



The Association of Accountants and Financial Professionals in Business

IMA Subscription Course Listing

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As of: 06/02/23

#	Field of Study	Title	CPE Credit	Course Description	Expiration Date	Delivery Method
1	Accounting	Accounting and Reporting for Defined Contribution Plans	1.0	In 2020, the Pension Rights Center reported that one out of three older adults received income from private company or union pension plans; federal, state, or local government pension plans; or railroad retirement, military, or veterans' pensions. The need to properly administer and account for pension funds is critical. There are very specific requirements for pension accounting. ASC 715 Compensation-Retirement Benefits provides guidance on financial reporting for employers who offer pension benefits to their employees. ASC 962 Plan Accounting-Defined Contribution Pension Plans address the plan accounting standards for defined benefit plans and defined contribution plans respectively. Those detailed calculations of pension cost and reporting requirements produce a complex accounting standard.	03/31/24	QAS Self-Study
2	Accounting	Accounting for Business Combinations v4.0	4.0	This course provides an overview of the accounting for business combinations. The accounting and reporting requirements relating to business combinations are outlined within Accounting Standards Codification (ASC) Topic 805, Business Combinations. The objective of ASC 805 is to improve the relevance, representational faithfulness, and comparability of the information that an entity provides in its financials for business combinations. This course reflects information current through the issuance of ASU 2019-06 which provided certain relief for not-for-profit entities. Speaker/Author: Kelen F. Camehl, CPA, MBA	05/31/24	QAS Self-Study
3	Accounting	Accounting for Defined Benefit Plans	2.0	In 2020, the Pension Rights Center reported that one out of three older adults received income from private company or union pension plans; federal, state, or local government pension plans; or railroad retirement, military, or veterans' pensions. The need to properly administer and account for pension funds is critical. There are very specific requirements for pension accounting. ASC 715 Compensation-Retirement Benefits provides guidance on financial reporting for employers who offer pension benefits to their employees. ASC 960 Plan Accounting-Defined Benefit Pension Plans address the plan accounting standards for defined benefit plans. Those detailed calculations of pension cost and reporting requirements produce a complex accounting standard.	02/29/24	QAS Self-Study
4	Accounting	Accounting for Foreign Currency v2.0	2.0	In today's modern economy, the growth of foreign operations is continuing upward and the number of companies with foreign operations has expanded. For example, a company often operates in different economic and currency environments to stay competitive in the global marketplace. Thus, it must have a process for reporting foreign currency balances to address several financial reporting issues, such as determining functional currencies, accounting for foreign currency transactions, and translating its foreign entity's financial statements. ASC 830 Foreign Currency Matters provides guidance for transactions denominated in a foreign currency, and for operations undertaken in a foreign currency environment. This course covers key aspects of the guidance and includes specific examples to illustrate its application. Relevant references to and excerpts from ASC 830 are discussed throughout the course.	08/31/23	QAS Self-Study



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5	Accounting	Accounting for Guarantees	1.0	Guarantees are often included within certain purchase agreements, sales agreements, commercial agreements, and many other types of agreements. This course provides an overview of the accounting, reporting, and disclosure requirements related to guarantees. The U.S. GAAP guidance related to guarantees is prescribed by ASC Topic 460.	03/31/24	QAS Self-Study
6	Accounting	Accounting for Guarantees	1.00	Guarantees are often included within certain purchase agreements, sales agreements, commercial agreements, and many other types of agreements. This course provides an overview of the accounting, reporting, and disclosure requirements related to guarantees. The U.S. GAAP guidance related to guarantees is prescribed by ASC Topic 460.	03/31/24	QAS Self-Study
7	Accounting	Accounting for Leases - Part II: The Application of the Lease Standard	4.0	Historically, lease accounting has been straightforward: a capital lease vs. an operating lease. An operating lease is treated as an off-balance sheet operating expense. The FASB issued ASU 2016-02, Leases (ASC 842) in response to the growing need for transparency and comparability among organizations. The basic concept of ASC 842 is that leases of all types convey the right to direct the use and obtain substantially all the economic benefit of an identified asset, creating an asset and liability for lessees. Thus, the most significant change requires lessees to recognize the rights and obligations resulting from all leases (greater than 12 months) as assets and liabilities on their balance sheets. Although the lessor accounting is largely unchanged from ASC 840, there are some important changes and more disclosure requirements. For example, certain principles of the lessor model are updated to align with changes to the lessee model and the revenue recognition standard (ASC 606). As a result, ASC 842 brings additional scrutiny from enterprise leaders, auditors, and regulators. This course series, Parts I, II and III, is designed to help you navigate the complexities of this standard. It explains financial accounting and reporting requirements for lessees and lessors with specific examples to illustrate the application. It also includes public business entities' reporting responsibilities and explains how ASC 842 affects a company's financial results. Finally, it shares insights that help companies develop a reasonable leasing policy threshold, maintain effective internal control over leases, and prepare for audits.	09/30/2024	QAS Self-Study



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8	Accounting	Accounting for Leases - Part III: Other Lease Matters	1.0	Historically, lease accounting has been straightforward: a capital lease vs. an operating lease. An operating lease is treated as an off-balance sheet operating expense. The FASB issued ASU 2016-02, Leases (ASC 842) in response to the growing need for transparency and comparability among organizations. The basic concept of ASC 842 is that leases of all types convey the right to direct the use and obtain substantially all the economic benefit of an identified asset, creating an asset and liability for lessees. Thus, the most significant change requires lessees to recognize the rights and obligations resulting from all leases (greater than 12 months) as assets and liabilities on their balance sheets. Although the lessor accounting is largely unchanged from ASC 840, there are some important changes and more disclosure requirements. For example, certain principles of the lessor model are updated to align with changes to the lessee model and the revenue recognition standard (ASC 606). As a result, ASC 842 brings additional scrutiny from enterprise leaders, auditors, and regulators. This course series, Parts I, II and III, is designed to help you navigate the complexities of this standard. It explains financial accounting and reporting requirements for lessees and lessors with specific examples to illustrate the application. It also includes public business entities' reporting responsibilities and explains how ASC 842 affects a company's financial results. Finally, it shares insights that help companies develop a reasonable leasing policy threshold, maintain effective internal control over leases, and prepare for audits.	09/30/2024	QAS Self-Study
9	Accounting	Accounting for Software Sales	1.5	This course provides an overview of the accounting for the costs of software to be sold, leased, or marketed. The accounting, reporting, and disclosure requirements related to this type of software is prescribed by ASC Topic 985-20. This course primarily addresses the concept of technological feasibility and how this impacts the cost classification of software development costs. The course also addresses the respective presentation and disclosure requirements.	03/31/24	QAS Self-Study
10	Accounting	Accounting for Special Purpose Acquisition Companies (SPACs)	1.0	This course provides an overview of Special Purpose Acquisition Companies (SPACs) along with a discussion of their advantages and disadvantages. This course also addresses the key stages of a SPAC transaction as well as the respective SEC filing requirements. Finally, this course includes several illustrative examples of SPAC financial statement disclosures. Author/Speaker: John Fleming	07/31/24	QAS Self-Study
11	Accounting	Accounting for the Lean Enterprise v1.1	2.0	This course provides an overview of accounting for the lean enterprise. This includes a discussion of lean thinking, how to implement lean, and the concept of kaizen. This course also addresses topics such as the various types of costing methods, dysfunctional behavior, value stream costing, and value stream performance measures. Finally, this course outlines how to implement lean accounting for accounts payable, accounts receivable, and financial statement preparation.	03/31/2025	QAS Self-Study



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12	Accounting	Accounting Principle Changes	1.0	This course provides an overview of the accounting requirements with respect to accounting principle changes. The scope of accounting changes includes a discussion of changes in accounting principles, changes in accounting estimates, as well as changes of a reporting entity. A majority of the information included within this course is sourced from the requirements found within FASB ASC Topic No 250, Accounting Changes and Error	11/30/23	QAS Self-Study
13	Accounting	Acquisition Planning and Accounting Best Practices	1.0	This course provides an overview of the key steps involved in acquisition planning and accounting best practices. This includes a discussion of the processes involved in the pre-diligence, due diligence, deal execution, and integration stages of an acquisition. This course also provides an overview of the key differences between a business combination transaction and an asset acquisition.	03/31/24	QAS Self-Study
14	Accounting	An Effective Accounts Payable Policy & Procedures Manual v1.1	2.0	Effective policies and procedures in the Accounts Payable function is critical for any organization wishing to reduce or eliminate duplicate payments, prevent and detect fraud, be cost effective and compliant with all regulatory issues affecting the payment function. The first step in that battle is having a current, detailed policy and procedures manual. This course presents information the professional can use to create an effective manual, that not only documents the organization's policies and procedures, but can be used as a reference and training guide. Industry expert Mary Schaeffer shows auditors, controllers, and managers how to create such a manual when none exists. She also includes an outline for a sample policy as well as a checklist they can use to determine if their current policy is best practice or something less. © Mary S. Schaeffer, Accounts Payable Now & Tomorrow, and	10/31/2024	QAS Self-Study
15	Accounting	An Overview of the COSO Framework v1.1	1.0	In this program, you will learn about the COSO Framework. Topics include: definition of internal control; the Framework's objectives, components, and principles; the meaning of effective internal control; and the limitations of internal control. Examples are also included to illustrate the application of the COSO Framework. This program is Part 1 of a two-part series of programs related to the COSO Framework. IMPORTANT: This course, previously titled "An Overview of the COSO Framework," has been republished in our current course platform. Please be aware that the content is the same, with only minor updates. If you have	09/30/24	QAS Self-Study



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16	Accounting	Analysis of the Corporate Annual Report v3.0	3.5	This course focuses on an analysis of the corporate annual report. It helps you interpret and understand its components, including the financial statements, footnotes, review of operations, auditor's report, supplementary schedules, management discussion and analysis (MD&A), and Management's Report On Internal Control Over Financial Reporting. It touches upon how the Sarbanes-Oxley 404 reporting differs from traditional reporting. The course also teaches you how to calculate and analyze financial ratios and cash flows. Author/Speaker: Steve Spafford, CPA	05/31/24	QAS Self-Study
17	Accounting	Analyzing Cost Data for Management - Part 1 v2.0	2.0	Analyzing Cost Data for Management, Parts 1 to 4, covers the managerial use of accounting, financial, and operating data for planning, control, and decision making. The course series is designed for managers and entrepreneurs who need hand-on knowledge and tools in processing, developing, and analyzing financial, cost, and business data for managerial use. Topics include strategic cost management, analysis of costs; break-even and contribution analysis; cost behavior analysis; activity-based costing (ABC); responsibility accounting and corporate balanced scorecard (CBS); budget for profit planning; short-term decisions; and capital budgeting. Author/Speaker: Steve Spafford, CPA	08/31/24	QAS Self-Study
18	Accounting	Analyzing Cost Data for Management - Part 2 v2.0	1.0	Analyzing Cost Data for Management, Parts 1 to 4, covers the managerial use of accounting, financial, and operating data for planning, control, and decision making. The course series is designed for managers and entrepreneurs who need hand-on knowledge and tools in processing, developing, and analyzing financial, cost, and business data for managerial use. Topics include strategic cost management, analysis of costs; break-even and contribution analysis; cost behavior analysis; activity-based costing (ABC); responsibility accounting and corporate balanced scorecard (CBS); budget for profit planning; short-term decisions; and capital budgeting. Author/Speaker: Steve Spafford, CPA	08/31/24	QAS Self-Study
19	Accounting	Analyzing Cost Data for Management - Part 3 v2.0	1.0	Analyzing Cost Data for Management, Parts 1 to 4, covers the managerial use of accounting, financial, and operating data for planning, control, and decision making. The course series is designed for managers and entrepreneurs who need hand-on knowledge and tools in processing, developing, and analyzing financial, cost, and business data for managerial use. Topics include strategic cost management, analysis of costs; break-even and contribution analysis; cost behavior analysis; activity-based costing (ABC); responsibility accounting and corporate balanced scorecard (CBS); budget for profit planning; short-term decisions; and capital budgeting. Author/Speaker: Steve Spafford, CPA	08/31/24	QAS Self-Study



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20	Accounting	Analyzing Cost Data for Management - Part 4 v2.0	1.0	Analyzing Cost Data for Management, Parts 1 to 4, covers the managerial use of accounting, financial, and operating data for planning, control, and decision making. The course series is designed for managers and entrepreneurs who need hand-on knowledge and tools in processing, developing, and analyzing financial, cost, and business data for managerial use. Topics include strategic cost management, analysis of costs; break-even and contribution analysis; cost behavior analysis; activity-based costing (ABC); responsibility accounting and corporate balanced scorecard (CBS); budget for profit planning; short-term decisions; and capital budgeting.	08/31/24	QAS Self-Study
21	Accounting	Balance Sheet: Fixed Assets v3.0	1.0	An asset is an item of economic value expected to yield a benefit to the owing entity in future periods. To provide information about liquidity, assets are divided into current and non-current assets on the balance sheet. A current asset, such as cash, account receivable, and prepaid expenses, is expected to be consumed within one year, while non-current assets, such as long-term investments, property, plant and equipment, and intangible assets, are to be consumed in more than one year. This course discusses generally accepted accounting principles (GAAP) for reporting fixed assets (property, plant & equipment) on the balance sheet.	03/31/24	QAS Self-Study
22	Accounting	Balance Sheet: Inventory v3.0	1.0	An asset is an item of economic value expected to yield a benefit to the owing entity in future periods. To provide information about liquidity, assets are divided into current and non-current assets on the balance sheet. A current asset, such as cash, account receivable, and inventory, is expected to be consumed within one year, while non-current assets, such as long-term investments, property, plant and equipment, and intangible assets, are to be consumed in more than one year. This course discusses generally accepted accounting principles (GAAP) for reporting inventory assets on the balance sheet.	03/31/24	QAS Self-Study
23	Accounting	Balance Sheet: Reporting Liabilities v2.0	4.0	A liability is a legal debt or obligation that arises during business operations. A current liability, such as accounts payable, is payable within one year (or within the normal operating cycle, whichever is longer). A noncurrent liability, such as bonds payable, long-term loan, and finance lease, is an obligation that is due in over a year. This course discusses generally accepted accounting principles (GAAP) for reporting liabilities on the balance sheet.	09/30/24	QAS Self-Study
24	Accounting	Bank Secrecy Act of 1970 (BSA)	1.0	This course provides an overview of the Bank Secrecy Act of 1970. This includes information related to both currency transaction reports and suspicious activity reports. This course also addresses various money laundering acts as well as the minimum requirements for establishing an anti-money laundering compliance program.	04/30/24	QAS Self-Study
25	Accounting	Best Practices for Accounts Payable: Invoice Handling	1.0	Best practices for the invoice handling function are critical for those organizations concerned about their profitability. Poor practices result in excess cost, duplicate payments, increased processing expenses, fraud, and frayed vendor relationships. This course presents information the professional can use to identify best practice problems. Industry expert Mary S. Schaeffer explains the invoice issues. She then reveals the best practices for	02/29/24	QAS Self-Study



