Buzz |
| BDS | Business Development Skills for Accountants |
| BITEE | Business Innovation in The Experience Economy (Also available as a 1-hour webcast) new |
| BPLAN-3 | Business Planning: A Managerial Accounting Approach - Advanced Level new |
| BPLAN-1 | Business Planning: A Managerial Accounting Approach - Basic Level new |
| BPLAN-2 | Business Planning: A Managerial Accounting Approach - Intermediate Level new |
| BSD | Business Strategy Development: More Than Operational Planning |
| CONSULT | Effective Consulting Skills - Moving From Subject Matter Expert to Business Consultant new |
| NRISK-3 | Enterprise Risk Management: A Pragmatic Approach - Advanced Level new |
| NRISK-1 | Enterprise Risk Management: A Pragmatic Approach - Basic Level new |
| NRISK-2 | Enterprise Risk Management: A Pragmatic Approach - Intermediate Level new |
| FINDND | Find a Need and Fill It: Your Key to Business Development (Also available as a 2-hour Webcast) |
| TCSWEB5 | Growing Your Business (Session 5) "The Trust Selling Cycle" (1-hour Webcast) |
| TCSWEB4 | Growing Your Business: (Session 4) "Listening to BuildTrust" (1-hour Webcast) |
| TCSWEB1 | Growing Your Business: (Session 1) "The Power of Trusting Relationships" (1-hour Webcast) |
| TCSWEB2 | Growing Your Business: (session 2) "The 4 Components of Trust" (1-hour Webcast) |
| TCSWEB3 | Growing Your Business: (Session 3) "Creating Client Value" (1-hour Webcast) |

Business Development CONT.

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| IDEAGUTS | Have the Idea and Have the Guts <small>new</small> |
| IFCS | Insights From The C-Suite |
| IOBV | Integrating Organizations, Blending Values |
| LISTEN | Listening for Leaders: Ask the Question, Discover the Need, Win the Trust |
| MRS | Making Rain: Strategies for Client Service, Selling and Negotiating (Also available as a 2-hour Webcast) |
| MLSFOUND | Making Learning Stick <small>new</small> |
| MLSIMMER | Making Learning Stick: Immersion and Application <small>new</small> |
| LTM | Learning That Matters (1-hour webcast) <small>new</small> |
| NETMING | Networking: Even Accountants Can Mingle |
| PIU | Professional Issues Update |
| MINDB | Reading Clients' Minds and Understanding How They're Reading Yours |
| UPSS | Selling for CPAs: Using Your Problem-Solving Skills to Promote Profitable Business Growth |
| CCFO | The Customer Map: A Critical Tool for Developing Business Acumen |
| DICM | The Finance & Accounting Organization as Strategist and Partner to the Business (Also available as a 2-hr webcast) |
| TCS | Trust Centered Selling: How to Attract and Retain Loyal Clients through Trusting Relationships (Also available in a series of five 1-hour webcasts) |
| BDCAMP | Turning Trust into Value: Business Development Boot Camp |
| TWITTER | Welcome to the Twitterverse, from a CPA Perspective (1-hour webcast) <small>new</small> |
| WHAT | Why You? Positioning Yourself Ahead of the Pack |
| DNA | Winning New Business - It's in the DNA |
| FUTURNOW | You Thought it was the Future. It's Now! <small>new</small> |

Business Law

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| MBA | The Eight Hour MBA <small>new</small> |
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Business Valuation

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| SSVS | Business Valuations in a SSVS* World (*Statement on Standards for Valuation Services) |
| LOYAL | Using Business Valuations to Keep Your Clients Loyal |

Business Writing

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| BPAFW | Best Practices in Accounting and Finance Writing: Being Clear and Accurate (2-hour Webcast) |
| MBW | Best Practices in Writing -for the Financial Services Professional |
| BBW | Better Business Writing |
| CAREER | Career Management: What's Next for You? |
| PFICE | Presenting Financial Information Clearly and Effectively |
| SEVEN | Seven Secrets of Successful Business Writing |

Career

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| COMEDY | Building Stronger Teams by Using Improvisational Comedy <small>new</small> |
| CAREER | Career Management: What's Next for You? |
| EMERGE | Emerging CFOs and Financial Executives: One on One Assessment and Coaching |
| WHO | Finding Your Way Through Career Transitions |
| FSSF | Five Smooth Stones - Facing Goliath and Winning |
| FCCFO | From Controller to CFO: How to Acquire the Skills Needed to Make the Leap |
| FCCFO-W | From Technical Expert to Financial Leader: How to Make a Critical Leap in Your Career Development (2-hour webcast) |
| GOODGRN | On Good Ground: Creating A Personal Strategy for a Great Life |
| SCCPM | Skillful Coaching: Careers and Performance Matter |
| SGS | SMART Goal Setting: Setting Goals to Achieve and Contribute |
| INVENT | What Next? Inventing a New Niche for Yourself |

Cash Flow

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| ICCL | Improve Cash Collections With Lean |
| LEAN | Lean Accounting for the Lean Enterprise |

Cash Management

ODM Operational Decision Making with Lean Accounting

Change Management

- BAO Building an Adaptive Organization
- CES Change Efforts that Stick
- SDSS From Slow Death to Sweet Success: Seven Survival Strategies
- CNCC How to Build a Culture that Maximizes Trust, Accountability, and Performance (Available in 4 or 8-hour format)
- LMF Leader vs. Manager vs. Facilitator: When, Why, How? (Also available as a 2-hour Webcast)
- LFMO Leadership in Fast-Moving Organizations
- IVAC Leadership in the Midst of Change: What Do I Do Monday Morning?
- APAI Leading Change: Action Planning to Actual Implementation
- SPF Strategic Planning Facilitation: Developing the High Performance Organization
- TLLC Team Leadership & Leading Change - Get it Right & Make it Last **new**
- MBA The Eight Hour MBA **new**

Coaching & Counseling

- IMPACT Coaching for Impact - Generational Diversity **new**
- CONSULT Effective Consulting Skills - Moving From Subject Matter Expert to Business Consultant **new**
- EMERGE Emerging CFOs and Financial Executives: One on One Assessment and Coaching
- IRP Hire the Lucky Ones - How to Improve Retention and Productivity by Selecting Fortunate Employees
- HIREFIRE Hiring, Firing and Everything in Between
- COACH Leaders as Coaches: Techniques for Maximizing the Development and Retention of Talent
- MAGYV MacGyvering: The Art of Being Resourceful in a Crisis (Also available as a 2-hour webcast)
- NLD New Leader Development
- PESPM Performance Execution: Succession Planning and Mentoring **new**
- RM Sharing Skills Between Generations
- SCCPM Skillful Coaching: Careers and Performance Matter
- SC Strategic Coaching - Growing Top-Notch Performers

Codification

NAVAASTD Navigating the New Accounting and Auditing Standards

Communication Skills / Communications

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| FCAS | Advanced Consulting for CPAs: Enhancing and Expanding Your Client Relationships |
| AWESOME | Awesome Financial Presentations |
| FACEBOOK | Best Practices for Facebook – Professionals new |
| LINKEDIN | Best Practices for LinkedIn – Professionals new |
| BPAFPIO | Best Practices in Accounting and Finance Writing: Putting Ideas in Order (2-hour Webcast) |
| BPAFW | Best Practices in Accounting and Finance Writing: Being Clear and Accurate (2-hour Webcast) |
| BBW | Better Business Writing |
| BLOG101 | Blog 101: First Steps to Stardom (1-hour Webcast) new |
| BRANDYOU | Brand You: How to Be a Leader and Boost Your Career - With a Little Help From Social Media (1-hour Webcast) new |
| TCPC | Build a Team by Teambuilding! |
| BCCC | Building a Culture of Conversation: Communication with a Purpose, For Results |
| CAREER | Career Management: What's Next for You? |
| IMPACT | Coaching for Impact - Generational Diversity new |
| CYS | Coaching Staff to Stay on the Right Track (Also available as a 2-hour Webcast) |
| CSM | CPAs and Social Media: Passing Fad or Valuable Tool? (2-hour Webcast) |
| CRW | Creating a Respectful Workplace |
| DDP | Dealing with Difficult People |
| CANDO | Delivering Credibility on the Phone - Conveying a "Can Do!" Attitude |
| DCS | Developing a Communication Strategy |
| ECFR | Effective Communications |
| CONSULT | Effective Consulting Skills - Moving From Subject Matter Expert to Business Consultant new |
| EMPMOTI | Employee Motivation and Engagement: Driving Results Without Driving Your Team Crazy new |
| ETALK | E-Talk: Tips for Using Email Efficiently & Effectively |
| EXCEPCUS | Exceptional Customer Service - Effective Communication new |
| EPRES | Executive Presence: An Experiential Approach to Networking & Negotiation |
| FSM | Fundamentals of Strategic Management new |
| LEAF | Getting Things Done - Engaging People to Execute Effectively (Also available as a 2-hour Webcast) |

Communication Skills / Comm. CONT.

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| CNCC | How to Build a Culture that Maximizes Trust, Accountability, and Performance (Available in 4 or 8-hour format) |
| CLL | How to Communicate Like a Leader |
| POSCOM | How to Survive Negative Times by Using Positive Communication - Your Key to Increased Productivity and Profitability |
| C3E | I Said, You Said: 3 Steps to Effective Communication |
| I2A | I2A: Strategic Thinking that takes Insights to Actions |
| PACM | Improve Productivity by Avoiding Conflict & Miscommunication <small>new</small> |
| BTRC | Interpersonal Leadership - Building Trust and Resolving Conflict |
| DPSI | It's All in the Presentation: Designing Presentations to Sell Ideas Effectively |
| NJQUEST | It's not Just the Question: Using Effective Communication Skills and Professional Skepticism while Gathering Information and Evidence |
| ITSNOT | It's Not What You Say, It's How You Say It |
| GENSHIFT | Leadership and Retaining Talent: How the Generational Shifts Changing Leadership |
| LATB | Leadership and the Blogger |
| LCV | Leadership: Communicating the Vision; Aligning the Values |
| MCWP | Leadership: Execution and Greatness - Great Ideas That Work |
| GRASP | Learn to Communicate in Ways that Others Can Easily Grasp <small>new</small> |
| LINK101 | LinkedIn 101: The Basics - and Beyond (1-hour Webcast) |
| LISTEN | Listening For Leaders: Ask the Question, Discover the Need, Win the Trust |
| LBT | Listening to Build Trust |
| MBC | Message-Based Communication |
| MP | Mingling for Professionals (Mingle, Mingle) |
| NETMING | Networking: Even Accountants Can Mingle |
| PELTPSTW | Performance Execution: Long-Term Planning in a Short-Term World <small>new</small> |
| PESPM | Performance Execution: Succession Planning and Mentoring <small>new</small> |
| PSWY | Personality Styles: What You Absolutely Should Know About Yourself & Others |
| BGRAPHIC | PowerPoint: Create Dynamic Financial Presentations with Business Graphics |
| NETBD | Practical Networking and Business Development for CPAs |
| PSW | Presentation Skills Workshop |
| MBP | Presentation Skills: Message Based Presentations |
| PFDFNA | Presenting Financial Data to Non-Financial Audiences - Avoiding Over-simplification |
| PFICE | Presenting Financial Information Clearly and Effectively |

Communication Skills / Comm. CONT.

| | |
|----------|---|
| POWPRE | Producing Powerful Presentations: Performance and Profit new |
| SPKPRES | Public Speaking: How to Speak with Presence (Also available as a 1-hr webcast) |
| MINDB | Reading Clients Minds and Understanding How They're Reading Yours |
| SEVEN | Seven Secrets of Successful Business Writing |
| BGC | Situational Communication: How to Connect with More People More Often new |
| BASECAMP | Social Media Bootcamp for Professional Service Firms |
| SOCMED | Social Media Strategy & Quick Start: Developing and Implementing a SocialMedia Strategy for CPA Firms & Organizations |
| SUSN | Strategic Uses of Social Networks and Blogs |
| DGCS | Strategies for Delivering Exceptional Customer Service More Often |
| INQ | Strengthen the Inquiry Skills You Need to Gather Evidence (Also available as a 2-hour webcast) |
| SCMC | Strengthening Collaboration and Managing Conflict |
| TBEL | Team Development - Secrets Behind Building an Award-Winning Team new |
| TLLC | Team Leadership & Leading Change - Get it Right & Make it Last |
| CC | The Communication Challenge: Disarming Difficult People new |
| POWRCONV | The Power of Successful Conversations new |
| TWIT101 | Twitter 101: Changing Your World 140 Characters at a Time (1-hour Webcast) |
| SOMELEAD | Using Social Media for Lead Generation |
| WEB20 | Web 2.0: Less Hype, More Help new |
| TWITTER | Welcome to the Twittiverse, from a CPA Perspective (1-hour webcast) |
| 21CNEG | Why Don't We Say Yes? 21st Century Negotiating |
| DNA | Winning New Business - It's in the DNA |

Conflict Management

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| CRW | Creating a Respectful Workplace |
| DDP | Dealing with Difficult People |
| PACM | Improve Productivity by Avoiding Conflict & Miscommunication |
| BTRC | Interpersonal Leadership - Building Trust and Resolving Conflict new |
| SCMC | Strengthening Collaboration and Managing Conflict |
| CC | The Communication Challenge: Disarming Difficult People |

Consulting

FCAS :: Advanced Consulting for CPAs: Enhancing and Expanding Your Client Relationships

Controllership

EVAMS :: Economic Value Added - Maximizing Shareholder Value

Corporate Finance

FRI :: Accounting Standards Review for Controllers and Finance Professionals (Latest Edition)

Cost / Managerial Accounting

ABCFR :: Activity Based Costing for Accounting and Finance Professionals: A case study approach

COSTWHAT :: It Cost What! A Practical Approach to Implementing Activity Based Costing

Creative Thinking

CREATE :: Creating Creativity: Outside - Outside the Box

CPS :: Creative Problem Solving

ELITE :: Focus, Form and Flow: The Disciplines of the Elite Mind **new**

IDEAGUTS :: Have the Idea and Have the Guts

SMART :: Smarter Decision-Making

INVENT :: What Next? Inventing a New Niche for Yourself

FUTURNOW :: You Thought it was the Future. It's Now! **new**

Customer Service

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| ABCSI | ABC's: Above and Beyond Customer Service - Improving Service Improves Your Bottom Line |
| BITEE | Business Innovation in The Experience Economy(Also available as a 1-hour webcast) new |
| CANDO | Delivering Credibility on the Phone - Conveying a "Can Do!" Attitude |
| EXCEPCUS | Exceptional Customer Service - Effective Communication new |
| TCSWEB5 | Growing Your Business (Session 5) "The Trust Selling Cycle" (1-hour Webcast) |
| TCSWEB4 | Growing Your Business: (Session 4) "Listening to BuildTrust" (1-hour Webcast) |
| TCSWEB1 | Growing Your Business: (Session 1) "The Power of Trusting Relationships" (1-hour Webcast) |
| TCSWEB2 | Growing Your Business: (session 2) "The 4 Components of Trust" (1-hour Webcast) |
| TCSWEB3 | Growing Your Business: (Session 3) "Creating Client Value" (1-hour Webcast) |
| DGCS | Strategies for Delivering Exceptional Customer Service More Often |
| TALENT | Talent Management - People as a Competitive Advantage in "Not Normal" Times (Keynote) new |
| CCFO | The Customer Map: A Critical Tool for Developing Business Acumen |

Delegation

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| LCDE | Leadership: Coaching to Develop and Empower - Accountability, Delegation and Dialogue (Also available as a 2-hour Webcast) |
| DFR | Situational Delegation - Inspiring Accountability in Your Employees |

Economics

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| CEICFO | Current Economic Issues and Their Impact on the Financial Professional |
| DEU | Dealing with Economic Uncertainty: The Recession |
| EU | Economic Update: The Slow, Winding Road to Recovery |
| STR | Financial and Accounting Decision Making in a Slowly Recovering Economy(Also available as a 2-hour Webcast) |
| KEYFINAN | Key Financial and Economic Issues Facing the Financial Executive new |
| PYOB | Providing Your Own Bailout |
| EHRIS | The Economics of Health Reform: Implications for Industry & Society (2-hour Webcast) |

Emotional Intelligence

- EI Emotional Intelligence and Personal Leadership
- PLINK 1-8 The Positivity Link Series **new**

Ethics - Behavioral

- AERW Applying Ethics in the Real World **new**
- COT8 Champions of Trust
- ETHHABIT Ethics Can Be Habit-Forming: Good Habits, Bad Habits & Turning One into the Other **new**
- ETHICSUR Ethics for People Who Don't Like Surprises: Why We Don't See It Coming Until It's Too Darn Late **new**
- EIA Ethics in Accounting
- EPA Ethics Principles and Applications (Also available as a 4-hour Webcast)
- TDBL Ethics: Caesar's Wife: Tipping the Delicate Balance of Leadership and Ethics(Also available as a 4-hour Webcast)
- BECCI Ethics: Confronting the Challenge of Integrity
- ETHICHOW Ethics: It's Not Just What You Do, but How You Do It! **new**
- STRAY Ethics: Why We Stray: A Different Look at Ethical Decision-Making
- ETHHABIT Ethics Can Be Habit-Forming: Good Habits, Bad Habits and Turning One into the Other

Ethics - Regulatory

- CELT A Matter of Integrity
- AERW Applying Ethics in the Real World **new**
- EUBI BLI's Ethics Update for CPAs in Business & Industry
- ETH Ethics
- PEU Ethics and the Attest Function: A Practical Update for CPAs in Public Practice
- EAA1 Ethics, Leadership and the Role of the CPA (Also available as a 4-hour Webcast)
- EAA2 Ethics, Leadership and the Role of the Financial Professional (4-hour Webcast)
- ETHCASES Ethics: Principles, Case Studies & Fraud **new**

Etiquette

- BDE Business Dining Etiquette
- MPI Maintaining a Professional Image in a Business Casual World
- PCBE Professionalism, Civility and Business Etiquette

Finance

- CONSTACC Construction Accounting - A "Real-Life" Inside Look at Critical Issues **new**
- HEDGE Derivatives and Hedge Accounting: The Essentials
- BGCF Executive Finance for Operating Leaders: Relating Numbers and Metrics to Reality
- FSA Financial Statements Analysis **new**
- LIONS Lions, and Tigers, and Numbers Oh My! Finance for the Non-Financial Manager
- SSF Strategic Skills for Finance **new**
- ESEC The Essentials of SEC Financial Reporting

Financial Analysis

- FRI Accounting Standards Review for Controllers and Finance Professionals (Latest Edition)
- EVAMS Economic Value Added - Maximizing Shareholder Value
- FSA Financial Statements Analysis **new**
- AF-120 Forecasting Techniques for Accounting and Finance Professionals (5-hour webcast) **new**
- LIONS Lions, and Tigers, and Numbers Oh My! Finance for the Non-Financial Manager
- MBA The Eight Hour MBA **new**

Financial Knowledge for Non-Accountants

- BGCF Executive Finance for Operating Leaders: Relating Numbers and Metrics to Reality
- LIONS Lions, and Tigers, and Numbers Oh My! Finance for the Non-Financial Manager
- PFDNFA Presenting Financial Data to Non-Financial Audiences -Avoiding Over-simplification

Financial Management

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| AIOPS | Accounting for International Operations |
| CHALCFO | Challenges for Financial Professionals |
| CPAMAL | CPA Malpractice - Am I at Risk of a Lawsuit? new |
| CEICFO | Current Economic Issues and Their Impact on the Financial Professional |
| HEDGE | Derivatives and Hedge Accounting: The Essentials |
| EVAMS | Economic Value Added - Maximizing Shareholder Value |
| FINWAR | Financial Warfare |
| AF-120 | Forecasting Techniques for Accounting and Finance Professionals (5-hour webcast) new |
| CRO | Guide to Compilation, Review and the Cash and Tax Basis of Accounting (Latest Edition) |
| KEYFINAN | Key Financial and Economic Issues Facing the Financial Executive new |
| ODM | Operational Decision Making with Lean Accounting |
| RNLA | Real Numbers Through Lean Accounting (2-hour Webcast) |
| MBA | The Eight Hour MBA new |

Financial Reporting

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| RRGAAP | A "Real-Life" Look at Revenue Recognition in Today's GAAP & What May Lie Ahead new |
| ACM | Accounting Considerations for Mergers and Acquisitions, Including Business Combinations |
| AIOPS | Accounting for International Operations |
| ACCREAL | Accounting for Real Estate - The Critical Issues of GAAP Compliance new |
| ACCSERV | Accounting Services, Compilations, and Reviews - A "Real-Life" Look at Your Risks new |
| AAUI | Annual Accounting Update for Industry |
| FRF | AICPA's Financial Reporting Framework for Small-to-Medium-Sized Entities: What You Need to Know Right Now new |
| BLO | Big GAAP, Little GAAP, and AICPA's Framework for Small-to-Medium-sized Entities Compared – What Direction Should We Take with Financial Reporting? new |
| AWAC | Best Practices for Audits in Compliance with Government Auditing Standards and OMB Circular A-133 |
| CONSTACC | Construction Accounting - A "Real-Life" Inside Look at Critical Issues new |
| DITFIN48 | Deferred Income Taxes and FIN 48 new |
| RAS | Effective and Efficient Risk-Based Financial Statement Audits in Compliance with Yellow Book (Also a 2-hour Webcast) |
| EXESUMAA | Executive Summary Accounting & Auditing for Industry |

Financial Reporting CONT.

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| FIN48 | FIN 48 new |
| FSRGAAP | Financial Statement Reporting - Select Problem Areas in Today's GAAP new |
| ICDEAFR | Internal Control - What You Need to Know to Design, Evaluate and Audit Internal Control Over Financial Reporting new |
| ICDNP | Internal Controls Design, Evaluation and Communication for Not-for-profits (Also available as a 2-hour Webcast) |
| ICDEC | Internal Controls for Smaller Entities - Practical Case Studies in Design, Evaluation and Communication (Also available as a 2-hour Webcast) |
| SSARS | Mastering the Standards Related to Compilation & Review Engagements new |
| PAANFP | Practical Accounting and Auditing Issues Facing Nonprofit Entities |
| PAAUGNE | Practical Accounting and Auditing Update for Governmental and Nonprofit Entities |
| PEXAAI | Practical Explanations of Accounting & Auditing Updates for Industry new |
| REVREC | Preparing for the Coming Wave of Accounting Standards: Revenue Recognition |
| ESEC | The Essentials of SEC Financial Reporting |
| TOP5-W | Top 5 Ways to Get the Most Value for Your Audit Fees (2-hour Webcast) |
| UIFRSGAA | Understanding International Financial Reporting Standards (IFRS) From a U.S. GAAP Perspective |

Forecasting

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| BACKCAST | Better Forecasting Using Backcasting |
| CPMUT | Critical Performance Measures - Useful Tools for Gauging Success (FrankRyan) |
| CPM | Critical Performance Measures: Useful Tools for Gauging Success |
| CPM-W | Critical Performance Measures: Useful Tools for Gauging Success (2-hour Webcast) |
| EVAMS | Economic Value Added - Maximizing Shareholder Value |
| ERMF | Enterprise Risk Management and Forecasting new |
| FSA | Financial Statements Analysis new |
| AF-120 | Forecasting Techniques for Accounting and Finance Professionals (5-hour webcast) new |
| WINPLAN | Preparing a Winning Business Plan |
| SOPF | Strategic and Operational Planning and Forecasting |

Fraud

FRAUD : Fraud: Detection and Prevention

Generational Issues

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| GENDIF | Are Generational Differences Helping or Hindering Your Team? |
| CAREER | Career Management: What's Next for You? |
| IMPACT | Coaching for Impact - Generational Diversity |
| CSM | CPAs and Social Media: Passing Fad or Valuable Tool? (2-hour Webcast) |
| RTMC | Developing and Retaining Talent -- an Organization Imperative |
| LMF | Leader vs. Manager vs. Facilitator: When, Why, How? (Also available as a 2-hour Webcast) |
| GCMMG | Leadership and Generations: What Are They Thinking? (Also available as a 4-hour webcast) |
| GENSHIFT | Leadership and Retaining Talent: How the Generational Shifts Changing Leadership |
| LPAI | Leadership: Power and Influence |
| MMG | Managing Multiple Generations: Next Steps and New Surprises(Available as a keynote) |
| NEWNORM | Next Steps in the New Normal World (1 hour webcast) |
| RM | Sharing Skills Between Generations |
| TALENT | Talent Management - People as a Competitive Advantage in "Not Normal" Times (Keynote) |
| GRUMP | The New Workforce - New Data, New Ideas, Aging Baby Boomers |
| WORKFLOW | You've Got to Move it, Move it! Workflow Un-conference |

Governance

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| NPG | A Commitment to Community: Nonprofit Board Service and CPAs |
| CHALCFO | Challenges for Financial Professionals |

Health Care

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| EHRIS | The Economics of Health Reform: Implications for Industry & Society (2-hour Webcast) |
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IFRS

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| ACM | Accounting Considerations for Mergers and Acquisitions, Including Business Combinations |
| ADVIFRS | Advanced IFRS Update new |
| IFRSUPDT | IFRS Update |
| IFRSGAAP | IFRS vs. US GAAP: Is there an App That? |
| IFRSB | International Financial Reporting Standards (IFRS) |
| IFRS5000 | International Financial Reporting Standards (IFRS) From 5,000 Feet |
| IFRS3 | International Financial Reporting Standards: An Overview of the Looming Change to Global Standards |
| IFRSASET | Measurement of Major Assets and Impairment new |
| REVREC | Preparing for the Coming Wave of Accounting Standards: Revenue Recognition |
| PIU | Professional Issues Update |
| IFRSJL | The Impact of IFRS and Other Global Standards on Private Entities (Also available as a 2 hour webcast) |
| NEEDIFRS | Things That Every CPA Need to Know About IFRS |
| UIFRS | Understanding IFRS 2012: A Hands-On, How to Approach |
| UIFRSGAA | Understanding International Financial Reporting Standards (IFRS) From a U.S. GAAP Perspective |

Information Technology

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| ADOBE-L | Adobe Acrobat Best Practices for CPAs |
| ETALK | E-Talk: Tips for Using Email Efficiently & Effectively |
| OFADBWIN | Excel + Outlook + Word + Adobe Acrobat + Windows 7 - Improve Personal Productivity new |
| EXWDADOB | Excel + Word+ Adobe Acrobat Features and Productivity Tips |
| EXCELA-L | Excel Advanced Productivity Features, Pivot Tables & Macro Recorder Tips |
| EXCLBOOT | Excel Boot Camp for CPAs new |
| EXCELC-L | Excel Charts, Graphs and Diagram Features |
| EXCLDABG | Excel Data Analysis Techniques and Business Graphics new |
| EXCELPT | Excel for Auditors: Pivot Tables in- depth, Data Analysis Functions & Tips |
| EXCELM-L | Excel Power User: Macro Programming using Visual Basic for Applications |
| EXCEL-L | Excel Refresher and Update |
| EXCELBEG | Excel Worksheets for Beginners new |

Information Technology CONT.

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| INFOSECU | Information Security End User Training <small>new</small> |
| OFFIC10 | Microsoft Office 2010 New Features Update with an Emphasis on Excel 2010 |
| OUTLK-L | Outlook 2010 Update and Best Practices for CPAs |
| BGRAPHIC | PowerPoint: Create Dynamic Financial Presentations with Business Graphics |
| BASECAMP | Social Media Bootcamp for Professional Service Firms <small>new</small> |
| SOCMED | Social Media Strategy & Quick Start: Developing and Implementing a Social Media Strategy for CPA Firms & Organizations |
| SUSN | Strategic Uses of Social Networks and Blogs |
| WEB20 | Web 2.0: Less Hype, More Help |
| TWITTER | Welcome to the Twitterverse, from a CPA Perspective (1-hour webcast) <small>new</small> |
| WORDBEG | Word Document Formatting for Beginners <small>new</small> |
| WORD-L | Word Productivity Features and Time-Saving Tips |

Internal Control

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| ABB | Auditing Bits in Bytes |
| ABB1 | Auditing Bits in Bytes Session 1: Pre-Engagement Planning Activities (2-hour Webcast) |
| ABB2 | Auditing Bits in Bytes Session 2: Preliminary Planning Activities (2-hour Webcast) |
| ABB3 | Auditing Bits in Bytes Session 3: Internal Control Considerations (2-hour Webcast) |
| ABB4 | Auditing Bits in Bytes Session 4 Assessing & Responding to Risk (2-hour Webcast) |
| ABB5 | Auditing Bits in Bytes Session 5: Substantive Testing (2-hour Webcast) |
| ABB6 | Auditing Bits in Bytes Session 6: Engagement Wrap-Up (2-hour Webcast) |
| ABB7 | Auditing Bits in Bytes Session 7: Identifying, Evaluating and Communicating Internal Control Deficiencies (2-hour Webcast) |
| ABB8 | Auditing Bits in Bytes Session 8: Quality Control Considerations (2-hour Webcast) |
| AWAC | Best Practices for Audits in Compliance with Government Auditing Standards and OMB Circular A-133 |
| RAS | Effective and Efficient Risk-Based Financial Statement Audits in Compliance with Yellow Book (Also a 2-hour Webcast) |
| EBPA | Employee Benefit Plan Auditing |
| INSFSA-W | How Audited Entity Mngmnt. and Governance Can Influence a More Effective & Efficient Financial Statement Audit (Also available as a 4-hour webcast) |

Internal Control CONT.

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| ICDEAFR | Internal Control - What You Need to Know to Design, Evaluate and Audit Internal Control Over Financial Reporting new |
| IDCNP | Internal Controls Design, Evaluation and Communication for Not-for-profits (Also available as a 2-hour Webcast) |
| ICDEC | Internal Controls for Smaller Entities - Practical Case Studies in Design, Evaluation and Communication (Also available as a 2-hour Webcast) |
| SOXW | Sarbanes-Oxley Section 404: What Everyone Needs to Know About Internal Controls |
| INQ | Strengthen the Inquiry Skills You Need to Gather Evidence (Also available as a 2-hour webcast) |

Leadership

| | |
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| MLW | 10 Things I Learned from Mothering that Every Executive Should Know (keynote) |
| NPG | A Commitment to Community: Nonprofit Board Service and CPAs |
| GENDIF | Are Generational Differences Helping or Hindering Your Team? |
| FALTT | At the Helm in the Storm: Seven Survival Strategies for Leaders in Turbulent Times |
| COMEDY | Building Stronger Teams by Using Improvisational Comedy new |
| LUAC | Challenge Thinking to Succeed |
| CHALCFO | Challenges for Financial Professionals |
| IMPACT | Coaching for Impact - Generational Diversity new |
| COMEHOME | Coming Home: Strengths-based Leadership for Personal and Organizational Prosperity new |
| EYIS | Embrace Your Inner Superhero |
| EMERGE | Emerging CFOs and Financial Executives: One on One Assessment and Coaching |
| EI | Emotional Intelligence and Personal Leadership |
| ERL21ST | Energy Rich Leadership: The Competitive of the 21st Century (keynote) new |
| ESTM | Essential Skills for CPA Firm Managers |
| TDBL | Ethics: Caesar's Wife: Tipping the Delicate Balance of Leadership and Ethics (Also available as a 4-hour Webcast) |
| ELITE | Focus, Form and Flow: The Disciplines of the Elite Mind new |
| FCCFO | From Controller to CFO: How to Acquire the Skills Needed to Make the Leap |
| SDSS | From Slow Death to Sweet Success: Seven Survival Strategies |
| FCCFO-W | From Technical Expert to Financial Leader: How to Make a Critical Leap in Your Career Development (2-hour webcast) |
| BROADEN | From Technical Expert to Financial Leader: How to Manage and Broaden Your Career new |

Leadership CONT.

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| FINANLDR | From Technical Expert to Financial Leadership new |
| FSM | Fundamentals of Strategic Management new |
| LEAF | Getting Things Done - Engaging People to Execute Effectively (Also available as a 2-hour Webcast) |
| LSHIFT | Goodbye Leadership. Hello Leadership! (1-hour Webcast) |
| GTOG | Great to Good: Using the Lessons of Good to Great AND How the Mighty Fall |
| CLL | How to Communicate Like a Leader |
| BTRC | Interpersonal Leadership - Building Trust and Resolving Conflict new |
| COACH | Leaders as Coaches: Techniques for Maximizing the Development and Retention of Talent |
| LA-4 | Leadership and Authenticity |
| GCMMG | Leadership and Generations: What Are They Thinking? (Also available as a 4-hour webcast) |
| GENSHIFT | Leadership and Retaining Talent: How the Generational Shifts Changing Leadership |
| LATB | Leadership and the Blogger |
| LEADDIFF | Leadership from a Slightly Different Perspective |
| IMPROV | Leadership Improv - Why "Fake It Until You Make It" Works |
| LFMO | Leadership in Fast-Moving Organizations |
| IVAC | Leadership in the Midst of Change: What Do I Do Monday Morning? |
| LNN | Leadership in the New Normal |
| LIO | Leadership Inside Out: Discovering the Leader Within |
| LFAA | Leadership: Alignment and Accountability |
| LCDE | Leadership: Coaching to Develop and Empower - Accountability, Delegation and Dialogue (Also available as a 2-hour Webcast) |
| MCWP | Leadership: Execution and Greatness - Great Ideas That Work |
| LMPN | Leadership: Motivation -- The Power of Needs, Styles and Ownership |
| PSPE | Leadership: Personal Style and Personal Effectiveness |
| LPAI | Leadership: Power and Influence |
| MLT | Leading and Managing: More and Less Than You Think |
| APAI | Leading Change: Action Planning to Actual Implementation |
| LMTB-4 | Leading, Mentoring and Team Building |
| LISTEN | Listening For Leaders: Ask the Question, Discover the Need, Win the Trust |
| LEADACAD | MACPA Leadership Academy |
| NLD | New Leader Development |
| PELTPSTW | Performance Execution: Long-Term Planning in a Short-Term World new |

Leadership CONT.

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| PESPM | Performance Execution: Succession Planning and Mentoring new |
| M2M | Personal Leadership in the New Normal |
| DTLT | Succession Planning: Developing Tomorrow's Leaders Today (2-hour Webcast) |
| TLLC | Team Leadership & Leading Change - Get it Right & Make it Last new |
| PIRATE | The "Pirate CPA": Leadership, Teamwork & Balance in Dangerous Times new |
| ALPHA | The Accidental Alpha: Building Resiliency in Women Leaders new |
| BLM | The Balanced Leader-Manager: Using the Right Leadership Style |
| FIVEDOOR | The Five Doorways of Health and Well-Being (keynote) new |
| WORKMOM | The Well Compensated Mother: Strength-based Leadership Strategies for the Working Mother |
| TMPL | Time Management and Personal Leadership new |
| TRANLEAD | Transitions to Leadership |
| SMLT | Your Strengths, Your Management Talent, Your Leadership: Making a Difference for You and Others |

Lean Accounting

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| ICCL | Improve Cash Collections With Lean |
| LEAN | Lean Accounting for the Lean Enterprise |
| LHR | Lean and Human Resources (HR) |
| LMLE | Lean Management in a Lean Economy |
| ODM | Operational Decision Making with Lean Accounting |
| RNLA | Real Numbers Through Lean Accounting (2-hour Webcast) |
| SR | Sustainability Reporting |
| TRIPLE | Sustainability: Using the "Triple Bottom Line" to Increase Your Success |

Management

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| IMPACT | Coaching for Impact - Generational Diversity new |
| ETP | Elevating Team Performance |
| EMPMOTI | Employee Motivation and Engagement: Driving Results Without Driving Your Team Crazy new |
| ESTM | Essential Skills for CPA Firm Managers |
| FCCFO | From Controller to CFO: How to Acquire the Skills Needed to Make the Leap |

Management CONT.

| | |
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| FCCFO-W | From Technical Expert to Financial Leader: How to Make a Critical Leap in Your Career Development (2-hour webcast) |
| FSM | Fundamentals of Strategic Management <small>new</small> |
| POSCOM | How to Survive Negative Times by Using Positive Communication - Your Key to Increased Productivity and Profitability |
| MLT | Leading and Managing: More and Less Than You Think |
| NLD | New Leader Development |
| NEWNORM | Next Steps in the New Normal World (1 hour webcast) <small>new</small> |
| PELTPSTW | Performance Execution: Long-Term Planning in a Short-Term World <small>new</small> |
| PESPM | Performance Execution: Succession Planning and Mentoring <small>new</small> |
| HEO | Performance, Productivity and Profit: Creating the Higher Energy Organization |
| BLM | The Balanced Leader-Manager: Using the Right Leadership Style |
| GRUMP | The New Workforce - New Data, New Ideas, Aging Baby Boomers |
| INFL | The Power to Influence and Connect |
| TRAIN | Training: How to Effectively (and Painlessly) Teach Your Staff |
| TRANLEAD | Transitions to Leadership |
| WORKFLOW | You've Got to Move it, Move it! Workflow Un-conference <small>new</small> |
| SMLT | Your Strengths, Your Management Talent, Your Leadership: Making a Difference for You and Others |

Marketing

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| BUZZ | Build Your Book of Business with Better Brand Buzz |
| DMBD | Business Development: Distinctions Between Marketing and Sales(1-hour Webcast) |
| ESTM | Essential Skills for CPA Firm Managers |
| FINDND | Find a Need and Fill It: Your Key to Business Development (Also available as a 2-hour Webcast) |
| TCSWEB5 | Growing Your Business: (Session 5) "The Trust Selling Cycle" (1-hour Webcast) |
| TCSWEB4 | Growing Your Business: (Session 4) "Listening to BuildTrust" (1-hour Webcast) |
| TCSWEB1 | Growing Your Business: (Session 1) "The Power of Trusting Relationships" (1-hour Webcast) |
| TCSWEB2 | Growing Your Business: (session 2) "The 4 Components of Trust" (1-hour Webcast) |
| TCSWEB3 | Growing Your Business: (Session 3) "Creating Client Value" (1-hour Webcast) |
| MRS | Making Rain: Strategies for Client Service, Selling and Negotiating (Also available as a 2-hour Webcast) |
| PSIE | Special Delivery: Delivering Presentations to Sell Ideas Effectively |
| TWITTER | Welcome to the Twitterverse, from a CPA Perspective (1-hour webcast) <small>new</small> |
| WHAT | Why You? Positioning Yourself Ahead of the Pack |

Meetings

- MME Meetings Made Easy (and Effective)
- PSIE Special Delivery: Delivering Presentations to Sell Ideas Effectively
- PIZZAZ Will the Audience Throw Eggs? - How to Present with Professionalism & Pizzazz

Negotiation

- EPRES Executive Presence: An Experiential Approach to Networking & Negotiation
- MRS Making Rain: Strategies for Client Service, Selling and Negotiating (Also available as a 2-hour Webcast)
- 21CNEG Why Don't We Say Yes? 21st Century Negotiating

Performance Management

- CPMUT Critical Performance Measures - Useful Tools for Gauging Success
- CPM-W Critical Performance Measures: Useful Tools for Gauging Success (2-hour Webcast)
- CPM Critical Performance Measures: Useful Tools for Gauging Success
- ETP Elevating Team Performance
- ESTM Essential Skills for CPA Firm Managers
- FIX Finally Fixing Performance Management Using New Tools
- HIREFIRE Hiring, Firing and Everything in Between
- HPO How the Best Financial Executives Create High Performance Organizations (Also available as a 2-hour Webcast)
- IDHT Identifying, Developing, and Hanging on to Talent (Also available as a 2-hour Webcast)
- LFAA Leadership: Alignment and Accountability
- PMIFC Managing Performance to Implement Strategy
- MLSFOUND Making Learning Stick **new**
- MLSIMMER Making Learning Stick: Immersion and Application **new**
- LTM Learning that Matters (1-hour Webcast) **new**
- MOTIVATE Motivating and Retaining Your Top Performers (1-hour webcast) **new**
- BALSCORE Planning and Implementing the Balanced Scorecard
- REVRECOG Revenue Recognition - Where We Are Headed **new**

Performance Management CONT.

| | |
|--------|---|
| SC | Strategic Coaching - Growing Top-Notch Performers |
| SR | Sustainability Reporting |
| TRIPLE | Sustainability: Using the "Triple Bottom Line" to Increase Your Success |
| TBEL | Team Development - Secrets Behind Building an Award-Winning Team |
| TLLC | Team Leadership & Leading Change - Get it Right & Make it Last <small>new</small> |
| WTC | Wrongful Termination Claims are on the Rise - Are You Protected? |

Personal Development

| | |
|----------|---|
| MLW | 10 Things I Learned from Mothering that Every Executive Should Know (keynote) |
| NPG | A Commitment to Community: Nonprofit Board Service and CPAs |
| FALTT | At the Helm in the Storm: Seven Survival Strategies for Leaders in Turbulent Times |
| BPAFPIO | Best Practices in Accounting and Finance Writing: Putting Ideas in Order (2-hour Webcast) |
| COMEDY | Building Stronger Teams by Using Improvisational Comedy <small>new</small> |
| BDE | Business Dining Etiquette |
| CALM | Calm in the Midst of Chaos: Techniques & Tips for Managing Stress Levels During Busy Times |
| COMEHOME | Coming Home: Strengths-based Leadership for Personal and Organizational Prosperity <small>new</small> |
| CRW | Creating a Respectful Workplace |
| CREATE | Creating Creativity: Outside - Outside the Box |
| CANDO | Delivering Credibility on the Phone - Conveying a "Can Do!" Attitude |
| EYIS | Embrace Your Inner Superhero |
| ERL21ST | Energy Rich Leadership: The Competitive of the 21st Century (keynote) <small>new</small> |
| ELITE | Focus, Form and Flow: The Disciplines of the Elite Mind <small>new</small> |
| FSSF | Five Smooth Stones - Facing Goliath and Winning |
| SDSS | From Slow Death to Sweet Success: Seven Survival Strategies |
| BROADEN | From Technical Expert to Financial Leader: How to Manage and Broaden Your Career <small>new</small> |
| FINANLDR | From Technical Expert to Financial Leadership <small>new</small> |
| LSHIFT | Goodbye Leadership. Hello Leadership! (1-hour Webcast) |
| IDEAGUTS | Have the Idea and Have the Guts <small>new</small> |
| ENERGY | High Performance Time Management: Boosting Your Personal Energy (Also available as a 2-hour webcast) |

Personal Development CONT.

| | |
|----------|--|
| CLL | How to Communicate Like a Leader |
| LNN | Leadership in the New Normal |
| LIO | Leadership Inside Out: Discovering the Leader Within |
| PSPE | Leadership: Personal Style and Personal Effectiveness |
| LIVELIFE | Living Life at Performance Level (keynote) |
| MAGYV | MacGyvering: The Art of Being Resourceful in a Crisis (Also available as a 2-hour webcast) |
| LEADACAD | MACPA Leadership Academy |
| MPI | Maintaining a Professional Image in a Business Casual World |
| MIH | Make it Happen! The Art of Discipline and Getting Things Done |
| MIH-W | Make it Happen! The Art of Discipline and Getting Things Done (2-hour Webcast) |
| MLSFOUND | Making Learning Stick <small>new</small> |
| MLSIMMER | Making Learning Stick: Immersion and Application <small>new</small> |
| LTM | Learning that Matters (1-hour Webcast) <small>new</small> |
| TMIP | Managing Multiple Priorities - The Discipline of Getting Things Done |
| MP | Mingling for Professionals (Mingle, Mingle) |
| NETMING | Networking: Even Accountants Can Mingle |
| GOODGRN | On Good Ground: Creating A Personal Strategy for a Great Life |
| GSO | Organizational Productivity - Practical Strategies for Getting and Staying Organized |
| PLINK | The Positivity Link Series <small>new</small> |
| HEO | Performance, Productivity and Profit: Creating the Higher Energy Organization |
| M2M | Personal Leadership in the New Normal |
| PERSTYLE | Personality Styles in the Workplace |
| PSWY | Personality Styles: What You Absolutely Should Know About Yourself & Others <small>new</small> |
| PCBE | Professionalism, Civility and Business Etiquette |
| SPKPRES | Public Speaking: How to Speak with Presence (Also available as a 1-hr webcast) |
| MINDB | Reading Clients Minds and Understanding How They're Reading Yours |
| RM | Sharing Skills Between Generations |
| SGS | SMART Goal Setting: Setting Goals to Achieve and Contribute |
| SMART | Smarter Decision-Making |
| SCMC | Strengthening Collaboration and Managing Conflict |
| PIRATE | The "Pirate CPA": Leadership, Teamwork & Balance in Dangerous Times <small>new</small> |
| ALPHA | The Accidental Alpha: Building Resiliency in Women Leaders <small>new</small> |

Personal Development CONT.

| | |
|----------|---|
| FIVEDOOR | The Five Doorways of Health and Well-Being (keynote) <small>new</small> |
| POWRCONV | The Power of Successful Conversations <small>new</small> |
| WORKMOM | The Well Compensated Mother: Strength-based Leadership Strategies for the Working Mother <small>new</small> |
| TMPL | Time Management and Personal Leadership <small>new</small> |
| TRANLEAD | Transitions to Leadership |
| FUTURNOW | You Thought it was the Future. It's Now! <small>new</small> |
| WORKFLOW | You've Got to Move it, Move it! Workflow Un-conference <small>new</small> |
| SMLT | Your Strengths, Your Management Talent, Your Leadership: Making a Difference for You and Others |

Personality Styles

| | |
|----------|---|
| IACM | Interviewing to Avoid Costly Mistakes in Hiring |
| IACM-W | Interviewing to Avoid Costly Mistakes in Hiring (2-hour Webcast) |
| PSPE | Leadership: Personal Style and Personal Effectiveness |
| PERSTYLE | Personality Styles in the Workplace |
| PSWY | Personality Styles: What You Absolutely Should Know About Yourself & Others |

Personnel/HR

| | |
|----------|---|
| NTAA | A Basic Overview for Non-CPAs and Those Charged with Governance of the Most Critical Issues Faced by the Accounting & Auditing Profession Today |
| MECA | Applying "Lean" Thinking to Making Employees Your Competitive Advantage |
| BBWH | Beyond the Buzzwords with Hiring: Apply "Lean" Processes and Fix the Way Your Organization Hires |
| BAO | Building an Adaptive Organization |
| TITB | CFO versus HR - Thinking Inside the Box |
| RTMC | Developing and Retaining Talent -- an Organization Imperative |
| EBPA | Employee Benefit Plan Auditing |
| IRP | Hire the Lucky Ones - How to Improve Retention and Productivity by Selecting Fortunate Employees |
| HIREFIRE | Hiring, Firing and Everything in Between |
| HIRE | How to Hire the Right Candidate: A Selection and Interview Process That Gets You What You Need |
| IDHT | Identifying, Developing, and Hanging on to Talent (Also available as a 2-hour Webcast) |

Personnel/HR CONT.

| | |
|----------|--|
| IACM | Interviewing to Avoid Costly Mistakes in Hiring |
| IACM-W | Interviewing to Avoid Costly Mistakes in Hiring (2-hour Webcast) |
| KEYFINAN | Key Financial and Economic Issues Facing the Financial Executive new |
| LHR | Lean and Human Resources (HR) |
| MMG | Managing Multiple Generations: Next Steps and New Surprises(Available as a keynote) new |
| PMIFC | Managing Performance to Implement Strategy |
| MOTIVATE | Motivating and Retaining Your Top Performers (1-hour webcast) new |
| NEWNORM | Next Steps in the New Normal World (1 hour webcast) new |
| TALENT | Talent Management - People as a Competitive Advantage in "Not Normal" Times (Keynote) new |
| GRUMP | The New Workforce - New Data, New Ideas, Aging Baby Boomers |
| TERM | To Terminate or Not to Terminate: That is the Question |
| TRAIN | Training: How to Effectively (and Painlessly) Teach Your Staff |
| DISASTER | When Disaster Strikes, Will You Be Ready? |
| WTC | Wrongful Termination Claims are on the Rise - Are You Protected? |

Presentation Skills

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| AWESOME | Awesome Financial Presentations |
| CAREER | Career Management: What's Next for You? |
| ECFR | Effective Communications |
| FRX1 | FRx Report Design Essentials I |
| DPSI | It's All in the Presentation: Designing Presentations to Sell Ideas Effectively |
| MME | Meetings Made Easy (and Effective) |
| PSW | Presentation Skills Workshop |
| MBP | Presentation Skills: Message Based Presentations |
| POWPRE | Producing Powerful Presentations: Performance and Profit |
| SPEAK | Public Speaking and Presentational Skills for Accountants |
| SPKPRES | Public Speaking: How to Speak with Presence (Also available as a 1-hr webcast) new |
| PSIE | Special Delivery: Delivering Presentations to Sell Ideas Effectively |
| SSF | Strategic Skills for Finance new |
| SUCSPROJ | Successful Project Approval Using a Business Case |
| PIZZAZ | Will the Audience Throw Eggs? - How to Present with Professionalism & Pizzazz |

Problem Solving

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|-------|---|
| CPS | Creative Problem Solving |
| FIX | Finally Fixing Performance Management Using New Tools |
| UPSS | Selling for CPAs: Using Your Problem-Solving Skills to Promote Profitable Business Growth |
| BGC | Situational Communication: How to Connect with More People More Often |
| SMART | Smarter Decision-Making |
| CC | The Communication Challenge: Disarming Difficult People |

Project Management

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|----------|--|
| EI | Emotional Intelligence and Personal Leadership |
| MIH | Make it Happen! The Art of Discipline and Getting Things Done |
| MIH-W | Make it Happen! The Art of Discipline and Getting Things Done (2-hour Webcast) |
| MSBP | Managing Strategic Business Partners (2-hour webcast) |
| OTPM | Project Management - Delivering Results On Time and Within Budget |
| PMIP | Project Management: Get the Buy-In to Get Results |
| DFR | Situational Delegation - Inspiring Accountability in Your Employees |
| SGS | SMART Goal Setting: Setting Goals to Achieve and Contribute |
| SUCSPROJ | Successful Project Approval Using a Business Case |

Public Speaking

| | |
|----------|---|
| LEADDIFF | Leadership from a Slightly Different Perspective |
| MBP | Presentation Skills: Message Based Presentations |
| SPEAK | Public Speaking and Presentational Skills for Accountants |
| PIZZAZ | Will the Audience Throw Eggs? - How to Present with Professionalism & Pizzazz |

Quantitative Analysis

| | |
|---------|---|
| BPLAN-3 | Business Planning: A Managerial Accounting Approach - Advanced Level new |
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Real Estate

ACCREAL Accounting for Real Estate - The Critical Issues of GAAP Compliance **new**

Risk Management

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| ARBBS | Audit Risk - Beyond the Balance Sheet |
| BPLAN-3 | Business Planning: A Managerial Accounting Approach - Advanced Level new |
| ERMAF | Enterprise Risk Management - Accountability Framework |
| ERMF | Enterprise Risk Management and Forecasting new |
| NRISK-3 | Enterprise Risk Management: A Pragmatic Approach - Advanced Level new |
| NRISK-1 | Enterprise Risk Management: A Pragmatic Approach - Basic Level new |
| NRISK-2 | Enterprise Risk Management: A Pragmatic Approach - Intermediate Level new |
| INSFSA-W | How Audited Entity Mngmnt. and Governance Can Influence a More Effective & Efficient Finan'l Stmtnt Audit (Also available as a 4-hour webcast) |
| IFCS | Insights From The C-Suite |
| RMDRP | Risk Management - Disaster Recovery Planning |
| DISASTER | When Disaster Strikes, Will You Be Ready? |

Strategic & Critical Thinking

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|----------|---|
| EATSTRAT | Becoming a Strategic Firm new |
| BOI | Blue Ocean Innovation: Market-Taker to Market-Maker (2-hour Webcast) |
| BAO | Building an Adaptive Organization |
| TITB | CFO versus HR - Thinking Inside the Box |
| LUAC | Challenge Thinking to Succeed |
| CEICFO | Current Economic Issues and Their Impact on the Financial Professional |
| DCS | Developing a Communication Strategy |
| BROADEN | From Technical Expert to Financial Leader: How to Manage and Broaden Your Career new |
| FINANLDR | From Technical Expert to Financial Leadership new |
| LEAF | Getting Things Done - Engaging People to Execute Effectively (Also available as a 2-hour Webcast) |
| GTOG | Great to Good: Using the Lessons of Good to Great AND How the Mighty Fall |

Strategic & Critical Thinking CONT.

| | |
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| IDEAGUTS | Have the Idea and Have the Guts <small>new</small> |
| I2A | I2A: Strategic Thinking that takes Insights to Actions |
| MAGYV | MacGyvering: The Art of Being Resourceful in a Crisis (Also available as a 2-hour webcast) |
| LEADACAD | MACPA Leadership Academy |
| SMART | Smarter Decision-Making |
| CCFO | The Customer Map: A Critical Tool for Developing Business Acumen |
| DICM | The Finance & Accounting Organization as Strategist and Partner to the Business (Also available as a 2-hr webcast) |
| INFL | The Power to Influence and Connect |
| INVENT | What Next? Inventing a New Niche for Yourself |
| FUTURNOW | You Thought it was the Future. It's Now! <small>new</small> |

Strategic / Business Planning

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|----------|--|
| ABSR | Avoiding Bankruptcy - Surviving the Recession (A Case Study Approach) |
| BACKCAST | Better Forecasting Using Backcasting |
| BLOG101 | Blog 101: First Steps to Stardom (1-hour Webcast) <small>new</small> |
| BRANDYOU | Brand You: How to Be a Leader and Boost Your Career - With a Little Help From Social Media (1-hour Webcast) <small>new</small> |
| BITEE | Business Innovation in The Experience Economy (Also available as a 1-hour webcast) <small>new</small> |
| BPLAN-3 | Business Planning: A Managerial Accounting Approach - Advanced Level <small>new</small> |
| BPLAN-1 | Business Planning: A Managerial Accounting Approach - Basic Level <small>new</small> |
| BPLAN-2 | Business Planning: A Managerial Accounting Approach - Intermediate Level <small>new</small> |
| BSD | Business Strategy Development: More Than Operational Planning |
| CHALCFO | Challenges for Financial Professionals |
| CSM | CPAs and Social Media: Passing Fad or Valuable Tool? (2-hour Webcast) |
| DEU | Dealing with Economic Uncertainty: The Recession |
| EU | Economic Update: The Slow, Winding Road to Recovery |
| ERMAF | Enterprise Risk Management - Accountability Framework |
| ERMF | Enterprise Risk Management and Forecasting <small>new</small> |
| NRISK-3 | Enterprise Risk Management: A Pragmatic Approach - Advanced Level <small>new</small> |

Strategic / Business Planning CONT.

| | |
|----------|---|
| NRISK-1 | Enterprise Risk Management: A Pragmatic Approach - Basic Level <small>new</small> |
| NRISK-2 | Enterprise Risk Management: A Pragmatic Approach - Intermediate Level <small>new</small> |
| EPRES | Executive Presence: An Experiential Approach to Networking & Negotiation |
| STR | Financial and Accounting Decision Making in a Slowly Recovering Economy(Also available as a 2-hour Webcast) |
| FINWAR | Financial Warfare |
| WHO | Finding Your Way Through Career Transitions |
| BROADEN | From Technical Expert to Financial Leader: How to Manage and Broaden Your Career <small>new</small> |
| FINANLDR | From Technical Expert to Financial Leadership <small>new</small> |
| FSM | Fundamentals of Strategic Management <small>new</small> |
| IFCS | Insights From The C-Suite |
| LNN | Leadership in the New Normal |
| LFAA | Leadership: Alignment and Accountability |
| LINK101 | LinkedIn 101: The Basics - and Beyond (1-hour Webcast) <small>new</small> |
| MSBP | Managing Strategic Business Partners (2-hour webcast) |
| MLSFOUND | Making Learning Stick <small>new</small> |
| MLSIMMER | Making Learning Stick: Immersion and Application <small>new</small> |
| LTM | Learning that Matters (1-hour Webcast) <small>new</small> |
| PELTPSTW | Performance Execution: Long-Term Planning in a Short-Term World <small>new</small> |
| PESPM | Performance Execution: Succession Planning and Mentoring <small>new</small> |
| BALSCORE | Planning and Implementing the Balanced Scorecard |
| NETBD | Practical Networking and Business Development for CPAs |
| WINPLAN | Preparing a Winning Business Plan |
| PYOB | Providing Your Own Bailout |
| BASECAMP | Social Media Bootcamp for Professional Service Firms <small>new</small> |
| SOPF | Strategic and Operational Planning and Forecasting |
| SPF | Strategic Planning Facilitation: Developing the High Performance Organization |
| SSF | Strategic Skills for Finance <small>new</small> |
| SUCSPROJ | Successful Project Approval Using a Business Case |
| DTLT | Succession Planning: Developing Tomorrow's Leaders Today (2-hour Webcast) |
| SR | Sustainability Reporting |
| TRIPLE | Sustainability: Using the "Triple Bottom Line" to Increase Your Success |
| MBA | The Eight Hour MBA <small>new</small> |

Strategic / Business Planning CONT.

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| TWIT101 | Twitter 101: Changing Your World 140 Characters at a Time (1-hour Webcast) <small>new</small> |
| SOMELEAD | Using Social Media for Lead Generation |
| WHAT | Why You? Positioning Yourself Ahead of the Pack |

Tax

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| DITFIN48 | Deferred Income Taxes and FIN 48 <small>new</small> |
| FIN48 | FIN 48 <small>new</small> |
| F990 | The Complete Guide to Understanding Challenging Nonprofit Tax and Form 990 Issues <small>new</small> |
| IRSM | The Top 50 Mistakes Practitioners Make and How to Fix Them: Dealing with the Internal Revenue Service <small>new</small> |
| GIBB | The Top 50 Mistakes Practitioners Make in Nonprofit Taxation & Governance Issues and How to Fix Them <small>new</small> |

Team Building

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| GENDIF | Are Generational Differences Helping or Hindering Your Team? |
| TCPC | Build a Team by Teambuilding! |
| COMEDY | Building Stronger Teams by Using Improvisational Comedy <small>new</small> |
| COMEHOME | Coming Home: Strengths-based Leadership for Personal and Organizational Prosperity <small>new</small> |
| ETP | Elevating Team Performance |
| ERL21ST | Energy Rich Leadership: The Competitive of the 21st Century (keynote) <small>new</small> |
| HPO | How the Best Financial Executives Create High Performance Organizations (Also available as a 2-hour Webcast) |
| IOBV | Integrating Organizations, Blending Values |
| IMPROV | Leadership Improv - Why "Fake It Until You Make It" Works |
| LFMO | Leadership in Fast-Moving Organizations |
| MCWP | Leadership: Execution and Greatness - Great Ideas That Work |
| LMPN | Leadership: Motivation -- The Power of Needs, Styles and Ownership |
| LMTB-4 | Leading, Mentoring and Team Building |
| DFR | Situational Delegation - Inspiring Accountability in Your Employees |
| TBEL | Team Development - Secrets Behind Building an Award-Winning Team |
| TLLC | Team Leadership & Leading Change - Get it Right & Make it Last <small>new</small> |
| PIRATE | The "Pirate CPA": Leadership, Teamwork & Balance in Dangerous Times <small>new</small> |

Time Management

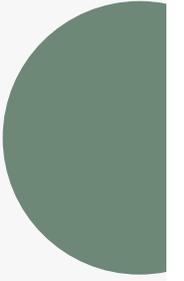
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| CALM | Calm in the Midst of Chaos: Techniques & Tips for Managing Stress Levels During Busy Times |
| ENERGY | High Performance Time Management: Boosting Your Personal Energy (Also available as a 2-hour webcast) |
| GSO | Organizational Productivity - Practical Strategies for Getting and Staying Organized |
| MLW | 10 Things I Learned from Mothering that Every Executive Should Know (keynote) |
| OTPM | Project Management - Delivering Results On Time and Within Budget |
| TMIP | Managing Multiple Priorities - The Discipline of Getting Things Done |
| TMPL | Time Management and Personal Leadership new |
| WORKMOM | The Well Compensated Mother: Strength-based Leadership Strategies for the Working Mother |

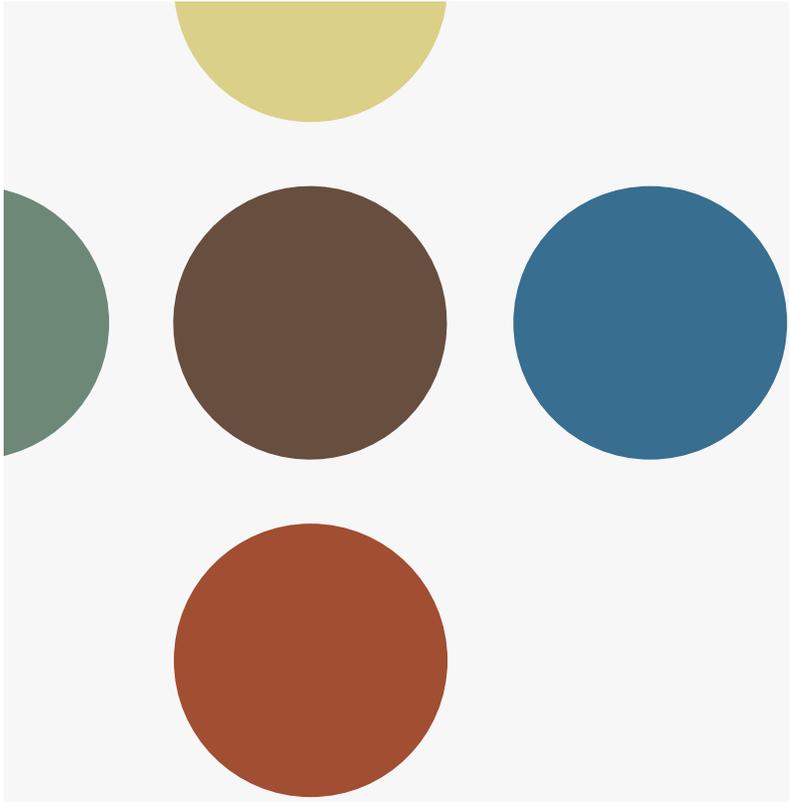
Trust

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| COT8 | Champions of Trust |
| FCCFO | From Controller to CFO: How to Acquire the Skills Needed to Make the Leap |
| FCCFO-W | From Technical Expert to Financial Leader: How to Make a Critical Leap in Your Career Development (2-hour webcast) |
| CNCC | How to Build a Culture that Maximizes Trust, Accountability, and Performance (Available in 4 or 8-hour format) |
| IOBV | Integrating Organizations, Blending Values |
| BTRC | Interpersonal Leadership - Building Trust and Resolving Conflict new |
| LA-4 | Leadership and Authenticity |
| LBT | Listening to Build Trust |
| TCS | Trust Centered Selling: How to Attract and Retain Loyal Clients through Trusting Relationships (Also available in a series of five 1-hour webcasts) |
| BDCAMP | Turning Trust into Value: Business Development Boot Camp |

Women's Issues

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|---------|--|
| MLW | 10 Things I Learned from Mothering that Every Executive Should Know (keynote) |
| EYIS | Embrace Your Inner Superhero |
| ALPHA | The Accidental Alpha: Building Resiliency in Women Leaders new |
| WORKMOM | The Well Compensated Mother: Strength-based Leadership Strategies for the Working Mother |





ALL EVENTS BY **COURSE TITLE**

A

RRGAAP

new

A REAL-LIFE LOOK AT REVENUE RECOGNITION IN TODAY'S GAAP & WHAT MAY LIE AHEAD

William Eskin, CPA

There is no other area of GAAP compliance more difficult than Revenue Recognition. We will look at critical issues involving today's GAAP and what may be coming down the road. (Available in 4 or 8-hour format)

NTAA

A BASIC OVERVIEW FOR NON-CPAS AND THOSE CHARGED WITH GOVERNANCE OF THE MOST CRITICAL ISSUES FACED BY THE ACCOUNTING & AUDITING PROFESSION TODAY

Jennifer Louis, CPA

Human resources, finance and accounting recruiting, public accounting firm marketing professionals, operations personnel, those charged with governance and others often need a basic understanding of common accounting and auditing issues impacting external public accountants. However, most literature and courses are written to the public accounting audience, which may assume an intermediate level of knowledge and experience. This course will explain the basics using terminology and exercises everyone can understand.