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26	Accounting	Business Combinations - U.S. GAAP vs. IFRS	1.0	This course provides an overview of the similarities and key differences between the business combination standards issued by the FASB (ASC Topic 805) and the IASB (IFRS 3). While these standards are very similar, as is the case with many areas of U.S. GAAP vs. IFRS, there are notable differences that are helpful to understand. Note that this course is not intended to provide an exhaustive discussion of these differences	03/31/24	QAS Self-Study
27	Accounting	Business Combinations v2.0	2.0	The accountant is frequently called upon to advise management of the impact of proposed combinations Knowledge of the emerging accounting rules in this	05/31/24	QAS Self-Study
28	Accounting	Cash Flow Based Ratios: What are They? v1.1	0.20	This nano-learning module is designed to describe and identify cash flow based ratios.	01/31/25	QAS Self-Study
29	Accounting	Consolidation Accounting	1.0	This course begins by looking at the general topic of a consolidation framework. The FASB has proposed revising existing consolidation guidance under Topic 810 as the proposed Topic 812. This course examines the three main sections of proposed Topic 812. It continues by examining the two models used to consolidate a reporting entity's financial statements, and by distinguishing between consolidation based on control and consolidation	08/31/23	QAS Self-Study
30	Accounting	COSO Framework – Part 1	1.0	This course provides an overview of the provisions of the COSO Framework. This includes defining what is internal control, understanding what is meant by an effective internal control system, and providing examples of key controls. This course also address the importance of entity level controls as well as the COSO Framework's objectives and components.	05/31/24	QAS Self-Study
31	Accounting	COSO Framework – Part 2	1.0	This course provides an overview of internal control and addresses what is meant by an effective internal control system. This includes a discussion of the three primary COSO Framework objectives along with the components and principles of internal control. This course also addresses certain points of focus and how they interrelate to demonstrate an effective system of internal control.	05/31/24	QAS Self-Study



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32	Accounting	Credit Losses on Financial Instruments - ASU 2016-13 v3.0	3.0	This course provides an overview of the credit losses standard issued by the Financial Accounting Standards Board (FASB) in June 2016. The standard (issued through ASU No. 2016-13) applies to nearly all entities, not just those in the financial services industry, and changes how entities document and account for credit impairment on their respective financial instruments. This standard is effective for public business entities for annual periods beginning after December 15, 2019 and interim periods therein. As such, this means that calendar-year SEC filers will have to apply the new requirements starting in first quarter 2020. For other entities, given certain delays issued by the FASB, it is effective for periods beginning after December 15, 2022.	11/30/2024	QAS Self-Study
33	Accounting	Credit Losses on Financial Instruments - ASU 2016-13 v4.0	4.00	This course provides an in-depth overview of Accounting Standards Update (ASU) No. 2016-13, Measurement of Credit Losses on Financial Instruments, issued by the Financial Accounting Standards Board (FASB) in June 2016. The standard applies to nearly all entities, not just those in the financial services industry, and changes how entities document and account for credit impairment on their respective financial instruments. This	01/31/2025	QAS Self-Study
34	Accounting	Current Issues in Accounting for Debt v2.0	1.0	This course provides an overview of current issues in accounting for debt. This includes a discussion of the early extinguishment of existing untroubled debt as well as extinguishments, modifications, and exchanges of debt. This course also addresses the accounting and reporting requirements with respect to troubled debt restructurings as well as recently issued ASUs impacting accounting guidance related to debt.	07/31/23	QAS Self-Study
35	Accounting	Deceptive Accounting Techniques – Costs and Expenses	1.0	A significant number of fraudulent accounting practices have taken place in the last 30 years, many of these in the area of costs and expenses. This course will discuss several case studies of companies or organizations manipulating costs and expenses by understating or overstating receivables or inventory, or perhaps participating in “cookie jar accounting schemes.” This will help you identify deceptive accounting techniques in order to recognize and prevent these types of practices.	08/31/23	QAS Self-Study
36	Accounting	Deceptive Accounting Techniques - Revenue Recognition	1.0	More than half of financial fraud during the last 30 years have been in the area of improper revenue recognition. In this course, you will learn to recognize examples of improper revenue recognition, including fictitious revenue and fictitious journal entries. Revenue recognition guidance and the risk of improper revenue recognition in the presentation of financial statements will be discussed to help mitigate audit risk. Guidance from	09/30/23	QAS Self-Study
37	Accounting	Do I Have a Lease?	1.0	This course provides an in-depth overview of the assessment of whether or not an arrangement is or contains a lease. This includes a discussion of specific guidance prescribed by ASC Topic 842 as well as additional interpretive guidance provided several of the Big 4 accounting firms. This course also addresses the short-term lease exception available in ASC Topic 842.	04/30/24	QAS Self-Study



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38	Accounting	Do I Have a Lease?	1.00	This course provides an in-depth overview of the assessment of whether or not an arrangement is or contains a lease. This includes a discussion of specific guidance prescribed by ASC Topic 842 as well as additional interpretive guidance provided several of the Big 4 accounting firms. This course also addresses the short-term lease exception available in ASC Topic	04/30/24	QAS Self-Study
39	Accounting	Dodd-Frank Act (DFA)	1.0	This course provides an overview of the background history and environment that led to the passing of the Dodd-Frank Act. This course focuses on the changes made by the Dodd-Frank act on financial institutions and consumer protection and mortgages. This course also address other key provisions of the law as appropriate.	04/30/24	QAS Self-Study
40	Accounting	Evaluating and Properly Disclosing FASB Accounting Standard Updates (ASUs)	1.0	This course provides an overview of the processes involved in understanding, evaluating, and properly disclosing Accounting Standard Updates (ASUs) issued by the FASB. This includes a look at the key elements included within each ASU, how companies should consider the impacts from the change, as well as how to properly disclose these impacts (if known) within their notes to their financial statements. This course also outlines an effective five-step	07/31/24	QAS Self-Study
41	Accounting	FASB Update	1.0	This course explores the application of new FASB ASUs issued in 2019, as well as the first quarter of 2020. Students will learn details concerning codification and accounting improvements, definition updates, and provisions for transition relief. Changes in options for financial instruments and credit losses will be examined. Effective dates will also be reviewed to facilitate prompt compliance.	08/31/23	QAS Self-Study



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42	Accounting	Financial Statement Analysis and Uses: Part 1 v2.0	3.0	Financial Statement Analysis and Uses: Part 1 is the first part of a three-part series. The course series is designed for interested parties who must understand how to read, interpret, and analyze financial statements. This course describes in clear, concise, and understandable language the intricacies of financial statements, and their use by investors, creditors, analysts, and other interested parties. This course series can enhance your chance for success in business and investing by enabling you to profit from the knowledge, insights, and perceptions of professionals who use financial statement analysis tools and techniques on a day-to-day basis. Realistic examples and illustrations of financial statement analysis are widely used in this course series to make the subject matter crystal clear. Financial Statement Analysis and Uses: Part 1 explains the objectives of financial statements in a meaningful manner. The accounting principles used in compiling financial statements and the qualitative characteristics of data appearing on financial statements are relevantly and reliably described.	04/30/24	QAS Self-Study
43	Accounting	Financial Statement Analysis and Uses: Part 2 v2.0	2.0	Financial Statement Analysis and Uses: Part 2 is the second part of a three-part series. The course series is designed for interested parties who must understand how to read, interpret, and analyze financial statements. This course describes in clear, concise, and understandable language the intricacies of financial statements, and their use by investors, creditors, analysts, and other interested parties. This course series can enhance your chance for success in business and investing by enabling you to profit from the knowledge, insights, and perceptions of professionals who use financial statement analysis tools and techniques on a day-to-day basis. Realistic examples and illustrations of financial statement analysis are widely used in this course series to make the subject matter crystal clear. Financial Statement Analysis and Uses: Part 2 begins with an overview of financial statement analysis, and continues by explaining analysis of liquidity and activity, analysis of solvency and capital structure, and profitability analysis.	04/30/24	QAS Self-Study
44	Accounting	Financial Statement Analysis and Uses: Part 3 v2.0	2.0	Financial Statement Analysis and Uses: Part 3 is the final part of a three-part series. The course series is designed for interested parties who must understand how to read, interpret, and analyze financial statements. This course describes in clear, concise, and understandable language the intricacies of financial statements, and their use by investors, creditors, analysts, and other interested parties. This course series can enhance your chance for success in business and investing by enabling you to profit from the knowledge, insights, and perceptions of professionals who use financial statement analysis tools and techniques on a day-to-day basis. Realistic examples and illustrations of financial statement analysis are widely used in this course series to make the subject matter crystal clear. Financial Statement Analysis and Uses: Part 3 first examines market strength ratios, then continues by exploring cash flow analysis and interim statements and segment analysis.	05/31/24	QAS Self-Study



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45	Accounting	Financial Statements and Analysis v2.1	1.0	Finance involves obtaining, using, and managing funds to achieve the company's financial objectives (e.g., maximization of shareholder value). This course emphasizes and develops an understanding of financial concepts, tools, strategies, and major decision areas related to the financial management of a business, as well as addressing issues associated with financial information analysis. The course is directed toward the business person who must have financial knowledge but has not recently had training	10/31/24	QAS Self-Study
46	Accounting	FMN - 2023/February, Seg 1 - The Ins and Outs of Hedge Accounting	2.00	Hedge accounting provides a mechanism where you can match the timing of the income statement impact of the derivative with the timing of the impact of the item that you're hedging. Jonathan Howard, Senior Consultation Audit & Assurance Partner with Deloitte & Touche LLP, explains hedge accounting, the different hedge accounting models, and the most common component risks that are hedged. Also reviewed are the implications of ASU 2017-12 and ASU 2022-01.	09/14/24	QAS Self-Study
47	Accounting	FMN - 2023/February, Seg 2 - Accounting in an Uncertain World	2.00	COVID-19 had a major impact on the accounting profession in many ways, including evolving technology, remote work issues, and new reporting requirements. Accountants have faced new professional challenges associated with these events as well as fallout from supply chain disruptions and climate change. Helen Kerrigan, Director of Future Finance Training, Ltd., offers ways for today's accounting and finance professionals to address these	09/14/24	QAS Self-Study
48	Accounting	FMN - 2023/January, Seg 3 - The Accountant's Role in Leveraging ESG	2.0	ESG has been a hot topic in the political and business worlds for years and is now drawing a great deal of attention in the accounting arena. Katherine Smith, Executive Director of the Center for Corporate Citizenship, reviews the recently issued proposals by the SEC that would help to improve ESG disclosures and suggests some new ways of thinking about ESG and accounting.	08/14/2024	QAS Self-Study
49	Accounting	FMN Plus-2023/April, Seg 2 - The Intersection of Data and Accounting	2.0	Finance and accounting organizations are using a variety of new digital technologies in the workplace. As today's cutting edge accountant becomes more of a business partner, knowing how to leverage data and technology is increasingly important. John Paillet, Director at KPMG, specializes in leasing, digital transformation, technical accounting, and compliance with new accounting guidance. He shares his insights on how data and accounting can form a productive ever-evolving working relationship.	11/14/2024	QAS Self-Study



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#	Field of Study	Title	CPE Credit	Course Description	Expiration Date	Delivery Method
50	Accounting	FMN Plus-2023/April, Seg 5 - GASB 87 Leases: Implementation and Other Considerations	2.0	Leasing is a major activity for not only most corporations but for many state and local governments in the United States. The Governmental Accounting Standards Board's (GASB's) new leases standard is designed to result in greater transparency and usefulness for financial statement users. Warren Ruppel and Phillip Marciano, Managing Directors with Mayer Hoffman McCann, review their client's experiences with implementing GASB No. 87 Leases.	11/14/2024	QAS Self-Study
51	Accounting	FMN Plus-2023/May, Seg 3 – Not-for-Profit: Navigating Investment Risk & Rewards	2.0	Investments are an integral part of the financial well-being of most endowments and foundations. Understanding the value of investment results as well as the various strategic challenges presented in the current economic environment are crucial to the success of Not-for-Profit organizations. Marci Thomas, of Transformation Advisors, reviews the importance of both a prudent investment policy and preservation of purchasing power. If managed well, the funds of an endowment should sustain operations of the organization into perpetuity.	12/14/2024	QAS Self-Study



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52	Accounting	FMN Plus-2023/May, Seg 5 - Subscription-Based IT Arrangements and Other GASB Agenda Items	2.0	In June of 2020 the GASB released Statement No. 96 on Subscription-Based IT arrangements in order to alleviate some of the inconsistencies that existed in practice. Warren Ruppel and Phillip Marciano, Managing Directors with Mayer Hoffman McCann, discuss the major issues relating to the new standard. They also review GASB No. 100 on Accounting Changes and Error Corrections and GASB No. 101 on Compensated Absences.	12/14/2024	QAS Self-Study
53	Accounting	Foreign Corrupt Practices Act (FCPA)	1.0	This course provides an overview of the Foreign Corrupt Practices Act including historical background and anti-bribery provisions. This course also includes a discussion of the accounting provisions including recordkeeping, internal controls, reporting, and scope. This course also addresses compliance requirements as well as whistleblower provisions and protections.	04/30/24	QAS Self-Study
54	Accounting	Foreign Corrupt Practices Act v2.0	1.0	This course provides a basic understanding of the history of the Foreign Corrupt Practices Act (FCPA) and the main provisions of the FCPA, including the anti-bribery provisions and the books and records and internal control provisions. It also discusses the penalties associated with violating the FCPA, and provides leading practices to remain in compliance with the FCPA.	03/31/2025	QAS Self-Study



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55	Accounting	Fraud Update: The Impact Of Fraud And Actions To Address Fraud v2.1	1.00	As fraud has evolved over the years the controls and procedures to prevent and detect fraud have also evolved. This course will consider the significant impact of fraud and the measures that have occurred to address fraud, particularly white-collar crime. The U.S. government response to events and situations involving fraudulent activity will be looked at, along with the consequences for committing fraud. The effectiveness of an organization's internal control system plays an important role regarding fraud, and an overview of the recently updated COSO's Internal Control - Integrated Framework is provided. Examples of fraud risks will be reviewed, along with steps that can be implemented as part of an anti-fraud program.	01/31/25	QAS Self-Study
56	Accounting	Fraud: Ensuring Integrity in Financial Reporting - Part 3	2.0	A corporate scandal involves alleged or actual unethical behavior by people acting within or on behalf of a corporation. Since the turn of the century, the U.S. has seen some large corporate collapses and scandals due to shoddy and deceptive accounting practices. Many companies, shareholders and employees suffered as stock prices fell and reputations were tarnished when businesses conducted questionable practices. This course is divided into four parts. Part 1 identifies the common financial shenanigans demonstrated with	09/30/2024	QAS Self-Study
57	Accounting	Fraud: Ensuring Integrity in Financial Reporting - Part 4	1.0	A corporate scandal involves alleged or actual unethical behavior by people acting within or on behalf of a corporation. Since the turn of the century, the U.S. has seen some large corporate collapses and scandals due to shoddy and deceptive accounting practices. Many companies, shareholders and employees suffered as stock prices fell and reputations were tarnished when businesses conducted questionable practices. This course is divided into four parts. Part 1 identifies the common financial shenanigans demonstrated with a series of real-life cases and addressed ongoing financial reporting issues	09/30/2024	QAS Self-Study
58	Accounting	Full Disclosure in Financial Reporting v5.0	2.5	The full disclosure principle, one of the major accounting principles, requires that information provided in financial statements be sufficiently complete to avoid misleading users of the reports by omitting significant facts of information. The full disclosure principle also refers to revealing information that would be useful in the decision-making processes of informed users. This course discusses the disclosures required of companies, including those related to accounting policies, long-term purchase contract obligations, segmental information, related parties, risks and uncertainties, and interim	09/30/24	QAS Self-Study
59	Accounting	Fundamentals of Accounts Payable: Enhancing Your AP Operations	1.0	Every organization has an accounts payable function. If it is handled poorly, it can cost the organization a lot more than it should. Not only are there extra operating costs, but poorly run operations can lead to duplicate payments, increased and costly frauds, and regulatory nightmares. In this course, you will learn some simple ways to enhance your accounts payable's productivity, create an effective electronic payment program, and minimize some common problems that lead to decreased productivity. Author/Speaker: Mary Schaeffer / Crystallus, Inc.	02/29/24	QAS Self-Study



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#	Field of Study	Title	CPE Credit	Course Description	Expiration Date	Delivery Method
60	Accounting	Fundamentals of Accounts Payable: Payment Fraud Prevention and Detection v1.1	2.0	Payment fraud is an unfortunate fact of life for virtually every organization doing business today. There's no such thing as too big or too small. Everyone is a target. But that doesn't mean you have to be a victim. In this course you will learn how to take the proper steps to prevent and detect check, card, and electronic payment fraud. You'll also learn about some of the risks your organization may not realize it has taken on when it allows employees to use	03/31/2025	QAS Self-Study
61	Accounting	Fundamentals of Accounts Payable: Payments	1.0	The payment process is fraught with opportunities to make mistakes - errors that will directly impact your company's bottom line. For the most part, they are easy to avoid. The key is knowing what they are and then devising best practice processes to make sure you don't inadvertently make them. You'd be	02/29/24	QAS Self-Study
62	Accounting	Getting Paid Faster	1.0	Most companies have at least a few customers who don't pay them in a timely manner. Unfortunately, for some the problem is worse. They have many customers who don't pay them as quickly as they'd like. While it is definitely true that some of these organizations purposely drag their feet when it comes to the timing of payments, that is not always the case. In fact, many times the delay is due to something the supplier did (or didn't do) during the billing process. These are simply practices that could be easily	03/15/24	QAS Self-Study
63	Accounting	Goodwill Impairment Basics	1.0	This course provides a basic overview of goodwill impairment testing. The accounting and reporting requirements related to goodwill are prescribed by the Financial Accounting Standards Board (FASB) in ASC Topic 350-20. This course focuses on the subsequent measurement requirements including the accounting alternative allowed for certain eligible entities. This course also addresses briefly describes the disclosure requirements for goodwill and is	11/30/23	QAS Self-Study
64	Accounting	Goodwill Impairment Testing	2.0	This course provides an overview of goodwill impairment testing. The accounting and reporting requirements related to goodwill are prescribed by the Financial Accounting Standards Board (FASB) in ASC Topic 350-20. This course focuses on topics such as the initial recognition of goodwill and subsequent measurement requirements including the accounting alternative	11/30/23	QAS Self-Study
65	Accounting	How to Account for Internal-Use Software Arrangements	1.0	This course provides an overview of the accounting for internal-use software. The accounting and reporting requirements related to internal-use software can be found within ASC Topic 350-40. The primary information addressed within this ASC Topic relates to the development costs that should and should not be capitalized, how those costs are amortized, how they are tested for impairment, as well as presentation and disclosure requirements. Speaker/Author: Kelen F. Camehl, CPA, MBA	07/31/24	QAS Self-Study



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#	Field of Study	Title	CPE Credit	Course Description	Expiration Date	Delivery Method
66	Accounting	How to Develop and Maintain a Cost-Effective and Sustainable SOX Compliance Program v1.1	2.00	This course provides an overview of the best practices for internal auditors, with specific emphasis on how to develop and maintain a cost-effective and sustainable SOX compliance program. Specific topics in this course include how to prepare a risk assessment and identify the key control gaps, and how to develop a practical, sustainable SOX compliance plan, as well as considerations with respect to testing key controls and concluding on their operating effectiveness. In addition, this course presents several examples of processes that can be implemented to strengthen internal controls.	01/31/25	QAS Self-Study
67	Accounting	IFRS - Part 1	1.0	This course, part one of a three part series, provides an overview of international financial reporting standards (IFRS) as established by the International Accounting Standards Board (IASB). In Part 1, specific financial reporting topics are discussed including IFRS 1, First-time Adoption of IFRS, as well as identification of specific differences between IFRS and U.S. GAAP.	04/30/24	QAS Self-Study
68	Accounting	IFRS and U.S. GAAP – Major Differences	1.0	This course provides an overview of the major differences between IFRS and U.S. GAAP. This course primarily focuses on those IFRS standards most relevant for financial reporting and disclosure. Author/Speaker: John Fleming	06/30/24	QAS Self-Study
69	Accounting	IFRS in the U.S.A.: An Implementation Guide v4.0	4.0	This course provides an introductory overview of International Financial Reporting Standards, including detailed discussions of the impact that adopting IFRS will have on businesses. This course also includes comprehensive reviews of the IASB structure and its standard-setting process, the basic framework that serves as the foundation for IFRS and the differences that exist between U.S. GAAP and	03/31/24	QAS Self-Study
70	Accounting	Introduction to Investment Companies	1.0	This course provides an overview of investment companies. This includes a discussion of the industry and relevant regulations including the U.S. Investment Company Act of 1940 and the U.S. Jumpstart Our Business Startups Act (JOBS Act). This course also addresses the relevant accounting guidance included within Topic 946 as well as the accounting for capital share transactions and distributions.	07/31/24	QAS Self-Study



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71	Accounting	Investment Company Act of 1940	1.0	This course provides an overview of the Investment Company Act of 1940. This includes a discussion of the main provisions of the Act as well as investment company characteristics. This course also includes a discussion of the nature of and classification of investment companies as well as examples of investment company disclosures.	02/29/24	QAS Self-Study
72	Accounting	Lease Accounting Fundamentals	1.0	This course provides a high level overview of the accounting and reporting requirements related to lease transactions as outlined in ASC Topic 842. This course addresses the process of determining whether an arrangement contains a lease and the resulting lease classification. This course also addresses recognition requirements as well as some high level presentation & disclosure topics. Speaker/Author: Kelen F. Camehl, CPA, MBA	07/31/24	QAS Self-Study
73	Accounting	Master Vendor File (and Other Vendor Issues) in Accounts Payable v1.1	4.0	Vendor issues in an effective accounts payable function are often ignored. This is unfortunate because poor controls around the master vendor file, the way data is entered, and the lack of rigid internal controls all play a key role in preventing fraud and duplicate payments. And it's not as easy as you might think. There are numerous details, which if ignored, can cause problems whose impact is felt directly in the bottom line. Industry expert Mary	10/31/2024	QAS Self-Study
74	Accounting	Non-Financial Asset Impairments Topics 350 and 360	1.0	This course will teach students how to deal with nonfinancial asset impairments, specifically as relates to goodwill and impairments for property, plant, and equipment. Students will learn how to measure and recognize nonfinancial impairment issues and be able to manage accounting outcomes of this type of impairment. Quantitative and qualitative approaches to goodwill impairment will be analyzed. Students will be made aware of significant accounting and disclosure issues, especially in circumstances of recession or an economic downturn.	08/31/23	QAS Self-Study
75	Accounting	Non-GAAP Financial Measures - What You Need to Know	2.5	This course provides an overview of non-GAAP financial measures with a particular emphasis on comments from the SEC, the FASB, as well as comment letter analysis from several of the Big 4 accounting firms. Non-GAAP financial measures continue to rank at the top of the most frequent comment letters issued by the SEC. As a result, it's important to understand the guidance with respect to these measures to ensure that an entity's	03/31/24	QAS Self-Study
76	Accounting	Non-Traditional Financial Statement Analysis 2.0	1.5	Non-Traditional Financial Statement Analysis is designed to provide a comprehensive review of financial statement analysis techniques that have become more common in recent years. The program's coverage includes cash flow based analysis, cash flow based ratios, cash gap analysis, non-GAAP	09/30/2024	QAS Self-Study
77	Accounting	Often-Overlooked Internal Control Breakdowns in Accts Payable	1.0	Strong internal controls are a good part of the fraud prevention framework any organization creates for the purposes of thwarting crooks. However, there are many places these controls fall down, and often they are in places where you least expect them. This is especially important when it comes to the accounts payable function. For control breakdowns in this area allow	06/30/24	QAS Self-Study



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78	Accounting	Overview of the Pension System in the United States	1.0	In 2020, the Pension Rights Center reported that one out of three older adults received income from private company or union pension plans; federal, state, or local government pension plans; or railroad retirement, military, or veterans' pensions. The need to properly administer and account for pension funds is critical. This course provides an overview of the pension system in the U.S. discussing the nature of pension plans, plan participants' activities, the classification of pension plans, and types of pension plans and their characteristics.	02/29/24	QAS Self-Study
79	Accounting	Overview of the SEC and Laws that Govern the Securities Industry v2.0	1.0	This course addresses the organization of the SEC as well as introducing the laws that regulate the securities industry. The divisions of the SEC include Corporate Finance, Trading and Markets, Investment Management, Enforcement, and Economic and Risk Analysis. The primary laws that govern the securities industry include Securities Acts of 1933 and 1934, Trust Indenture Act of 1939, Investment Advisors Act of 1940, Investment Company Act of 1940, Sarbanes-Oxley Act of 2002, Dodd-Frank Act of 2010, and Jumpstart Our Business Startups Act of 2012.	02/29/24	QAS Self-Study



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80	Accounting	Real Estate: Basic Accounting and Mathematics	2.0	Real Estate: Basic Accounting and Mathematics is a refresher course covering the basic concepts and tools of accounting, finance, and math necessary for new real estate professionals. It is also applicable for accountants as well as real estate investors. Topics covered are balance sheet, income statement, basic accounting concepts, real estate algebra, finance math, and more.	09/30/2024	QAS Self-Study



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81	Accounting	Recognizing Assets and Liabilities in a Business Combination	2.0	Recognizing assets acquired and liabilities assumed in a business combination is a critical step in applying the acquisition method process to business combinations. This step is also one of the more significant steps involved in a business combination transaction. Given the importance of the recognition of assets and liabilities, it's critical that you have a good understanding of the principles and requirements related to this step in the process. This course provides an in-depth overview of this step based on the standards prescribed by Financial Accounting Standards Board (FASB) Accounting Standards Codification (ASC) Topic 805 ("Business Combinations").	01/31/24	QAS Self-Study



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82	Accounting	Related Party Transactions - A Recurring Issue v2.0	1.0	This course provides an overview of the accounting and reporting considerations with respect to related party transactions. This includes a discussion of the importance of appropriately identifying and disclosing these transactions within an entity's financial statements. This course also presents the various accounting and auditing standards that guide the procedures and considerations of related party relationships.	09/30/23	QAS Self-Study
83	Accounting	Revenue from Contracts with Customers – ASU 2014-09 as Amended, (Topic 606) Disclosure Requirements	1.0	This course provides an overview of the revenue recognition topic prescribed by the FASB such that participants can understand the key purpose of the revenue disclosure requirements. In addition, this course also provides an overview of the five-step revenue recognition approach.	03/31/24	QAS Self-Study
84	Accounting	Revenue from Contracts with Customers - ASU 2014-09, as Amended (Topic 606) v1.1	1.0	In this course, you will learn about the revenue guidance issued by the Financial Accounting Standards Board (FASB) - ASU 2014-09 (Topic 606). This guidance impacts nearly every financial statement reporting entity and provides recognition, measurement, presentation and disclosure guidance substantially different from legacy revenue recognition topics. IMPORTANT: This course, previously titled "Revenue from Contracts with Customers - ASU 2014-09, as Amended (Topic 606)," has been republished in our current course platform. Please be aware that the content is the same.	09/30/24	QAS Self-Study
85	Accounting	Revenue Recognition - Contract Assessment	1.0	This course provides an overview of the first step in the revenue recognition process – the identification of a contract with a customer. This includes a discussion of key definitions and considerations along with the detailed accounting guidance from ASC Topic 606. This course incorporates excerpts from the FASB's basis for conclusions of the new revenue recognition standard as well as key excerpts from Big 4 revenue recognition guides in	03/31/24	QAS Self-Study



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86	Accounting	Revenue Recognition - Part 1 v2.0	1.0	In 2014, after years of deliberations, the Financial Accounting Standards Board (the FASB) and the International Accounting Standards Board (the IASB) jointly issued the Accounting Standard Update (ASU) No. 2014-09 (codified primarily in ASC 606) and IFRS 15, respectively. ASC 606, the new revenue standard, replaces virtually all (including industry-specific) U.S. GAAP revenue guidance with a single model. The standard does not just change the amounts and timing of revenue but potentially affects organizations' financial	12/31/2024	QAS Self-Study
87	Accounting	Revenue Recognition - Part 2 v2.0	2.0	In 2014, after years of deliberations, the Financial Accounting Standards Board (the FASB) and the International Accounting Standards Board (the IASB) jointly issued the Accounting Standard Update (ASU) No. 2014-09 (codified primarily in ASC 606) and IFRS 15, respectively. ASC 606, the new revenue standard, replaces virtually all (including industry-specific) U.S. GAAP revenue guidance with a single model. The standard does not just change the amounts and timing of revenue but potentially affects organizations' financial	11/30/2024	QAS Self-Study
88	Accounting	Revenue Recognition - Part 3 v2.0	2.0	In 2014, after years of deliberations, the Financial Accounting Standards Board (the FASB) and the International Accounting Standards Board (the IASB) jointly issued the Accounting Standard Update (ASU) No. 2014-09 (codified primarily in ASC 606) and IFRS 15, respectively. ASC 606, the new revenue standard, replaces virtually all (including industry-specific) U.S. GAAP revenue	11/30/2024	QAS Self-Study
89	Accounting	Revenue Recognition - U.S. GAAP vs. IFRS	1.0	This course provides an overview of the similarities and key differences between the revenue recognition standards issued by the FASB (ASC Topic 606) and the IASB (IFRS 15). While these standards are materially similar as the regulators worked jointly to issue the new converged standards, there are notable differences that are good to understand. However, this course is not intended to provide an exhaustive discussion of these differences.	03/31/24	QAS Self-Study
90	Accounting	SEC Top Focus Areas: Non GAAP Financial Measures	1.0	This course provides an overview of non-GAAP financial measures with a particular emphasis on comments from the SEC, the FASB, as well as comment letter analysis from several of the Big 4 accounting firms. Non-GAAP financial measures continue to rank at the top of the most frequent comment letters issued by the SEC. As a result, it's important to understand the guidance with respect to these measures to ensure that a company's financial statements remain GAAP compliant and are not misleading. Speaker/Author: Kelen F. Camehl, CPA, MBA	06/30/24	QAS Self-Study