NPG

A COMMITMENT TO COMMUNITY: NONPROFIT BOARD SERVICE AND CPAS

Michael Daigneault, Esq.

With their significant financial and business expertise, CPAs often volunteer - or are asked to serve on - nonprofit boards. This interactive and dynamic seminar will review the core elements of nonprofit governance as well as challenge even the most experienced CPA with leading-edge nonprofit governance and accountability trends and strategies. It offers an excellent opportunity to fine tune your nonprofit board skills and knowledge, and develop younger CPAs with the goal of serving on a nonprofit board to further their training and leadership development and foster meaningful relationships in the community.

CELT

A MATTER OF INTEGRITY

Michael Daigneault, Esq.

Join your colleagues for this highly educational and interactive ethics seminar. This practical seminar has been updated with the latest ethics guidance and rules and fulfills Maryland's mandated ethics requirement. Utilizing a combination of hypotheticals, informative exercises and examples, you will have the opportunity to review the elements and implications of recent changes to CPA ethical standards, and join others in enhancing the vital leadership role CPAs play in the business community today. The CPE credits satisfied by this seminar are required by the Maryland Board of Accountancy every two years. CPAs residing and working in the state of Maryland also licensed in Virginia please note: It is a policy of the Virginia Board of Accountancy to accept the CPE requirements met by a CPA in their home state (where they live and work) as long as it is comparable to the requirement for 120 hours over 3 years.

BUSCOMB

new

A PRACTICAL GUIDE TO BUSINESS COMBINATION STANDARDS: COMING TO TERMS WITH FASB STATEMENTS 141, 142 & 146 (ASC 805)

Ray Thompson, CMA, CFM, CBA

The course uses the principles based approach of FASB/IASB standards to explain how existing practice will be altered through the use of the fair value model. Extensive examples and implementation guidance will also be provided. Recent changes to standards for testing goodwill and intangibles will also be explored. Extensive case studies will be used to explain both SFAS No. 141 and No. 160 from an implementation perspective.

ABCSI

ABC'S: ABOVE AND BEYOND CUSTOMER SERVICE - IMPROVING SERVICE IMPROVES YOUR BOTTOM LINE

Kelly Watkins

Don't work harder than you need to! It costs six to ten times more - in time, money and effort - to obtain a new customer than it does to keep the one you already have. When your current customers/clients are happy, they'll come back - and they'll tell others. This highly interactive program teaches relevant techniques to establish the customer service mindset at the highest level of your firm or company. It includes role play exercises, examples and discussion.

- PAAA** **ACCOUNTING AND AUDITING CURRENT DEVELOPMENTS 2012**
Ray Thompson, CMA, CFM, CBA
 Get a fast-paced broad-based overview of the profession today and the major issues and challenges it faces. Understand how FASB's convergence projects on financial instruments, financial statement presentation and consolidation are reshaping financial reporting. Gain insight into how FASB's new approach to revenue recognition will affect statement preparation and presentation. Understand how the new lease accounting model will alter companies' financial statements. Preview changes in financial reporting that are likely to result in Big GAAP - Little GAAP. Receive an update on recent developments in compilation and review involving SSARS 19 and how it affects CPAs serving smaller clients. Review recent FASB standards in their codified form and how they will affect your clients, and get updated on current and proposed standards involving EITF, FASB, PCAOB, ASB and IASB.
- ACM** **ACCOUNTING CONSIDERATIONS FOR MERGERS AND ACQUISITIONS, INCLUDING BUSINESS COMBINATIONS**
Thomas Selling, Ph.D., CPA
 This course covers accounting considerations throughout the life cycle of merger and acquisition activity. The official guidance is primarily located in Topics 350 (Goodwill) 805 (Business Combinations) and 810 (Consolidation), virtually all aspects of which have been recently modified with the issuance of FAS 141(R), and revisions to FIN 46(R). Numerical examples and cases will be provided throughout the course, and we will also be describing the significant differences between U.S. GAAP and International Financial Reporting Standards (IFRS).
- AIOPS** **ACCOUNTING FOR INTERNATIONAL OPERATIONS**
Thomas Selling, Ph.D., CPA
 This course provides an accounting and managerial perspective on the financial reporting issues which can arise when conducting foreign operations or engaging in foreign currency transactions. It offers an in-depth treatment, through discussion of principles and numerous illustrative case studies, of virtually all aspects of controlling and reporting the results of international operations.(Available in 4 - 12 hour format)
- ACCREAL** **ACCOUNTING FOR REAL ESTATE - THE CRITICAL ISSUES OF GAAP COMPLIANCE**
new
William Eskin, CPA
 Considered by many to be the most difficult industry to stay in compliance with GAAP, we will discuss how to prepare financial statements for Real Estate entities without significant GAAP errors.
- FRI** **ACCOUNTING STANDARDS REVIEW FOR CONTROLLERS AND FINANCE PROFESSIONALS (LATEST EDITION)**
Ray Thompson, CMA, CFM, CBA
 Find out how newly-issued FASB standards for fair value accounting, multiple deliverables & subsequent events will affect your company. Understand how FASB & IASB's convergence agenda is reshaping revenue recognition, lease accounting, financial statement presentation and financial instrument reporting. Participants will receive an update on recent trends in fraud reporting. Obtain a broad-based understanding of a wide range of accounting issues that affect practitioners in industry, both today and in the coming 12 months. Understand how SEC, AcSEC, EITF, ASB and IASB are adapting to demands for different, more timely and accurate financial information. Topics can be customized based on the client's needs and interests.
- ASGC** **ACCOUNTING SYSTEMS FOR GOVERNMENT CONTRACTORS**
new
Norman Lorch, CPA
 This course will give you an understanding of the unique system requirements for government contractors accounting systems and the minimum levels of internal controls that must be implemented as part of an acceptable system. Learn what software systems are available or can be uniquely designed for use by contractors. You will also evaluate a hypothetical system and then correct perceived deficiencies and shortcomings.

ACCSERV

new

ACCOUNTING SERVICES, COMPILATIONS, AND REVIEWS - A REAL-LIFE LOOK AT YOUR RISKS**William Eskin, CPA**

Everytime a CPA puts pencil to paper when performing services for their client, they are putting themselves at risk from a lawsuit from either the client or a 3rd party. We will be taking a "real-life" approach on how to reduce these risks and perform your various engagements as effectively and efficiently as possible. (Available in 4 or 8-hour format)

ABCFR

ACTIVITY BASED COSTING FOR ACCOUNTING AND FINANCE PROFESSIONALS: A CASE STUDY APPROACH**Francis Ryan, MBA, CPA**

Coming to grips with the challenges of the market have never been greater. Traditional costing systems provide only minimal guidance to the financial and accounting professionals to assist in improving profitability. This course provides a step by step approach of how to effectively implement Activity Based Costing to improve profitability. A case study approach is used. (Available in 4 or 8 hour format)

ADOBE-L

ADOBE ACROBAT BEST PRACTICES FOR CPAS**Judith Borsher, CPA, MBA, CGMA, CIT**

PDF is the standard format for managing and controlling information electronically in digital documents. The course will present productivity features for using the Adobe Acrobat program versions 9 or X for creating, managing and securing pdf files. (Format choices: "Lecture only with live demo" or "hands-on, participants bring laptops or tablets")

FCAS

ADVANCED CONSULTING FOR CPAS: ENHANCING AND EXPANDING YOUR CLIENT RELATIONSHIPS**Michael Daigneault, Esq.**

All CPAs are consultants, even if we don't call it "consulting." CPAs provide a variety of expert accounting, financial and management-related services and must carefully manage interactions with clients. This course, based on Peter Block's legendary book "Flawless Consulting," is designed to help CPAs thoughtfully and successfully manage client communications and offer increased opportunities for building lasting and mutually beneficial client relationships.* (4 or 8-hour format available)

ADVIFRS

new

ADVANCED IFRS UPDATE**Peter Margaritis, CPA, MAcc**

This course will focus on the new IFRS standards and amendments to current IAS standards that will become effective beginning in 2013 and beyond. An update on the status of the remaining convergence projects will be provided. (Available in 2 - 8-hour format)

FRF

new

AICPA'S FINANCIAL REPORTING FRAMEWORK FOR SMALL-TO-MEDIUM-SIZED ENTITIES: WHAT YOU NEED TO KNOW RIGHT NOW**Ray Thompson, CMA, CFM, CBA**

Standards overload has been a long-running problem for smaller companies. In response to these frustrations, AICPA has released its FRF for SMEs. This course will enable financial statement preparers and auditors to evaluate its suitability for their needs. Extensive examples and illustrations will be used to illustrate the alternatives available.

AAUI

ANNUAL ACCOUNTING UPDATE FOR INDUSTRY**Elizabeth Gantnier, CPA**

This is the definitive course to keep industry CPAs abreast of the latest updates on recent accounting standards including those that have just recently become effective - or those about to become effective (also available in 4-hour format).

MECA APPLYING "LEAN" THINKING TO MAKING EMPLOYEES YOUR COMPETITIVE ADVANTAGE

Karl Ahlrichs, SPHR

Lean thinking has probably been applied effectively throughout your organization - except in Human Resources. Yet, in the end, the survival of your company depends on its employees. In this fast-paced, interactive session, we will look at best practices that you can implement for finding and retaining high-value employees. The instructor has a great deal of experience in the people side of business, and he will share specifics on what works and what falls short.

AERW APPLYING ETHICS IN THE REAL WORLD

new

Jennifer Elder, CPA

In today's fast-paced environment we are constantly being faced with ethical issues and dilemmas. It's not only what we do that matters but how we do it is just as important. With the increasing popularity of social media and internet access, ethical missteps can become an instant public relations nightmare. Learn to think about ethics from a pro-active perspective to avoid becoming tomorrow's top story. Using current case studies we will identify the ethical issues, develop alternate courses of action, and consider potential consequences of those actions.

GENDIF ARE GENERATIONAL DIFFERENCES HELPING OR HINDERING YOUR TEAM?

Sheila Birnbach

Generational differences have been a fact of business life for decades, but today's workforce has an unusual challenge - four dramatically different generations in the same workplace. Each of these age groups has different expectations and different demands. This session will address the most important concerns managers face when working with different generations and will offer solutions. (Available in 3, 4 or 6 hour format)

FALTT AT THE HELM IN THE STORM: SEVEN SURVIVAL STRATEGIES FOR LEADERS IN TURBULENT TIMES

Greg Conderacci

These are difficult times. Professionals and their firms face special challenges. Never has leadership been so important -- or seemingly so dangerous. With the press full of stories of fallen leaders, it seems like being a leader is both a risky and lonely position to hold. However, opportunities for leaders abound and there are many ways to weather the storm. This course is also available in a 4-hour format.

ARBBS AUDIT RISK - BEYOND THE BALANCE SHEET

Robert Tarola

What keeps CFOs up at night? CPAs and other audit professionals need to develop an understanding of the many risks that companies face. With this knowledge, auditors can better focus scope and procedures to address both balance sheet and "beyond the balance sheet" risks, with the objective of minimizing auditor risk due to unmet expectations. This program will address these issues and more, including the big picture, the value-drivers, managing the board, risk management, economic analysis, behavioral drivers and credibility assessment. Available in 4 and 8 hour formats

ABB AUDITING BITS IN BYTES

Jennifer Louis, CPA

Auditing Bits in BytesT is a series of eight individual sessions that guides professionals through the complete audit process from "A to Z" - starting with Pre-Engagement Planning Activities, and going all the way through Wrap-up and Quality Control. The auditing profession is undergoing the most significant changes in modern history. Think about it. In recent years the Auditing Standards Board has been issuing new and revised Statements on Auditing Standards at its most rapid pace ever, the GAO has been revising Government Auditing Standards in an effort to remain current, the PCAOB separately releases Auditing Standards related to audits of SEC "issuers" that directly influence standards established for "non-issuers," independence rules promulgated by all relevant standard setters have been clarified and enhanced, and Statements on Quality Control Standards for firms performing attestation services have also been revamped and strengthened. Whew! That is alot! And to think that professionals complained about being confused before all these changes occurred!! All professionals, both those that are new to performing financial statement audits and those with previous experience, can benefit from focused training that walks participants through the complete audit process from "A to Z", providing practical tips and best practices for ensuring an effective and efficient financial statement audit in compliance with relevant professional and regulatory standards. This course can be offered in a full 8-hour day, in 2-4 hour sessions, or in bytes of eight 2-hour webcast sessions.

A

A133 AUDITS IN ACCORDANCE WITH YELLOW BOOK

Jennifer Louis, CPA

Yellow Book and OMB Circular A-133 reporting entities have complex and unique financial statement audit, compliance and reporting issues. Deficiencies in these types of audit engagements are common. This course will reduce the likelihood of non-compliance with relevant professional and regulatory auditing and reporting standards.

ABSR AVOIDING BANKRUPTCY - SURVIVING THE RECESSION (A CASE STUDY APPROACH)

Francis Ryan, MBA, CPA

Bankruptcy isn't a four letter word, in fact it can serve as a life line for a business that is struggling to stay above water. But how can you avoid filing even when everyone says that's what you should do Strategies and tactics for avoiding the bankruptcy option will be covered in this course, along with mastering the methodology to survive and even thrive. In order to best illustrate the steps to take, this course uses a case study approach. (Available in 4 or 8 hour format)

AWESOME AWESOME FINANCIAL PRESENTATIONS

Jennifer Elder, CPA

Have you ever presented financial results to a board and been confronted with glassy-eyed stares and stifled yawns, only to be followed with questions two weeks later? It would be so much more productive for both you and the organization if your presentation was understood the first time. Learn the techniques for translating financial information into compelling and useful presentations.

B

AWAC BEST PRACTICES FOR AUDITS IN COMPLIANCE WITH GOVERNMENT AUDITING STANDARDS AND OMB CIRCULAR A-133

Jennifer Louis, CPA

Often, entities that require A-133 audits are the least-profitable clients for CPA firms. This is sometimes a direct result of engagement teams being less familiar with the compliance and testing requirements for these types of engagements, as well as best practices for boosting quality and profitability. This course will provide proven tips and techniques for performing a more effective and efficient audit of federal financial awards.

FACEBOOK BEST PRACTICES FOR FACEBOOK _ PROFESSIONALS

Andrew Rose

Facebook is one of the fastest growing social media channels in the world. Most people understand how to use it as a social medium, but many don't comprehend the value it offers to professionals for business development, client retention, client communications, etc. With the myriad of changes to the user interface, it has also brought changes to the account/privacy and security settings.

LINKEDIN new BEST PRACTICES FOR LINKEDIN _ PROFESSIONALS

Andrew Rose

LinkedIn is one of the fastest growing professional social media channels in the world; it has been described as a rolodex on steroids. Some people have confused it with Facebook. Both, although similar, are governed by a different set of rules. LinkedIn has a great degree of value to professionals for business development, client retention, client communications, etc.

BPAFPIO BEST PRACTICES IN ACCOUNTING AND FINANCE WRITING: PUTTING IDEAS IN ORDER (2-HOUR WEBCAST/ON-DEMAND)

Lin Kroeger, CMC

This course will show you how to manage your thinking and create an organized document that highlights what you want your reader to know, think, and do. Participants will learn how to present ideas in the proper sequence so that readers will understand their writing.

B

BPAFW

BEST PRACTICES IN ACCOUNTING AND FINANCE WRITING: BEING CLEAR AND ACCURATE (2-HOUR WEBCAST/ON-DEMAND)**Lin Kroeger, CMC**

Readers of finance and accounting documents expect the information to be complete, accurate, and readable - neither overly simplistic nor complex. This program will enable participants to select and apply language that delivers clear and readable documents, reports, letters, and emails.

MBW

BEST PRACTICES IN WRITING -FOR THE FINANCIAL SERVICES PROFESSIONAL**Lin Kroeger, CMC**

Good writing skills are essential in our jobs. We write more than ever in e-mail, proposals, presentations, faxes and even on our PDAs. The truth is, what we write suggests to the receiver how clearly we understand what we are writing about. It can begin the process of getting the recipient to agree with our points and to get the right work done. The development of writing skills is a key need for professionals at all levels of an organization.

BBW

BETTER BUSINESS WRITING**Carol Haislip**

Learn the tips to ensuring your written messages are appropriate and effective. Focus will be on appropriate formats for business correspondence and various types of written correspondence. Learn how to take advantage of style, tone, and formality. Discover how to sharpen your business writing skills so that the message you write gets you the reaction you want. Learn how to write so that your message is the one that will get read (and remembered). Learn how to avoid correspondence pitfalls and make sure your writing matches your intention. Learn the structure for a variety of written correspondence and learn how to compose those hard to write letters, such as responses to angry clients, letters of apology, and letters of dismissal and rejection.

BACKCAST

BETTER FORECASTING USING BACKCASTING**Jennifer Elder, CPA**

Your strategic plan is for 5 years. Your forecast is for 1 year. But there's no link between the two. Shouldn't the next year of your operations really be tied to and support your 5 year plan? Learn how you can use "backcasting" to bridge the gap. Backcasting, a technique successfully used by Nike, was originally developed to address sustainability but can be used by any organization that wants to link its long-term strategy with its short-term forecast.

BBWH

BEYOND THE BUZZWORDS WITH HIRING: APPLY "LEAN" PROCESSES AND FIX THE WAY YOUR ORGANIZATION HIRES**Karl Ahlrichs, SPHR**

This is a fast-paced look at clever and aggressive new hiring processes that save time and effort and are legally compliant. Mixing "Lean" theory, fresh case studies and psychological theory, the instructor covers new ground with a fresh, data-driven look at the hiring process. This workshop begins with a passionate indictment of the "status quo", progresses with "how-to" content in the middle, and ends with an inspirational call to action. The instructor will challenge how your organization currently hires and will give practical tips and advice on making clever process changes that produce real results, both in hiring and retention. Bad hires come from bad knowledge, and this session shares good, practical secrets.

BLO

new

BIG GAAP, LITTLE GAAP, AND AICPA'S FRAMEWORK FOR SMALL-TO-MEDIUM-SIZED ENTITIES COMPARED – WHAT DIRECTION SHOULD WE TAKE WITH FINANCIAL REPORTING?**Ray Thompson, CMA, CFM, CBA**

Standards overload has been a long-running problem for smaller companies. Recently, decisions were made to develop two different approaches to standard setting for private companies. This course explains, compares and evaluates the three approaches that are now available for smaller companies that are looking for more cost-effective and meaningful reporting. Extensive examples and illustrations will be used to illustrate the alternatives available.

BLI'S ETHICS UPDATE FOR CPAS IN BUSINESS & INDUSTRY**Ray Thompson, CMA, CFM, CBA**

Receive a fast-paced overview of ethical standards promulgated by the AICPA and State Society and State Board authorities as they apply to CPAs working in the business world. We will use case studies and group discussion to examine the connections between ethical principles, formal rules and the profession's public responsibility. The ethical dimensions of the responsibilities CPAs have when preparing financial statements will also be discussed. In addition, learn how to apply the independence rules of Interpretation 101-3 when providing both attest and non-attest (management advisory) services for closely held clients. Receive up-to-the minute coverage of evolving issues and recent revisions to the Ethics code. (Content can be customized to client needs)

BLOG101**new****BLOG 101: FIRST STEPS TO STARDOM (1-HOUR WEBCAST)****William Sheridan, CAE**

Want to boost your brand, become a thought leader, start a conversation, and drive the world to your website all at the same time? Here's how: Start a blog. Here's a quick-start guide to starting your blog and what you need to do to make it shine.

BOI**BLUE OCEAN INNOVATION: MARKET-TAKER TO MARKET-MAKER (2-HOUR WEBCAST)****R. Donald McDaniel**

In their ground-breaking book "Blue Ocean Strategies, How to Create Uncontested Market Space and Make the Competition Irrelevant," Chan Kim and Ren, e Mauborgne argue that traditional competition-based strategies (red ocean strategies) are not sufficient to sustain high performance. Instead, you have to create "blue oceans," the unknown market space, untainted by competition, where demand is created rather than fought over. This course will give participants new insight into innovative business strategies.

BRANDYOU**new****BRAND YOU: HOW TO BE A LEADER AND BOOST YOUR CAREER - WITH A LITTLE HELP FROM SOCIAL MEDIA (1-HOUR WEBCAST)****William Sheridan, CAE**

You don't need to write books or earn advanced degrees to be a thought leader. We're all experts at something, and thanks to social media, it's easier than ever to tell the world about it. This session examines the dos and don'ts of personal brand management in the age of social media.

TCPC**BUILD A TEAM BY TEAMBUILDING!****Lin Kroeger, CMC**

Teamwork requires a shared goal and a problem or challenge that can only be dealt with by sharing knowledge, perspective and effort. Different problems require different teams and effective communication is required to support team structure.

BUZZ**BUILD YOUR BOOK OF BUSINESS WITH BETTER BRAND BUZZ****Greg Conderacci**

Buzz, commonly called word of mouth, is one of the most powerful (and least expensive) tools to increase business, yet it is rarely used effectively. This session gives you tips and tactics on spreading the word, including how to package and promote yourself using state-of-the art approaches from social sciences, marketing and even medicine. Can you create an epidemic of demand for your services Only if your buzz is contagious enough. This course is also available in a 4 hour format.

BCCC**BUILDING A CULTURE OF CONVERSATION: COMMUNICATION WITH A PURPOSE, FOR RESULTS****Lin Kroeger, CMC**

From new staff member to highly experienced, long-term executives, employees need to converse regularly to clarify direction, priority and expectations. Organizations that don't encourage and accommodate conversation tend not to hear information that can foster creative decision-making, innovative ideas and solutions, and improved productivity and general functioning of that organization. Conversation is not just coffee klatsching -- it's dialogue that helps people connect, understand issues and personalities, and gain commitment to action. Ultimately, organizations with strong conversational cultures can move and change faster than their competitors.

BAO BUILDING AN ADAPTIVE ORGANIZATION**Alan Patterson**

Organizations that assimilate the impact of increased competition and cost pressures into their strategy and business processes are better prepared to capitalize on changes in market conditions. This course is designed for top and mid-level executives who are preparing for, or are experiencing a major change initiative.

COMEDY BUILDING STRONGER TEAMS BY USING IMPROVISATIONAL COMEDY

new

Peter Margaritis, CPA, MAcc

The popular TV show, *Whose Line Is It Anyway?* is a form of improvisational comedy. Did you know that the core principles of improvisational comedy are the same core principles in efficient, effective, and productive teams? Through trust and teamwork, businesses can achieve remarkable results. The question many managers and owners are challenged with today is how to develop and foster a team environment that leads to organizational productivity and profitability. This is a high-energy and interactive workshop that will help you and your team learn how humor and improvisation can lead to successful teams and ultimately a more productive and profitable business. (Available in 1 - 2-hour formats)

BDS BUSINESS DEVELOPMENT SKILLS FOR ACCOUNTANTS**Peter Margaritis, CPA, MAcc**

In today's competitive market, business development is critical to survival. Business development can be defined as attracting new business and retaining quality business. This is a challenging task one that requires knowledge, experience, patience, and a plan. Business development does not happen overnight. It is a process of developing relationships over time and having a plan in place in order to achieve your goals the earlier that a professional understands the process of business development, the more profitable to the organization they become. Participants of this course will learn the skills necessary to attract new business and develop relationships to retain current business.

DMBD BUSINESS DEVELOPMENT: DISTINCTIONS BETWEEN MARKETING AND SALES(1-HOUR WEBCAST/ ON-DEMAND)**Greg Conderacci**

Is it marketing or is it sales And, does it make a difference This short course explores those key questions - and their implications for growing your business.

BDE BUSINESS DINING ETIQUETTE**Cathleen Hanson**

Be confident in any dining situation, whether with friends or business associates. Learn the proper use of utensils, American and Continental styles of dining and other dining do's and don'ts. Know not only how to handle yourself, but also learn the history behind many of our customs. Impress the most important of clients, and focus on making the sale instead of which fork to use. This program is available in a minimum of two-hour format.

BITEE BUSINESS INNOVATION IN THE EXPERIENCE ECONOMY (ALSO AVAILABLE AS A 1-HOUR WEBCAST)

new

Bob Dean, CCO

What was your most memorable customer experience in the past year? What can professional services firms learn from the success of Starbucks, Apple, and American Girl Place? We are all living and working in The Experience Economy. Goods and services have been commoditized and consumers and businesses spend increasing amounts of money on experiences. How can you differentiate your business by shifting from providing commoditized goods and services to "staging" memorable and compelling customer experiences. Whatever your business, a shift in the very fabric of the economy is a time to act boldly. Delivering transformational customer and employee experiences can be clear differentiators in every industry. The course materials are adapted for the professional services industry from the *The Experience Economy* (1999 and 2011, Harvard Business School Press). The presenter is one of the first 10 people in the world to be certified as an Experience Economy Expert (2006).

BPLAN-1

new

BUSINESS PLANNING: A MANAGERIAL ACCOUNTING APPROACH - BASIC LEVEL**Michael Kraten, PhD**

What do you do when an off-the-shelf business planning software program is insufficient to meet your needs? How do you prepare a plan that captures the unique characteristics of your market, your customer base, and most importantly, your product or service? This course takes a pragmatic, hands-on approach to walking participants through the five essential components of a customized business plan. It emphasizes "nuts and bolts" managerial accounting concepts and techniques in order to optimize its utility for business development work. (Available in formats from 2 to 8 hours)

BPLAN-2

new

BUSINESS PLANNING: A MANAGERIAL ACCOUNTING APPROACH - INTERMEDIATE LEVEL**Michael Kraten, PhD**

Basic business plans emphasize broad strategic goals and traditional financial accounting statements. However, the most effective plans also incorporate technical managerial accounting practices that can guide an organization's implementation activities at the operational level. This course takes a pragmatic, hands-on approach to walking participants through fifteen specific managerial accounting practices that should be added to any business plan of intermediate level complexity. It emphasizes the application of these practices at the operational level. (Available in formats from 2 to 8 hours)

BPLAN-3

new

BUSINESS PLANNING: A MANAGERIAL ACCOUNTING APPROACH - ADVANCED LEVEL**Michael Kraten, PhD**

In today's hyper-competitive economic environment, accounting professionals are constantly pressured to apply the most advanced tools of statistical analysis to their business plans. These tools require an advanced understanding of quantitative research methods, as well as an ability to integrate accounting techniques with production, service, marketing, and other functions. This course takes a pragmatic, hands-on approach to walking participants through four specific indepth cases that address such concerns. It emphasizes the business planning functions of simulation analysis, performance measurement, risk management, and investment valuation. (Available in formats from 2 to 8 hours)

BSD**BUSINESS STRATEGY DEVELOPMENT: MORE THAN OPERATIONAL PLANNING****Alan Patterson**

While most organizations engage in a yearly ritual for preparing budgets, few use a process to dig into marketplace conditions and customer needs, and to define their unique value within this context. This session sets out a practical process for developing a strategy based on collecting the best data, developing a strategic vision, identifying critical decisions, and aligning the organization for effective execution.

SSVS**BUSINESS VALUATIONS IN A SSVS* WORLD (*STATEMENT ON STANDARDS FOR VALUATION SERVICES)****Brad Davidson**

Whether you write one valuation a year or one hundred, the AICPA's new Statement on Standards for Valuation Services affects you. What valuation principles and theory must you master -- what skills must you possess -- to comply with the SSVS This course gives a roadmap. (Can be 1 hour keynote; or 3 hours, or 4 hours)

C

CALM

CALM IN THE MIDST OF CHAOS: TECHNIQUES & TIPS FOR MANAGING STRESS LEVELS DURING BUSY TIMES**Gretchen Pisano**

Learn essential skills for managing well-being during extremely demanding times in your professional and personal lives. This interactive session is designed to bring fresh perspective and tangible new strategies to reduce stress levels and increase productivity and positivity.

CAREER

CAREER MANAGEMENT: WHAT'S NEXT FOR YOU?**Peter Margaritis, CPA, MAcc**

CPA firms invest thousands of dollars per year in order to increase the technical knowledge of staff members during the first five years of employment. There is little to no investment in their non-technical (soft) skills prior to promotion to manager. Once they are promoted to manager they are asked to build and maintain client relationships with little to no training. This strategy may have worked 10+ years ago, but the competitive nature of the business world rewards those who have the skills to develop client loyalty, referrals, and cross selling of services. The challenge is to achieve balance between technical and non-technical skills in order to reduce the learning curve once staff is promoted into management positions. This course will prepare future managers to win business, increase productivity, and increase the firms profits. (Available in 2 - 4-hour formats)

TITB

CFO VERSUS HR - THINKING INSIDE THE BOX**Karl Ahlrichs, SPHR**

As CFOs rise in power within organizations, the rest of the company can become puzzled by the mindset and decision style of the financial leader. These departments, through solid metrics and a strategic alignment with the bottom line, can make a significant impact on the organization. This workshop will build the understanding and communication patterns needed to help other departments understand the CFO, and give the CFO data to better communicate.

LUAC

CHALLENGE THINKING TO SUCCEED**Lin Kroeger, CMC**

Great leaders seek opportunities to hear and understand bad news, according to Michael Collins in "Good to Great." Organizations that teach people how to surface conflicting views and manage the resulting conversations respond quickly to change and encounter fewer surprises. Participants will learn ways to surface and manage conflict and will develop strategies for encouraging people to identify the "uglies," with the intent to strengthen the organization. This program is also available in a 4-hour format.