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91	Accounting	Securities Act of 1933 and the Securities Exchange Act of 1934 v2.0	2.0	This course addresses the Securities Acts of 1933 and 1934. The primary purpose of this course is to provide an overview of the two acts sufficient to understand the requirements of each act focusing on registration and disclosure. Part 3 of this SEC series will address the Securities Acts of 1933 and 1934's financial statement requirements for a registrant as well as the SEC's Staff Accounting Bulletins (SABs).	02/29/24	QAS Self-Study
92	Accounting	Securities and Exchange Commission: Regulations S-K and S-X v2.0	2.0	Regulations S-K and S-X provide registrants with the rules applicable to SEC filings from initial registration statements (Form S-1) to recurring required filings with the SEC such as Form 10-K and Form 10-Q. Specifically, Regulation S-K describes the information required in the non-financial statement portions of filings whereas Regulation S-X describes the form and content for financial statements and related note disclosures in filings.	02/29/24	QAS Self-Study
93	Accounting	Securities and Exchange Commission: Reporting Requirements v2.0	2.0	This course provides an overview of SEC Reporting Requirements. This includes information relating to Forms S-1, S-3, and S-4 that relate to a company's initial registration statement under the Securities Act of 1933. This course also addresses periodic reporting requirements in forms 8-A, 10, 8-K, 10-K, and 10-Q as required by the Securities Act of 1934; the SEC's Financial	11/30/23	QAS Self-Study
94	Accounting	Share-Based Compensation v1.1	1.0	This course provides an overview of the accounting guidance prescribed by ASC 718 related to share-based compensation. This includes a discussion of recently issued ASUs, characteristics of awards classified as equity vs. liabilities, and issues frequently encountered by private companies. Additionally, this course also includes a discussion of disclosure requirements, SEC comments letter trends, as well as differences in U.S. GAAP vs. IFRS	03/31/2025	QAS Self-Study



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95	Accounting	Subsequent Events	1.0	This course provides an overview of subsequent events. This includes a discussion of both recognized and nonrecognized subsequent events as well as the disclosure requirements for each. This course also includes several case studies to help illustrate the subsequent events reporting guidance.	09/30/23	QAS Self-Study
96	Accounting	Sustainability and Integrated Reporting	2.0	Sustainability reporting has become almost commonplace for many companies as more companies are interested in reporting on their company's contributions towards promoting prosperity and economic growth while protecting the planet and people across three interconnected core elements. These include environments, social, and governance. This course provides an	09/30/23	QAS Self-Study
97	Accounting	The COSO Framework – Objectives, Components, Relevant Principles, & Points of Focus v1.1	1.0	In this program, you will learn about the COSO Framework as issued in 2013 by focusing on the Framework's objectives, components, relevant principles and points of focus. The five components of internal control are linked to the 17 relevant principles and the 77 points of focus in order to explain and	09/30/24	QAS Self-Study
98	Accounting	The Sarbanes-Oxley Act and Corporate Governance - Part 1 v3.0	3.0	A corporate scandal involves alleged or actual unethical behavior by people acting within or on behalf of a corporation. Since the turn of the century, the U.S. has seen some large corporate collapses and scandals due to shoddy and deceptive accounting practices. Many companies, shareholders and employees suffered as stock prices fell and reputations were tarnished when businesses such as Nokia, Lucent Technologies, energy, and internet-related	02/29/2024	QAS Self-Study
99	Accounting	The Sarbanes-Oxley Act and Corporate Governance - Part 2 v3.0	3.0	A corporate scandal involves alleged or actual unethical behavior by people acting within or on behalf of a corporation. Since the turn of the century, the U.S. has seen some large corporate collapses and scandals due to shoddy and deceptive accounting practices. Many companies, shareholders and employees suffered as stock prices fell and reputations were tarnished when businesses such as Nokia, Lucent Technologies, energy, and internet-related businesses conducted questionable practices. The Sarbanes-Oxley Act and	01/31/24	QAS Self-Study
100	Accounting	Traditional Financial Statement Analysis v1.1	2.0	Traditional Financial Statement Analysis is designed to provide a comprehensive review of financial statement analysis techniques that have been used for many years. The program's coverage includes horizontal and vertical analysis, accrual-based ratio analysis, use of the Altman Z-Score with an emphasis on developing expectations.	09/30/2024	QAS Self-Study
101	Accounting	U.S. GAAP vs. IFRS - Rev Rec & Business Combinations	2.0	This course provides an overview of the similarities and key differences between the revenue recognition and business combination standards issued by the FASB and the IASB. While these standards are similar in many material respects, there are notable differences that are good to understand. However, this course is not intended to provide an exhaustive discussion of these differences.	03/31/24	QAS Self-Study



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102	Auditing	Audit Evidence: Statement on Auditing Standard Number 142	1.0	This course provides an overview of Statement on Auditing Standard Number 142 related to audit evidence. This course addresses what constitutes audit evidence as well as the key attributes. This course also addresses the effect of audit evidence on documentation. Speaker/Author: Rebecca Lee	07/31/24	QAS Self-Study
103	Auditing	Audit Update – Areas of Importance to Employee Benefit Engagements	1.0	This course provides an overview of key auditing standards that are effective for periods ending after December 15, 2021. This includes a discussion of the key requirements outlined within SAS 134-140 as well as the significant changes prescribed throughout.	02/29/24	QAS Self-Study
104	Auditing	Auditing Standards' Boards v2.0	1.0	This course identifies and describes the primary auditing standard setters that exist in the United States as well as the International Auditing and Assurance Standards Board (IAASB). The course will also identify the primary auditing standards that serve as the basis for auditing standards used for external auditors, internal auditors, government auditors and international auditors.	02/29/24	QAS Self-Study
105	Auditing	Best Practices For Internal Auditors, Part II: Internal Controls And SOX Testing V1.1	2.00	This course provides an overview of the regulatory environment that drives the testing of internal control over financial reporting to help internal auditors understand the intricacies of internal controls testing. The course also includes a discussion of the various elements in an effective internal controls testing program, the components of internal control, as well as the phases involved in a typical risk-based control testing program. The course concludes	01/31/2025	QAS Self-Study
106	Auditing	Best Practices For Internal Auditors/Part I: Overview Of Requisite Skill Set V1.1	1.00	This course provides an overview of the emerging roles of internal auditors, the related key challenges they face, along with some of the top concerns from various stakeholders. In addition, this course also presents an overview of key internal audit objectives, the requisite value-added skill sets internal auditor should seek to obtain, along with specific keys to success. Finally, the course concludes with a discussion of effective interviewing techniques.	12/31/2024	QAS Self-Study
107	Auditing	Best Practices for Internal Auditors/Part II: Internal Controls and SOX Testing v1.1	2.0	This course provides an overview of the regulatory environment that drives the testing of internal control over financial reporting to help internal auditors understand the intricacies of internal controls testing. The course also includes a discussion of the various elements in an effective internal controls testing program, the components of internal control, as well as the phases involved in a typical risk-based control testing program. The course concludes	01/31/2025	QAS Self-Study



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#	Field of Study	Title	CPE Credit	Course Description	Expiration Date	Delivery Method
108	Auditing	Best Practices For Internal Auditors/Part III: Fraud Risk Management, Prevention And Monitoring v1.1	2.00	This course provides an overview of the best practices for internal auditors with respect to fraud risk management, fraud prevention, and monitoring. This includes a discussion of the current regulatory landscape, an overview of anti-fraud controls, and identification of common fraud schemes. The course also includes an overview of the building blocks to an effective fraud risk management program, actions to deter, prevent, or detect fraud, and	01/31/2025	QAS Self-Study
109	Auditing	Best Practices for Internal Auditors/Part III: Fraud Risk Management, Prevention and Monitoring v1.1	2.0	This course provides an overview of the best practices for internal auditors with respect to fraud risk management, fraud prevention, and monitoring. This includes a discussion of the current regulatory landscape, an overview of anti-fraud controls, and identification of common fraud schemes. The course also includes an overview of the building blocks to an effective fraud risk management program, actions to deter, prevent, or detect fraud, and	01/31/2025	QAS Self-Study
110	Auditing	Best Practices for Internal Auditors/Part IV: Analyzing and Testing Key Accounting Processes v1.1	2.00	This course provides an overview of the best practices for internal auditors with respect to analyzing and testing key accounting processes. Specifically, this course is intended to provide an overview of the integrated accounting environment and discuss the procedures an internal auditor should consider when analyzing and reviewing the billing, disbursement, payroll, and financial	01/31/2025	QAS Self-Study
111	Auditing	Best Practices for Internal Auditors/Part V: Corporate Investigation v1.1	2.00	This course provides an overview of the corporate investigation process, with a focus on procedures internal auditors should consider in conducting fraud investigation. In addition, this course provides a discussion of drivers of corporate investigations, factors contributing to fraudulent behavior, as well as common fraud schemes and common red flags. Finally, the course also addresses manners in which fraudulent payments are disguised as well as notable initiatives and procedures designed to deter fraud.	01/31/25	QAS Self-Study
112	Auditing	Compliance Auditing – Summarizing the Results and Concluding the Audit (Part 5)	1.0	This course provides an introduction to compliance auditing with a specific focus on summarizing the results and concluding the audit. This course is the final part of a five-part series. This course provides an overview of identifying and writing findings and assessing the appropriate audit opinion to issue. This course also provides information relating to concluding steps such as reviewing for subsequent events, commitments and contingencies, and obtaining required representations from management.	06/30/23	QAS Self-Study
113	Auditing	Employee Benefit Plan Guidance to Forming an Audit Opinion and Reporting	2.0	This course provides an overview of the changes in the auditor opinion and reporting model as a result of SAS 136. The includes a discussion of the focus areas and additional procedures as well as changes in both management and auditor responsibilities. This course also provides examples of several auditor’s reports illustrating the changes. Speaker/Author: Rebecca Lee	07/31/24	QAS Self-Study



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#	Field of Study	Title	CPE Credit	Course Description	Expiration Date	Delivery Method
114	Auditing	Financial Statement Frauds v2.1	1.0	In this course, the fraud triangle will serve as the backdrop for examining financial statement fraud. The three elements of the fraud triangle - pressure, opportunity, and rationalization - will be analyzed in the context of misrepresentation of financial statements. Cookie jar reserves, a creative accounting scheme used to manipulate reported earnings, will be discussed in depth. Sixteen specific financial statement fraud cases have been selected as representative of the major frauds that take place in organizations. Summaries of each case, along with the causes and motivations behind them, are discussed. Important: This course, "Financial Statement	05/31/2024	QAS Self-Study
115	Auditing	FMN - 2023/March, Seg 2 - An "Inside-Out" Approach to Fraud	2.00	Fraud is everywhere, and it is expensive. Kelly Richmond Pope, professor, author, speaker and filmmaker, explains something she calls the fraud archetype system. In this system there are three different types of perpetrators: intentional, accidental, and righteous. Understanding the characteristics of these perpetrator types will help your organization recognize the internal controls that are needed to protect against	10/14/2024	QAS Self-Study
116	Auditing	Fraud Risk in a Financial Statement Audit v2.1	1.0	This course introduces the user to the concept of fraud as it applies to financial reporting. The course will discuss the common characteristics which could cause fraud to exist within a company, the indicators of fraud and the auditors' responsibility with respect to fraud risk within the organization. Important: This course, "Fraud Risk in a Financial Statement Audit v2.0" has been republished in our current course	05/31/2024	QAS Self-Study
117	Auditing	Fraud Risk in a Financial Statement Audit v2.1	1.00	This course introduces the user to the concept of fraud as it applies to financial reporting. The course will discuss the common characteristics which could cause fraud to exist within a company, the indicators of fraud and the auditors' responsibility with respect to fraud risk within the organization. Important: This course, "Fraud Risk in a Financial	05/31/24	QAS Self-Study
118	Auditing	Fundamentals Of Fraud Detection And Prevention v3.1	3.00	This course presents the methodology for conducting an investigation of occupational fraud. Applicable professional standards and legal issues are addressed, along with the typical types of fraud encountered in the workplace. Strategies for detection and prevention of fraud also are described. The material covered in this course is applicable to external auditors, fraud examiners, internal auditors, and managers.	01/31/25	QAS Self-Study
119	Auditing	Identifying and Reporting Key Audit Matters	2.0	This course provides an overview of the identification and reporting of key audit matters. This includes a discussion of how to recognize key audit matters and the characteristics of key audit matters, as well as the process for evaluating key audit matters. This course also provides information about how to report key audit matters and provides example disclosures. Speaker/Author: Rebecca Lee	05/31/24	QAS Self-Study



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#	Field of Study	Title	CPE Credit	Course Description	Expiration Date	Delivery Method
120	Auditing	Introduction To Fraud Theory v2.1	1.0	The following course will introduce the user to fraud theory as applied to financial reporting. The course will seek to define fraud and provide examples of how fraud can occur by or against a company. Finally, the course will introduce the user to key causes of fraud and the characteristics of those causes.	06/30/2024	QAS Self-Study
121	Auditing	Misappropriation of Assets v2.1	1.0	In this course, you will learn techniques to identify, detect and prevent asset misappropriation. Asset misappropriation schemes, while not the largest from a dollar standpoint, are the most common type of occupational fraud. The fraud triangle will be discussed in the context of these schemes. The absence of strong internal controls often provides the opportunity element of the fraud triangle. Pressure and rationalization, the other elements of the fraud triangle, are unique to the individual. Strengthening internal controls, particularly segregation of duties, helps to prevent future asset	05/31/2024	QAS Self-Study
122	Auditing	Non-Statistical Sampling for Efficient Audits	1.0	Many auditors do little sampling in their audits because of the misconception that sampling must be statistical. This course illustrates the non-statistical sampling guidance in the current AICPA Audit Sampling Guide relating to non-statistical applications designed to improve audit engagement efficiency.	06/30/24	QAS Self-Study
123	Auditing	PCAOB's Risk-Based Audit Approach	1.0	This course describes the Public Company Accounting Oversight Board's (PCAOB) Risk Assessment Auditing Standards used in its risk-based audit approach. These standards are organized in the following audit sections: AS 1101 - Audit Risk; AS 1105 - Audit Evidence; AS 2101 - Audit Planning; -AS 2105 - Consideration of Materiality in Planning and Performing the Audit; AS	06/30/24	QAS Self-Study
124	Auditing	Significant Unusual Transactions	2.0	This course provides an overview of significant unusual transactions as prescribed by SAS 135 – the standard intended to more closely align Auditing Standards Board guidance with the PCAOB. This course provides an overview of both the major and minor changes to the risk assessment process as well as the related documentation requirements. Speaker/Author Rebecca Lee	11/30/23	QAS Self-Study
125	Behavioral Ethics	Cultural Awareness In Business	2.0	The 21st century has ushered in the era of the global marketplace. Technology has rapidly accelerated our capacity to work in a multi-national environment. Understanding the individual and business climate of professionals in the United States is central to any overseas initiative. This course provides learners with vital knowledge and best practices when conducting business in the U.S.	01/31/2025	QAS Self-Study
126	Behavioral Ethics	Ethics in a Changing World	2.0	The co-founder of Intel, Gordon E. Moore observed in the mid 1960's that the number of transistors on integrated circuits doubles approximately every two years. This observation evolved into Moore's Law which serves as the basis for technological innovation (that computing power grows at an exponential pace). Fast forward fifty years and we find practitioners spinning in place when confronted with today's dizzying pace of technological and cultural advancements. This course provides learners with a primer on recent events and how evolving trends in a fast changing world shape everyday ethical choices we face.	01/31/2025	QAS Self-Study



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#	Field of Study	Title	CPE Credit	Course Description	Expiration Date	Delivery Method
127	Behavioral Ethics	FMN - 2023/January, Seg 1 - Exceeding Expectations Beyond Ethics	2.0	Professional accountants, whether in business or public practice, have been viewed as ethical leaders in society. The profession's Code of Ethics imposes on accountants a responsibility to act ethically. Diane Jules, a Director with the International Ethics Standards Board for Accountants (IESBA), discusses her organization's Code of Ethics and why having a code is important. She also reviews the impact of organizational culture, technology and diversity and inclusion (D&I) on ethics.	08/14/2024	QAS Self-Study
128	Behavioral Ethics	Giving Voice to Values: The "How" of Business Ethics	1.0	It is not uncommon for accountants and business managers to find themselves in a situation where they were explicitly told, or were implicitly pressured, to do something that conflicts with their own values. Our cameras were on hand as Dr. Mary Gentile, creator/director of the Giving Voice to Values program, demonstrated to the Zicklin Center for Corporate Integrity at Baruch College how values-driven decision making can, and should be, crucial to accountants and financial executives.	08/31/23	QAS Self-Study
129	Business Law	FMN - 2022/December, Seg 4 - Subpoena Implications for Accounting and Finance	2.0	Accountant-client privilege is a confidentiality privilege, or more precisely, a group of privileges, defined in American federal and state law. CPAs have an ethical duty to keep their client information confidential. However, CPAs and other financial professionals often receive subpoenas related to their clients' confidential information. David Richan, partner at Baritz & Colman LLP, discusses the responsibilities of the CPA or financial professional when served with a subpoena and how to balance that with the obligation to protect client confidentiality.	07/12/2024	QAS Self-Study
130	Business Management & Organization	Gaining a Competitive Advantage: Critical Skills for CFOs and Controllers	2.0	The role of finance leaders within an organization has changed considerably in more recent years. CFOs and controllers are constantly being asked to take on new tasks that involve the critical functions of the organization. This course will discuss how finance leaders can create value within their organizations in the current competitive market, how the perception of value in the area of finance has changed, the role of the finance function in cybersecurity, and how finance leaders can help create a data-driven organization. Speaker/Author: David R. Peters, CPA	05/31/24	QAS Self-Study
131	Business Management & Organization	Quality Management and Benchmarking: v3.0	2.0	This program covers pervasive topics concerning quality management systems, such as total quality management (TQM), benchmarking, and the ISO standards. A pervasive consideration is the pursuit of quality in all aspects of the organization's activities. Benchmarking and TQM are aspects of the modern approach to quality. Quality management has been recognized by the International Organization for Standardization, which has issued quality assurance standards.	02/29/24	QAS Self-Study
132	Business Management & Organization	The Next Step: Succession Planning Fundamentals & Basic Documents	2.5	Succession planning is one of those things that is never at the top of the list, yet it is often among the most important things a company does. The successful passing of the torch to tomorrow's leaders can often mean the difference between a business thriving or faltering in the next generation. Through case studies and the review of research, this course will examine what succession planning is, what makes it successful, and why we put it off! Speaker/Author: David R. Peters, CPA	05/31/24	QAS Self-Study



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133	Business Management and Organization	Disaster Plan Development	1.0	Ensuring the continuation of critical business operations in the event of an unforeseeable disaster is a chief responsibility of an organization's management team, including its chief financial officer. Many companies believe that because they are small that they are at less risk and are unable to afford the protection that larger companies can afford; however, it is the smaller companies that are at the greatest risk because they are more likely to have all their eggs in one basket. This course will introduce you to the process of developing, communicating and testing a disaster recovery plan to avoid this potential pitfall and ensure the continuation of critical business operations in the case of an unforeseeable event.	01/31/24	QAS Self-Study
134	Business Management and Organization	FMN - 2023/March, Seg 4 - Numbers: Is That All There Is?	2.00	In 2022 the Institute of Management Accountants, the California Society of CPAs, and the International Federation of Accountants released a report focused on the current state of DE&I issues within the global accounting profession. Representatives from each of those organizations discuss the major findings from the research. They discuss why it is important for the accounting profession as well as individual organizations to address DE&I issues now.	10/14/2024	QAS Self-Study
135	Business Management and Organization	FMN Plus-2023/May, Seg 4 – DE&I: Actionable Solutions for Progress	2.0	The 2022 research report, Diversifying Global Accounting Talent: Actionable Solutions for Progress, conducted by three leading accounting associations, identified three catalysts for action on the DE&I front. Loreal Jiles, Vice President of Research and Thought Leadership at the Institute of Management Accountants, reviews those catalysts for change as well as a number of the 70 actionable practices that organizations can take to achieve progress in DE&I.	12/14/2024	QAS Self-Study
136	Business Management and Organization	Strategic Management: Concepts and Tools: Part 1 v3.0	5.0	The course series Strategic Management: Concepts and Tools introduces, explains, and analyzes the activities needed to develop, select, implement, and evaluate a firm's competitive strategy. This program focuses on both the content of a firm's strategy and the process by which this strategy is developed and executed. Part 1 of this series, along with Part 2, is designed to illustrate development, formulation, implementation, and evaluation of business strategy. Emphasis is placed on the need for awareness of, and accommodation to, changes in an organization's internal and external environments. Generic types of business strategies and techniques for analyzing strategies are also covered.	02/29/24	QAS Self-Study
137	Business Management and Organization	Strategic Management: Concepts and Tools: Part 2 v3.0	5.0	The course series Strategic Management: Concepts and Tools introduces, explains, and analyzes the activities needed to develop, select, implement, and evaluate a firm's competitive strategy. This program focuses on both the content of a firm's strategy and the process by which this strategy is developed and executed. Part 2 of this series, along with Part 1, is designed to	02/29/24	QAS Self-Study
138	Business Management and Organization	Strategic Planning Process v1.1	2.0	Company executives operate their company in a constantly evolving competitive market with certain advantages and disadvantages of their organization. These executives need to continuously monitor changing	03/31/2025	QAS Self-Study



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#	Field of Study	Title	CPE Credit	Course Description	Expiration Date	Delivery Method
139	Communications & Marketing	Developing A Powerful Social Media Content Strategy	1.0	This course provides an overview of developing a powerful social media content strategy. This includes a discussion of creating social media goals, building social media objectives, and understanding your audience. This course also addresses how to create a content calendar, tracking strategy performance, and analytics.	01/31/24	QAS Self-Study
140	Communications & Marketing	A Framework for Effective Business Presentations	1.0	The goal of this program is to help you better understand how to make effective presentations and conduct effective question-and-answer (Q&A) sessions.	05/31/24	QAS Self-Study
141	Communications & Marketing	Audit Report Writing v2.1	2.0	This course provides an overview of audit reporting writing. This includes a discussion of drafting workpapers thoroughly based on objective observations, creating a company-specific template to facilitate the writing process, and developing a clear, concise vocabulary for documenting audit reporting. This course also includes extensive syntax and diction tips, which can help to improve your writing style.	12/31/23	QAS Self-Study
142	Communications & Marketing	Business Grammar	2.0	This course provides an overview of the principles and best practices with respect to business grammar. This course addresses the most frequent sentences problems and walks through how to use tricky pronouns and adjectives correctly. Finally, this course addresses the differences between verb tenses and provides rules for punctuation and mechanics. Speaker/Author: Philip Vassallo, Ed.D	07/31/24	QAS Self-Study



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#	Field of Study	Title	CPE Credit	Course Description	Expiration Date	Delivery Method
143	Communications & Marketing	Communicate Your Brand v1.1	2.0	This course focuses on identifying the principles underlying branding as well as stating a unique selling proposition that offers unique solutions. This includes a discussion of establishing personal brand objectives, setting your perception profile to heighten your presence, and creating effective introductions to heighten visibility. Additionally, this course also focuses on showcasing yourself with an executive presence that builds trust and credibility.	03/31/2025	QAS Self-Study
144	Communications & Marketing	Communicating with Executives	2.0	This course provides an overview of best practices with respect to executive communication. This includes identifying executive-level concerns and objectives to ensure focused communication as well as recognizing strategies for achieving the high points in communication. Finally, this course also includes a discussion of adapting styles and identifying those that are best	05/31/24	QAS Self-Study
145	Communications & Marketing	Communication as a Team v3.0	1.0	The purpose of this course is to show the user how successful employee teams can communicate in modern organizations. This course will discuss the importance of communicating in a team-oriented environment, the phases of team development, the role of conflict within teams, characteristics of successful teams, techniques for organizing team-based presentations, the importance of listening in teams, and non-verbal communication techniques.	04/30/2025	QAS Self-Study
146	Communications & Marketing	Communication at Work v3.0	1.0	This program introduces the user to the process and the products of effective communication. The program walks the user through the fundamentals of both interpersonal and organizational communications as well as providing the user with a solid grounding in business ethics.	04/30/2025	QAS Self-Study
147	Communications & Marketing	Communication Skills for Effective Customer Service v2.1	2.0	This program contains information regarding recommended customer service communication skills. The information focuses on the following major topics: Customer Service Communication, Rules for Effective Customer Service Communication, Social Media Customer Service, Verbal Customer Service Techniques, Phone Customer Service Communication Suggestions, Nonverbal	02/28/2025	QAS Self-Study
148	Communications & Marketing	Conducting Effective Business Meetings	1.0	This course contains information that will help you plan and conduct effective business meetings. In doing so, the information addressed in this program focuses on the following major topics: Is a Meeting Really Necessary?, Choosing the Most Appropriate Business Meeting Type, Business Meeting Manners, Business Meeting Etiquette, Planning Business Meetings, Business Meeting Facilitators, Business Meeting Chairperson Considerations, Business	04/30/24	QAS Self-Study



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149	Communications & Marketing	Connect Globally v1.1	2.0	This course provides an overview of the principles with respect to connecting globally. This includes a discussion of thinking globally but acting locally, as well as getting grounded but keeping flying. The course presents some of the key advantages to connecting globally and also provides a significant number of points and suggestions for effective communication. 	03/31/2025	QAS Self-Study
150	Communications & Marketing	Course name Communication Skills for Effective Customer Service v2.1	2.00	This program contains information regarding recommended customer service communication skills. The information focuses on the following major topics:Customer Service Communication, Rules for Effective Customer Service Communication, Social Media Customer Service, Verbal Customer Service Techniques, Phone Customer Service Communication Suggestions, Nonverbal Customer Service Techniques, Role of Effective Listening in Customer Service, Writing Effective Customer Service Messages, Other Useful Customer Service Communication Techniques,and Role of Feedback in Customer Service Communication. Before addressing these topics, however, theImportance of Effective Customer Service will be discussed. While the course is obviously appropriate for customer service representatives, all business people who interact with customers will find the information to be most helpful.	02/28/2025	QAS Self-Study
151	Communications & Marketing	Designing and Presenting a Business Case	2.0	This course provides an overview of the key parts of a business case. This includes a discussion of how to develop a well-structured and articulate business case based on the business's concern. This course also provides best practices for how to present salient points of the case with credibility and purposefulness.	03/31/2024	QAS Self-Study
152	Communications & Marketing	Feedback and Coaching	2.0	This course provides an overview of best practices with respect to feedback and coaching. This includes a discussion of real relationships, practical standards, effective feedback, and proactive follow up. This course also addresses the key steps and processes involved in applying the ADDIE process.	05/31/24	QAS Self-Study



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153	Communications & Marketing	Getting Ahead: The Art of Marketing for CPAs	2.0	To many clients, CPA firms all look the same. While services and specialties may vary significantly from one firm to another, it is hard for the average person to see this by simply looking at the sign outside our office door. Is there any way to make us stand out more to the outside world? Through surveys, statistics, and examples, this course looks at how CPA firms can develop a marketing plan beyond just relying on referrals. We look at the	07/31/24	QAS Self-Study
154	Communications & Marketing	Interpersonal Skills for 21st Century Organizations	1.0	This course explains what good interpersonal skills consist of, why they are important and how you can improve them. With the rise of teamwork and collaboration in contemporary organizations, the need for every employee to work effectively with and through others is paramount. The lack of interpersonal skills may be the major reason highly technically qualified professionals are not promoted and managers are less effective. Whether working on a team or leading a team, every employee needs to be able to	01/31/24	QAS Self-Study
155	Communications & Marketing	Managing Meetings and Presentations v1.1	2.0	This course provides an overview of best practices for managing meetings and preparing presentations, specifically around the processes of planning, designing, delivering, and cultivating. This includes a discussion of the steps involved in dealing with issues, recording the message, and addressing key agenda items. Additionally, this course also provides best practices for slide presentations, certain pre-presentation tips, and key considerations with	03/31/2025	QAS Self-Study
156	Communications & Marketing	Online Customer Service Communication	3.0	This program contains information regarding online customer service communication suggestions. The information focuses on the following major topics: Importance of Effective Customer Service, Online Customer Service Communication, Common Customer Service Mistakes, Suggested Ways to Conduct Effective Online Customer Service, Email Customer Service Suggestions, Texting Customer Service Suggestions, Social Media Customer Service Suggestions, Online Chat Customer Service Suggestions, Customer Service Apps, Suggested Ways to Improve Customer Service Communication on Company Websites, Additional Customer Service Communication Suggestions, and Customer Service Feedback Suggestions. Before addressing these topics, however, the Importance of Effective Customer Service will be	02/29/24	QAS Self-Study
157	Communications & Marketing	Presenting Powerfully v2.1	2.00	This course provides an overview of methods and techniques for presenting powerfully. This includes identifying key elements of presenting powerfully, creating quality, audience-centered content, composing visuals that focus and move the audience, and employing excellent platform skills. This course also provides tips that can be used before, on the day of, and during a presentation.	01/31/25	QAS Self-Study