CHALCFO

CHALLENGES FOR FINANCIAL PROFESSIONALS**Francis Ryan, MBA, CPA**

As the economy continues to struggle, the leadership role of the CFO / Controller has never been more important and governance and effective management controls become critical in that role. This course provides guidance to the financial executive in dealing with the financial and accounting issues of the volatile financial markets in the current global economy. Useful tools will be explored as they relate to the major risks an organization faces and how to effectively use those tools in strategic and operational roles of the CFO / Controller. A case study approach is used. (Available in 4 or 8 hour format)

COT8

CHAMPIONS OF TRUST**Greg Conderacci**

Trust, trust, trust - never has there been so much interest in trust. Amazon lists 20 books on the subject, including "The Speed of Trust" by Stephen M. R. Covey (son of Stephen Covey), fast becoming an instant business best seller. Google the phrase "trust me" and you get 120 million choices. In a world hungry for trust, you can become a champion of it - if you use a few key approaches - some ancient, some very modern. This program is also available in a 4-hour format and as a keynote speech.

CES

CHANGE EFFORTS THAT STICK**Gretchen Pisano**

Even the most well-intentioned and well-funded change efforts can be brought to a halt by individuals and organizations that are not prepared for, or willing to take, the journey that change requires. Learn how to build an effective system-wide change effort, discover practical tools that will help you ensure success, and understand ways you can work with those who champion it as well as those who resist. This course will show you the components that underlie a change system, provide you with the knowledge to work with the flow of people's individual change, and equip you with a tool set for change no matter how big or small.

IMPACT

new

COACHING FOR IMPACT - GENERATIONAL DIVERSITY**Dr. Jeffrey Magee**

The fourth in a series of 12 modules from the Leadership Academy of Excellence® Series, this program focuses on the essential building blocks to interacting with the five diverse generational segmentations in today's work place. Discover ways to interactively build a greater understanding among group business units (teams, committees, strategic business units, etc.)

CYS

COACHING STAFF TO STAY ON THE RIGHT TRACK (ALSO AVAILABLE AS A 2-HOUR WEBCAST/ON-DEMAND)**Jennifer Louis, CPA**

Retaining and developing staff is critical to the long-term success of your firm. Learn how to be a better coach, mentor and lead your staff to desired professional growth.

COMEHOME

new

COMING HOME: STRENGTHS-BASED LEADERSHIP FOR PERSONAL AND ORGANIZATIONAL PROSPERITY**Gretchen Pisano**

The energy that we bring to everything we do, whether it's in our personal or professional life domains, is all we've got. It is the power source of the intellectual, emotional and physical capacities that we have to innovate and collaborate, and it is the key to thriving in the fast-paced global world we find ourselves in today. It is also a finite resource that follows the laws of sound investment strategy; specifically, we can make investments of ourselves that yield varying rates of return and if we are not careful, we can bankrupt ourselves along the way.

Strengths based leadership is an orientation and a practice. Coming home to your strengths will change the way you are investing yourself and subsequently change the quality of your life and your outcomes. Based on research conducted by the Gallup organization and leading edge scientific insights from the field of positive psychology, this interactive workshop will challenge you with fresh perspective and offer creative pathways forward to personal and organizational prosperity in the new economy. (Customized programs available from 90 minutes to 6 hours.)

CONSTACC

new

CONSTRUCTION ACCOUNTING - A "REAL-LIFE" INSIDE LOOK AT CRITICAL ISSUES**William Eskin, CPA**

Now you have the opportunity to learn and understand the difficulties involved with construction accounting from a CPA who was part of senior management of the world's largest surety from the underwriting, claims, and recovery perspectives

CONVGAAP

new

CONVERGENCE: CHANGES COMING TO US GAAP**Peter Margaritis, CPA, MAcc**

This course will focus on current and completed convergence projects and how they will impact U.S. GAAP. The convergence projects discussed and analyzed are: revenue recognition, leasing, financial instruments, consolidation, joint arrangements, fair value, and more.

CPAMAL

new

CPA MALPRACTICE - AM I AT RISK OF A LAWSUIT?**William Eskin, CPA**

The audit/review is finished, the financial statements have been submitted, and we have collected our fee. But wait, the bank is yelling FOUL. Am I at risk of getting sued? (4 hours for industry, 8 hours for public)

CSM CPAS AND SOCIAL MEDIA: PASSING FAD OR VALUABLE TOOL? (2-HOUR WEBCAST)**William Sheridan, CAE**

Join us for this enlightening session about how CPAs are using Social Media to develop business, make connections, do research and become thought leaders. Tom Hood has led the CPA profession in innovative uses of social media and will be presenting the latest tips and techniques to get you started using these exciting tools.

CRW CREATING A RESPECTFUL WORKPLACE**Sheila Birnbach**

Workplace harassment is any unwelcomed verbal, visual or physical conduct on a basis prohibited by law that creates an intimidating, offensive or hostile work environment or that interferes with work performance. This can include jokes, gestures, visual material in paper or electronic media. In 1999, the Supreme Court impressed upon employers the need to train employees on harassment and discrimination prevention. No longer can employers simply rely on the existence of policies against harassment and discrimination to avoid punitive damages. Training on harassment and discrimination prevention is critical to protecting the organization. (Available in 3 or 6 hour format)

CREATE CREATING CREATIVITY: OUTSIDE - OUTSIDE THE BOX**Greg Conderacci**

It's right there on the tip of your tongue, just beyond your reach or around the next corner. It's the idea that will change your life, guarantee career success, and make everybody say "Why didn't I think of that" You only have to be a little creative. Some people are naturally creative. For the rest of us, there is this course. Its built upon the tricks of the trade that famous (and not-so-famous) thinkers have used to ignite the creative spark. This is a highly interactive course with many creative exercises.

CPS CREATIVE PROBLEM SOLVING**Lin Kroeger, CMC**

Creativity and innovation are not the sole responsibility of "the oddballs down the hall." Individuals who want to succeed, contribute to their organization's (and their own) success and stay ahead of the forces of change need to be creative and know how to introduce potentially disruptive ideas into the organization, in a constructive manner.

CPMUT CRITICAL PERFORMANCE MEASURES - USEFUL TOOLS FOR GAUGING SUCCESS (FRANK RYAN)**Francis Ryan, MBA, CPA**

Focusing time and energy for corporate leaders and CPA firms is essential in today's business climate. As organizations go lean in processes and people, it is critical to have the tools you need to meet the needs of your customers and to allow you to manage the performance of your company. Using a case study approach, this course will examine those performance measures and other critical elements of success for today's busy financial executive and CPA including growth models, product concept, target costing, operational planning and strategic planning. A case study approach is used. (Available in 4 or 8 hour format)

CPM CRITICAL PERFORMANCE MEASURES: USEFUL TOOLS FOR GAUGING SUCCESS (ALSO AVAILABLE AS A 2-HOUR WEBCAST/ON-DEMAND)**Jennifer Louis, CPA**

Successful organizations know how to effectively channel energies, abilities and knowledge of their people toward achieving short- and long-term strategic goals. Financial professionals have a special obligation to make decisions that are in the best interest of an organization. Focusing on critical performance measures might change the way you measure and manage your company.

C

CEICFO CURRENT ECONOMIC ISSUES AND THEIR IMPACT ON THE FINANCIAL PROFESSIONAL

Francis Ryan, MBA, CPA

The emergence of regulatory policy as a major impact on an organization's costs and competitiveness, as well as the combined impact of fiscal and monetary policy on financing for organizations are causing CFO / Controllers to understand the impact of decisions well outside their control in order to survive and grow. In this course, the financial services bill (Dodd-Frank Bill), health care reform, shortfalls in Social Security, unfunded liabilities, and deficit spending will all be explored relative to their impact on the CFO / Controller and your organization. We will provide guidance in dealing with the financial and accounting issues of today's volatile financial markets. Useful tools for the CFO / Controller to deal with these macro-economic forces will be explored. A case study approach is used. (Available in 4 or 8 hour format)

LGAA CUSTOMIZED ANNUAL UPDATE FOR ACCOUNTANTS AND AUDITORS

Elizabeth Gantnier, CPA

The definitive course to keep CPAs abreast of the fast-paced changes in accounting and auditing, this comprehensive program covers all the relevant pronouncements, exposure drafts and consensus reports recently issued in the accounting, auditing, compilation and review arenas and will be customized based on desired topics and the needs of the client.

D

DDP DEALING WITH DIFFICULT PEOPLE

Lin Kroeger, CMC

Difficult people appear in all areas of life—each of us needs strategies and tactics to communicate effectively, achieve our purpose, and feel good about ourselves when dealing with them. This workshop will provide an opportunity to learn strategies and tactics that can help in many situations when difficult people are making work and communication challenging.

DEU DEALING WITH ECONOMIC UNCERTAINTY: THE RECESSION

Francis Ryan, MBA, CPA

The recession is still looming. The financial markets are in turmoil. Those that plan for the impact of the recession and financial market instability will survive in tact and be ready for the next market upturn. The skills needed to meet these daunting times are seldom taught but are so critical to survival. The methodology to survive and even thrive in the current environment will be the subject of our course. A case study approach is used. (Available in 4 or 8 hour format)

DITFIN48 DEFERRED INCOME TAXES AND FIN 48

new

William Eskin, CPA

Deferred income taxes and FIN 48 are 2 GAAP areas that not only users of the financial statements have troubles understanding, but even CPAs and accountants responsible for financial statement preparation. We will try to make sense of these critical issues.

CANDO DELIVERING CREDIBILITY ON THE PHONE - CONVEYING A "CAN DO!" ATTITUDE

Sheila Birnbach

Do the people who answer your telephones sound happy to be at work? Do they convey a positive image of your organization or do they sound bored or tired on the telephone? Do your callers perceive them as rude or uninterested? The people who answer the telephones in your organization can be image enhancers or image detractors, depending upon their vocal quality.

D

HEDGE

DERIVATIVES AND HEDGE ACCOUNTING: THE ESSENTIALS**Thomas Selling, Ph.D., CPA**

Hedge accounting, by its very nature, is fraught with inconsistencies, which are further compounded by the complexity of the financial relationships within the scope of the hedge accounting standards under U.S. GAAP. The objective of this course is to show that there is a "method to the madness" of hedge accounting. Starting with the basics, numerous examples will rapidly become more complex; and the explanation of each solution will be couched in terms of common themes.

DCS

DEVELOPING A COMMUNICATION STRATEGY**Lin Kroeger, CMC**

Communication is the heart of every organization. Through communication, people understand what's happening, what the priorities are and how the business is doing. Leaders use communication to connect to their followers and followers expect their leaders to communicate with them so that they know how (and where and why) to follow. Managers and supervisors communicate regularly, establishing expectations and providing feedback. Without a communication strategy, you and your organization cannot attract and retain the right people, and make the right things happen to be effective in the marketplace.

RTMC

DEVELOPING AND RETAINING TALENT -- AN ORGANIZATION IMPERATIVE**Lin Kroeger, CMC**

New economy or old economy, in today's economy one thing is certain -- attracting and retaining talent is the key to organization success. Talent is tough to locate, attract, develop and retain, but only with talent can your organization thrive. The traditional approaches of paying dues and apprenticeships no longer meet the needs of young and mid-career professionals. It is difficult to motivate these young professionals because what they seek is often not what their predecessors sought. Yet, the future depends on finding a way to bring in and nurture the talent of the professionals who will deliver success in the short term and take over their organizations long term.

E

EU

ECONOMIC UPDATE: THE SLOW, WINDING ROAD TO RECOVERY**Anirban Basu, J.D.**

This presentation will focus upon the emerging economic recovery, its characteristics and its likely sustainability. Particular attention shall be paid to the messages being sent by financial markets, the performance of the labor market, regional economic performance, and factors that have the potential to shift the economy's present trajectory. The presentation also provides economic outlooks to support decision-makers. (This program is available in a one to 4 hour format.)

EVAMS

ECONOMIC VALUE ADDED - MAXIMIZING SHAREHOLDER VALUE (FRANK RYAN)**Francis Ryan, MBA, CPA**

In the turbulence of the financial markets of 2008, the valuation of a company's earnings and business model becomes increasingly important. Financial market panics undermine the very fundamental analysis that every corporate executive, auditor, consultant and financial executive should be employing as they review their strategic direction. A case study approach is used. (Available in 4 or 8 hour format)

RAS

EFFECTIVE AND EFFICIENT RISK-BASED FINANCIAL STATEMENT AUDITS IN COMPLIANCE WITH YELLOW BOOK (ALSO AVAILABLE AS 2-HOUR WEBCAST/ON-DEMAND)**Jennifer Louis, CPA**

In recent years, the auditing standards have been strengthened in an attempt to improve the quality and effectiveness of financial statement audits. CPA firms need to act now to train audit professionals on how to effectively and efficiently perform audits that comply with relevant standards.

ECFR

EFFECTIVE COMMUNICATIONS**Francis Ryan, MBA, CPA**

CPAs are counted on to deliver communications that are outside of pronouncements. In order to be an effective member of a team, you must be able to communicate in your emails and when speaking in public. In addition, effective communicators must be trained to be good listeners. This course will cover the skills a CPA needs to be effective in communications for speaking, writing, and listening to the needs of the client and the dynamic market forces that we currently are facing. A case study approach is used. (Available in 4 or 8 hour format)

CONSULT

new

EFFECTIVE CONSULTING SKILLS - MOVING FROM SUBJECT MATTER EXPERT TO BUSINESS CONSULTANT**Steve McClatchy**

Your ability to grow and be profitable is directly tied to your ability to help your clients do the same. To achieve success in consulting, your consultants must work with your clients not for them. Effective Consulting Skills is practical, holistic and one of the only training programs ever designed to improve the consulting skills of delivery consultants. This program is not lectured, it is customized and facilitated with interaction, exercises and real world examples. (Available in full day, half-day or keynote format)

ETP

ELEVATING TEAM PERFORMANCE**Alan Patterson**

Every strong leadership team knows that their organization's future depends on team performance. Today's business environment is too unforgiving to allow functions or teams to underperform. This workshop pinpoints how to improve team performance by reinforcing the basic principles of goal setting, alignment, and clarity of expectations.

EYIS

EMBRACE YOUR INNER SUPERHERO**Gretchen Pisano**

What if we DID do it all? What if there wasn't one single thing that we would give up? What did Clark know that we don't? This course will introduce you to a conceptual model for thinking about how to lead a very busy, and fulfilling life, without completely losing your mind. You will be introduced to some practical tools to apply to your life, and there will be ample discussion time to take theory to practice. While this course is especially relevant to female leaders, it does not exclude the male perspective.

EMERGE

EMERGING CFOS AND FINANCIAL EXECUTIVES: ONE ON ONE ASSESSMENT AND COACHING**Alan Patterson**

Today's successful financial leaders have unique skills characterized by their agility, resilience and experience. The global economy, competitive environment, scarcity of resources, issues of profitability and the need to serve multiple masters create difficult expectations. In most organizations there are several individuals who are outstanding leaders, some of whom will rise to the level of CFO or Partner. However, it is only a small percentage that has the proverbial right stuff to take the financial executive position. Therefore, an organization's ability to recognize skill and nurture talent is imperative. Identifying emerging CFOs and Partners and grooming them for future responsibilities is critical to the on-going success of the organization. This program is an in-depth assessment and professional development and one-on-one coaching process with Dr. Alan M. Patterson. This program is highly customized.

EI

EMOTIONAL INTELLIGENCE AND PERSONAL LEADERSHIP**Lin Kroeger, CMC**

It is not enough to be smart, experienced or focused. Only when you understand who you are, how you impact others, and how best to manage yourself and your communication, will you be able to use your smarts and become effective. Emotional intelligence is the missing element in many potentially successful professionals' careers. This workshop introduces the concepts of emotional intelligence and allows participants the opportunity to explore their role in personal and organizational effectiveness.

EBPA EMPLOYEE BENEFIT PLAN AUDITING**Jennifer Louis, CPA**

Employee benefit plans involve complex and unique accounting, auditing, regulatory and financial reporting issues. Recent inspections have noted significant deficiencies in many employee benefit plan audits. This course will focus on quality auditing of common employee benefit plans.

EMPMOTI
new**EMPLOYEE MOTIVATION AND ENGAGEMENT: DRIVING RESULTS WITHOUT DRIVING YOUR TEAM CRAZY****Ray Perry**

Have you ever wondered how you could minimize the problems, headaches, and difficulty associated with managing other people? This practical course provides you with "I can definitely use that today" answers that will give you greater confidence, control, and results _ regardless of your years managing other people.

ERL21ST
new**ENERGY RICH LEADERSHIP: THE COMPETITIVE OF THE 21ST CENTURY (KEYNOTE)****Gretchen Pisano**

Competitive advantage that is gained through material innovation is thin and temporary. It is just too easily and quickly replicated in today's economy. Competitive advantage that is gained through engagement of your people and their positive, collaborative and creative contributions is tough to match and impossible to replicate.

There is just one problem. How do you do it? Positivity, and the science that underpins our understanding of energy-rich leadership, lends insight and practical wisdom to this new competitive strategy.

The beginning of a new way of being, this keynote touches on leading edge research that is delivering fresh perspective and new alternatives for engaging ourselves, and our people, in the business of flourishing in our work life and life's work.

ERMAF**ENTERPRISE RISK MANAGEMENT - ACCOUNTABILITY FRAMEWORK****Robert Tarola**

In recent years, external factors have fueled a heightened interest by organizations in ERM. Industry and government regulatory bodies, as well as investors, have begun to scrutinize companies' risk-management policies and procedures. By identifying and proactively addressing risks and opportunities, business enterprises protect and create value for their stakeholders, including owners, employees, customers, regulators, and society overall. The purpose of this course is to help CPAs and other finance professionals develop an understanding of enterprise risk and the critical success factors to thoughtfully address such risks. The course will explore strategic, operational, financial and legal risks, not just from a perspective of "what might go wrong" - but from the view of "what must go right."

ERMF
new**ENTERPRISE RISK MANAGEMENT AND FORECASTING****Francis Ryan, MBA, CPA**

Underlying risks of managing a business are examined in a process approach to understanding risks. A detailed case study will be examined utilizing the tools learned in the risk analysis approach.

NRISK-1
new**ENTERPRISE RISK MANAGEMENT: A PRAGMATIC APPROACH - BASIC LEVEL****Michael Kraten, PhD**

What do you do when an off-the-shelf risk management software program is insufficient to meet your needs How do you prepare a plan that captures the unique characteristics of your market, your customer base, and most importantly, your product or service? This course takes a pragmatic, hands-on approach to walking participants through the eight essential components of a customized Enterprise Risk Management (ERM) plan as defined by the Council of Sponsoring Organizations (COSO). It emphasizes "nuts and bolts" operational concepts and techniques in order to optimize its utility for business development work.(Available in formats from 2 to 8 hours)

NRISK-2 ENTERPRISE RISK MANAGEMENT: A PRAGMATIC APPROACH - INTERMEDIATE LEVEL

new

Michael Kraten, PhD

Basic Enterprise Risk Management (ERM) plans emphasize broad strategic goals and traditional quantitative measurements. However, the most effective plans also incorporate technical internal and external accounting practices that can guide an organization's implementation activities at the operational level. This course takes a pragmatic, hands-on approach to walking participants through fifteen specific accounting practices that should be added to any ERM plan of intermediate level complexity. It emphasizes the application of these practices at the operational level. (Available in formats from 2 to 8 hours)

NRISK-3 ENTERPRISE RISK MANAGEMENT: A PRAGMATIC APPROACH - ADVANCED LEVEL

new

Michael Kraten, PhD

In today's hyper-competitive economic environment, accounting professionals are constantly pressured to apply the most advanced tools of statistical analysis to their Enterprise Risk Management (ERM) plans. These tools require an advanced understanding of quantitative research methods, as well as an ability to integrate accounting techniques with production, service, marketing, and other functions. This course takes a pragmatic, hands-on approach to walking participants through four specific in-depth cases that address such concerns. It emphasizes the ERM functions of simulation analysis, performance measurement, crisis management, and investment valuation. (Available in formats from 2 to 8 hours)

ESTM ESSENTIAL SKILLS FOR CPA FIRM MANAGERS**Jennifer Louis, CPA**

This course focuses on helping audit professionals become more firm-focused, beyond improving the quality and efficiency of specific engagements. Proven tips and techniques, combined with hands-on practice, will help professionals enhance important soft skills necessary for developing firm leaders and long-term profitability. This course is appropriate for any experienced professionals with firm-wide leadership potential or responsibilities, including professionals from audit, tax and other service lines.

ETALK E-TALK: TIPS FOR USING EMAIL EFFICIENTLY & EFFECTIVELY**Kelly Watkins**

Many of your clients and colleagues meet you for the first time via email. They form perceptions about you (and your company / firm) based on your ability to type - or, rather, by your ability to communicate via email. Think about it: People develop opinions about you (and your firm's services or products) based solely on your email messages. This interactive session will teach you how to be more effective and save time using email, while establishing credibility with clients and colleagues. It is loaded with practical examples and relevant activities. You'll leave the program knowing how to use email communication more efficiently and effectively.

ETH ETHICS**Gary Bulmash, CPA**

Review recent topics concerning ethics 2 or 4 CPE hours. Virginia Ethics can also be covered in this program.

PEU ETHICS AND THE ATTEST FUNCTION: A PRACTICAL UPDATE FOR CPAS IN PUBLIC PRACTICE**Ray Thompson, CMA, CFM, CBA**

Receive a fast-paced overview of ethical standards promulgated by the AICPA and State Society and State Board authorities as they apply to small-to-medium-sized CPE firms. We will use case studies to examine the connections between ethical principles, formal rules and the profession's public responsibility. In addition, learn how to apply the independence rules of Interpretation 101-3 when providing both attest and non-attest (management advisory) services for closely held clients. Receive up-to-the minute coverage of evolving issues such as tax advisory services and recent revisions to the Ethics Code. (Content can be customized to client needs)

ETHHABIT

new

ETHICS CAN BE HABIT-FORMING: GOOD HABITS, BAD HABITS AND TURNING ONE INTO THE OTHER**Greg Conderacci**

"When a habit emerges, the brain stops fully participating in decision-making," according to Charles Duhigg, author of the business best-seller, *The Power of Habit*. This is course about the ethical challenges we face in the Twilight Zone of thinking: the habits, hidden assumptions, blind spots, intuitions, instincts, and other foggy pathways of our brains. It focuses on pitfalls and practices to avoid them, including harnessing the power of habit to lead a better, more ethical life.

ETHICSUR

new

ETHICS FOR PEOPLE WHO DON'T LIKE SURPRISES: WHY WE DON'T SEE IT COMING UNTIL IT'S TOO DARN LATE**Greg Conderacci**

"How come nobody saw that coming" is one of the most common refrains of modern society. Whether it's the Enron scandal, the Internet bubble, the economic crisis of 2008, 9/11, or a serious ethical breach at a local accounting firm, we seem blind to the signs of trouble on the horizon. This course explains why we so often miss what seems so obvious in retrospect - and what we can do about it.

EIA

ETHICS IN ACCOUNTING**Robert Tarola**

This course will explore the history of, and typical factors around, ethical lapses in accounting.

EPA

ETHICS, PRINCIPLES, AND APPLICATIONS (ALSO AVAILABLE AS A 4-HOUR WEBCAST/ON-DEMAND)**Francis Ryan, MBA, CPA**

While ethics training is required by many states, the true value of our CPA license is in understanding how critically important ethical behavior is to one another, our customers and to the public. Ethical behavior is what we are all about. This course will explore the basic tenets of ethical behavior and use various case studies to explore what has gone wrong in the past. Using real disciplinary cases, we will examine what went wrong with the behavior of others in our profession. We will review a standard of conduct and then show you how to apply those standards to the real world. A case study approach is used.

EAA1

ETHICS, LEADERSHIP AND THE ROLE OF THE CPA (ALSO AVAILABLE AS A 4-HOUR WEBCAST)**Francis Ryan, MBA, CPA**

Designed to provide all CPAs with both a conceptual and practical approach to professional ethics in today's volatile and high-profile marketplace, this course will provide the skills needed to guide your actions when faced with difficult ethical decisions. A case study approach is used.

EAA2

ETHICS, LEADERSHIP AND THE ROLE OF THE FINANCIAL PROFESSIONAL (4-HOUR WEBCAST)**Francis Ryan, MBA, CPA**

Designed to provide the financial professional and corporate leader with both a conceptual and practical approach to professional ethics in today's volatile and high-profile marketplace, this course will provide the skills needed to guide your actions when faced with difficult ethical decisions. A case study approach is used.

TDBL

ETHICS: CAESAR'S WIFE: TIPPING THE DELICATE BALANCE OF LEADERSHIP AND ETHICS (ALSO AVAILABLE AS A 4-HOUR WEBCAST/ON-DEMAND)**Greg Conderacci**

In today's complicated world, CPAs carry an increasing burden of public trust. As in the past, they are expected to give sound, ethical advice on accounting matters. Yet, what used to be an end is now just a beginning. The press, the government, business leaders and others look to CPAs to bring judgment, honesty, clarity and transparency to many murky issues. This course goes beyond just "the rules" to discuss broader and deeper issues affecting the profession and your role in it.

BECCI

ETHICS: CONFRONTING THE CHALLENGE OF INTEGRITY**Greg Conderacci**

Ask CPAs to list their values and integrity will always appear near the top of the list. Ask them what integrity means, though, and many answers emerge. It turns out that there is considerable debate about integrity and what it means in a complex world of competing values. But, there is little debate that integrity is at the heart of the profession.

E

ETHICHOW

new

ETHICS: IT'S NOT JUST WHAT YOU DO, BUT HOW YOU DO IT!**Jennifer Elder, CPA**

In today's hyper-connected and increasingly transparent world, the reputation you worked so hard to build can be destroyed in an internet minute. Mere compliance with regulations is no longer enough. Companies need to move beyond thinking about what they can't do to a new paradigm of what they should do. The world has changed and it is time for corporate governance to change too. It is time to move beyond the "command and control" style of leadership and into values based governance using collaboration and inspiration. In this seminar, learn how to lead your company into a values based operation that not only promotes ethical behavior but inspires excellence at the same time.

STRAY

ETHICS: WHY WE STRAY: A DIFFERENT LOOK AT ETHICAL DECISION-MAKING**Greg Conderacci**

What was he thinking? Have you ever wondered that in the wake of an ethical breach by a previously respected person? Often, the unethical action is hard to believe much less explain because the conditions that contribute to unethical behavior are far from clear. These subtle factors are the "danger zones" that ethical practitioners - and especially leaders - need to recognize in themselves, their firms and their clients. This course explores the tangled paths to ethical problems. It is designed to sensitize you to the subtle traps and to suggest strategies to avoid or extricate yourself from them - whether they are internal, cultural, organizational or societal. The course is taught by 130498, a BLI Senior Fellow, marketing consultant, and a faculty member at the Johns Hopkins Carey Business School.

EECON

EVERYDAY ECONOMICS**Ronald Baker**

While most people think of economists as seers who try to predict the future of the stock market, government deficits, unemployment and similar areas, this is a far too parochial a view of what economists do. The really fascinating economists are engaged in the study of human behavior. The most fertile minds in economics today deal with observing the world and trying to understand it, not predict it. This course will explore how economics can be used to explain everyday behavior, in a myriad of real life situations. By discussing the work of the most influential and seminal minds in the economics profession, attendees will gain an appreciation for how the economist views the world and the power of their theories to explain why people behave the way they do and then be able to apply it to their approach to doing business.

EVRYDAY

new

EVERYDAY ETHICS: DOING WELL AND DOING GOOD**Ronald Baker**

Ethical behavior of CPAs is expected each and every day--in and out of the practice of accountancy. Failure to follow ethical behavior jeopardizes your personal and professional future. What ethical obligations do you have to your customers, employer, team members, and outside stakeholders? What impact have the recent accounting scandals had upon the profession, and how can they prevent repeating those ethical lapses? This course will help you to define your obligations beyond the rules and regulations, to create a new moral code based upon the principles of individual creativity, community, realism, and the other virtues that make up the spirit of enterprise.

OFADBWIN

new

EXCEL + OUTLOOK + WORD + ADOBE ACROBAT + WINDOWS 7 - IMPROVE PERSONAL PRODUCTIVITY**Judith Borsher, CPA, MBA, CGMA, CIT**

Improve your personal productivity by knowing how these programs complement each other and offer quick techniques to get your work done. This fast-paced course is designed to focus on a combination of important business productivity features in Excel, Outlook, Word, Adobe Acrobat and Windows 7. The content of this presentation applies to Microsoft Office versions 2007 and 2010 and Adobe Acrobat versions 9 or X. (Format choices: "Lecture only with live demo" or "hands-on, participants bring laptops or tablets")

EXWDADOB

EXCEL + WORD+ ADOBE ACROBAT FEATURES AND PRODUCTIVITY TIPS**Judith Borsher, CPA, MBA, CGMA, CIT**

This fast-paced course is designed to focus on important intermediate and advanced level productivity features in Excel, Word and Adobe Acrobat. The content of this presentation applies to Microsoft Office versions 2007 and 2010 and Adobe Acrobat versions 9 or X. (Format choices: "Lecture only with live demo" or "hands-on, participants bring laptops or tablets")

EXCELA-L

EXCEL ADVANCED PRODUCTIVITY FEATURES, PIVOT TABLES & MACRO RECORDER TIPS

Judith Borsher, CPA, MBA, CGMA, CIT

Professionals who work with Excel every day will benefit from these advanced topics. This fast-paced program covers: range naming, decision-making IF and VLOOKUP functions, financial functions, Pivot Table reporting, controlling calculation inputs, securing files, formula auditing, external formula linking, many multiple worksheet tips and time-saving usage of the macro recorder. The content of this presentation applies to Excel 2007 or 2010. (Format choices: "Lecture only with live demo" or "hands-on, participants bring laptops or tablets")

EXCLBOOT

new

EXCEL BOOT CAMP FOR CPAS

Judith Borsher, CPA, MBA, CGMA, CIT

CPAs who work with Excel every day will benefit from these topics and tips which include: protecting features, range naming, decision-making IF and VLOOKUP functions, financial functions, Pivot Table reporting, controlling calculation inputs, securing files, formula auditing, external formula linking, business graphics, linking Excel data and graphs to Word, many multiple worksheet and consolidation tips, time-saving usage of the macro recorder and Visual Basic tips. Even if you thought you knew it all in Excel, this course will advance your knowledge. Topics covered apply to Excel 2007 and Excel 2010. (Format: "hands-on, participants bring laptops")

EXCELC-L

EXCEL CHARTS, GRAPHS AND DIAGRAM FEATURES

Judith Borsher, CPA, MBA, CGMA, CIT

Excel includes many new graph templates, diagram types, and tools to create a professional presentation of data in a visual format. In this course, you will learn the Excel features to present data using enhanced chart types, graphs, and diagrams. Drawing tools for adding annotation features will also be covered. Participants will learn many time-saving tips for presenting business information. The content of this presentation applies to Excel 2007 or 2010. (Format choices: "Lecture only with live demo" or "hands-on, participants bring laptops or tablets")

EXCLDABG

new

EXCEL DATA ANALYSIS TECHNIQUES AND BUSINESS GRAPHICS

Judith Borsher, CPA, MBA, CGMA, CIT

Excel 2010 includes sophisticated features to present Pivot Table reports and analyze data using sophisticated tools. This course covers the many Excel features to test, organize, calculate and find trends in data as well as report the results. You will also learn the Excel features to present data using enhanced charts styles, graphs, and diagrams using drawing tools for annotating. Participants will learn many time-saving tips in this course for calculating and presenting business information. The content of this presentation applies to Excel 2007 or 2010. (Format choices: "Lecture only with live demo" or "hands-on, participants bring laptops or tablets")

EXCELPT

EXCEL FOR AUDITORS: PIVOT TABLES IN- DEPTH, DATA ANALYSIS FUNCTIONS & TIPS

Judith Borsher, CPA, MBA, CGMA, CIT

Excel includes sophisticated features to present Pivot Table reports. This course covers the many Excel features to test, organize, calculate and find trends in data as well as report the results. Participants will learn many time-saving tips. (Format choices: "Lecture only with live demo" or "hands-on, participants bring laptops")

EXCELM-L

EXCEL POWER USER: MACRO PROGRAMMING USING VISUAL BASIC FOR APPLICATIONS

Judith Borsher, CPA, MBA, CGMA, CIT

Enhance your productivity and save time with Excel macros. This course will teach you how to work effectively with the Visual Basic Programming language as it applies to Excel, use the Excel Visual Basic Editor to create macro code and create macros that go beyond the capabilities of the macro recorder. The material is presented in an exceptionally easy-to-follow format with examples, clear definitions of terms and useful take-home examples. The content of this presentation applies to Excel 2007 or 2010. (Format choices: "Lecture only with live demo" or "hands-on, participants bring laptops or tablets")

EXCEL-L

EXCEL REFRESHER AND UPDATE**Judith Borsher, CPA, MBA, CGMA, CIT**

This refresher course covers Excel Worksheet features in a fast-paced format to benefit beginner through intermediate level users. The many new business productivity enhancements in Excel will be covered. Participants will learn about file compatibility issues with earlier versions of Excel and how to save time with many quick tips. The content of this presentation applies to Excel 2007 or 2010. (Format choices: "Lecture only with live demo" or "hands-on, participants bring laptops or tablets")

EXCELBEG

new

EXCEL WORKSHEETS FOR BEGINNERS**Judith Borsher, CPA, MBA, CGMA, CIT**

This course covers Excel Worksheet features at a basic level and will benefit those who are beginning to use Excel. Participants will learn how to design worksheets, enter data and formulas to build worksheets, format cells and print worksheets. The content of this presentation applies to Excel 2007 or 2010. (Format choices: "Lecture only with live demo" or "hands-on, participants bring laptops or tablets")

EXCEPCUS

new

EXCEPTIONAL CUSTOMER SERVICE - EFFECTIVE COMMUNICATION**Sarah Gershman**

There is no greater determinant of your professional success than your ability to communicate effectively with your customers. In this fun and interactive workshop, you will gain a toolbox of simple and concrete customer service strategies that can be applied immediately - in a variety of settings. All participants will have opportunities for practice and feedback.