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158	Communications & Marketing	Revising, Editing, and Proofreading	2.0	This course provides an overview of best practices related to revising, editing, and proofreading. This includes a discussion of using the “Protect Your REP” method when reviewing writing as well as reviewing strategies for proper placement of content. This course also addresses best practices for editing sentences and improving documents by finding what everyone else has missed. Speaker/Author: Philip Vassallo, Ed.D	07/31/24	QAS Self-Study
159	Communications & Marketing	Selling for the 21st Century v2.0	1.0	This course outlines professional sales principles, including: addressing the internal and external customer; identifying effective presentation skills; eliciting customer needs and expectations; countering negative reactions; and negotiating the sale. It continues with personal selling skills, including: identifying and overcoming internal blocks; recognizing your selling potential; knowing how to motivate yourself; projecting a professional image; and establishing a win/win relationship.	03/31/24	QAS Self-Study
160	Communications & Marketing	The Power of Storytelling	2.0	This course provides an overview of the power of storytelling. This includes a discussion of the value of story to include benefits, traditions, and elements, as well as the crafting of story which addresses uses, sources, cautions, and tips. Finally, this course also addresses the telling of story and includes a discussion of different types of stories as well as various examples.	04/30/24	QAS Self-Study
161	Communications & Marketing	Understanding Communication Styles at Work	2.0	Nothing is more important in business than the ability to successfully interact with others. Developing and improving this fundamental skill is critical to your success. Each interaction has the potential to work for or against achieving the most desirable effect and outcome. Knowing how to communicate effectively in day-to-day interactions is a critical part of achieving personal and organizational success. This course teaches professionals how to identify and understand unique behavioral differences among co-workers in ways that enhance relationships and personal performance. This is a powerful learning experience that will help improve your interpersonal effectiveness by teaching you to identify and understand different personalities at work.	04/30/24	QAS Self-Study



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#	Field of Study	Title	CPE Credit	Course Description	Expiration Date	Delivery Method
162	Communications & Marketing	Writing Effective and Efficient Email v2.1	2.0	This course provides an overview of writing effective and efficient emails. This includes a discussion of getting to the point, the balance of risks and rewards, and focusing on readers. This course also addresses considerations such as tone, balancing content and context, and managing and dealing with email. The course concludes with a discussion of the key questions you should ask with respect to your statement, support, structure, and style. IMPORTANT: This course, previously titled "Writing Effective and Efficient Email v2.0," has been republished in our current course platform. Please be aware that the content is the same, with only minor updates. If you have already received credit for this course, you cannot receive credit again.	12/31/23	QAS Self-Study
163	Communications & Marketing	Writing Effective Business Reports and Proposals	1.0	This course contains information that will strengthen your ability to develop effective business reports and proposals. In doing so, the information addressed in this program focuses on the following major topics: Business Report Roles, Business Report Categories, Business Report Types, Report & Proposal Development Tools, Conducting Research for Business Reports & Proposals, Business Report Styles, Formal Business Reports, Business Proposals, Visual Elements, Business Report & Proposal Writing Suggestions,	01/31/24	QAS Self-Study
164	Computer Software & Applications	Using Excel for Corporate Accounting v1.1	2.0	The course provides the foundation for financial professionals who use Excel in their day-to-day activities. This course provides opportunities for you to learn how to create a basic worksheet, identify its parts, and how to use basic functions to create accounting formulas. This course also provides best practices when creating and working with spreadsheets specifically for financial professionals. IMPORTANT: This course, previously titled "Using Excel for Corporate	07/31/23	QAS Self-Study
165	Economics	Understanding the Economy - Part 1	1.5	This course is Part 1 of a four-part series, Understanding the Economy. Understanding the economy and coping with the economic environment is critical in today's business performance, which is a major concern for managers and investors. This course series addresses macro-economic factors that may affect a business's performance. Macro-economic factors include business cycles, interest rates, economic policy, inflation, unemployment, housing starts, money supply, and foreign exchange rates. For example, how the Fed's monetary policy affects corporate earnings is stressed. A variety of	09/30/2024	QAS Self-Study
166	Economics	Understanding the Economy - Part 2	2.0	This course is Part 2 of a four-part series, Understanding the Economy. Understanding the economy and coping with the economic environment is critical in today's business performance, which is a major concern for managers and investors. This course series addresses macro-economic factors that may affect a business's performance. Macro-economic factors include business cycles, interest rates, economic policy, inflation, unemployment, housing starts, money supply, and foreign exchange rates. For example, how the Fed's monetary policy affects corporate earnings is stressed. A variety of economic statistics and indicators are also explained in depth.	09/30/2024	QAS Self-Study



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#	Field of Study	Title	CPE Credit	Course Description	Expiration Date	Delivery Method
167	Economics	Understanding The Economy - Part 4	1.5	This course is the final part of a four-part series, Understanding the Economy. Understanding the economy and coping with the economic environment is critical in today's business performance, which is a major concern for managers and investors. This course series addresses macro-economic factors that may affect a business's performance. Macro-economic factors include business cycles, interest rates, economic policy, inflation, unemployment, housing starts, money supply, and foreign exchange rates. For example, how the Fed's monetary policy affects corporate earnings is stressed. A variety of economic statistics and indicators are also explained in depth.	09/30/2024	QAS Self-Study



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#	Field of Study	Title	CPE Credit	Course Description	Expiration Date	Delivery Method
168	Finance	A History of Investing and a Look Ahead	2.0	You hear it all the time. Financial products are becoming more complex. Diversification has changed. Our approach to investing has changed. What does all this mean? In this course, we will explore how investment theory has changed over time from Markowitz to Factor Investing. Using examples and practical applications, we will talk about how our modern notions of portfolio building have developed throughout history. Speaker/Author: David R. Peters, CPA	05/31/24	QAS Self-Study



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#	Field of Study	Title	CPE Credit	Course Description	Expiration Date	Delivery Method
169	Finance	A Practical Guide to Mergers and Acquisitions v3.0	3.0	This program discusses all facets of mergers and acquisitions (M&As) including deciding on terms, key factors to consider, pros and cons, types of arrangements, evaluative criteria, valuation methods, financial effects of the merger, holding companies, takeover bids, SEC filing requirements, accounting and reporting requirements for business combinations, and financial analysis of combinations. Also addressed is emergence of corporate development officers (CDOs).	02/29/24	QAS Self-Study



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#	Field of Study	Title	CPE Credit	Course Description	Expiration Date	Delivery Method
170	Finance	Accountant's Guide to Capital Budgeting v3.0	3.0	This course is designed for accountants who must have financial knowledge but have not had formal training in finance. Topics include: valuation of stocks and bonds, time value of money, measurement of risks and rates of return, the cost of capital and capital budgeting techniques. The course concentrates on providing a working vocabulary for communicating on the above topics. The course uses examples and illustrations, with an emphasis on the practical application of financial concepts, tools, and methodology.	04/30/24	QAS Self-Study
171	Finance	Asset-Backed Securities v1.1	2.0	Finance has changed its focus over the years from relationships to commodities. Agreements that used to hold two people together are transformed into merchandise to be acquired and terminated at will. For example, an agreement to arrange a loan to a customer creates a relationship between the lender and borrower. However, that direct relationship is changed when the loan is converted into a bond or debenture. It becomes a commodity that can be traded among any number of bond buyers, who assume the role of lenders. By packaging and selling the bond into the	03/31/2025	QAS Self-Study



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#	Field of Study	Title	CPE Credit	Course Description	Expiration Date	Delivery Method
172	Finance	Building a Better Budget in a Time of Uncertainty	5.0	Most financial leaders would agree that budgeting is easy when business and the economy are stable. When revenues and expenses are expected to remain the same, the process becomes merely an exercise in carrying over what was done before to the current year. However, what happens when we	05/31/2024	QAS Self-Study
173	Finance	Controllers' Guide to Multinational Financial Management: Part 1 v3.0	3.0	This course (Parts 1 through 4) is designed for managers working for multinational companies (MNCs) as well as accountants, CFOs, controllers, treasurers, and international investors. In a modern economy, neither businesses nor individual investors can afford to be ignorant of the basic concepts of international finance. Changes in exchange rates and differences in national inflation and interest rates can affect the competitive position of businesses regardless of whether they are engaged in international operations. For companies that are engaged in international business, national differences in banking, commercial laws, regulations, and political stability also complicate decision making. Today's investors must also understand the effects of, and interactions among, exchange rates, inflation rates, and interest rates if they wish to maximize their returns and minimize their risks. The study of multinational finance constitutes an essential component of a modern business education. The subject multinational finance is offered in a	07/31/24	QAS Self-Study
174	Finance	Controllers' Guide to Multinational Financial Management: Part 2 v3.0	2.0	This course (Parts 1 through 4) is designed for managers working for multinational companies (MNCs) as well as accountants, CFOs, controllers, treasurers, and international investors. In a modern economy, neither businesses nor individual investors can afford to be ignorant of the basic concepts of international finance. Changes in exchange rates and differences in national inflation and interest rates can affect the competitive position of businesses regardless of whether they are engaged in international operations. For companies that are engaged in international business, national differences in banking, commercial laws, regulations, and political stability also complicate decision making. Today's investors must also understand the effects of, and interactions among, exchange rates, inflation rates, and interest rates if they wish to maximize their returns and minimize their risks. The study of multinational finance constitutes an essential component of a	07/31/24	QAS Self-Study
175	Finance	Controllers' Guide to Multinational Financial Management: Part 3 v3.0	2.0	This course (Parts 1 through 4) is designed for managers working for multinational companies (MNCs) as well as accountants, CFOs, controllers, treasurers, and international investors. In a modern economy, neither businesses nor individual investors can afford to be ignorant of the basic concepts of international finance. Changes in exchange rates and differences in national inflation and interest rates can affect the competitive position of businesses regardless of whether they are engaged in international operations. For companies that are engaged in international business, national differences in banking, commercial laws, regulations, and political stability also complicate decision making. Today's investors must also understand the effects of, and interactions among, exchange rates, inflation rates, and interest rates if they wish to maximize their returns and minimize their risks. The study of multinational finance constitutes an essential component of a modern business education. The subject multinational finance is offered in a	07/31/24	QAS Self-Study



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#	Field of Study	Title	CPE Credit	Course Description	Expiration Date	Delivery Method
176	Finance	Controllers' Guide to Multinational Financial Management: Part 4 v3.0	3.0	<p>This course (Parts 1 through 4) is designed for managers working for multinational companies (MNCs) as well as accountants, CFOs, controllers, treasurers, and international investors. In a modern economy, neither businesses nor individual investors can afford to be ignorant of the basic concepts of international finance. Changes in exchange rates and differences in national inflation and interest rates can affect the competitive position of businesses regardless of whether they are engaged in international operations.</p> <p>For companies that are engaged in international business, national differences in banking, commercial laws, regulations, and political stability also complicate decision making. Today's investors must also understand the effects of, and interactions among, exchange rates, inflation rates, and interest rates if they wish to maximize their returns and minimize their risks. The study of multinational finance constitutes an essential component of a modern business education. The subject multinational finance is offered in a variety of titles including international finance, global finance, international</p>	07/31/24	QAS Self-Study
177	Finance	Critical Skills for CFOs & Controllers: Budgeting & Forecasting Strategies for Today's World	2.0	<p>The budget and the forecast are two common tools used by controllers and CFOs across almost every industry. However, are we really getting the most out of these tools? Or are we merely replicating whatever was done last year? In this course, we will use examples and illustrations to demonstrate various budgeting and forecasting techniques. We will discuss traditional approaches, as well as newer approaches such as flexible budgeting, in an effort to show how companies can gain more value.</p>	05/31/2024	QAS Self-Study



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#	Field of Study	Title	CPE Credit	Course Description	Expiration Date	Delivery Method
178	Finance	Economic Value Added (EVA) or Economic Profit v2.0	1.0	The purpose of this course is to enable the user to become familiar with the concept of economic profit and how it differs from GAAP net income. The user will also understand how economic profit compares with other performance metrics such as DCF, ROI and EPS.	09/30/23	QAS Self-Study
179	Finance	Financial Concepts And Tools For Managers V1.1	4.0	Finance involves obtaining, using, and managing funds to achieve the company's financial objectives (e.g., maximization of shareholder value). The course emphasizes and develops an understanding of financial concepts, tools, strategies, and major decision areas related to the financial management of the business. This course is directed toward the businessperson who must have financial knowledge but has not recently had training in finance. Topics include a broad overview of business types and formation, funding, capital markets, tax planning, budgeting, financial statement and analysis and many other aspects of running a business. Many subjects are discussed with the intention of providing the businessperson with a quick introduction to commonly used business terms and requirements.	03/31/2025	QAS Self-Study
180	Finance	Financial Forecasting: Tools and Applications – Part 1 v2.0	2.00	Business and financial forecasting is of extreme importance to managers at practically all levels. It is required for top managers to make long-term strategic decisions. Middle management uses sales forecasts to develop their departmental budgets. Every other plan such as a production plan, purchasing plan, manpower plan, and financial plan follows from demand forecasting. The critical element in any supply chain plan is the demand forecast. The goal	12/31/2024	QAS Self-Study
181	Finance	Financial Forecasting: Tools And Applications - Part 2 v2.0	2.00	Business and financial forecasting is of extreme importance to managers at practically all levels. It is required for top managers to make long-term strategic decisions. Middle management uses sales forecasts to develop their departmental budgets. Every other plan such as a production plan, purchasing	12/31/2024	QAS Self-Study
182	Finance	Financial Forecasting: Tools And Applications - Part 3 v2.0	2.00	Business and financial forecasting is of extreme importance to managers at practically all levels. It is required for top managers to make long-term strategic decisions. Middle management uses sales forecasts to develop their departmental budgets. Every other plan such as a production plan, purchasing plan, manpower plan, and financial plan follows from demand forecasting.	12/31/2024	QAS Self-Study



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#	Field of Study	Title	CPE Credit	Course Description	Expiration Date	Delivery Method
183	Finance	Financial Markets Part 1: Financial Markets and Intermediaries and Interest Rates	2.0	Financial markets represent the lifeblood of our global economy. These mechanisms promote greater economic efficiency by transferring funds from individuals, businesses and governments with an excess of available funds to those with a shortage. Funds are transferred in the financial markets through the purchase and sale of financial instruments (such as stocks and bonds). Short-term financial instruments are available in money markets, while longer-term financial instruments are purchased and sold in the world's capital markets. Many financial markets have been in existence for hundreds of years; however, the modern era has brought along many new innovations such as securitization and the derivatives market. This series of courses.	04/30/24	QAS Self-Study
184	Finance	Financial Markets Part 2: Central Banking and Monetary Policy and Money Markets	2.0	Financial markets represent the lifeblood of our global economy. These mechanisms promote greater economic efficiency by transferring funds from individuals, businesses and governments with an excess of available funds to those with a shortage. Funds are transferred in the financial markets through the purchase and sale of financial instruments (such as stocks and bonds). Short-term financial instruments are available in money markets, while longer-term financial instruments are purchased and sold in the world's capital markets. Many financial markets have been in existence for hundreds of years; however, the modern era has brought along many new innovations such as securitization and the derivatives market.	04/30/24	QAS Self-Study
185	Finance	Financial Markets Part 3: Capital Markets	2.0	Financial markets represent the lifeblood of our global economy. These mechanisms promote greater economic efficiency by transferring funds from individuals, businesses and governments with an excess of available funds to those with a shortage. Funds are transferred in the financial markets through the purchase and sale of financial instruments (such as stocks and bonds). Short-term financial instruments are available in money markets, while longer-term financial instruments are purchased and sold in the world's capital markets. Many financial markets have been in existence for hundreds of years; however, the modern era has brought along many new innovations such as securitization and the derivatives market. This series of courses.	04/30/24	QAS Self-Study
186	Finance	Financial Markets Part 4: Foreign Exchange Markets and Derivatives Markets	2.0	Financial markets represent the lifeblood of our global economy. These mechanisms promote greater economic efficiency by transferring funds from individuals, businesses and governments with an excess of available funds to those with a shortage. Funds are transferred in the financial markets through the purchase and sale of financial instruments (such as stocks and bonds). Short-term financial instruments are available in money markets, while longer-term financial instruments are purchased and sold in the world's capital markets. Many financial markets have been in existence for hundreds of	04/30/24	QAS Self-Study
187	Finance	Introduction to Derivatives and Hedging: Part 1 of 3 v2.1	1.0	This course provides an introduction and starting point to understanding derivative instruments and their uses, and the concept of hedging and managing risk. The course begins by examining financial risk management and includes a five-step process to managing risk. Various types of financial risk encountered in the market, including interest rate risk, credit risk, and foreign exchange risk are defined and described. The course concludes by providing a brief overview and discussion of the various types of derivative categories covering interest rate derivatives, equity derivatives, foreign exchange derivatives, credit derivatives, and commodities.	03/31/2025	QAS Self-Study



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#	Field of Study	Title	CPE Credit	Course Description	Expiration Date	Delivery Method
188	Finance	Introduction to Derivatives and Hedging: Part 2 of 3 v2.1	2.0	This course focuses on two specific types of derivative instruments: forward contracts and futures contracts. The course begins with an overview of forward contracts and a description of the unique characteristics of those contracts. Hedging practices through the use of forward contracts is reviewed, and the calculation of a forward contract's payoff is exhibited with examples and illustrations. Forward pricing is discussed, and foreign exchange	03/31/2025	QAS Self-Study
189	Finance	Introduction to Derivatives and Hedging: Part 3 of 3 v2.1	2.0	This course describes the various types of swap and option contract arrangements/ instruments that are available to market participants and discusses appropriate ways to use these derivative-based instruments to hedge exposed positions. Throughout the course, the unique characteristics of these arrangements/instruments are highlighted and explained, and their mechanics are exhibited in detailed examples and illustrations. Swap arrangements such as interest rate swaps, currency swaps, and credit default swaps, and the process for calculating swap settlement amounts, is reviewed. The course concludes with a detailed discussion of options trading and	03/31/2025	QAS Self-Study
190	Finance	Managing And Improving Your Cash Flow: Part 1 V3.0	1.0	Cash is the lifeblood of a business. Sound cash management is the key to the survival of any business. You can go broke even while making a profit. Profit is generally measured on an accrual basis in accounting. This course, Managing and Improving Your Cash Flow: Part 1, along with Part 2 and Part 3 of the series, alerts you to the difference between profit and cash flow and teaches you the tools and techniques that allow you to effectively increase and manage your cash flow.	03/31/2025	QAS Self-Study
191	Finance	Managing And Improving Your Cash Flow: Part 2 V3.0	1.0	Cash is the lifeblood of a business. Sound cash management is the key to the survival of any business. You can go broke even while making a profit. Profit is generally measured on an accrual basis in accounting. This course, Managing and Improving Your Cash Flow: Part 2, along with Part 1 and Part 3 of the	03/31/2025	QAS Self-Study
192	Finance	Managing And Improving Your Cash Flow: Part 3 v3.0	1.0	Cash is the lifeblood of a business. Sound cash management is the key to the survival of any business. You can go broke even while making a profit. Profit is generally measured on an accrual basis in accounting. This course, Managing and Improving Your Cash Flow: Part 3, along with Part 1 and Part 2 of the series, alerts you to the difference between profit and cash flow and teaches you the tools and techniques that allow you to effectively increase and manage your cash flow.	03/31/2025	QAS Self-Study
193	Finance	Managing Your Balance Sheet v2.0	1.0	The balance sheet is one of four financial statements used by management and users to manage the operations of a business and report periodically on the financial status of the organization. The goal of this course is to enable the user to understand the concepts and elements of the balance sheet. This course also discusses bases of accounting, valuation issues, and balance sheet	08/31/23	QAS Self-Study



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#	Field of Study	Title	CPE Credit	Course Description	Expiration Date	Delivery Method
194	Finance	Modern Portfolio Theory and Stock Market Valuation Techniques v1.1	2.0	In this course, the development and adoption of modern portfolio theory (MPT) is described including expected return, standard deviation of returns as a measure of risk, the Capital Markets Line, the Capital Asset Pricing Model (CAPM) and Arbitrage Pricing Theory (APT). The tools of MPT are widely used in today's investment world to evaluate and select portfolio managers, mutual funds, and hedge funds. These tools have created standards for comparing performance and risk across different markets and Mutual funds have become more and more popular as a way for investors to save for retirement and other long-term financial goals. This popularity is partially due to the fact that mutual funds are available to a wide range of investors at a variety of economic levels. Many mutual funds have account opening minimum requirements that are small enough to provide the opportunity for many people to purchase mutual funds. The	03/31/2025	QAS Self-Study
195	Finance	Mutual Fund Basic v1.1	1.0	Financial statements are a window into what is going on in the day-to-day operations of the company. They help us see what the company's strengths and weaknesses are. However, financial statements can often have different messages depending on the user.	03/31/2025	QAS Self-Study
196	Finance	Seeing Beyond The Numbers: Financial Statement Analysis For CFOs And Controllers	5.0	This comprehensive program (Parts 1 and 2) gives you every sales formula and modeling techniques you need to analyze your operation both as a whole and by segment. You'll be provided with proven techniques that help you identify and fix problem areas, analysis techniques that help you evaluate proposals for profit potential, analysis tools that help you better manage working capital, cash, and accounts receivable, plus much more. You also receive dozens of worked-out models and modeling techniques that simplify your most difficult business decisions, and are easy to adapt to any computer spreadsheet program. This program supplies company accountants, treasurers, CFOs with all the techniques needed to financially analyze a business as a whole or a segment. Includes analysis techniques, analysis tools for managing capital, and more.	11/30/2023	QAS Self-Study
197	Finance	Techniques of Financial Analysis and Modeling - Part 1 v1.1	4.0		02/28/2025	QAS Self-Study



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198	Finance	Techniques of Financial Analysis and Modeling - Part 2 v1.1	5.0	This comprehensive program (Parts 1 and 2) gives you every sales formula and modeling techniques you need to analyze your operation both as a whole and by segment. You'll be provided with proven techniques that help you identify and fix problem areas, analysis techniques that help you evaluate proposals for profit potential, analysis tools that help you better manage working capital, cash, and accounts receivable, plus much more. You also receive dozens of worked-out models and modeling techniques that simplify	02/28/2025	QAS Self-Study
199	Finance	The Cost of Capital: The When, Why, & How	1.5	Have you ever wondered why a company chooses certain ways of capital funding over others? Through analysis, discussion questions, and a review of prevailing financial theory, this course explores why some companies choose debt financing, while others choose equity financing. Speaker/Author: David R. Peters, CPA	07/31/24	QAS Self-Study
200	Finance	Time Value of Money: Useful Applications: Part 1 v2.0	1.0	CPAs must have a working knowledge of future value and present value concepts because of their application to numerous types of business events and transactions that require proper valuation and presentation. Time value of money is also a critical consideration in financial and investment decisions. For example, compound interest calculations are needed to determine future sums of money resulting from an investment. Discounting is used to evaluate the future cash flow associated with capital budgeting projects. This course	02/29/24	QAS Self-Study
201	Finance	Time Value of Money: Useful Applications: Part 2 v2.0	1.0	CPAs must have a working knowledge of future value and present value concepts because of their application to numerous types of business events and transactions that require proper valuation and presentation. Time value of money is also a critical consideration in financial and investment decisions. For example, compound interest calculations are needed to determine future sums of money resulting from an investment. Discounting is used to evaluate the future cash flow associated with capital budgeting projects. This program	02/29/24	QAS Self-Study
202	Finance	Understanding the Economy - Part 3	1.5	This course is Part 3 of a four-part series, Understanding the Economy. Understanding the economy and coping with the economic environment is critical in today's business performance, which is a major concern for managers and investors. This course series addresses macro-economic factors that may affect a business's performance. Macro-economic factors include business cycles, interest rates, economic policy, inflation, unemployment,	09/30/2024	QAS Self-Study



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203	Finance	Valuations: Businesses, Securities, and Real Estate v4.0	2.0	This course covers valuations ranging from businesses, bonds, preferred stock and common stock to real estate. Business valuation is essentially a present value concept that involves estimating future cash flows of a business and discounting them at a required rate of return. The value of a bond is essentially the present value of all future interest and principal payments. Stock price may be expressed as a function of the expected future dividends and a rate of return required by investors. Real estate valuation presents	04/30/24	QAS Self-Study
204	Finance	War & Finance: How Conflict Affects Markets and Pocketbooks	1.0	In times of conflict, clients become keenly aware of how interconnected our economy is. They know that money feels tight, but they are not quite sure why. They often times will turn to you as their financial advisor for answers. In this course, we will explore how the broader economy during times of global conflict affects individuals from a personal finance, investing, and tax perspective. Using plain-language examples and discussion questions, we will explore economic theories that can be used to explain to clients why a war that is far away can affect them in very real ways here at home. <i>Speaker/Author: David R. Peters, CPA</i>	05/31/24	QAS Self-Study
205	Finance	Working Capital Management v2.0	1.0	This course provides an overview of the principles of managing an organization's working capital effectively. The goal of working capital management is to ensure that an entity is able to maintain its operations and can satisfy both maturing debt and upcoming operating expenses. The management of working capital involves managing working inventory, accounts receivable, accounts payable, and cash.	09/30/23	QAS Self-Study
206	Information Technology	Accountant's Guide to Computers and Information Technology: Part 1 v4.0	2.0	The two-part course series, Accountant's Guide to Computers and Information Technology, covers what every accountant should know about computers and information systems and technology. In Part 1 of this series, practical and efficient use of computer technology is highlighted. Popular accounting, compliance, taxes, audit, write-up, forecasting and statistical, budgeting and planning, project management, activity-based accounting (ABC) software are explained. Finally, the importance of information security and data protection is discussed. Numerous examples and graphics are	02/29/24	QAS Self-Study
207	Information Technology	Accountant's Guide to Computers and Information Technology: Part 2 v4.0	3.0	The two-part course series, Accountant's Guide to Computers and Information Technology, covers what every accountant should know about computers and information systems and technology. In Part 2 of this series, the importance of databases, client-server computing, and cloud computing are discussed, with an emphasis on security issues. The course also teaches you how to make lease-purchase decisions and analyze and evaluate information technology (IT) investments. Numerous examples and graphics are interspersed throughout the course.	03/31/24	QAS Self-Study
208	Information Technology	Blockchain Fundamentals v1.1	1.00	What is Blockchain? What is cryptocurrency? Blockchain is growing quickly in a number of industries and changing the way business is conducted. Learning the fundamentals of Blockchain will add value to any business leader.	02/28/2025	QAS Self-Study



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209	Information Technology	Cloud Computing: Trends, Strategies, and Best Practices v1.1	2.00	Cloud computing manages information by providing a secure, efficient way of maintaining data, while keeping information accessible. Governmental agencies, nonprofits and the private sector have now incorporated cloud computing use as a best practice. The convenience of keeping data in the cloud frees up space that would otherwise cause uneconomical use of equipment and personnel and unnecessary expenditures to a company's budget. This course covers the evolution of cloud computing, cloud computing architecture, the different types of cloud deployments, and the benefits to	02/28/2025	QAS Self-Study
210	Information Technology	Data Analytics v3.0	2.00	This course provides an overview of data analytics with a specific focus on artificial intelligence, big data, and the technologies that assist in the audit process. This course also addresses various data analytic techniques, the blockchain, as well as a discussion of the types of audit sampling methods and journal entry testing procedures.	02/28/2025	QAS Self-Study
211	Information Technology	E-Commerce: Application and Technology v2.0	3.0	The combination of growth in the commercial utilization of the Internet, the rapid changes in technology, and the complexity of management has expanded the scope of the duties of business managers. This, part 1 of a 2-part course, covers all aspects of electronic commerce: the Internet, advertising and marketing, and specific technologies. It also addresses steps to move business online, e-commerce strategies, and the concerns of business managers such as security issues.	09/30/2023	QAS Self-Study
212	Information Technology	FMN - 2022/December, Seg 1 - Cryptocurrency Deep Dive: Topics Most Haven't Considered	2.0	A digital currency wallet allows you to send, receive, and spend digital assets like Bitcoin and Ether. Mark Eckerle, a Senior Manager and Team Leader of Withum's digital technology and blockchain technology, reviews all aspects of crypto wallets. Topics discussed include the different types of wallets, internal control considerations and public versus private blockchain.	07/12/2024	QAS Self-Study



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213	Information Technology	FMN Plus-2023/April, Seg 4 - Cybersecurity Cutting Edge Practices	2.0	Malicious actors are hard at work every day trying to hack into individual and corporate accounts. According to Daniel Katz, Cybersecurity Consulting Practice Leader for Mazars USA, what is needed to combat the threat is good cyber hygiene. In this segment he reviews what that entails including using passphrases instead of passwords, multi-factor authentication, penetration testing, and how to make "humans" the first line of defense in security.	11/14/2024	QAS Self-Study
214	Information Technology	It's Time for You to Get Serious about Protecting against Cybercrime	1.0	Organizations are focusing increased attention and resources on enterprise security, as they experience an unprecedented surge in the frequency and magnitude of cyber attacks. Yet, financial executives too often regard unauthorized access to IT systems as just another expense that is associated with risk and insurance. Robert Cioffi, CEO and co-founder of Progressive Computing, Inc., provides us with ten critical IT security protections that every business must have in place now.	09/30/23	QAS Self-Study



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215	Information Technology	Managing Cyber Risk v1.1	2.0	Managing Cyber Risk is the second part of a two course series training program that assists senior executives and board members with better understanding how to understand and manage an organization's cyber risk. This course provides an overview of cyber risk dashboards to help organizations successfully monitor and manage its cyber risk, and some best practices for creating and implementing a dashboard. This course also covers best practice recommendations and considerations to reduce cyber risk via policy and controls implementation across four broad categories: people, process, technology, and environment. Despite the best defenses and preparation, the changes of an organization falling victim to a major cyber incident remain a reality. To address this reality, this course also details how an organization should react in the event of a data breach. It lays out broad recommendations on how to implement and	12/31/23	QAS Self-Study
216	Information Technology	Principles of Cloud Computing: Perspectives on Business, Technology, and Cost v1.1	1.0	This course provides an overview of overall cloud and traditional concepts related to computer-based systems that impact customer and non-customer applications. The course focuses on different application architectures and discusses database components that makeup a multi-tier solution. Additionally, this course also addresses concepts related to dedicated systems, the basics of cloud solutions, as well as the future of cloud-based solutions.	04/30/2025	QAS Self-Study
217	Information Technology	The Impact of Cloud Computing on Business and IT v2.0	1.0	Cloud Computing has proven to be the most effective method of storage and security used by organizations today. It is not only efficient, but it is a powerful tool that will only expand its reach in the future. This course is focused on how cloud computing is changing the nature of business applications, particularly as they impact information technology. The course material explores company organization structures, the future of in-house IT groups, and the global implications of cloud computing. The first major section delves into a major future business dynamic that is affecting corporations	03/31/2025	QAS Self-Study