BGCF

EXECUTIVE FINANCE FOR OPERATING LEADERS: RELATING NUMBERS AND METRICS TO REALITY**Jahn Ballard**

Numbers are a second language to you, but how can you explain them to your colleagues and clients, quickly and efficiently? This course will show you how to create an ongoing operations finance and business reporting structure that can be understood by anyone. You will also learn to convert the numbers into at-a-glance pictures, allowing non-financial people to feel comfortable working with, communicating about and making decisions with financial statement data. This course also teaches a proven method for hard-wiring the cash-flows to the balance sheet; completing quick and accurate trail-balanced what-ifs; and how to develop and test key performance indicators. You'll also learn how to apply Three Bottom Line Performance to real numbers using Financial Scoreboard Software (www.financialscoreboard.com). Two secret financial tools behind IBM's sensational success in the sixties and seventies are presented in this workshop by a colleague of Louis R. Mobley, the inventor. Mobley was the founding director of the IBM Executive School at Sand's Point and author of *Beyond IBM: Leadership, Marketing and Finance for the Future*. This workshop will give you much more developed tools than IBM had to accomplish its phenomenal growth and success.

EPRES

EXECUTIVE PRESENCE: AN EXPERIENTIAL APPROACH TO NETWORKING & NEGOTIATION**Michael Kraten, PhD**

Effective networking and negotiation skills are critical when sharing information with colleagues and other professionals, including those from other nations and cultures. This course offers planning and implementing negotiation strategies, along with numerous techniques for developing leadership skills in a competitive global environment. Text materials, video presentations, and interactive simulations of real-world situations will be incorporated into the curriculum. 8 hours (available in formats from 2 to 8 hours)

EXESUMAA

EXECUTIVE SUMMARY ACCOUNTING & AUDITING FOR INDUSTRY**Jennifer Louis, CPA**

All finance and accounting professionals need to stay abreast of significant changes in various standards at least at a high level, including standards related to accounting, financial reporting, and attestation. However, not all professionals need detailed case studies and application explanation. This course provides an executive summary of the most important issues facing most companies and their accountants.

F

FSU

FASB / SAS UPDATE (LATEST EDITION)**Ray Thompson, CMA, CFM, CBA**

This course will provide an up-to-the-minute understanding of newly-issued and forthcoming accounting and auditing standards. Understand how the convergence agenda involving IFRS and GAAP standards is progressing and its consequences for the world of financial reporting. Participants will receive an in-depth explanation of newly enacted convergence standards in the areas of revenue recognition, leasing, consolidation and financial instrument accounting and their likely impact on small- to medium-sized companies. Understand how the financial reporting for non-public companies will change in the near future and learn about recent developments in the compilation and review arena. Receive an update on current and proposed standards involving EITF, FASB, PCAOB, ASB and IASB. (Content can be customized to client needs.)

FIN48

new

FIN 48**William Eskin, CPA**

Just hearing the words "FIN 48" should send shivers up your spine. It may be the most difficult item ever handed to our profession by the FASB. We will discuss this "monster" in detail.

FIX

FINALLY FIXING PERFORMANCE MANAGEMENT USING NEW TOOLS**Karl Ahlrichs, SPHR**

Simply put, most performance management systems simply do not perform very well, so it's understandable that many organizations want to improve their systems. The question is whether this can be achieved via relatively minor changes, major overhauls, or radical shifts in how managers think about managing performance. This workshop looks at all three options, and applies social networking concepts to the challenge. The objective of this workshop is simple to diagnose the flaws in attendees performance management systems, and put a plan in place for new processes that get better results.

STR

FINANCIAL AND ACCOUNTING DECISION MAKING IN A SLOWLY RECOVERING ECONOMY(ALSO AVAILABLE AS A 2-HOUR WEBCAST)**Francis Ryan, MBA, CPA**

The recession is now over a year old. The financial markets are in turmoil. Those that plan for the impact of the recession and financial market instability will survive in tact and ready for the next market upturn. The skills needed to meet these daunting times are seldom taught but are so critical to survival. The methodology to survive and even thrive in these times will be the subject of this course. A case study approach is used. (Available in 4 or 8 hour format)

FSRGAAP

new

FINANCIAL STATEMENT REPORTING - SELECT PROBLEM AREAS IN TODAY'S GAAP**William Eskin, CPA**

Discuss a number of areas that have caused CPAs problems when attempting to prepare GAAP financial statements that have resulted in significant GAAP errors. (Available in a 4 or 8-hour format)

FSA

new

FINANCIAL STATEMENTS ANALYSIS**Jennifer Elder, CPA**

The financial statements contain a wealth of information that can explain historical results and predict future performance. But how do you draw that information out of the statements Learn to be both a financial detective and a fortune teller by applying analysis techniques to the income statement, balance sheet, and statement of cash flows.

FINWAR

FINANCIAL WARFARE**Francis Ryan, MBA, CPA**

The course provides guidance to the financial executive in dealing with the financial and accounting issues of these volatile financial markets that the global economy is currently experiencing. Understanding the impact of market volatility and enterprise risk on your banking relationships, supplier viability, and critical elements of survival for your business will be discussed. A daily flash report of critical survival metrics will be explored in depth. Activity based costing issues relating to cost drivers and cost controls for the firm will be explained as part of a financial warfare defense. A case study approach is used. (Available in 4 or 8 hour format)

F

- FINDND** **FIND A NEED AND FILL IT: YOUR KEY TO BUSINESS DEVELOPMENT (ALSO AVAILABLE AS A 2-HOUR WEBCAST/ON-DEMAND)**
Greg Conderacci
 It's the oldest saw in your business toolbox -- find a need and fill it. Yet the fine art of uncovering needs is a powerful tool to help you take your business to the next level. This course helps you reframe your sales and marketing efforts from a traditional solutions-based platform to a more effective needs-based platform. This course is also available in a 2-hour format.
- WHO** **FINDING YOUR WAY THROUGH CAREER TRANSITIONS**
Greg Conderacci
 Do you want to be ready for the next step in your career? A promotion, a new job, a move to another city, a merger of firms - these are only a few of the transitions you can expect in your career. You can't prepare for every eventuality, but you can be ready for almost any thing that can happen. This is a highly-interactive course designed to give you hands-on experience that can be used immediately - whether you are trying to sell an engagement, convince a colleague about the merits of your ideas, or looking to make a key career move. Also available in a 4-hour format.
- FSSF** **FIVE SMOOTH STONES - FACING GOLIATH AND WINNING**
Greg Conderacci
 Are you facing the challenge of a lifetime? It can be a difficult career transition, a terrific (and somewhat terrifying) business opportunity, or any major effort. Before David faced Goliath, he selected five smooth stones for his sling. This course gives you five strategies for succeeding in the face of seemingly overwhelming odds. This course is also available in a 4-hour format.
- ELITE**
 new **FOCUS, FORM AND FLOW: THE DISCIPLINES OF THE ELITE MIND**
Greg Conderacci
 Olympic athletes, Zen masters, top executives and successful artists share key mental disciplines that propel them to leadership in their professions. These same disciplines of Focus, Form and Flow can help anyone find balance and improve performance in a turbulent and competitive world. This course draws on some of the latest (and most ancient) wisdom from science, sports, business and philosophy to tap the power within all of us.
- FRAUD** **FRAUD: DETECTION AND PREVENTION**
Jennifer Elder, CPA
 Fraud costs US companies \$400 billion annually. 31% of fraud occurs in companies with fewer than 100 employees. Don't let your company be the next victim. Learn to identify and protect against the missed common types of business fraud.
- FCCFO** **FROM CONTROLLER TO CFO: HOW TO ACQUIRE THE SKILLS NEEDED TO MAKE THE LEAP**
Alan Patterson
 When contemplating transitions in their careers, most individuals are uncertain about how to prepare for making these critical changes. This workshop describes a roadmap of the skills, competencies, and experiences needed to transition successfully from a Controller to CFO.
- SDSS** **FROM SLOW DEATH TO SWEET SUCCESS: SEVEN SURVIVAL STRATEGIES**
Greg Conderacci
 Life is full of what the British euphemistically call, bad patches, difficult times that can transition to a far better life -- or not. Yet history is full of strategies that can turn a career (or a life) around. From Robinson Crusoe to POWs in the Hanoi Hilton, these are the stories and strategies that can help you get out of a rut before it becomes a grave! This interactive, full-day program is for anyone, but especially for those who must lead others through periods of intense change.

BROADEN

new

FROM TECHNICAL EXPERT TO FINANCIAL LEADER: HOW TO MANAGE AND BROADEN YOUR CAREER

Alan Patterson

Technical expertise is a necessary requirement for professional development, particularly because it contributes to building your base of credibility. Beyond a certain point in your career, however, managing relationships and strategic thinking become more critical. Even in high level individual contributor roles, selling ideas and influencing others, the heart of leadership, are the competencies that define long-term career growth.

FCCFO-W

FROM TECHNICAL EXPERT TO FINANCIAL LEADER: HOW TO MAKE A CRITICAL LEAP IN YOUR CAREER DEVELOPMENT (2-HOUR WEBCAST/ON-DEMAND)

Alan Patterson

When contemplating transitions in their careers, most individuals are uncertain about how to prepare for making these critical changes. This webcast highlights a roadmap of the skills, competencies, and experiences needed to transition successfully from a Controller to CFO.

FINANLDR

new

FROM TECHNICAL EXPERT TO FINANCIAL LEADERSHIP

Alan Patterson

This is a comprehensive leadership development process using integrated modules for on-the-job application over a 6-9 month period.

FSM

new

FUNDAMENTALS OF STRATEGIC MANAGEMENT

Dr. Jeffrey Magee

The first in a series of 12 modules from the Leadership Academy of Excellence® Series, this program focuses on the strategic aspects of transformational Managerial-Leadership skills for leaders, directors and managers of today's top business and sales organizations. Learn what you must possess to engage, grow, support, challenge and prepare succession planning.

G

LEAF

GETTING THINGS DONE - ENGAGING PEOPLE TO EXECUTE EFFECTIVELY (ALSO AVAILABLE AS A 2-HOUR WEBCAST/ON-DEMAND)

Lin Kroeger, CMC

Leaders are responsible for ensuring people execute organizational strategy and achieve goals. However, telling people what to do is impracticable -- people won't necessarily do what they're told to do and no leader has the time to figure out and communicate exactly what each person needs to accomplish. The key to execution is knowing how to communicate expectations, and how to develop people's ability to think and act appropriately and effectively. Participants in this program will review the highlights of Larry Bossidy and Ram Charan's execution and the skills of facilitation to develop people's thinking and encourage execution. This program is also available in a 2-hour format.

LSHIFT

GOODBYE LEADERSHIP. HELLO LEADERSHIFT! (1-HOUR WEBCAST)

Emmanuel Gobillot

Emmanuel Gobillot is one of Europe's most sought after business speakers and author of *The Connected Leader: Creating Agile Organizations for People, Performance, and Profit* and his latest book, *Leadershift: Reinventing Leadership for the Age of Mass Collaboration*. He has been described as "the first leadership guru for the MySpace generation" and "the freshest voice in leadership today." As we look at global and social trends affecting all business, we're excited to bring Emmanuel's high energy, thought provoking perspective and new leadership formula to the Business Learning Institute. His formula, Leadership + Collaboration = Innovation, will leave you and your team inspired, asking bigger questions, taking more risk and living with purpose. Why wait. (available as a keynote)

GCIC

new

GOVERNMENT CONTRACTORS AND INDIRECT COST RATES: PREPARATION AND SURVIVING THE GOVERNMENT AUDIT

Norman Lorch, CPA

Note: Qualifies for Yellow Book

If you are in public practice or industry and deal with government contracts and processes, this course is a must. It covers the process of preparing indirect cost rate submission, the associated federal regulations, penalties for claiming unallowable costs, and the government's audit process.

G**GTOG****GREAT TO GOOD: USING THE LESSONS OF GOOD TO GREAT AND HOW THE MIGHTY FALL****Greg Conderacci**

The book *Good to Great: Why Some Companies Make the Leap. And Others Don't* is a perennial business best seller. But in recent years, many of the firms in the book have fallen - spawning another best seller by Jim Collins: *How the Might Fall And Why Some Companies Never Give up*. Both books together contain many lessons for trouble times. Taken together, they outline a strategic approach to building great organizations while avoiding the pitfalls that can trip even the mighty. This course seeks to help you apply those principles to your practice. (Available full day or half day or as a keynote)

TCSWEB5**GROWING YOUR BUSINESS (SESSION 5) "THE TRUST SELLING CYCLE" (1-HOUR WEBCAST)****Mark Slatin**

Traditional sales funnels follow a linear flow with all activities, measurement and targets aimed at a major event - the close. The Trust Selling Cycle presents trust as a non-linear process and sets its destination at creating client trust instead of strictly getting a sale. This session incorporates all of the concepts from the first four sessions and provides a roadmap through each step of the selling process to build client trust. It is the last session of a five-webcast series designed to help service professionals in relationship-oriented selling environments attract and retain loyal clients through trusting relationships.

TCSWEB4**GROWING YOUR BUSINESS: (SESSION 4) "LISTENING TO BUILD TRUST" (1-HOUR WEBCAST)****Mark Slatin**

Seek first to understand, then to be understood. It's easier said than done. According to one Harvard Business School study, failure to listen or follow directions was the number one reason of seller mistakes according to buyers. In this course, you will learn the traps we fall into as listeners and the roadblocks to effective listening. This is the fourth of a five-webcast series designed to help service professionals in relationship-oriented selling environments to attract and retain loyal clients through trusting relationships.

TCSWEB1**GROWING YOUR BUSINESS: (SESSION 1) "THE POWER OF TRUSTING RELATIONSHIPS" (1-HOUR WEBCAST)****Mark Slatin**

Let's be honest, "sell" is a four letter word to most service professionals. Yet, getting a book of business is no longer an option, it's an expectation. The paradox in selling is the less we work to close sales and the more we focus on building the relationship, the more success we'll enjoy. Trust Centered Selling acknowledges the stigma attached to selling and reframes the stereotypes that have created an invisible wall of distrust between buyers and sellers. In this course, you learn the components that underpin trust between buyers and sellers to learn the basics to build trusting relationships.

TCSWEB2**GROWING YOUR BUSINESS: (SESSION 2) "THE 4 COMPONENTS OF TRUST" (1-HOUR WEBCAST)****Mark Slatin**

Trust is part art and part science. This session explores what components equate to our client's perception of us as trustworthy. It's the second of a five-webcast series designed to help service professionals in relationship-oriented selling environments to attract and retain loyal clients through trusting relationships.

TCSWEB3**GROWING YOUR BUSINESS: (SESSION 3) "CREATING CLIENT VALUE" (1-HOUR WEBCAST)****Mark Slatin**

Traditional selling models tend to focus on the transaction and highlight expertise, and fail to emphasize how service professionals can differentiate themselves by having client-focused conversations. This course will introduce the "value driver model" that simplifies the process and will help participants understand buying decisions through the "value scale". This is the third of a five-webcast series designed to help service professionals in relationship-oriented selling environments to attract and retain loyal clients through trusting relationships.

CRO**GUIDE TO COMPILATION, REVIEW AND THE CASH AND TAX BASIS OF ACCOUNTING (LATEST EDITION)****Ray Thompson, CMA, CFM, CBA**

This course offers an overview of the standards, interpretations and practice problems involved in compilation and review today. Participants will gain an understanding of the CPAs increased responsibilities of detecting and reporting fraud during review engagements. Coverage will reflect the most recently issued authoritative literature and use case studies to illustrate the accountant's responsibilities. Course content will focus on the role of the CPA providing accounting, consulting and financial statement services. (Content can be customized to client needs)

H

IDEAGUTS

new

HAVE THE IDEA AND HAVE THE GUTS**Jody Padar, CPA, MST**

Are you an accounting professional who needs some fresh ideas to get your current firm out of its current rut and make it more profitable? Or, are you someone that has been thinking of starting their own firm but just didn't know exactly how? This course is presented using the "MBSN" methodology. The course content is completely dependent on the group of individuals attending the workshop. Be prepared to get involved. Attendees will be lead through a process of "Have the Idea and Have the Guts" from which your small group will create a new Innovative CPA firm.

ENERGY

HIGH PERFORMANCE TIME MANAGEMENT: BOOSTING YOUR PERSONAL ENERGY (ALSO AVAILABLE AS A 2-HOUR WEBCAST)**Robert Cooper**

Old fashioned time management is sooo 20th Century. These days, it's energy management that makes all the difference. In a world of rapid change, the orderly management of scarce time is almost obsolete - there are too many surprises. Even worse, while carefully husbanding your time, you can easily miss opportunities. The secret of success is focusing, increasing and leveraging your most precious commodity: your energy.

IRP

HIRE THE LUCKY ONES - HOW TO IMPROVE RETENTION AND PRODUCTIVITY BY SELECTING FORTUNATE EMPLOYEES**Karl Ahlrichs, SPHR**

It never fails. A few unlucky employees often cause a high percentage of an organization's worker's compensation claims, safety issues and productivity problems. Wouldn't it be great if you could spot bad luck before you make a hiring offer, or coach fortunate skills in existing employees

HIREFIRE

HIRING, FIRING AND EVERYTHING IN BETWEEN**Sheila Birnbach**

How often have you hired a new employee believing he/she could "walk on water" only to discover that, within 3 months, you needed to terminate your new hire? How often have you known you should fire someone only to procrastinate and let the problem fester? Have your coaching or counseling efforts ever fallen on deaf ears? (Available in 4 and 6 hour format)

INSFSA-W

HOW AUDITED ENTITY MANAGEMENT. AND GOVERNANCE CAN INFLUENCE A MORE EFFECTIVE & EFFICIENT FINANCIAL STATEMENT AUDIT (ALSO AVAILABLE AS A 4-HOUR WEBCAST)**Jennifer Louis, CPA**

Various regulatory and standard setting bodies have been focusing on improving the reliability of financial reporting. One part of the equation involves clarifying and enhancing the standards that external auditors are required to follow, which has increased the complexity of financial statement audits. However, the other part of the equation relies on encouraging audited entities (including management, boards of directors, others charged with governance, and any other personnel associated with the audit process) to take a greater responsibility for generating reliable financial statements for audit, improving internal control over financial reporting, and overseeing services provided by the external auditors. Assuming audited entities are successful in taking on greater responsibility of their own financial reporting, this may mitigate potential increases in audit fees - as well as strengthen the ultimate reliability of the underlying financial statements themselves. (Offered as a webcast in four 1-hour segments)

HPO

HOW THE BEST FINANCIAL EXECUTIVES CREATE HIGH PERFORMANCE ORGANIZATIONS (ALSO AVAILABLE AS A 2-HOUR WEBCAST)**Alan Patterson**

The ability to maximize an organizations performance is increasingly difficult due to dramatic changes caused by economic pressures and competition for scarce resources. The key to creating a high performance culture is an effective leadership team, one that embraces change, sets priorities and meets organizational challenges head on. Ultimately, success is based on their ability to continuously scan the business environment and realign the organization for maximum performance. This course is ideally suited as an 8-hour working session for intact teams to assess, analyze, and create plans for better alignment and more effective execution. Such teams include the C-suite executive team, functional/departmental organizations, customer account teams, and cross-functional project or implementation teams. One hour for advanced orientation and preparation is required.

CNCC HOW TO BUILD A CULTURE THAT MAXIMIZES TRUST, ACCOUNTABILITY, AND PERFORMANCE**Alan Patterson**

In high change environments and in particular during this period of economic turmoil financial leaders must create a culture that maximizes performance, respect, and accountability if they are to survive in the long run. This course describes the process and tools needed to transform the organizational culture. (Available in 4 or 8-hour format)

CLL HOW TO COMMUNICATE LIKE A LEADER**Kelly Watkins**

As an executive, partner, or high-level manager, you cant afford to lose productivity due to miscommunication. Its not enough to have a vision or strategy; you must also be able to communicate your initiatives to your staff. You need to know how to adapt to each staff member to obtain maximum productivity and motivation, while avoiding conflict and misunderstandings on a daily basis. Your personal credibility, as well as your companys or firms reputation, depends on your ability to communicate effectively. At your level, you can no longer afford to ignore the implications of good communication. This course will show you how to use the DiSC Behavior Profile as a tool to learn more about yourself as a leader. The program will focus on how to improve manager / staff relations by developing more effective communication skills and lead more successfully by learning how to adapt your style to others.

HIRE HOW TO HIRE THE RIGHT CANDIDATE: A SELECTION AND INTERVIEW PROCESS THAT GETS YOU WHAT YOU NEED**Alan Patterson**

Selecting the best candidate for a position requires a hiring manager to see not only what an individual has accomplished, but also how that person achieves results. However, the over-reliance on resumes and under-reliance on effective interviewing techniques often stand in the way of the best selection decision. In this workshop, you will learn the basic principles of data-based interviewing, also known as behavioral event interviewing a process that requires setting clear performance standards for the position and using specific questions and listening techniques to calibrate a candidates competencies against the standards

POSCOM HOW TO SURVIVE NEGATIVE TIMES BY USING POSITIVE COMMUNICATION - YOUR KEY TO INCREASED PRODUCTIVITY AND PROFITABILITY**Kelly Watkins**

Everyone is tired of hearing about the negative economy, the bad times, and the decreasing revenues. Discover how your company or firm can increase productivity and improve revenue by using positive, professional communication. People form opinions about your talent as a leader based on your ability to communicate. Are you sending a positive, professional image* Is your company or firm losing profits because staff is wasting time with confusion and misunderstandings* Are you losing clients because they don't perceive you as credible or knowledgeable* This course will teach you how to communicate effectively, to improve efficiency, reduce misunderstandings with staff, and retain clients. Relevant examples and practical techniques will be present so that you can use them immediately to improve productivity. In this interactive session, youll receive opportunities to practice your new skills with exercises and activities.

C3E I SAID, YOU SAID: 3 STEPS TO EFFECTIVE COMMUNICATION**Lin Kroeger, CMC**

Why can't there be a simple way to approach sharing and acquiring information? There are so many possible strategies for communicating effectively, who can remember each one, let alone use it in the right situation? This program presents a three-step process for communicating effectively in any situation. Participants will have the opportunity to practice the steps and develop their skill.

I2A I2A: STRATEGIC THINKING THAT TAKES INSIGHTS TO ACTIONS**Tom Hood, CPA, CITP, CGMA**

"To keep pace in your industry, let alone excel as a leader, requires your rate of learning to be greater than, or equal to, the rate of change" Given the rate of change today, this means that you must have: future-minded flexible thinking skills, the tools to rapidly adapt to new circumstances, the ability to make your ideas clear to other people in a way they can easily grasp and the personal influence to inspire others throughout your network. The i2a Strategic Thinking System is a five stage process that teaches critical and creative thinking. The system is designed to yield a thoughtful strategic plan that is realistically optimistic, leverages the strengths of the organization, is aligned with a shared vision and provides the detail that gets the work done. Unique to the i2a System are the powerful "share the air" wall charts that facilitate collaboration and creativity and teach the impact of making your thinking visible to others. In addition, the process of the i2a Strategic Thinking workshop is designed to fundamentally change the way in which leaders think. I2a is exciting because it is the next evolution in strategic planning and leadership skills and represents the intersection of solid strategic planning processes, powerful visual tools and evidence-based practices in motivating people. *Certification and licensing is available for this product.

IDHT IDENTIFYING, DEVELOPING, AND HANGING ON TO TALENT (ALSO AVAILABLE AS A 2-HOUR WEBCAST)**Alan Patterson**

Developing organizational talent is too critical to leave to chance. Unfortunately, many businesses wrongly equate talent development with the annual performance review process. This course will present a proven approach on how to elevate the most talented staff within your organization.

IFRSUPDT IFRS UPDATE**Peter Margaritis, CPA, MAcc**

This course focuses on the current status of the IASB and FASB convergence projects, such as revenue recognition, leases, financial statement presentation, and more. An examination into issued exposure drafts, and new IFRS standards will be conducted. In addition, any new information concerning the SEC's deliberations toward implementation of IFRS in the U.S. will be presented. (Available in 1 - 2-hour format)

IFRSGAAP IFRS VS. US GAAP: IS THERE AN APP THAT?**Peter Margaritis, CPA, MAcc**

This course will explain the differences between the International Financial Reporting Standards (IFRS) which are principles-based standards and U.S. GAAP which are rules-based standards. There will be discussion of how this accounting transition began, along with an update on the current developments from the SEC, FASB, and the IASB. Considerable time will be spent comparing the financial statements under each standard along with analyzing the differences in the accounting treatment for assets, liabilities, revenue and expense recognition, business combinations, and consolidations. The session will conclude with a discussion concerning IFRS 1 - First Time Adoption.

ICCL IMPROVE CASH COLLECTIONS WITH LEAN**Jean Cunningham**

What if you could improve cash flow by shortening your current cash collection process not just by hours or days but by weeks? What would an infusion of cash into your business mean in today's environment? This timely course addresses cash flow issues in a troubled economy to help you face the recession head-on.

PACM IMPROVE PRODUCTIVITY BY AVOIDING CONFLICT & MISCOMMUNICATION**Kelly Watkins**

Seventy to ninety percent of all communication is misinterpreted. Miscommunication leads to conflict, and conflict leads to lost productivity. Can you afford to misunderstand your staff, colleagues, or clients? Most conflict situations can be avoided by simply listening, yet only ten percent of professionals have ever had a class on listening skills. Test your listening skills and discover your natural listening approach. This interactive course is filled with exercises and activities that will help you to improve efficiency within your company, department, or firm. You will learn specific techniques you can use now and be able to see immediate results (less confusion, fewer errors, and clearer communication). When you improve your listening skills, you gain respect from others.



IND

INDEPENDENCE & OBJECTIVITY FOR ATTEST SERVICE PROVIDERS

Jennifer Louis, CPA

Due to recent fraud and accounting scandals, there is increased public and regulatory scrutiny related to independence and objectivity of accountants providing attest services for clients (compilations, reviews, audits, and agreed upon procedures). This session is designed to provide participants with a solid understanding of one of the most important judgment calls made before an attest engagement even begins - whether an accountant is independent to accept or continue with attest services for a client. While this decision is made by the person with final attest authority, the impact of this conclusion has a direct impact on the entire engagement team, as appropriate safeguards to mitigate or eliminate threats to independence and objectivity may be necessary in order to comply with professional and regulatory standards (AICPA, GAO, PCAOB, and SEC).

INFOSECUR

new

INFORMATION SECURITY END USER TRAINING

Judith Borscher, CPA, MBA, CGMA, CIT

Maintaining the security of your computer, mobile devices and network is an important responsibility of each computer user. This course will heighten your awareness with regard to: protecting your identity and company information online; reporting a security threat; identifying a physical or information security breach; identifying common information security threats; identifying information to protect; understanding current Federal information security laws. (Format: "Lecture only with live demo")

IFCS

INSIGHTS FROM THE C-SUITE

Robert Tarola

The totality of issues facing CFOs and CEOs in today's economic environment is staggering. Finance professionals in business and public accounting need to understand these issues so they can help their clients / colleagues make more informed business decisions. This program will address these issues and more including the big picture, managing the board, the value-drivers, business vs. corporate, financial services, risk management and economic analysis. Available in 4 and 8 hour formats

IOBV

INTEGRATING ORGANIZATIONS, BLENDING VALUES

Alan Patterson

Mergers, acquisitions and strategic partnerships succeed or fail based on leadership's ability to integrate diverse organizations at both a process and relationship level. In this course, you will learn the critical steps which need to be taken for two organizational cultures to be successfully blended into one coherent, functioning team. It is well-suited as an intervention session for members of merged or newly integrated organizations.

ICDEAFR

new

INTERNAL CONTROL - WHAT YOU NEED TO KNOW TO DESIGN, EVALUATE AND AUDIT INTERNAL CONTROL OVER FINANCIAL REPORTING

Jennifer Louis, CPA

This course is designed to give you a solid understanding of internal control concepts critical to properly designing, evaluating and auditing internal control over financial reporting. Internal controls guidance was enhanced in recent years to provide entities with the tools and techniques to increase the likelihood of appropriately managing risk of not fulfilling relevant objectives, including those related to strategy, compliance, operations and financial reporting. In addition, internal and external auditors are being held to a stricter standard for properly communicating identified internal control matters noted during the course of audits.

ICDNP

INTERNAL CONTROLS DESIGN, EVALUATION AND COMMUNICATION FOR NOT-FOR-PROFITS (ALSO AVAILABLE AS A 2-HOUR WEBCAST/ON-DEMAND)

Jennifer Louis, CPA

Significant changes in the auditing industry have highlighted the necessity for all entities, regardless of nature, size and complexity, to have a well-designed and effectively operating system of internal controls over reliable financial reporting. This course will provide practical guidance on exactly what a sound system of internal controls looks like, and the resulting impact on the financial statement audit. The program qualifies towards the 24-hour Yellow Book requirement.

ICDEC INTERNAL CONTROLS FOR SMALLER ENTITIES - PRACTICAL CASE STUDIES IN DESIGN, EVALUATION AND COMMUNICATION (ALSO AVAILABLE AS A 2-HOUR WEBCAST/ON-DEMAND)

Jennifer Louis, CPA

There is simply no denying that a sufficiently designed and effectively operating system of internal controls over financial reporting is more important than ever. In this course, we will use extensive exercises and case studies to reinforce fundamental theory through "real-life" scenarios that both internal and external accounting personnel performing internal control-related activities in a wide variety of industries will find beneficial. The program qualifies toward the 24-hour Yellow Book requirement.

IFRS3 INTERNATIONAL FINANCIAL REPORTING STANDARDS: AN OVERVIEW OF THE LOOMING CHANGE TO GLOBAL STANDARDS

Jennifer Louis, CPA

The SEC is in the process of considering to create a road map for transitioning U.S. companies to global rules related to accounting and financial reporting standards. The hope is that use of a single, high-quality standard will eventually empower investors to make better-informed investment decisions by enabling them to easily compare financial statements worldwide. There are both supporters and detractors for this initiative. This course will explore both viewpoints by providing an overview of why adopting IFRS for U.S. companies may be desirable, including consideration of the likely widespread impact on all users of financial statements (both positive and negative). (Also offered in 4-hour format)

IFRS5000 INTERNATIONAL FINANCIAL REPORTING STANDARDS (IFRS) FROM 5,000 FEET

Peter Margaritis, CPA, MAcc

This course will provide an overview of the transition from U.S. GAAP to IFRS. The differences between IFRS (principles-based) and U.S. GAAP (rules-based) will be outlined. There will be discussion of how this accounting transition began, along with an update on the current developments from the SEC, FASB, and the IASB. Finally, financial statements will be analyzed under both standards, along with the current developments on the joint financial statement preparation project.

IFRSB INTERNATIONAL FINANCIAL REPORTING STANDARDS (IFRS)

Gary Bulmash, CPA

Do we all need to go back to college to re-study accounting? The US is moving towards a set of global accounting standards, IFRS. This course introduces to participants this upcoming area of accounting.

BTRC INTERPERSONAL LEADERSHIP - BUILDING TRUST AND RESOLVING CONFLICT

new

Steve McClatchy

Building Trust - Relationships that are high in trust are much more effective than ones that are not. Trust cannot be faked, manipulated or forced but it can be earned. Establishing compelling trust in relationships is everyone's job but one that is not always easy to do. In this presentation we will look at the challenge of building trust in every relationship and the impact of trust on a company's bottom-line.

Resolving Conflict (Removing The Dead Moose) - Conflict is a natural part of any relationship. Conflict by itself is not good or bad but the way we address it can be. When you are faced with an issue that you don't think you can address with someone, it puts a distance between you and them. The more issues there are, the greater the distance and the lower the trust. Addressing conflict in a non-confrontational way that strengthens a relationship is a skill that everyone needs to develop to be successful. When not addressed correctly, conflict can destroy a relationship and the productivity of both people involved. In this presentation participants will learn how to create an environment of safety where issues can be addressed and obstacles removed. (Available in full day, half-day or keynote format)

IACM INTERVIEWING TO AVOID COSTLY MISTAKES IN HIRING (ALSO AVAILABLE AS A 2-HOUR WEBCAST/ON-DEMAND)

Jennifer Louis, CPA

Hiring managers must effectively evaluate a wide range of competencies for a given job position, and be able to exit the interview with specific assessments for each candidate. The ultimate goal is to thoroughly measure a candidate's skills and personality, including negative traits and behaviors he or she may not present during the interview.



IARG
new

INTRODUCTION TO THE ACCOUNTING REQUIREMENTS OF GOVERNMENT CONTRACTS

Norman Lorch, CPA

This course is for CPAs in public practice or industry who desire to understand the regulations and requirements of government contracts. Review and refresh your knowledge on federal regulations and requirements, and updates on the impact of the atmosphere of government procurement. A case study approach is used to reinforce the important concepts covered in this course.

COSTWHAT

IT COST WHAT! A PRACTICAL APPROACH TO IMPLEMENTING ACTIVITY BASED COSTING

Francis Ryan, MBA, CPA

For the financial executive, coming to grips with the challenges of business and profitability have never been greater. However, traditional costing systems provide only minimal guidance to the financial and accounting professionals to assist in improving profitability. This course provides a step-by-step approach of how to effectively implement Activity Based Costing to improve profitability by converting existing GAAP statements to Activity Based Costing Statements. (Available in 4 or 8-hour format)

DPSI

IT'S ALL IN THE PRESENTATION: DESIGNING PRESENTATIONS TO SELL IDEAS EFFECTIVELY

Lin Kroeger, CMC

Technology allows us to present beautiful slides with animation, photographs, vivid color and even sound, but ultimately, the quality of a presentation depends on how well the ideas presented are sequenced and supported with the visuals. Participants will practice designing presentations that inform and persuade, and will develop visual aids that increase the impact of the ideas.

NJQUEST

IT'S NOT JUST THE QUESTION: USING EFFECTIVE COMMUNICATION SKILLS AND PROFESSIONAL SKEPTICISM WHILE GATHERING INFORMATION AND EVIDENCE

Brian Kush, CPA, CISA, CITP

Based on past SEC enforcement actions and recent PCAOB inspection findings, auditors have not always exercised adequate professional skepticism based on present risk factors. This may result in ineffective selection and execution of audit procedures and lack of sufficient evidence to support conclusions and evaluation of potential fraud. This course provides insights, tips, and techniques to better understand an auditors general responsibility with regards to professional skepticism. It also covers utilizing effective communication skills to better gain evidence through inquiry procedures, and overcoming common pitfalls related to inquiry procedures.

ITSNOT

IT'S NOT WHAT YOU SAY, IT'S HOW YOU SAY IT

Kelly Watkins

People form perceptions about you (and make judgments about your capability as a CPA) based on how you communicate. Although its unfair, its fact. Are you portraying the image of a confident, knowledgeable CPA or manager? Are you presenting a professional impression to your clients and staff? It doesn't matter how much you know if youre unable to share that information in a professional, competent manner. You can make a professional, credible impression on both clients and staff by improving not only what you say, but how you say it. In this interactive session, you'll learn practical techniques to improve your credibility and professionalism by utilizing effective verbal skills.



KEYFINAN
new

KEY FINANCIAL AND ECONOMIC ISSUES FACING THE FINANCIAL EXECUTIVE

Francis Ryan, MBA, CPA

The role of the financial executive in turbulent economic times has never been more challenging. The course will explore the current economic trends and analyze their impact on you as the financial executive. Specific recommendations and insights will be offered to you to deal with the challenges ahead in the financial markets, human relations, costs of benefits, impact on pricing and dealing with customers. The effects of regulatory policy as a major impact on an organization's costs and competitiveness as well as the combined impact of fiscal and monetary policy on financing for organizations are causing CFO/Controllers to understand the impact of decisions well outside their control in order to survive and grow. (Available in 4 or 8-hour format)

L

LMF

LEADER VS. MANAGER VS. FACILITATOR: WHEN, WHY, HOW? (ALSO AVAILABLE AS A 2-HOUR WEBCAST)**Lin Kroeger, CMC**

New generations are bringing different expectations to the workplace, and globalization continues to increase the complexity of the situation by introducing new markets, new demands, and more diversity. How does any one individual enable others to produce results in this kind of environment? This workshop introduces and compares the differences between leading, managing and facilitating teams, divisions and organizations; the situations in which each of these approaches is appropriate; and some skills for getting better at switching between them effectively.

COACH

LEADERS AS COACHES: TECHNIQUES FOR MAXIMIZING THE DEVELOPMENT AND RETENTION**OF TALENT**
Alan Patterson

Effective coaching is a critical, if not the critical component for successful talent development. Unlike performance management, talent development expands the leader's role far beyond evaluating an individual's performance. Successful coaches use techniques to develop an individual's strengths, traits, and values, transforming a person's capability into professional and organizational success. This course will review different coaching techniques and explain how they can improve the development and retention of talent. Participants will learn how to apply coaching best practices to current business situations.

LA-4

LEADERSHIP AND AUTHENTICITY**Lin Kroeger, CMC**

In the wake of corporate scandals, leaders have been tasked to develop their authenticity. Being an authentic leader can help to develop trusting relationships throughout an organization, with clients/customers - and is key to leading any organization through challenging times, market shifts, and change. This course will help you define authenticity and its attributes and apply them to your own leadership style.

GCMMG

LEADERSHIP AND GENERATIONS: WHAT ARE THEY THINKING? (ALSO AVAILABLE AS A 4-HOUR WEBCAST)**Lin Kroeger, CMC**

Increasingly, generational differences are causing conflict and frustration in many organizations. Some of the differences, from how an employee views a dress code or work hours to how work gets done and what a full day of work means, are creating dissension. Each generation seems to be communicating: "What are they thinking?" In this program, you will learn about generational differences and develop an appreciation for how valuable those differences can be. You'll identify the areas where differences are most evident and discover ways to deal with them. This includes giving and receiving feedback, managing performance expectations, and increasing organizational effectiveness, productivity and harmony.

GENSHIFT

LEADERSHIP AND RETAINING TALENT: HOW THE GENERATIONAL SHIFTS CHANGING LEADERSHIP**Lin Kroeger, CMC**

With a significant increase in expectation of workplace flexibility, learning opportunities, and the need for ongoing feedback among younger employees, how does a leader practice leadership? Are there new approaches? This course will provide the information you need to lead and communicate with staff in a multi-generational work environment. (This program is available in 4 or 8 hour format.)

LATB

LEADERSHIP AND THE BLOGGER**Lin Kroeger, CMC**

Communication tools keep changing. Which ones are worth working with? What are the benefits and risks? How can you strengthen leadership relationships, and connect to employees and clients more frequently and effectively?

LEADDIFF

LEADERSHIP FROM A SLIGHTLY DIFFERENT PERSPECTIVE**Peter Margaritis, CPA, MAcc**

There are many different qualities that an effective leader must possess such as integrity, vision and a sense of humor, to name a few. These leadership skills get transformed into one's own style of leadership, and those styles vary from former President Ronald Reagan to Steve Jobs.. This program will explore leadership through a different lens by incorporating the principles of improvisational comedy, the power of networking and the diversity of generations in the workplace. In addition, we will discuss how to conquer the fear of public speaking and ways to inspire our creativity. (Available in 2 - 4 hour formats)

IMPROV

LEADERSHIP IMPROV - WHY "FAKE IT UNTIL YOU MAKE IT" WORKS**Greg Conderacci**

One of the key differences between leadership and management is the creativity that true leaders bring to their jobs. Do you think outside the box? You can learn how - and how to introduce this creativity to your team. This course uses the lessons and spontaneous creativity of improv acting to improve your leadership and business development skills. This course is also available in a 4-hour format.

LFMO

LEADERSHIP IN FAST-MOVING ORGANIZATIONS**Lin Kroeger, CMC**

Organizations are moving ever-faster, and current and potential leaders must keep up with the pace while continuing to enable followers to keep moving forward. Sometimes, speed creates a change in direction or emphasis, and often, speed creates additional complexity. Regardless of the cause or impact, leaders are responsible for keeping work focused, productive and meaningful.

IVAC

LEADERSHIP IN THE MIDST OF CHANGE: WHAT DO I DO MONDAY MORNING?**Lin Kroeger, CMC**

Attaining and maintaining market leadership requires constant change, and change can be demanding, intimidating and expensive to people and their budgets. Major initiatives require change and staying competitive forces change. People who understand these details are more likely to support that initiative. So after you realize what your goals and strategy are, now it's time to figure out, "What do I do Monday morning"

LNN

LEADERSHIP IN THE NEW NORMAL**Gretchen Pisano**

The definition of leadership has changed as we've evolved into the information age. We are no longer bound by the hierarchies of our firms, but instead are leading across companies, sectors, and traditional boundaries. This kind of leadership requires three key competencies: * Strategic, future-minded flexibility * Strength-based leadership * Leadership that comes from personal power rather than position power so that it can be utilized across a network and not be limited to traditional org chart channels. This full day session is designed to engage participants in exploring the changing definition of leadership, the strength assets they bring to the proverbial table, leveraging the recent evidence-based findings in the science of well-being in the workplace, and the art of facilitating conversations that change the trajectory of ideas. It is designed to provide new information and an opportunity for participants to apply that information in the contexts of their everyday lives so that we go beyond theory and into practice.(This program is available in 8 and 16 hour formats)

LIO

LEADERSHIP INSIDE OUT: DISCOVERING THE LEADER WITHIN**Greg Conderacci**

Leadership begins within. Effective leaders understand their own personalities and the leadership styles that work best with them. They have a personal mission and a vision that functions like a compass, guiding the choices they make. Great leaders know how to earn the trust of their peers and subordinates, and how to use that trust to meet the challenges their teams face. This course is designed to help develop this vital leadership foundation for yourself. This course is also available in a 4-hour format.

LFAA LEADERSHIP: ALIGNMENT AND ACCOUNTABILITY

Lin Kroeger, CMC

A successful organization's strategy, vision, values, work plans, evaluation process and rewards should be aligned so every individual and group in the organization is fully accountable for the work to be done. This program offers leaders a focused approach to aligning the organization's strategy and structure, and outlining the process of creating and maintaining accountability. Leaders with focus are engaged with work teams, stay in tune with clients and customers, and encourage the sharing of both good and bad news. They communicate effectively and frequently, and they demonstrate consistently that they are going somewhere exciting with the organization and that getting on board is demanding and also enjoyable.

LCDE LEADERSHIP: COACHING TO DEVELOP AND EMPOWER - ACCOUNTABILITY, DELEGATION AND DIALOGUE (ALSO AVAILABLE AS A 2-HOUR WEBCAST)

Lin Kroeger, CMC

Leaders enable people to fulfill assignments by clarifying expectations, and ensuring they have resources and the competency to fulfill them. Accountability is the agreement. Delegation and dialogue are two primary tools that leaders use to establish accountability and empower people to follow through on their commitments.

LCV LEADERSHIP: COMMUNICATING THE VISION; ALIGNING THE VALUES

Lin Kroeger, CMC

Despite the effort spent on defining the vision and values of an organization, most people don't live the vision and values. Leaders must effectively communicate and model the vision and values, but how* This program will provide an opportunity for leaders to develop a strategy for communicating these two essential elements for their organization, using stories, dialogue and strategic communication.

MCWP LEADERSHIP: EXECUTION AND GREATNESS - GREAT IDEAS THAT WORK

Lin Kroeger, CMC

Leadership requires ongoing personal development. In fact, recently released research by Jim Collins, "Good to Great, Built to Last" and Marcus Buckingham, "First, Break All the Rules," suggests that traditional goals for development are not necessarily on target. Each author has recently introduced to the market research-based conclusions suggesting alternative choices real people can make to exercise effective and ultimately, high performing leadership. If the definition of a leader is someone who is being followed, what are you doing today that makes it appealing for someone to follow you? If people perform best under certain predictable conditions, are you ensuring those conditions exist?

LMPN LEADERSHIP: MOTIVATION -- THE POWER OF NEEDS, STYLES AND OWNERSHIP

Lin Kroeger, CMC

It is necessary for leaders to understand what people need and expect so they can ensure those needs are met -- then work on helping them meet their own expectations. When we meet our needs, we are able to work harder and more productively. When we are allowed to work toward meeting our expectations, we can become stronger performers. This program is also available in a 4-hour format.

PSPE LEADERSHIP: PERSONAL STYLE AND PERSONAL EFFECTIVENESS

Lin Kroeger, CMC

Leaders need to know who they are and what strengths they have in order to be effective. Participants will use three assessments to better understand themselves and others, identifying ways to self-motivate and help motivate those around them -- a key skill for leaders of teams and organizations. Participants will self-assess using three profiles: the McClelland Social Work Motives; the InQ, or InQuiry; and the Myers Briggs Type Indicator (MBTI). They will develop a broad picture of needs, information processing strengths and preferences when gathering information and making decisions. This information allows a leader to encourage diversity of thought and style.

LPAI LEADERSHIP: POWER AND INFLUENCE

Lin Kroeger, CMC

Leaders use power and influence to make things happen, but power is no longer the result of a strong, charismatic personality. Power is the result of relationships established and maintained over time, with obligations understood and accepted. This program enables participants to understand the sources of power and ways to employ them to be productive. This program is also available in a 4-hour format.

L

MLT

LEADING AND MANAGING: MORE AND LESS THAN YOU THINK**Lin Kroeger, CMC**

As the market deteriorated, great minds continued to try and identify what could make a difference, and what could lead to failure. Jim Collins, of Good to Great, is publishing his next book and his think tank has identified key patterns of what can lead a great company on a downward spiral. Charles Jacobs has analyzed the rational approach to feedback and management, and has found the rational fails us. So what have these two found, and what can an organization do with the information This course will take a look at these theories and help participants identify action steps organizations, leaders, and managers can take to find success.

APAI

LEADING CHANGE: ACTION PLANNING TO ACTUAL IMPLEMENTATION**Lin Kroeger, CMC**

New initiatives, new projects and ongoing business challenges resulting in change can be intimidating; yet, until the world named "change management" as a challenge, most of us worked in changing environments effectively. Today, there is far greater sensitivity to change and its impact on the individual. There is also the assumption that everyone hates and resists change.

LMTB-4

LEADING, MENTORING AND TEAM BUILDING**Francis Ryan, MBA, CPA**

Success requires everyone in the organization to be leaders, mentors and team builders. This course will emphasize how to achieve greatness and success in challenging times. A case study approach is used. (Available in 4 or 8 hour format)

LEAN

LEAN ACCOUNTING FOR THE LEAN ENTERPRISE**Jerry Solomon**

As customers demand shorter lead times at lower prices, companies participating within a value stream are under pressure to reduce their lead times, while simultaneously reducing prices and improving economic value added (EVA) and customer service. Companies that fail to effectively implement the Lean Business System or another holistic business model risk becoming uncompetitive. Accounting methods that support Lean prove that continuous improvement projects yield the results that create a competitive advantage.

LHR

LEAN AND HUMAN RESOURCES (HR)**Jean Cunningham**

Lean principles and practices revolve around the notion of eliminating waste. Lean has been adopted by operations in manufacturing, healthcare and other industries over the past decade and is now rapidly moving into the office support functions. This course demonstrates how to apply lean principles to dramatically raise productivity in internal Human Resources processes, while also demonstrating how HR can provide lean-based support to help supercharge the enterprise's lean journey. Learn from a recognized industry leader with hands-on experience in this important field. (also available in 2 or 4 hour format depending upon length of session)

LMLE

LEAN MANAGEMENT IN A LEAN ECONOMY**Francis Ryan, MBA, CPA**

In today's competitive market place, the need to satisfy the customer at the least cost has never been greater. Competitive demands require companies to operate lean. This course will help you to understand what lean truly means in order to develop a long term lean strategy that enhances your organizations ability to thrive. A case study approach is used. (Available in 4 or 8 hour format)

GRASP

LEARN TO COMMUNICATE IN WAYS THAT OTHERS CAN EASILY GRASP**Gretchen Pisano**

Making conversation visible has been a powerful tool throughout time, whether we were drawing on the walls of a prehistoric cave or the back of a napkin. However, we still haven't mastered this technique and continue to overwhelm our clients and colleagues with endless data that cannot be quickly synthesized or integrated. Taught by two professional graphic facilitators with 30 years of corporate experience, this workshop is designed to give you the tools and techniques, as well as the hands-on practice, to create simple, powerful visuals that translate data to information and display it in a way that it can be intuitively read and, most importantly, remembered

LTM

new

LEARNING THAT MATTERS (1-HOUR WEBCAST)**Bob Dean, CLO**

Imagine this - you attend, and are actually engaged by a training experience that is filled with excellent ideas and content highly relevant to your work; you set clear goals with action plans for applying the concepts at work; you decide whose support and assistance you need and with whom you need to share your learning; you immediately begin applying what you have learned and start seeing and documenting early results; you continue enacting your plans and start to develop new habits that help you do your work differently and better; you begin to see and record positive business results.

Back to reality: Most learning never gets applied and becomes learning scrap.

Imagination becomes reality: Learning experiences that are applied and achieve meaningful results - this experience shows you how.

LEASE

new

LEASE ACCOUNTING - BIG CHANGES AHEAD**Ray Thompson, CMA, CFM, CBA**

Participants will get an understanding of how the transition from operating leases to capitalization will affect companies of all sizes. In addition, they will learn how the balance sheet treatment of leases will alter financial statement numbers, ratios and loan covenants. How lease contingencies are incorporated into the lessee's calculations of assets and obligations will also be covered as well as the proposed receivables and residual approach to lessor accounting. Gain insights into how companies can implement the lease standard in a cost effective manner. Finally, learn how OCBOA (cash and tax basis accounting) may provide smaller companies with a more cost effective approach to presentation.

LINK101

new

LINKEDIN 101: THE BASICS - AND BEYOND (1-HOUR WEBCAST)**William Sheridan, CAE**

They call it "the Facebook for professionals," but LinkedIn is its own social media powerhouse.

LIONS

LIONS, AND TIGERS, AND NUMBERS OH MY! FINANCE FOR THE NON-FINANCIAL MANAGER**Jennifer Elder, CPA**

Numbers don't have to be a nightmare anymore and you don't need to be an accountant to understand them! Master the basics of the language behind the primary financial reports. Through the use of case studies, learn how to read each of the financial statements - the balance sheet, income statement, and the statement of cash flows. Then learn to read between the numbers to analyze performance. Spot both short and long-term trends that can be used to improve overall business performance.

LISTEN

LISTENING FOR LEADERS: ASK THE QUESTION, DISCOVER THE NEED, WIN THE TRUST**Greg Conderacci**

There is no more powerful skill in building enduring and profitable relationships -- with clients, members of your firm and others in your life -- than listening. Yet listening is incredibly difficult, even if you are trying hard. This course teaches tips and tricks for mastering this most difficult and rewarding skill. This course is also available in a 4-hour format.

LBT

LISTENING TO BUILD TRUST**Mark Slatin**

According to Carl Rogers, "Man's inability to communicate is a result of his failure to listen effectively." To lead and persuade others, one must gain the trust of others. Trust isn't something you can bestow on yourself, it must be earned. This course explores how to listen and ask questions that help leaders build trust.

LIVELIFE

LIVING LIFE AT PERFORMANCE LEVEL (KEYNOTE)**Curtis Zimmerman**

Curtis Zimmerman gives a dynamic, experiential program which hands participants the tools to ignite their ultimate potential. Audiences learn to juggle, play "Simon Says" and other activities; not just for fun but to absorb the concepts of Creating a life of relevance and accountability; taking risks; making character-driven decisions; choosing positive influences; being a leader; being responsible; being authentic; and being a catalyst for change. Can opt to add an additional breakout session on goal setting and ethical decision making to enhance the program.

M

MAGYV

MACGYVERING: THE ART OF BEING RESOURCEFUL IN A CRISIS (ALSO AVAILABLE AS A 2-HOUR WEBCAST)

Greg Conderacci

Angus MacGyver, the TV secret agent of the late 80s and early 90s, somehow always managed to extricate himself from crises using only his trusty Swiss Army Knife, duct tape, paper clips and his wits. "MacGyvering" involves applying the very useful approach of this mythical hero. In today's "do-more-with-less" business environment, he is the model for the resourcefulness firms and clients often demand from CPAs. Taught by a Johns Hopkins University Carey Business School adjunct faculty member with more than 30 years of experience in communication, marketing and resourcefulness, this highly interactive course will utilize many creative exercises and give you the tools to be more resourceful in difficult situations. (Available in 4 or 8 hour format)

LEADACAD

MACPA LEADERSHIP ACADEMY

Tom Hood, CPA, CITP, CGMA

Leadership development is the single biggest challenge, and the biggest opportunity, facing organizations today.

This two and a half day program will equip participants with the resources they need to forge relationships, expand their competencies and empower them to become leaders. Learn to identify and leverage your own unique leadership strengths, discover what these strengths mean, and understand the implications of how they affect your personal life, career, and the CPA profession.

Our leadership formula is built around three essential competencies for leading in rapidly changing times: strategic thinking, strength-based leadership and network leadership. Our application of this formula says: find a strength and leverage it; where one doesn't exist but is needed, develop the talent. Our philosophy says: all hands on deck - everyone is called to lead in some capacity or another.

Participants will be actively engaged in dialog throughout the workshop and will be making presentations of their insights and action plans throughout the program.

MPI

MAINTAINING A PROFESSIONAL IMAGE IN A BUSINESS CASUAL WORLD

Cathleen Hanson

Take control of the impression you make on others! Everything you do and say creates an impression that others have of you and the company for which you work. Learn how casual dress is not the same as "Saturday Casual." Understand how to present a professional image including dress and demeanor to command respect in the business environment. This course is available in a minimum one hour format.

MIH

MAKE IT HAPPEN! THE ART OF DISCIPLINE AND GETTING THINGS DONE (ALSO AVAILABLE AS A 2-HOUR WEBCAST/ON-DEMAND)

Jennifer Louis, CPA

Professionals sometimes struggle to achieve professional goals. Often, we are so busy juggling conflicting priorities and tasks that well-intentioned objectives stay indefinitely on our to-do lists or only half-heartedly get accomplished. This session helps you find the discipline to ensure that they make the things that are important happen.

MLSFFOUND

new

MAKING LEARNING STICK

Bob Dean, CLO

"In a period of rapid change and increasing complexity, the winners are going to be the people who can learn faster than the rate of change and faster than the competition." - Tom Hood, CPA; CEO of MACPA and BLI. But what about the transfer and application of learning? The primary purpose of learning, development, and CPE is to improve business and personal results it rarely happens. This learning experience provides an introduction to the Progression of Learning Value (POLV) and a foundation in using a proven six-step process for achieving measurable results from your learning and development initiatives. This process can also be applied to meetings, events, and other initiatives.

MLSIMMER

MAKING LEARNING STICK: IMMERSION AND APPLICATION**Bob Dean, CLO**

"In a world that shows no signs of slowing down, no individual can rest on his or her intellectual laurels... The future belongs to those organizations, as well as those individuals, that have made an active, lifelong commitment to continue to learn." - Howard Gardner, *Five Minds for the Future* (2009, HBS Press) But what about the transfer and application of that learning? The primary purpose of learning, development, and CPE is to improve business and personal results – it rarely happens. This immersive learning experience guides you in applying the models and frameworks of the Progression of Learning Value (POLV™) in a proven six-step process for achieving measurable results from your learning and development initiatives, meetings and other initiatives.

MRS

MAKING RAIN: STRATEGIES FOR CLIENT SERVICE, SELLING AND NEGOTIATING (ALSO AVAILABLE AS A 2-HOUR WEBCAST/ON-DEMAND)**Jennifer Louis, CPA**

Rainmaker -- the Bloomberg Financial Glossary defines a rainmaker as a valuable employee, manager or subcontracted person who brings new business to a company. The success of any firm relies heavily on the ability of its professionals to retain and expand services to an existing client service base, while building a tremendous referral network to attract quality new clients. This course will help you obtain the skills necessary to attract and retain quality clients for your firm.

MMG

new

MANAGING MULTIPLE GENERATIONS: NEXT STEPS AND NEW SURPRISES (AVAILABLE AS A KEYNOTE)**Karl Ahlrichs, SPHR**

Simply put, much of what you think you know about the newest generation in the workforce is out of date. In this fast-paced update, Karl Ahlrichs will share some new and quite surprising information about the latest crop of employees that are arriving in our organizations, and impart his insight on generational challenges that may be causing problems. (Available as a keynote presentation.)

TMIP

MANAGING MULTIPLE PRIORITIES - THE DISCIPLINE OF GETTING THINGS DONE**Ray Perry**

It seems as if there's always too much to do and not enough time to do it. Imagine the impact on productivity if your employees learned how to better manage this situation! What would happen to their sense of control and accomplishment during the day. In this practical workshop, your employees will learn how to get more done in less time -- with less stress -- by upgrading their skills at managing multiple and sometimes competing priorities.

PMIFC

MANAGING PERFORMANCE TO IMPLEMENT STRATEGY**Lin Kroeger, CMC**

What is performance management? Performance management is an ongoing process involving both the performance manager and the employee in identifying and describing essential job functions. They must then relate those factors to the mission and goals of the organization while developing realistic and appropriate performance standards. This process involves giving and receiving feedback about performance, writing and communicating constructive performance appraisals, and planning education and development.

MSBP

MANAGING STRATEGIC BUSINESS PARTNERS (2-HOUR WEBCAST)**Alan Patterson**

A growing number of organizations report that as much as 80% of their core business processes are now handled through various types of strategic or outsourced business partners. Managing these relationships successfully and profitably requires a unique approach - one that creates win-win-win outcomes for the organization, the business partner, and the customer. This program will show you how to develop and build strong, strategic business partnerships by establishing best practice options. It is particularly well-suited as a Customized Training Solution session between business partners.

SSARS

new

MASTERING THE STANDARDS RELATED TO COMPILATION & REVIEW ENGAGEMENTS**Jennifer Louis, CPA**

Identify the activities required to perform non-attest accounting services, compilations and reviews of financial statements, draft the accountant's report, and document the engagement in accordance with professional standards. (Available in 4 or 8 hour format)

M**MWMTC****MEASURE WHAT MATTERS TO CUSTOMERS: USING KEY PREDICTIVE INDICATORS****Ronald Baker**

Do your firm's internal measurements give you a competitive advantage in the marketplace? Do they judge the success of your company the same way your customers do? Are there leading indicators that have predictive ability and correlate with value as defined by your customers? If you get what you measure, what exactly do your internal metrics get you?

IFRSASET**new****MEASUREMENT OF MAJOR ASSETS AND IMPAIRMENT****Peter Margaritis, CPA, MAcc**

IFRS measures assets at acquisition using the historical cost principle that is the same as U.S. GAAP. However, IFRS allows certain assets to be valued using fair value after acquisition. Depending on the type of asset, fair value may be based on quoted market prices, appraisals, discounted cash flow, net realizable value, replacement cost or indexed cost. Preparers and users of IFRS financial statements need to identify the precise measurement requirements for each type of asset, and the related impact on profit, loss, and equity. These requirements involve annual impairment tests and the resulting write-down and write-up of asset values. Get an in-depth review of the IFRS standards related to major assets and impairment reporting including: IAS 2 - Inventory Measurement, IAS 16 - Property, Plant & Equipment, IAS 17 - Leased Assets, IAS 38 - Intangibles, and IAS 36 - Impairment of Assets.

MME**MEETINGS MADE EASY (AND EFFECTIVE)****Kelly Watkins**

As a CPA manager, you may feel as though your life is just one long meeting. But, meetings don't have to be inefficient, boring, or a waste of your time. You can convene meetings that are productive and even fun (when appropriate). This course will give you the tools you need to conduct meetings efficiently and effectively. You will hear techniques for handling meetings with CPA and non-CPA attendees, learn tips for keeping participants attention, and get information on the newer forms of meetings, like webcasts and tele-conferences. When you learn how to conduct meetings correctly, you can develop a good reputation. People will willingly attend your meetings. And, they'll come ready to participate.

MBC**MESSAGE-BASED COMMUNICATION****Lin Kroeger, CMC**

Communication remains a skill central to personal success. When messages are not clear, there are invariably costs attached to their failure. Worse, the individual who communicates poorly appears less intelligent than the individual who communicates effectively. Communication occurs every time we see other people, read e-mail, send a letter, write a proposal, produce marketing materials and make presentations.

EXCLDATA**MICROSOFT EXCEL: DATA ANALYSIS, NEW TABLE FEATURES AND NEW PIVOT TABLE ENHANCEMENTS (2-HOUR WEBCAST)****Judith Borsher, CPA, MBA, CGMA, CIT**

Tips covered in this program help you achieve mastery over many Excel data analysis features, including Pivot Tables, and will save you time each day. As a Microsoft Certified Trainer and CPA, Judy Borsher enthusiastically shows you how to use many of the time-saving "need to know" data analysis features in Excel.

OFFIC10**MICROSOFT OFFICE 2010 NEW FEATURES UPDATE WITH AN EMPHASIS ON EXCEL 2010****Judith Borsher, CPA, MBA, CGMA, CIT**

Microsoft Office 2010 enhancements, including collaboration tools, offer professionals many new features to increase productivity. Once again, Excel analysis tools and presentation graphics have improved. This course will focus on new features added in Microsoft Office 2010 to migrate effortlessly to this new version. Special emphasis will be given to the new productivity features in Excel as well as Word, PowerPoint and Outlook as they apply to CPAs. (Format choices: "Lecture only with live demo" or "hands-on, participants bring laptops or tablets")

MP**MINGLING FOR PROFESSIONALS (MINGLE, MINGLE)****Cathleen Hanson**

First impressions really do last a lifetime! Participants will learn the art of making a successful entrance and working the room. Focus will be upon initiating a conversation, appropriate topics for small talk and overcoming "mingle-phobia." Participants will learn to create the most effective initial impression through proper handshaking, eye contact, introductions and appropriate nonverbal communication. Finally, where would a successful mingling event be without teaching participants the etiquette of a graceful escape. This program can also include the secrets to successful networking. This program is available in a two-hour format.

M

MOTIVATE

new

MOTIVATING AND RETAINING YOUR TOP PERFORMERS (1-HOUR WEBCAST)**Sheila Birnbach**

This session will enable participants to more effectively motivate employees, bring about performance excellence, retain top workers and thereby reduce unwanted and costly turnover. (Available in 4 or 8-hour sessions)

OFFICE7

MS OFFICE 2007: MASTERING THE USER INTERFACE WITH EMPHASIS ON EXCEL 2007 (2-HOUR WEBCAST)**Judith Borsher, CPA, MBA, CGMA, CIT**

Tips covered in this program help you achieve mastery over many new features in MS Office 2007 and will save you time each day. As a Microsoft Certified Trainer and CPA, Judy Borsher enthusiastically shows you how to find and use new features in Excel and Word and also how to customize settings.

N

NAVAASTD

NAVIGATING THE NEW ACCOUNTING AND AUDITING STANDARDS**Anthony Cuozzo, CPA, CGFM**

Get an update of recent FASB, AICPA and other Professional Standards

NETMING

NETWORKING: EVEN ACCOUNTANTS CAN MINGLE**Peter Margaritis, CPA, MAcc**

Networking is one of the most powerful tools accountants can develop, but it takes time, energy and commitment in order to build a strong network. Having a strong network will assist you in launching a new idea or plan, developing new business and clients, reducing costs in recruiting, and leveraging your career.

NLD

NEW LEADER DEVELOPMENT**Alan Patterson**

Identifying and supporting new leaders is a critical strategy for emerging organizations. Leadership development - particularly for talented, new leaders - is critical for both retaining and leveraging talent to create a deeper organization. This "New Leader Development" course will teach individuals the skills and techniques for successfully managing performance, motivating and coaching teams, and building on-going relationships. The course unveils how new leaders create accessibility and visibility for their teams, colleagues, and senior management.

NEWNORM

"NEXT STEPS" IN THE NEW NORMAL WORLD (1 HOUR WEBCAST)**Karl Ahlrichs, SPHR**

These are odd fiscal times, and "Best Practices" are obsolete. Stop being defensive with your core business and people practices - use Human Resources both as a force for change and have impact on the bottom line. Get some fresh ideas for 2012 from some surprising areas of business.

O

GOODGRN

ON GOOD GROUND: CREATING A PERSONAL STRATEGY FOR A GREAT LIFE**Greg Conderacci**

How great would your life be if you did what you loved to do? Imagine spending every day doing what you do best. Each of us has a "good ground" - a fertile niche where the seeds of our efforts grow most productively. Few of us find it. This course helps you design a strategy for getting there. The course is taught by an adjunct faculty member at the Johns Hopkins Business School, with more than 40 years of experience in communication and marketing. He has advised countless individuals at all levels on strategies for career change and success. (also available as a keynote or 4 hours)

ODM

OPERATIONAL DECISION MAKING WITH LEAN ACCOUNTING**Jean Cunningham**

Companies are working hard to both control cost and improve productivity. But many are floundering to find the best information to help make the right decisions and to assess the impact of those decisions. Often the decisions are based on traditional financial reporting, and when the results are different than expected, they are surprised or even worse, out of business. This workshop shows how the adoption of Accounting for Lean improves decision making. During the workshop, specific examples are discussed showing how to identify the value streams / product lines and the most relevant information. By attending this workshop, you'll also explore how to conserve cash by taking specific actions that might not be obvious from traditional standard cost information (also available in 2 or 4 hour format but would be scaled back)

GSO

ORGANIZATIONAL PRODUCTIVITY - PRACTICAL STRATEGIES FOR GETTING AND STAYING ORGANIZED**Ray Perry**

It's happened to most of us. We organize our desk on a Monday only to find that it is disorganized by Wednesday. What would happen to productivity and performance if employees could get organized and stay that way? How much more control would they have over their day?

OUTLK-L

OUTLOOK 2010 UPDATE AND BEST PRACTICES FOR CPAS**Judith Borsher, CPA, MBA, CGMA, CIT**

Outlook is the software standard for client contact, meeting scheduling and sending and receiving business documents. Improving your Outlook skills might be one of your best time management investments. This course emphasizes features that will enhance productivity for tracking and managing client contact information, locating documents, searching, sharing team calendars and archiving client information. Interactivity with Excel and Word will also be covered. (Format choices: "Lecture only with live demo" or "hands-on, participants bring laptops or tablets")

PELTPTW

new

PERFORMANCE EXECUTION: LONG-TERM PLANNING IN A SHORT-TERM WORLD**Dr. Jeffrey Magee**

The eleventh in a series of 12 modules from the Leadership Academy of Excellence® Series, this program (with maps from Magee's Risky Business: Wise Organizational Decision Making Skills at The C-Level® primer book), takes the managerial-leadership team through an evaluative series of Q&A exercises that helps determine if their independent and interpersonal actions are congruent with where they should be; if core competencies, core business units and core beliefs are aligned; and if not, how to re-evaluate where they should be. This session presents both strategic and tactical tools for evaluating and implementing decisions, with back-up plans and ways to minimize risk.

PESPM

new

PERFORMANCE EXECUTION: SUCCESSION PLANNING AND MENTORING**Dr. Jeffrey Magee**

The tenth in a series of 12 modules from the Leadership Academy of Excellence® Series, this program details the eight unique competencies of today's most explosive managerial-leaders and executives from behind the scenes of what has given them impactful authenticity. The core of this session is about leadership legacy and internal SUCCESSION PLANNING, career pathway analysis, and developmental engagement needs at the micro and macro level of an organization, and how one creates a culture of developing its future.

P

HEO PERFORMANCE, PRODUCTIVITY AND PROFIT: CREATING THE HIGHER ENERGY ORGANIZATION
Greg Conderacci

Time management is sooo 20th century. You can't get any more hours in the day - but you can get more energy for yourself - and infuse your organization with it. These days, it's personal energy management that makes the difference in performance, productivity and profit. Athletes, entertainers, astronauts, trial attorneys and the military train constantly to be physically and mentally ready to perform as a peak energy team over short periods of time - a game, a show, a flight, a trial or an engagement. Yet in business, professionals attempt to perform at high levels over many weeks and months, often without much of a break. As a result, they experience performance-sapping low morale, burnout and turnover. This course will show you how to change your outlook and approach by tapping secrets and strategies from sports, science, psychology, literature and even history.

RSRCHCOD PERFORMING RESEARCH USING THE CODIFICATION**Jennifer Louis, CPA**

The Financial Accounting Standards Board completed its codification project in July 2009 with the goal of streamlining the research of accounting issues. This resulted in a major restructuring of accounting and financial reporting standards. All professionals, both in public accounting and industry, must have a strong familiarity with successfully negotiating through this valuable resource.

M2M PERSONAL LEADERSHIP IN THE NEW NORMAL**Gretchen Pisano**

One of the distinctly new aspects of living in the 21st century is the desire for autonomy, mastery and purpose at every stage of our lives and in both our personal and professional domains. The science of well-being tells us that these three human privileges are powerful motivators (Daniel Pink, Drive) for action and capacities that yield sustainable well-being - they are also available to us to matter where we are in the organizational hierarchy. The Mind to Matter Personal Leadership in the New Normal workshop is a two-day intensive personal development session designed to increase the leadership competencies required in the new normal: self-awareness in the moment, strategic future-minded flexibility, strength-based leadership, and the skills to lead across a network of people versus within the channels of an org chart. The workshop is designed to provide new information and an opportunity for participants to apply that information in the contexts of their everyday lives so that we go beyond theory and into practice.*Certification and licensing is available for this product.

PERSTYLE PERSONALITY STYLES IN THE WORKPLACE**Jennifer Elder, CPA**

Experience accounts for only 15% of workplace success. The other 85% is due to people skills! Take the DISC Profile and identify your own personality style. If you can understand and understand others from the perspective of what motivates them and how best to interact with them, you can dramatically increase your workplace effectiveness.

PSWY PERSONALITY STYLES: WHAT YOU ABSOLUTELY SHOULD KNOW ABOUT YOURSELF & OTHERS**Jennifer Louis, CPA**

Having a better understanding of how different personality types are likely to communicate and react to situations will help you plan better interactions with others. In this course, you'll learn to recognize your own natural personality style and how to quickly identify the personality style of others in order to interact with them more effectively.

BALSCORE PLANNING AND IMPLEMENTING THE BALANCED SCORECARD**Jennifer Elder, CPA**

There is more to understanding the success of business than the bottom-line. The Balance Scorecard looks beyond the standard financial measures of success and incorporates factors related to customers, employees, and internal business processes. Learn how the Balanced Scorecard can be used to take your organization to the next level.

PLINK Series THE POSITIVITY LINK SERIES(1-8 with w/
Practicums)**Gretchen Pisano**

A series of modules that focus on ground-breaking research from positive psychology and neuroscience that is changing the way we view the world and think about our happiness.

BGRAPHIC

POWERPOINT: CREATE DYNAMIC FINANCIAL PRESENTATIONS WITH BUSINESS GRAPHICS**Judith Borsher, CPA, MBA, CGMA, CIT**

Most professionals are called upon to present information not only verbally but with visual aids, handouts, and presentation software. Applying graphics to represent or enhance data can help you make a lasting impression on your audience. Whether you want to “wow” your audience and/or convey a serious message simply, this course will give you many examples of how to incorporate graphics into a presentation. You can choose from the right pre-designed graphic or build your own graphics and diagrams. The content of this presentation applies to PowerPoint 2007 or 2010.(Format choices: “Lecture only with live demo” or “hands-on, participants bring laptops or tablets”) Available in 4 or 8 hour format

PAANFP

PRACTICAL ACCOUNTING AND AUDITING ISSUES FACING NONPROFIT ENTITIES**Jennifer Louis, CPA**

Professionals who specialize in audits of nonprofit entities need to stay abreast of current developments in economic legislative, regulatory and professional issues in order to perform a high quality engagement. This course will provide an overview of significant relevant financial audit accounting and reporting issues, as well as concepts important to maintain the quality of a nonprofit entity financial statement audit.

PAAUGNE

PRACTICAL ACCOUNTING AND AUDITING UPDATE FOR GOVERNMENTAL AND NONPROFIT ENTITIES**Jennifer Louis, CPA**

All professionals need to stay abreast of significant changes in various standards at least at a high level, including standards related to accounting, financial reporting, audits, compilations, and reviews. This course provides a high level overview of the most important issues facing governmental and nonprofit entities and their accountants, including Yellow Book and A-133 compliance audits.

PEXAAI

new

PRACTICAL EXPLANATIONS OF ACCOUNTING & AUDITING UPDATES FOR INDUSTRY**Jennifer Louis, CPA**

All finance and accounting professionals need to stay abreast of significant changes in various standards to varying degrees, including standards related to accounting, financial reporting, and attestation. However, not all professionals need detailed case studies and application explanation. This course provides a practical overview of the most important issues facing most companies and their accountants

NETBD

PRACTICAL NETWORKING AND BUSINESS DEVELOPMENT FOR CPAS**Andrew Rose**

Networking and business development skill don't typically come naturally to CPAs. This course will offer practical and easily utilized knowledge for networking and developing referral channels taught by a business development expert for a CPA firm.

WINPLAN

PREPARING A WINNING BUSINESS PLAN**Jennifer Elder, CPA**

A good business plan is essential for start-ups - to obtain financing or investments, to double-check assumptions, and create a viable operational model. It's also beneficial for existing businesses - providing a road map to keep you on focused and moving toward goals. Learn the essential elements of a business plan and how to turn it into a usable and successful action plan.

REVREC

PREPARING FOR THE COMING WAVE OF ACCOUNTING STANDARDS: REVENUE RECOGNITION**Ray Thompson, CMA, CFM, CBA**

Revenue is probably the most important number in the financial statements. Standard setters have struggled to keep pace with the ways in which innovative business models and marketing arrangements have left guidance essentially out-dated and subject to structuring. For this reason a joint FASB-IASB exposure draft has been developed, which will revise revenue reporting from the ground up. This course provides a comprehensive analysis of the exposure draft and its impact on your company and / or clients.(Available in a 2-4 hour format)

WAVE PREPARING FOR THE COMING WAVE OF ACCOUNTING STANDARDS**Ray Thompson, CMA, CFM, CBA**

For many years, standard setters on both sides of the Atlantic have worked to create a platform which could lead to global financial reporting. Their efforts are now resulting in radical changes in the financial reporting model that US GAAP has used for many years. This sequence of courses explains the practical issues involved in implementing these new standards. (Available in a 4-8 hour format)

WAVEFINS PREPARING FOR THE COMING WAVE OF ACCOUNTING STANDARDS: FINANCIAL INSTRUMENTS, DEBT & EQUITY ACCOUNTING AND COMPREHENSIVE INCOME**Ray Thompson, CMA, CFM, CBA**

FASB recently issued exposure drafts on accounting for financial instruments (debt and equity) and their presentation in the statement of comprehensive income. This will have significant, but different, effects on financial institutions and commercial entities. IASAB has a related set of proposals which are significantly different. This course will track both Boards' proposals as they evolve (hopefully) to an agreed approach to accounting in this difficult area. (Available in 2 - 4 hour formats)

WAVEFVM PREPARING FOR THE COMING WAVE OF ACCOUNTING STANDARDS: FAIR VALUE MEASUREMENT**Ray Thompson, CMA, CFM, CBA**

Over the past decade GAAP has steadily evolved from being a cost-based discipline to one where fair value plays an increasingly prominent role. There is now an agreed-upon approach where both FASB and IASB have settled on a framework for fair value reporting and disclosure. This course explains this approach and considers its consequences, especially where fair value information may not be readily available, easily verifiable or cost prohibitive to obtain. Fair value also involves interaction between preparers, auditors and any specialists, which poses difficult issues of interaction and independence.

WAVEIFRS PREPARING FOR THE COMING WAVE OF ACCOUNTING STANDARDS: IFRS GAAP CONVERGENCE**Ray Thompson, CMA, CFM, CBA**

Irrespective of whether or not regulators can agree to a global system of financial reporting, FASB and IASB are already making considerable progress to minimize the differences between their respective standards. This course provides an in-depth explanation of how far FASB and IASB have come in their attempt to create common standards. The course will set out the convergence agenda and pay particular attention to the areas of revenue recognition and lease accounting. The Boards' agreed approach in these areas will be explained and evaluated. Any areas of continuing differences between the Boards' standards, are also discussed.

WAVELEAS PREPARING FOR THE COMING WAVE OF ACCOUNTING STANDARDS: LEASE ACCOUNTING**Ray Thompson, CMA, CFM, CBA**

For many years, standard setters have struggled to create an accounting approach that would get leases on the balance sheet. Standard setters are aware that the standards are deficient. For this reason, a joint FASB/IASB exposure draft has been developed. This alternative approach will revise revenue reporting from the ground up. The course provides a comprehensive analysis of the exposure draft and its impact on your company and/or clients.

PSW PRESENTATION SKILLS WORKSHOP**Judith Borsher, CPA, MBA, CGMA, CIT**

Communication is a core skill of any leader, current or future. Professionals who can develop effective presentations and delivery skills tend to be seen as leaders and persuasive communicators. Appropriate use of technology will also enhance a presentation. It makes sense to develop ways of using thinking and technology that will make the best use of both. (Group Format is one or two full days. Practice/review/feedback time is built into the second day. One-on-one executive coaching is a minimum of 2 hours; 4 hours is recommended)

MBP PRESENTATION SKILLS: MESSAGE BASED PRESENTATIONS**Lin Kroeger, CMC**

Every professional has to present ideas to others. Effective presentation of those ideas can strengthen relationships, affect the outcome of teamwork and bring in new business. Yet, making a presentation effectively remains one of the big challenges of the business world. This workshop enables participants to deliver a clear message, supported by appropriate facts and examples, and presented with a logic the listeners can understand. Participants will learn to use the key skills of focus and voice in a way suitable to them and not to a stage performance. This workshop is also offered in a 16-hour segment by adding the following options: preparing visual aids, working with a script and/or a TelePrompter, developing scripts and delivering difficult information.

PRESENTING FINANCIAL DATA TO NON-FINANCIAL AUDIENCES -AVOIDING OVER-SIMPLIFICATION**Lin Kroeger, CMC**

Knowing the details of finance, accounting, and auditing data is critical to the professional in finance, accounting, and/or audit. However, presenting that information to people who do not fully understand the concepts, terminology, and significance of the data can be frustrating for everyone. What does "that word" mean Is that table showing me something I need to know Is that graph significant to the decisions I make How can I ask a question without looking uninformed This course will help professionals in finance, accounting, and auditing prepare presentations that make sense to professionals in other business specialties. Non-finance professionals will be able to understand the relevance of the information, ask pertinent questions, and use the information for their business purposes.

PRESENTING FINANCIAL INFORMATION CLEARLY AND EFFECTIVELY**Lin Kroeger, CMC**

Managers deliver important presentations to each other, to staff, and to executives who must use the information and make significant decisions. This workshop will enable participants to design and deliver presentations that are clear, effective, and relevant to the business concerns of the listeners.

PRICING ON PURPOSE (FOR INDUSTRY)**Ronald Baker**

This course will give you alternatives to pricing your products and/or services based on customer-perceived value, rather than cost-plus pricing methods. By learning to avoid the deleterious consequences of cost-plus pricing, you will communicate better with customers, be able to discover their expectations up-front, enhance their loyalty and retention, and increase your profitability. Unless businesses adopt new and innovative pricing, rising costs and increased competition will diminish profit margins and they will not be able to reap the full rewards of technological investments that increase productivity, quality and service. Participants will be given alternative pricing methods that focus on customer-perceived value and will be better equipped to deal with the death of cost-plus pricing.

PRODUCING POWERFUL PRESENTATIONS: PERFORMANCE AND PROFIT**Robert Cooper**

A powerful presentation can be the key to professional success. It can enhance your career, contribute to business development, and communicate your ideas effectively. This course is designed to help you master the art of presentation, from planning to closing. Taught by experienced instructors with a proven track record of outstanding presentations, this course will take your communication skills to the next level. (Also available in 4 hours)

PROFESSIONAL ISSUES UPDATE**Tom Hood, CPA, CITP, CGMA**

How do you keep up with accounting? Come here this entertaining and informative coverage of the major issues happening in the accounting world today. This special update for financial professionals will feature a conversation about the 'new normal' - what it is and what it means. Tom Hood, recently named as one of the Top 100 Most Influential People in the CPA Profession will cover the four mega-trends facing the accounting and finance professions - the economy, globalization, workforce, and technology. You will hear updates on globalization, IFRS, XBRL, pending legislation and regulation such as the new Wall Street Reform and Consumer Protection Act of 2009. In addition, Tom will cover how you can use social media to strengthen your professional network, get recognized as thought leaders, and build a global professional network. Tom finishes with tips and techniques to help you keep up with these rapid changes and use them to enhance your leadership and collaboration skills.

PROFESSIONALISM, CIVILITY AND BUSINESS ETIQUETTE**Cathleen Hanson**

Success in the business world is about much more than just your technical knowledge. In order to present oneself with polish and authority, there is a set of rules one must know. Learn what it takes to be comfortable in most any business situation including: proper handshaking, introductions, cell phone, telephone and email etiquette, common courtesies for the office and appropriate thank-you's. This program can also include business dining etiquette. This course is available in a four and eight hour format.

P

OTPM PROJECT MANAGEMENT - DELIVERING RESULTS ON TIME AND WITHIN BUDGET**Ray Perry**

Imagine the impact on overall organizational performance if the number of projects completed on time, on target and on budget increased by 30 percent! What would that mean to your organization, your employees and your customers?

PMIP PROJECT MANAGEMENT: GET THE BUY-IN TO GET RESULTS**Lin Kroeger, CMC**

Project planning is challenging because activities and benchmarks have to first be identified, then scheduled and systematized. Then, the people who have to perform those tasks, resulting in modified work schedules and processes, need to buy into the plan. Often, this leads to greater resistance and more expensive project work as a result. This program introduces a planning process that integrates activities and people issues to produce a bought into plan that can be implemented.

LEASACCT PROPOSED LEASE ACCOUNTING -HOW DO YOU RUN AN AIRLINE WITHOUT AIRPLANES?**Anthony Cuzzo, CPA, CGFM**

Hear the latest on the proposed new Lease Accounting rules - and you thought accounting was boring!

PYOB PROVIDING YOUR OWN BAILOUT**Francis Ryan, MBA, CPA**

The financial markets are in turmoil. Those that plan for the impact of the recession and financial market instability will survive in tact and ready for the next market upturn. The skills needed to meet these daunting times are seldom taught but are so critical to survival. This course will give you an opportunity to see how best to deal with the financial crisis of the century. A case study approach is used.

SPEAK PUBLIC SPEAKING AND PRESENTATIONAL SKILLS FOR ACCOUNTANTS**Peter Margaritis, CPA, MAcc**

Jerry Seinfeld once said that at a funeral, most people would rather be in the casket than giving the eulogy. Americas greatest anxiety, public speaking, is a necessity in todays business world. Those who can speak in front of crowds and have effective presentational skills tend to move up the corporate ladder more swiftly. The ability to stand in front of an audience, project confidence and knowledge, all the while making a connection and capturing your audiences imagination is very powerful and persuasive. In this course, participants will learn how to overcome their fear of public speaking and be well prepared to present information in a concise and logical manner.

SPKPRES PUBLIC SPEAKING: HOW TO SPEAK WITH PRESENCE (ALSO AVAILABLE AS A 1-HR WEBCAST)

new

Sarah Gershman

Speaking with presence is a vital skill that everyone can learn. Whether you are presenting complex information to a client, speaking to colleagues, or briefing your superiors, your ability to communicate with presence can make or break your career. In just a short time, you will learn how to hone your message and transform your delivery. (Format can be customized from 90 minutes to 6 hours)

R

MINDB READING CLIENTS MINDS AND UNDERSTANDING HOW THEY'RE READING YOURS**Robert Cooper**

This fun program helps you determine minute-by-minute whether your approach to influencing others is working. Learn the art of reading customer tells a skill which has made millions of dollars at the poker table for many. Participants will review the science of body language and Microexpressions the specific and involuntary movements of the 43 human facial muscles indicating contempt, disgust, fear and myriad other motivating emotions and gain an understanding of how to use the powers of observation to better read their environment. (also available as a keynote or 4 hours)

R

RNLA

REAL NUMBERS THROUGH LEAN ACCOUNTING (2-HOUR WEBCAST)**Jean Cunningham**

The business enterprise has evolved dramatically over the past 100 years. Many business professionals claim that traditional accounting practices have not evolved and no longer support modern operations. This has most clearly been demonstrated in manufacturing, where manufacturers have moved from batch processing to single-piece flow processing, a result of applying “lean” principles perfected in the Toyota Production System. Lean operations have now taken root in most industries. Healthcare, service, construction, government, and countless other industries successfully apply lean concepts to eliminate waste and get more from fewer resources. So what are progressive finance and accounting professionals to do with the conflict between traditional accounting practices and modern lean operations at odds? The notion of “lean accounting” seeks to address this problem.

REVRECOG

new

REVENUE RECOGNITION - WHERE WE ARE HEADED (ALSO AVAILABLE AS SELF STUDY TEXTBOOK)**Ray Thompson, CMA, CFM, CBA**

* Understand the fundamental principles of the contract-based approach to revenue recognition developed by FASB and IASB

* Learn how to analyze contracts and account for them in terms of their performance obligations

* Study how basic guidance is interpreted in more complex transactions using extensive implementation examples.

* Understand how the new approach to revenue will affect companies in a variety of industries

* The multiple deliverables issue and its effect on revenue and cost calculations.

* Learn how the percent of completion approach may be altered by the revised accounting model

RMDRP

RISK MANAGEMENT - DISASTER RECOVERY PLANNING**Jennifer Elder, CPA**

Did you know that 35% of businesses never reopen after a disaster? While we think of disasters as storms or fires, even small events can have disastrous results to the bottom line. If a server goes down, it only takes 48 hours for a business to suffer permanent damage. In order to prevent or minimize losses every business needs a plan to protect their assets, prevent damage, and prepare for recovery. In this course you will learn how to identify and prioritize risks, develop countermeasures to protect against loss, and learn the step by step process for preparing a disaster recovery plan.

S

SOXW

SARBANES-OXLEY SECTION 404: WHAT EVERYONE NEEDS TO KNOW ABOUT INTERNAL CONTROLS**Jennifer Louis, CPA**

A solid understanding of internal controls is essential in a well-run organization, affecting the board of directors, management and every other level of personnel. Corporations must continually assess and improve their internal control systems to achieve profitability targets, ensure reliable financial reporting, and comply with laws and regulations. Unfortunately, many people struggle with this sometimes daunting task of internal controls.

UPSS

SELLING FOR CPAS: USING YOUR PROBLEM-SOLVING SKILLS TO PROMOTE PROFITABLE BUSINESS GROWTH**Greg Conderacci**

Good news! You don't have to have a CPA to be a great salesperson - but it can help. The same problem-solving skills you use so effectively to advise your clients can be put to work selling them future engagements. It also works well for those who must sell to internal clients. This course is also available in a 4-hour format.

S

SEVEN

SEVEN SECRETS OF SUCCESSFUL BUSINESS WRITING**Greg Conderacci**

Although good business writing can be a life-long pursuit, it is possible to learn the basic principles of good business writing in a relatively short period of time. This course is about the art and skill of good business writing. In particular, it's about how to write business letters, memos, reports, and e-mails in a clear, concise and effective manner that will reflect well on the writer, be easy to read and meet the needs of his or her organization. (Available in 4 or 8 hour format)130498, A BLI Senior Fellow, will be the trainer. Although he has a Magna Cum Laude degree in English from Princeton University where he was also Editor-in-Chief of The Daily Princetonian, Greg learned to write at America's Best Writing School: The Wall Street Journal. One of the most intensively edited newspapers in the world, The Journal's crisp, clear style has always been its hallmark. Greg was a Journal reporter for seven years, four in Detroit covering the auto industry and three in Washington covering economic policy. Today, he is a popular lecturer in the Marketing Department at the Johns Hopkins University Business School.

RM

SHARING SKILLS BETWEEN GENERATIONS**Lin Kroeger, CMC**

Mentoring is a hot topic in many organizations. The assumption is if mentoring is good, we should ensure it occurs. Underlying that assumption is a belief that experienced professionals have a lot to share with less-experienced professionals. However, mentoring is as much about chemistry and personality as it is about structure. Further, mentoring only from the top down does not capitalize on the opportunity for reciprocal mentoring: less experienced and usually younger professionals can bring valuable skills, knowledge and perspective to the more experienced professionals, who can then share their skills, experience and wisdom.

BGC

SITUATIONAL COMMUNICATION: HOW TO CONNECT WITH MORE PEOPLE MORE OFTEN**Ray Perry**

How important is communication to the success of your employees* According to Tom Peters in "The Management Advantage," 82% of workplace problems are related to miscommunication.

DFR

SITUATIONAL DELEGATION - INSPIRING ACCOUNTABILITY IN YOUR EMPLOYEES**Ray Perry**

How often do managers choose to do it themselves instead of delegate? How often do they micromanage solid employees and what does this do to employee/team motivation and morale?

SCCPM

SKILLFUL COACHING: CAREERS AND PERFORMANCE MATTER**Lin Kroeger, CMC**

Coaching requires focus, empathy, and skill and is built on conversations that can be challenging - especially when the coach wants to help someone develop or change to be more productive. This workshop gives coaches an opportunity to understand and practice conversation skills, feedback techniques, and assessing SMART goals. It helps define the role of a coach who is an active professional helping less experienced professionals learn and achieve.

SGS

SMART GOAL SETTING: SETTING GOALS TO ACHIEVE AND CONTRIBUTE**Lin Kroeger, CMC**

Goal setting is key for individuals who want to ensure that they are setting the right priorities and having the right conversations about contribution and personal development at work. Too often, individuals set goals that demonstrate high aspiration but do not lead to "measurable" results, producing subjective discussions about achievement. SMART is an acronym used in many organizations to guide the setting of goals which contribute to a culture of accountability and conversation. This workshop introduces the use of SMART, the development of SMART goals, and opportunities to practice writing goals that strengthen the individual and the organization.

SMART

SMARTER DECISION-MAKING**Jennifer Elder, CPA**

Business professionals need to be able to respond to today's rapidly changing business environment by making quick and smart decisions. This interactive course will help you understand and build decision-making, critical-thinking, and creative problem-solving skills. You will cover methods of assessing and resolving problems and learn to ask the right questions during the process.

S

BOOTCAMP

new

SOCIAL MEDIA BOOTCAMP FOR PROFESSIONAL SERVICE FIRMS

Andrew Rose

This hands-on workshop will provide attendees with an overview of how search (how prospects find you) can be influenced through integrated social media tactics. We will explain how the search engines send out their robots and what they look for. We will review the importance of keywords and content (both micro - like Twitter and macro - like blogs). We will discuss how to repurpose content (both external and internally developed).

SOCMED

SOCIAL MEDIA STRATEGY & QUICK START: DEVELOPING AND IMPLEMENTING A SOCIAL MEDIA STRATEGY FOR CPA FIRMS & ORGANIZATIONS

Tom Hood, CPA, CITP, CGMA

Get beyond the hype and learn how to develop and implement a social media strategy that accelerates your organizational strategy and enhances your on-line presence and connections to your customers, employees, and community. The MACPA is known for its thought leadership in the uses of social media in the CPA profession and has been featured numerous times in the national trade press and Journal of Accountancy. Now they are available to share their best practices and learning with CPA firms and organizations in a customized coaching process to help you develop and implement a strategy in ninety days. Each session will offer hands-on tips and techniques and a chance to get your questions answered.

SPRETRET

SOLE PROPRIETOR'S RETREAT

Ronald Baker

Sole proprietors make up the largest class of CPA firms. Yet, as a group, these single owners face difficult leadership issues, have limited support mechanisms and/or have, at best, ad-hoc support alternatives. Designed by leading CPA profession advisors and educators, this new and innovative program is designed to provide sole proprietors with the benefits shared by larger firms. As a group, you will tackle the issues directly facing sole proprietors. You will help determine the agenda by using a survey that will let the instructors know what is most important to you. The survey results from each firm will form the basis for your experience.

PSIE

SPECIAL DELIVERY: DELIVERING PRESENTATIONS TO SELL IDEAS EFFECTIVELY

Lin Kroeger, CMC

In a world of fast moving imagery, professionals must present well. Listeners expect to be kept interested in the material being presented, and are used to seeing polished and articulate speakers. This program provides an opportunity to develop personal skills in presenting with videotaped practice sessions. Participants will also practice how to manage question and answer sessions that give tough questioners time to probe ideas.

SOPF

STRATEGIC AND OPERATIONAL PLANNING AND FORECASTING

Francis Ryan, MBA, CPA

Winning plans are what every leader wants to deliver to his or her organization - but how This course offers a way to achieve this in a case study setting. The forces that can bring success, or failure, are identified and discussed so that leaders can avoid them - or use them to their advantage. A case study approach is used. (Available in 4 or 8 hour format)

SC

STRATEGIC COACHING - GROWING TOP-NOTCH PERFORMERS

Ray Perry

Imagine if every member of your team were a perfect "10" in terms of skill and motivation. What impact would that have on team performance and morale, not to mention the quality of your workday In this fast-paced workshop, participants will develop a strategy that will target key team members for coaching. The strategy will help participants to employ a set of customized best practices to ensure that targeted team members will significantly improve performance and move closer to "10."

SPF

STRATEGIC PLANNING FACILITATION: DEVELOPING THE HIGH PERFORMANCE ORGANIZATION

Tom Hood, CPA, CITP, CGMA

This unique and indispensable workshop offers a nationally recognized facilitator who will help you organize your next retreat or strategic planning workshop, and show you how to incorporate the latest trends and create a process to develop a shared vision and strategy for your organization. This is a high-energy, interactive session which will identify goals, alignment, and specific next steps to increase the dynamics and performance of your organization. (This course is also available in an 8-hour format.)

SSF

new

STRATEGIC SKILLS FOR FINANCE**Jennifer Elder, CPA**

You know that strategy is important! According to a 2011 Deloitte survey, strategy setting has doubled in importance for CFOs. Yet 75% of CFOs indicate that their staff needs training to perform in a strategic role. So how do you change your focus from historical financial presentation to future strategic planning. Get you and your team prepared for the challenges by learning how to analyze data, define decision-making options, present effectively, gain consensus, and develop action plans.

SUSN

STRATEGIC USES OF SOCIAL NETWORKS AND BLOGS**Lin Kroeger, CMC**

Communication tools have changed dramatically. This workshop will review current options available for corporate communication, suggest strategies and tactics for effective use and management of those communication efforts, and provide an opportunity for hands-on experience with these tools.

DGCS

STRATEGIES FOR DELIVERING EXCEPTIONAL CUSTOMER SERVICE MORE OFTEN**Ray Perry**

Is providing excellent customer service an important part of your operational strategy? When it comes to handling internal and/or external customers, could your team benefit from a tuneup? Do you consult with your clients on how to integrate their entire business operations around exceeding their customer's expectations?

INQ

STRENGTHEN THE INQUIRY SKILLS YOU NEED TO GATHER EVIDENCE (ALSO AVAILABLE AS A 2-HOUR WEBCAST/ON-DEMAND)**Jennifer Louis, CPA**

Recent developments in various auditing, regulatory and compliance standards have increased the importance of effective inquiry as a means of gathering sufficient and appropriate evidence to support conclusions. This course will provide tips and techniques for effectively gathering information needed from management, employees, and others - while maintaining and enhancing interpersonal relationships. We will also emphasize how to evaluate whether sufficient and appropriate evidence has been obtained to satisfy objectives of inquiry procedures.

SCMC

STRENGTHENING COLLABORATION AND MANAGING CONFLICT**Sheila Birnbach**

Differences between people are a major source of friction. Fortunately, it's possible to manage such differences so work relationships are enhanced, productivity is increased, and conflict is minimized.

CLUE

SUCCESS LEAVES CLUES: CAREER STRATEGIES FOR NEW PROFESSIONALS**Ronald Baker**

Discover everything you never learned in college and what it really takes to thrive in the accounting profession. Presented by leading thinkers in the profession and founders of VeraSage Institute, Ronald J. Baker and Daniel D. Morris, this course provides unique observations about the future of the profession along with what every emerging CPA needs to know now to thrive in the future.

SUCSPROJ

SUCCESSFUL PROJECT APPROVAL USING A BUSINESS CASE**Jennifer Elder, CPA**

You have a great idea that could improve your company's bottom line, but you can't seem to get any interest from the C-suite. Try using a business case - a tried and true method for presenting a project in terms that management can buy into. Learn how to prepare a business case for your idea starting with identifying risks and opportunities, cover alternative solutions, and finally present an implementation plan. Work in teams on a case study to practice the process and prepare a presentation.

DTLT

SUCCESSION PLANNING: DEVELOPING TOMORROW'S LEADERS TODAY (2-HOUR WEBCAST)**Alan Patterson**

Simply extrapolating the past is no longer adequate for firms when trying to anticipate the future. Strategic foresight does not attempt to forecast the future, but simply allows firms to understand key drivers that may result in plausible future scenarios and provides the tools to position them favorably regardless of which future(s) actually unfold. Participants will gain understanding on how their firm competes, be able to determine primary drivers on these competitive aspects and anticipate how these drivers will change during specific time-frames, and will review the best and worst-case scenarios for their company. The primary objective is for participants to leave as champions in their organizations for embracing the future.

S

SR

SUSTAINABILITY REPORTING**Jennifer Elder, CPA**

Sustainability reporting is growing at a rate of 34% per year. Stay ahead of curve and learn what Sustainability is, why your organization's bottom line can benefit immediately, various reporting standards, and how your organization can get started today.

TRIPLE

SUSTAINABILITY: USING THE "TRIPLE BOTTOM LINE" TO INCREASE YOUR SUCCESS**Jennifer Elder, CPA**

Sustainability is here to stay! Learn how implementing sustainability initiatives will improve your efficiency, increase your innovation, and engage your employees. Incorporating sustainable strategies into your day-to-day operations creates a competitive advantage, enhances your brand, and benefits the bottom line.

T

TALENT

new

TALENT MANAGEMENT - PEOPLE AS A COMPETITIVE ADVANTAGE IN "NOT NORMAL" TIMES (KEYNOTE)**Karl Ahlrichs, SPHR**

Connect the dots with Customer Service, Worker's Compensation, Health Insurance and Employee Engagement. In this fast paced presentation, we will look for "Silver Bullets" in Talent Management, and then apply that knowledge to aligning HR with the core values and vision of the organization. This is not a "soft and squishy" presentation on happy talk and vague theories.

TBEL

TEAM DEVELOPMENT - SECRETS BEHIND BUILDING AN AWARD-WINNING TEAM**Ray Perry**

How cohesive is your team? Would others say there is a great deal of trust on your team or a great deal of frustration? In this interactive workshop, participants will step outside their role as team leader to diagnose and then prescribe solutions to problems and obstacles that are getting in the way of team productivity, communication and camaraderie. Using this as a backdrop, participants will then customize a set of strategies for leading their respective teams to increased performance and morale - while at the same time minimizing intra-team problems and friction.

TLLC

new

TEAM LEADERSHIP & LEADING CHANGE - GET IT RIGHT & MAKE IT LAST**Steve McClatchy**

How well does your team adapt to change? Do you have the skills you need to address denial and resistance? How do you personally adapt to change? Change is a necessary part of any business focused on improvement. Some teams struggle while others are more agile. This program will teach you the skills and strategies you need to launch, implement and sustain lasting change. This topic is not lectured! The ideas and strategies are facilitated with interaction, exercises and real world examples. (Available in full day, half-day or keynote format)

PIRATE

new

THE PIRATE CPA: LEADERSHIP, TEAMWORK & BALANCE IN DANGEROUS TIMES**Barbara Geary**

In these times, a pirate is viewed both as horror on the high seas and Hollywood hero. Neither would seem to be good model for CPAs. Yet, if we remove the murder and mayhem, the swashbuckling pirates of old could teach us many a lesson no living and working together under stress. Perhaps that's why, in today's demanding and constantly changing world, the pirate stand out as an historical figure. The purpose of this course is not to make heroes out of villains; instead, it takes a look at the core principles that pirates used to survive and thrive despite difficult obstacles - both internal and external. The pirates discovered the secrets of camaraderie, equality, freedom, living in the moment and traveling light. This course is designed to be a good-humored approach to finding balance, flexibility and cooperation in our firms and companies because we're all in the same boat.

T

ALPHA

new

THE ACCIDENTAL ALPHA: BUILDING RESILIENCY IN WOMEN LEADERS**Gretchen Pisano**

Many of the women I know are super busy. In fact, they are busy beyond belief. They are the hub of their personal and professional networks, charged with the well-being of customers, clients, children and cupcakes; they are managing but at what cost to themselves? Resiliency, and the science that underpins our understanding of it lends insight and practical wisdom to the art of living a self-full life, and thriving while leading across personal and professional domains.

BLM

THE BALANCED LEADER-MANAGER: USING THE RIGHT LEADERSHIP STYLE**Jennifer Louis, CPA**

The demands on mid- and high-level executives require them to effectively display both management and leadership skills. However, often individuals struggle with what distinguishes these different yet related competencies, including how to effectively balance day-to-day responsibilities and long-term strategic objectives. Only those who have strong skills as both manager and leader can achieve and maintain personal and organizational success.

BBBYSR

THE BEST BUSINESS BOOKS EVER WRITTEN**Ronald Baker**

Nearly 3,000 business books are published each year. With today's busy and demanding schedules, do you feel you don't devote enough time to reading and absorbing new ideas*

BOFI

THE BUSINESS OF THE FUTURE (FOR INDUSTRY)**Ronald Baker**

Today's company is challenged by a variety of factors: new technologies, intensified competition, continued consolidation, a shrinking labor pool, more sophisticated customers, and downward pressure on profit margins.

CC

THE COMMUNICATION CHALLENGE: DISARMING DIFFICULT PEOPLE**Ray Perry**

How often do you deal with difficult clients, co-workers, staff and bosses What impact do they have on productivity and morale

F990

new

THE COMPLETE GUIDE TO UNDERSTANDING CHALLENGING NONPROFIT TAX AND FORM 990 ISSUES**Stuart Sobel**

The object of this course is to train both new and experienced staff accountants and other preparers to deal with the challenging aspects relating to the filing of the Form 990 series of tax returns. This course offers a practical, hands-on approach to completing one of the most difficult tax forms.(Qualifies for Yellow Book CPE credit)

CCFO

THE CUSTOMER MAP: A CRITICAL TOOL FOR DEVELOPING BUSINESS ACUMEN**Alan Patterson**

Going against the grain of popular wisdom, most customers / business partners do not know what they want, much less how your organization can meet their needs. The Customer Map is a structured process for getting below the surface of what your customers ask you for to uncover what they need the most. The Map enables your organization to set priorities and take action from improving processes, to creating new services and products, to anticipating customer needs.This course will review the Customer Map process and show you how to utilize it to develop successful business partner relationships.

EHRIS

THE ECONOMICS OF HEALTH REFORM: IMPLICATIONS FOR INDUSTRY & SOCIETY (2-HOUR WEBCAST)**R. Donald McDaniel**

Increasingly, laws are passed with a focus on short-term merits or benefits to a few constituencies and groups. This presentation will analyze both the short- and long-term implications, and the possibly unintended consequences of the recently passed U.S. HL reform legislation, including how it might affect consumers, employers and U.S. industry. In this way, the presentation will compare stated policy goals with anticipated outcomes.This program is customizable depending on the needs of the client.

T

MBA
new**THE EIGHT HOUR MBA****Jennifer Elder, CPA**

If you don't have the time to complete an MBA degree but still want to understand the key concepts then this course is for you. Designed for managers, professionals, and business owners who want to develop a broad perspective to deal more effectively in today's rapidly changing and increasingly complex business environment.

This program is available in a 5-day in-depth version.

ESEC

THE ESSENTIALS OF SEC FINANCIAL REPORTING**Thomas Selling, Ph.D., CPA**

This two-day course provides in-depth fundamentals of SEC reporting and the latest information on recent developments at the SEC. Whether you have just become involved in the SEC reporting process, or have been working in the field for years, this course will give you a solid grounding in the principle rules and regulations and their compliance triggers. You will also be brought up-to-date on all the recent developments occurring in this unprecedented period of change. (Available in 4-10 hour format)

DICM

THE FINANCE & ACCOUNTING ORGANIZATION AS STRATEGIST AND PARTNER TO THE BUSINESS (ALSO AVAILABLE AS A 2-HR WEBCAST/ON-DEMAND)**Alan Patterson**

How have successful finance and accounting organizations shed the image of policeman even in the wake of added controls to become partners and strategists to the business? It is because they accept technical competence as a necessity. The added value they bring is they spend more time developing and managing critical relationships in order to learn all there is to know about the business, its customers, and the competition. This workshop explores how the finance and accounting organization positions itself to work as a trusted advisor to the business.

FIVEDOOR

new

THE FIVE DOORWAYS OF HEALTH AND WELL-BEING (KEYNOTE)**Gretchen Pisano**

A one-hour keynote designed to thoroughly familiarize participants with the Theory of Well-being and what it tells us about why pursuing happiness won't make us happy. If finding the sweet-spot of life is proving to be elusive, this session will provide new insights into sustainable well-being and the formula for a life well-lived, customized to fit you.

IFRSJL

THE IMPACT OF IFRS AND OTHER GLOBAL STANDARDS ON PRIVATE ENTITIES (ALSO AVAILABLE AS A 2 HOUR WEBCAST/ON-DEMAND)**Jennifer Louis, CPA**

By now it is common knowledge that U.S. issuers (or publicly-traded entities) are in the process of possibly transitioning to International Financial Reporting Standards (IFRS). The hope is that use of a single, high-quality standard will eventually empower investors to make better-informed investment decisions by enabling them to easily compare financial statements worldwide. But, what about the ultimate impact on nonissuers (or private entities)? This course will explore all of the global professional and regulatory standards currently impacting private entities.

GRUMP

THE NEW WORKFORCE - NEW DATA, NEW IDEAS, AGING BABY BOOMERS**Karl Ahlrichs, SPHR**

In the new economy, managers are challenged by an aging workforce that is not retiring anytime soon. They may have planned to have financial and personal independence by now, but the economy has gotten in the way. The challenge now is to motivate and manage a complex workforce, with a core of baby boomers that are grumpy and disaffected. This course will provide managers, supervisors and executives tools for getting higher productivity, customer service and profitability from their existing workforce. It offers knowledge and understanding of the core motivational theories that work on boomers in particular and the modern workforce in general.

POWRCONV

new

THE POWER OF SUCCESSFUL CONVERSATIONS**Sarah Gershman**

Professional success happens one conversation at a time. In this fun and challenging training, you will learn how to prepare for and execute critical day-to-day communications. Through a series of skill-building exercises, you will learn simple and concrete communication strategies that can be applied immediately. (Format can be customized from 90 minutes to 6 hours)

INFL THE POWER TO INFLUENCE AND CONNECT

Mark Jankowski

Many people achieve their influence objectives only at the expense of important relationships. Others habitually avoid challenging influence situations at the expense of fulfilling their work goal. This course focuses on influencing peers, direct reports, colleagues, managers, clients, and suppliers - both inside and outside one's organization - while maintaining and nurturing important work relationships.

IRSM THE TOP 50 MISTAKES PRACTITIONERS MAKE AND HOW TO FIX THEM: DEALING WITH THE INTERNAL REVENUE SERVICE

new

Stuart Sobel

Tax practice and the resolution of tax problems with the Internal Revenue Service can be tedious and outright challenging. This course will show practitioners how to navigate through the confusing IRS system, help them save time, and enable them to avail their clients of all the rights to which they are entitled. The techniques and tools this course provides will make tax practice less "taxing."

GIBB THE TOP 50 MISTAKES PRACTITIONERS MAKE IN NONPROFIT TAXATION & GOVERNANCE ISSUES AND HOW TO FIX THEM

new

Stuart Sobel

The nonprofit sector is growing by leaps and bounds. There are now more than 2 million organizations in the United States. Congress and the IRS are now scrutinizing nonprofits in much greater depth. New applications for tax-exempt status are being analyzed more thoroughly, and Form 990 has been revised to provide more in-depth information that will enable both the IRS and donors to evaluate organizations. This unique course will enable CPAs to serve their existing clients in an improved manner as well as open markets to this growing client base. The class will include recent legislative changes and court cases affecting the nonprofit sector and revisions to Form 990. Cases studies will extensively cover internal control, budgeting, conflicts of interest and other similar areas. (Qualifies for Yellow Book CPE)

WORKMOM THE WELL COMPENSATED MOTHER: STRENGTH-BASED LEADERSHIP STRATEGIES FOR THE WORKING MOTHER

Gretchen Pisano

An interactive and hands-on workshop designed to explore the art and science of thriving while being a hardcharging, smart, professional and loving working mother capable of inspirational leadership in both professional and personal domains.

NEEDIFRS THINGS THAT EVERY CPA NEED TO KNOW ABOUT IFRS

Peter Margaritis, CPA, MAcc

There are over a 125 countries that either require or permit the use of IFRS. Closer to home, Canada adopted IFRS on January 1, 2011 and Mexico is going to adopt IFRS on January 1, 2012. The SEC is poised to set a mandatory adoption date for publicly traded companies to implement IFRS in 2015 or 2016. In addition, the AICPA recognizes the International Accounting Standards Board (IASB) as a standard setter which allows privately held companies to adopt IFRS for Small-to-Medium Sized Entities (IFRS for SMEs). Whether you're in public or industry accounting, have a client base solely in privately-held companies, or work for a privately held business, the likelihood of an IFRS question being asked of you is increasing. This course offers basic knowledge that every CPA needs to know about IFRS. .

TMPL TIME MANAGEMENT AND PERSONAL LEADERSHIP

new

Steve McClatchy

In this age of social networking, text messages, instant messaging, email, voice mail, cell phone calls, face-to-face meetings, virtual meetings, drop-ins and a to-do list that never seems to end a new approach to managing it all is needed. Used by Pfizer, Disney, Comcast, HP, Wells Fargo, Ikea, Nestle, BASF, Accenture and the San Francisco 49ers this presentation delivers a fresh, practical every day approach that will help you to accomplish more in less time and with less stress. Time management is about managing you and the choices you make, not about managing the clock. In this fast paced, interactive and engaging presentation you will learn three skills at the heart of great time management and how to gain master control over your to-do list, calendar, contacts and meeting notes.

The way you lead your life is directly tied to the way you manage your time. Great habits can yield a lifetime of success and achievements while poor ones can keep us stressed, frustrated and out of balance. Time Management & Personal Leadership is at the foundation of the leadership process and guaranteed to build leaders and great time managers at every level of your organization. (Available in full day, half-day or keynote format)

T**TERM****TO TERMINATE OR NOT TO TERMINATE: THAT IS THE QUESTION****Sheila Birnbach**

The process of terminating an employee can be uncomfortable and anxiety-producing. Yet doing nothing about a terminable employee can damage the morale of an entire organization. If a termination is done incorrectly, it can leave your organization legally vulnerable. Learn how to determine when it is appropriate to terminate an employee and how to protect your organization.

TOP5-W**TOP 5 WAYS TO GET THE MOST VALUE FOR YOUR AUDIT FEES (2-HOUR WEBCAST/ON-DEMAND)****Jennifer Louis, CPA**

Audited organizations of all nature, size and complexity have a vested interest in successfully managing the financial statement audit process. Cost-effectiveness, timely financial reporting, minimizing organizational disruption, and other incentives can result from an effective and efficient financial statement audit. While there are certain factors that drive audit fees which are outside of the control of the audited entity, there are several ways for organizations to proactively get the most value for the cost of the audit.

TRAIN**TRAINING: HOW TO EFFECTIVELY (AND PAINLESSLY) TEACH YOUR STAFF****Kelly Watkins**

As an executive, partner, or manager, you know that training is vital. You're a firm believer in the importance of a knowledgeable staff whether its a CPA topic, a company message, or a professional development skill. But, training takes time and time is limited with the consequences being you deny your staff of their necessary training or you procrastinate and then ineffectively throw something together at the last minute. This course will review easy steps to create training sessions on any topic and show you how to efficiently and (relatively painlessly) avoid those scenarios and provide quality training. You'll receive fun, interactive activities that you can use with your staff.

TRANLEAD**TRANSITIONS TO LEADERSHIP****Sheila Birnbach**

Excellence in technical or financial skills does not automatically translate to excellence in supervising others. First-time supervisors face unique challenges as they transition to management: supervising work with which they may be unfamiliar, supervising employees with whom they had previously been co-workers or employees with greater seniority, understanding the extent of responsibility and decision making authority they have, wanting to be liked, finding ways to communicate expectations to their employees and making unpopular decisions. This workshop will help new supervisors to successfully navigate the transition.

TCS**TRUST CENTERED SELLING: HOW TO ATTRACT AND RETAIN LOYAL CLIENTS THROUGH TRUSTING RELANSHPS (ALSO AVAILABLE IN A SERIES OF FIVE 1-HOUR WEBCASTS)****Mark Slatin**

The paradox in selling is that the harder we try to make the sale our goal, the more we come across as untrustworthy. Instead, if we make trust our objective, we'll achieve success in selling. This course helps sellers of complex or relationship-based services build trusting relationships with their clients. In a highly interactive, hands-on session, participants learn the factors effecting trust and principles that will help them achieve higher profitability and higher revenues. This program is also available in a series of five, 1-hour Webcast sessions: *Trust Centered Selling - Business Development through Trusting Relationships - Session 1 of 5 - "The Power of Trusting Relationships" *Trust Centered Selling - Business Development through Trusting Relationships - Session 2 of 5 - "The 4 Components of Trust" *Trust Centered Selling - Business Development through Trusting Relationships - Session 3 of 5 - "Creating Client Value" *Trust Centered Selling - Business Development through Trusting Relationships -Session 4 of 5 - "Listening to Build Trust" *Trust Centered Selling - Business Development through Trusting Relationships - Session 5 of 5 - "The Trust Selling Cycle - Step 1 - Making the Initial Contact"

BDCAMP**TURNING TRUST INTO VALUE: BUSINESS DEVELOPMENT BOOT CAMP****Greg Conderacci**

Few professions can command the trust and respect of the CPA, and indeed the demand for CPA services has never been higher. At the same time, though, many CPA services are becoming commoditized and pressure on hourly rates is intense. It is also increasingly difficult to move choice business from competitors. Finally, firms and companies are finding the competition for talented employees can be more challenging than the competition for good clients. In short, successful firms must be able to translate trust into value to monetize and capitalize more successfully the benefits they offer.

TWIT101**new****TWITTER 101: CHANGING YOUR WORLD 140 CHARACTERS AT A TIME (1-HOUR WEBCAST)****William Sheridan, CAE**

It's no fad -- Twitter has changed the ways in which professionals communicate, collaborate and learn.

U

UIFRS

UNDERSTANDING IFRS 2012: A HANDS-ON, HOW TO APPROACH**Ray Thompson, CMA, CFM, CBA**

This timely course will help you understand the process and the players involved in the movement toward global, converged accounting standards. Become familiar with the major differences between IFRS and US GAAP and how this is likely to narrow in the coming years as convergence gathers momentum. The process and elections involved in transitioning from national GAAP to IFRS using IAS 1 will also be highlighted. Examine the specific major differences between GAAP and IFRS and gain awareness of how IFRS has developed a separate set of reporting requirements for non-public entities. Engage in practical case studies where concepts relating to IFRS are applied to everyday reporting issues. (Content can be customized to client needs)

UIFRSGAA

UNDERSTANDING INTERNATIONAL FINANCIAL REPORTING STANDARDS (IFRS) FROM A U.S. GAAP PERSPECTIVE**Thomas Selling, Ph.D., CPA**

Whatever the future holds for IFRS in the U.S., there is no question that it has already had a profound effect on financial reporting by U.S. companies. Moreover, even if convergence of U.S. GAAP and IFRS takes place, substantial differences will remain between the two financial reporting regimes. This course is designed to provide a comprehensive review of the major differences between U.S. GAAP and International Financial Reporting Standards (IFRS) at both the principle and rule levels. It will also review current convergence projects and provide information for the participant to evaluate for themselves the possibility and desirability of future IFRS adoption for U.S. companies (Available in 6 - 14 hour format)

LOYAL

USING BUSINESS VALUATIONS TO KEEP YOUR CLIENTS LOYAL**Brad Davidson**

Accountants often struggle to get clients to see them as "trusted advisors" instead of just tax preparers. The reward for succeeding is client loyalty and increased practice profit margins. This course will teach you how to utilize business valuations so clients see you as a value-added problem solver - whether or not you do business valuations yourself. (can be 1 hour keynote; or 2 - 4 hours)

SOMELEAD

USING SOCIAL MEDIA FOR LEAD GENERATION**Andrew Rose**

Successful firms have discovered that by using social media, they have enhanced their search engine rankings, become more appealing to recruits and have connected to the next generation of clients. Learn how to use free social media platforms to drive prospects to your firm.

V

MLC8

VALUE-ADDED INTERNAL CONTROL COMMUNICATIONS THAT COMPLY WITH THE STANDARDS - DETAILED ANALYSIS AND CASE STUDIES (4-HR OVERVIEW AVAILABLE)**Jennifer Louis, CPA**

In the past, internal control communications were often an afterthought to the audit. However, recent changes to the Statements on Auditing Standards (SASs) have made identifying and communicating weaknesses in internal controls around reliable financial reporting noted during the course of the audit, a presumptive requirement. Making value-added internal control communications a higher priority on audit engagements can have many benefits, including: improving client relations, proactively preventing, future audit issues and making audits more interesting by forcing engagement team members to view clients with a business advisory perspective that includes operational effectiveness and efficiency, and the ability to meet strategic objectives.. (Also available in a 4-hour Overview)

VARAA

VARIOUS ACCOUNTING/AUDITING - SELECTIVES**Gary Bulmash, CPA**

Many of these subjects are constantly needed for your clients or company. You may select which topics you want covered as in a "buffet" table. 4 or 8 CPE credit hours

W

WEB20

WEB 2.0: LESS HYPE, MORE HELP

William Sheridan, CAE

Web 2.0 is no fad. It has broken new ground in the way businesses communicate with clients, customers, employees and each other. Blogs, podcasts, wikis, social networks and virtual worlds are accepted - and in many cases, expected - communication tools for large and small organizations alike. Which of these tools might work for your business ... and which should you avoid Explore the possibilities here.

TWITTER

new

WELCOME TO THE TWITTERVERSE, FROM A CPA PERSPECTIVE (1-HOUR WEBCAST)

Jody Padar, CPA, MST

Learn the value and strategies for using Twitter to develop your firm's brand as well as your professional brand.

INVENT

WHAT NEXT? INVENTING A NEW NICHE FOR YOURSELF

Greg Conderacci

Perhaps it happened suddenly; perhaps it happened gradually; but what you used to do to succeed isn't succeeding any more. A weaker economy, stronger competition, a merger or acquisition, an advance in technology or just plain boredom all can make you want to change your career, your company's business or your practice focus. But, how do you do that This highly interactive course will reveal to you how the process goes from the inside out and offers many "hands on" exercises.

WDDEC

WHEN DEBITS DON'T EQUAL CREDITS (FOR PROFESSIONALS AND INDUSTRY)

Ronald Baker

This course is different--radically different. It is designed to generate thinking and discussion among colleagues about the significant changes, trends and demographics facing the future of our chosen profession. It is offered in the spirit of collegiality to current and future leaders of the profession who want to have an impact beyond the existing year's bottom line.

DISASTER

WHEN DISASTER STRIKES, WILL YOU BE READY?

Sheila Birnbach

Every organization is susceptible to crises such as natural disasters, financial misconduct and public relations fiascos. Whether it is your organization or the organizations of the clients you serve, a disaster recovery plan is essential. This workshop will prepare you for crises, discuss the three fundamental approaches - prevention, mitigation and recovery - and provide tools to manage operations in times of crisis.

21CNEG

WHY DON'T WE SAY YES? 21ST CENTURY NEGOTIATING

Greg Conderacci

This practical, interactive course prepares participants to negotiate using traditional skills adapted to today's realities. It focuses on proven, fundamental principles of negotiating while considering game-changing issues like globalization, trust, culture, technology, brain science and even political correctness. In particular, it helps participants understand why people say no when they should say yes and vice versa.

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Y

WORKFLOW

new

YOU'VE GOT TO MOVE IT, MOVE IT! WORKFLOW UN-CONFERENCE**Jody Padar, CPA, MST**

Un-conferencers will try to answer the question, "How do we make born-digital, scanned, and paper materials workflow part of the "the norm" in our firm?" Discussion will focus on the need for firm-wide strategies, the viability of workflow across different software platforms and generational/workstyle issues. We will also compare the abilities and limitations of specific tools to the broader idea of how to collaborate and build better tools. Come prepared to get up and move through the unconference process of preparing a tax return.

SMLT

YOUR STRENGTHS, YOUR MANAGEMENT TALENT, YOUR LEADERSHIP: MAKING A DIFFERENCE FOR YOU AND OTHERS**Lin Kroeger, CMC**

Management wisdom today suggests that we should manage ourselves and others based on the respective strengths of each. Do you know what your strengths are? Can you recognize others strengths? This workshop will introduce frameworks for identifying your own strengths and those of others, and will show you how to use that knowledge to move from self management to management to a leadership position.

#

MLW

10 THINGS I LEARNED FROM MOTHERING THAT EVERY EXECUTIVE SHOULD KNOW (KEYNOTE)**Gretchen Pisano**

A keynote designed for hardcharging, smart professional working mothers who desire to do "great" work in both personal and professional domains. Learn a strategic approach to applying the skills of mothering to the art of leading.



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