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218	Information Technology	The Impact of the Latest Technology Challenges on You	1.0	As enterprises increasingly rely on digital technologies to conduct their operations, financial executives are becoming more aware that the most recent cyber developments provide the greatest benefit, while posing a growing risk, to their organization. Attorney and technologist Peter Vogel of Foley Gardere emphasizes the need for you to remain alert to the latest changes in the business technology environment, from blockchain and ransomware to GDPR and IOT.	09/30/23	QAS Self-Study
219	Information Technology	Understanding Big Data v2.0	1.0	This course provides an overview of big data concepts. This includes a discussion of binary conversions, the evolution of big data, as well as data anomalies. This course also includes examples of how big data is being used today by certain companies, the benefits of big data, as well as specific job roles that involve the use of big data.	03/31/2025	QAS Self-Study
220	Information Technology	Understanding Cyber Risk v1.1	2.0	Cybersecurity issues continue to grow in both prevalence and disruptive potential. While senior business leaders recognize that cyber risks pose significant threats to their businesses and organizations, more can be done to proactively increase the ability to oversee and manage these risks. This course is the first of two that aim to educate business leaders and management on how to assess, monitor and then manage cyber-related risks. Understanding Cyber Risk provides an overview of cyber risk and the lens and model through which leaders should view and measure that risk.	12/31/23	QAS Self-Study
221	Information Technology	Using Data Analytics to Give You a Competitive Advantage: Data Types, Data Inquiries, and Data Integrity (Long Version)	5.0	Through case studies and discussion, this course will explore what data analytics is and how to approach it. Participants will be given scenarios in which to think about the data available, and how it can be applied within specific company contexts. The focus of the course will be on how to approach big data, data analytics, and data integrity, so that participants can better utilize the data available to them in their current working lives. Speaker/Author: David R. Peters, CPA	05/31/24	QAS Self-Study



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#	Field of Study	Title	CPE Credit	Course Description	Expiration Date	Delivery Method
222	Information Technology	Using Data Analytics to Give You a Competitive Advantage: Data Types, Data Inquiries, and Data Integrity (Short Version)	1.5	Through case studies and discussion, this course will explore what data analytics is and how to approach it. Participants will be given scenarios in which to think about the data available, and how it can be applied within specific company contexts. The focus of the course will be on how to approach big data, data analytics, and data integrity, so that participants can better utilize the data available to them in their current working lives. Speaker/Author: David R. Peters, CPA	05/31/24	QAS Self-Study
223	Management Advisory Services	FMN - 2023/March, Seg 1 - Mobile Workforce Success: Technology & Compliance	2.00	Employee management, productivity, communication, technology and other business issues all present unique challenges when it comes to creating an effective model for today's global mobile workforce. David Livitt, Partner and Head of Global Mobility Services with Mazars USA, discusses the tools and compliance strategies crucial to effectively leveraging global mobility programs.	10/14/2024	QAS Self-Study
224	Management Advisory Services	FMN - 2023/March, Seg 3 - Company Construction: The Debt - Equity Continuum	2.00	Selecting the correct capital structure is one of the primary tasks taken on by financial business leaders. Understanding the key considerations in determining the debt-equity mix is also critical. Kyle Tushaus, a Managing Partner of New West Capital reviews the basics of capital structure providing real life examples. Other topics discussed include Enterprise Value versus market capitalization, the Modigliani-Miller Theorem, and recapitalization.	10/14/2024	QAS Self-Study
225	Management Services	A Controller's Guide to Assessing the Risk of Your Organization: Coverages and Exclusions for Basic Business Policies	2.0	Part of being a CFO or Controller is protecting the assets of the organization and managing risk. While many financial leaders feel comfortable with the strategic aspect of this task, finding the right insurance coverages can leave one feeling out of their element. This course will focus on three common business policies - the package policy, the business & property policy, and the cyber policy. Through case studies and illustrative examples, we will	05/31/2024	QAS Self-Study



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226	Management Services	Cost Behavior Analysis v2.0	1.0	Cost behavior analysis provides a useful overview of financial data and financial outcomes for planning, control, and decision making. The program is designed for managers and entrepreneurs who need hand-on knowledge and tools in processing, developing, and analyzing financial, cost, and business data for managerial use. Topics include break-even analysis, cost-volume-profit analysis, fixed and variable costing, and regression analysis.	02/29/24	QAS Self-Study
227	Management Services	FMN - 2023/February, Seg 3 - Maximizing the Mobile Workforce in a Shrinking World	2.00	As today's workforce is becoming increasingly global, a host of new challenges arise related to talent management, different tax protocols, and technologies. David Livitt is the Head of Global Mobility Services at Mazars USA. He has over 20 years of experience in global mobility tax services, helping companies and individuals navigate the complexities of an international presence. In this segment, he discusses what today's leaders need to know in order to use their global presence as one of their greatest assets.	09/14/24	QAS Self-Study
228	Management Services	FMN - 2023/January, Seg 2 - Board of Directors: Building the Company of Tomorrow	2.0	In today's corporate world, it has now become very much part of the Board of Directors' duties to see that there are frameworks and policies around ESG. Helle Bank Jorgensen, founder and chief executive of Competent Boards, has more than 30 years of experience evaluating ESG risks and opportunities for leading Fortune 500 companies as well as smaller and medium-sized businesses. She shepherds us through an analysis of current and future implications related to ESG for board members and financial executives at today's leading companies.	08/14/2024	QAS Self-Study
229	Management Services	FMN - 2023/January, Seg 4 - Sustainability: "Stand for Social"	2.0	Accountants have an ethical obligation to make decisions that are free from bias and take into consideration environmental, social, and governance (ESG) factors. Loreal Jiles, Vice President, Research and Thought Leadership, with the Institute of Management Accountants, reviews the intersection of ethics and ESG and how accountants, external stakeholders, and regulators are leading the way to improved sustainable business management.	08/14/2024	QAS Self-Study
230	Management Services	FMN PLUS- 2023/May, Seg 1 - Higher-Level Accounting to Facilitate Productive Collaboration	2.0	Today's accountant takes on many roles - technical accounting expert, mediator, teacher and collaborator. The successful accountant knows how to create synergy within and among departments, acting as a hub to connect stakeholders and align strategy with operations. Lauren Aldrich, Senior Controller at JMP Statistical Discovery LLC, guides us through the challenges	12/14/2024	QAS Self-Study



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231	Management Services	FMN Plus-2023/April, Seg 3 - The Enlightened Accountant - Maximizing Client Communications	2.0	Today's "enlightened accountant" needs the tools necessary to effectively communicate with clients. Accounting literacy is crucial for today's accountant both in their own practice and in their ability to successfully engage clients. Peter Frampton, CEO of Wealthvox, has helped develop a new approach to give everyone access to the financial conversation, resulting in increased engagement, performance, profitability and cash flow. 	11/14/2024	QAS Self-Study
232	Management Services	How Can You Communicate "Trust" in an Age of Crisis? v1.1	1.0	For many enterprises, their reputation may be their most valuable asset. When that reputation comes under attack, protecting and defending it becomes the highest priority for executives and financial managers. But what can you do now so that you will not be fighting an uphill battle when a crisis does occur? Public relations guru Richard Levick returns to our program to advocate for strategic initiatives that you can pursue before a crisis does take place. Author/Speaker: Richard Levick	10/31/23	QAS Self-Study
233	Management Services	Improve Your Profit: Identifying Cost Cutting Opportunities	2.0	Part of one's duty as a CPA working in industry is to safeguard the assets of the organization. Cost cutting is one way to preserve assets and maintain a company's competitive position in the industry. However, what keeps us from ridding our organizations of unnecessary costs? In this course, we will look at the factors that prevent our companies from being as streamlined as they could be. By using statistics and survey data, we will attempt to show how to better negotiate and navigate budgeting and contracting decisions. We will also discuss financial statement analysis techniques, benchmarking, and cash flow management in an effort to better cut costs and maintain the long-run viability of an organization. Speaker/Author: David R. Peters, CPA	05/31/24	QAS Self-Study
234	Management Services	Managing Business Disputes: What You Can Do	1.0	Conflict is an inevitable part of work. We have all witnessed situations where people or enterprises with different goals and needs have clashed. Nonetheless, it is possible to turn even tense business disputes into productive negotiations and to maintain strong relationships. Here, a trio of experts - Steve Grace, Joseph Monteleone and Dr. H. Stephen Grace - walk us through a six-step analytical process, and several case studies, to aid in resolving business disputes.	02/29/24	QAS Self-Study



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235	Management Services	Project Management: A Financial Perspective - Part 1	2.0	This series of courses (Parts 1, 2, and 3) on project management is designed to provide you with a deep understanding of the applications and importance of Project Management. You will learn how to assess a project with respect to time, costs, and resources in order to effectively and efficiently reach your goals. You will become familiar with the five processes involved in Project management - Initiating, Planning, Executing, Controlling, and Closing on time and within budget -- Project Integration, Project Scope, Project Time, Project Cost, Project Quality, Project Human Resources, Project Communications, Project Risk Management, and Project Procurement - that are essential to being an expert Project Manager. This series of courses follows for the most part the framework within the Project Management Institute's Project Management Body of Knowledge (PMBOK). The material, however, places a financial focus on projects as a way to accomplish desired changes in the	03/31/24	QAS Self-Study
236	Management Services	Project Management: A Financial Perspective - Part 2	2.0	This series of courses (Parts 1, 2, and 3) on project management is designed to provide you with a deep understanding of the applications and importance of Project Management. You will learn how to assess a project with respect to time, costs, and resources in order to effectively and efficiently reach your goals. You will become familiar with the five processes involved in Project management - Initiating, Planning, Executing, Controlling, and Closing on time and within budget -- Project Integration, Project Scope, Project Time, Project Cost, Project Quality, Project Human Resources, Project Communications, Project Risk Management, and Project Procurement - that are essential to being an expert Project Manager. This series of courses follows for the most part the framework within the Project Management Institute's Project Management Body of Knowledge (PMBOK). The material, however, places a financial focus on projects as a way to accomplish desired changes in the	03/31/24	QAS Self-Study
237	Management Services	Project Management: A Financial Perspective - Part 3	2.0	This series of courses (Parts 1, 2, and 3) on project management is designed to provide you with a deep understanding of the applications and importance of Project Management. You will learn how to assess a project with respect to time, costs, and resources in order to effectively and efficiently reach your goals. You will become familiar with the five processes involved in Project management - Initiating, Planning, Executing, Controlling, and Closing on time and within budget -- Project Integration, Project Scope, Project Time, Project Cost, Project Quality, Project Human Resources, Project Communications, and others who wish to explore or implement SPM² systems in their	04/30/24	QAS Self-Study
238	Management Services	Strategic Performance Management: An Introduction v.2	1.0	This course presents a model for implementing strategic performance measurement and management (SPM ²) systems using field-tested methods derived from organizations that have been identified as sites of "best practice." Practical and effective transformation management methods from a "systems thinking" perspective are included to enhance the work of those who wish to implement a SPM ² system. It will benefit managers, executives, and others who wish to explore or implement SPM² systems in their	01/31/24	QAS Self-Study
239	Management Services	Strategic Performance Management: An Introduction v2.0	1.0	This course introduces strategic performance measurement and management (SPM ²) by using field-tested methods derived from organizations that have been identified as sites of "best practice." It will benefit managers, executives, and others who wish to explore or implement strategic performance measurement systems in their organizations and who wish to have a comprehensive and integrated model for building an SPM ² system.	01/31/2024	QAS Self-Study



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#	Field of Study	Title	CPE Credit	Course Description	Expiration Date	Delivery Method
240	Management Services	Strategic Performance Measurement and Management Implementation v2.1	1.0	This course presents a model for implementing strategic performance measurement and management (SPM ²) systems using field-tested methods derived from organizations that have been identified as sites of "best practice." Practical and effective transformation management methods from a "systems thinking" perspective are included to enhance the work of those who wish to implement a SPM ² system. It will benefit managers, executives, and others who wish to explore or implement SPM ² systems in their organizations and who wish to have a comprehensive and integrated model for building such systems. This course is directed particularly at organizations that are having trouble in one or both of the following areas: Reaching consensus and clarity on strategic objectives and intentions. Achieving appropriate focus among activities and action programs	03/31/2025	QAS Self-Study
241	Management Services	The Balanced Scorecard: Strategic-Based Control v3.0	2.0	The Balanced Scorecard (BSC) is a strategic-based responsibility accounting system that converts an organization's mission and strategy into operational objectives and measures for four perspectives: the financial perspective, the customer perspective, the internal process perspective, and the learning and growth perspective. The course addresses the main features of the Balanced Scorecard and its implementation. Several notable case studies that implemented and applied the BSC are presented.	02/29/24	QAS Self-Study
242	Management Services	Think Like a PMP: What All the Cost and Schedule Assessment Calculations Really Mean v1.1	1.0	Financial and reputation risks for general financial operations in business is mounting across the globe. Recent events has laid bare the high cost of exposing clients and organizations to the vulnerabilities to intrusion. As an industry leader, it is your responsibility to protect assets and avoid attacks. Performing this task will require that you are able to assess risks and measure cost that are necessary to be aware of when planning and maintaining projects. This class is targeted at Accounting professionals and others who work in the industry. In this course, you will learn about the different cost and schedule assessment calculations used in projects. The different formulas and outcomes of these calculations will be explained. IMPORTANT: This course, previously titled "Think Like a PMP: What All the Cost and Schedule Assessment Calculations Really Mean," has been republished in our current course platform. Please be aware that the content	12/31/23	QAS Self-Study
243	Management Services	Thinking Agile: How to Use Agile Principles in Business Leadership v1.1	1.0	You've probably heard the buzzword Agile everywhere in the business world, around the virtual water cooler all the way up to the corporate boardroom. Once practiced in the dark arts of software development, Agile has become a trending style across business operation and planning, particularly in project and team management. But it's more than a buzzword or trend - Agile is a new way of solving age-old business problems. IMPORTANT: This course, previously titled "Thinking Agile: How to Use Agile Principles in Business Leadership," has been republished in our current course platform. Please be aware that the content is the same, with only minor	12/31/23	QAS Self-Study



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244	Personal Development	Building a Better Team: Being a Better Manager	1.0	When stepping into a leadership role in the accounting profession, many practitioners are surprised to see how their job shifts from being less about analysis and more about people. In many ways, accounting skills take a backseat to the ability to build a positive culture and increase engagement. In this course, we will utilize research and survey results to help identify the qualities of a top manager. We will use case studies to identify how leadership	05/31/24	QAS Self-Study
245	Personal Development	Building a Better Team: Being a Better Teammate	1.0	While accountants deal with many complicated code sections and analytical issues, perhaps the most difficult thing that every financial professional deals with is how to create a good office environment. Utilizing discussions and case studies, this course will explore how to become a better teammate. We will learn strategies for how to form better relationships with colleagues and others. We will learn the importance of good culture – and how negative culture can work against the overall goals of the company.	05/31/24	QAS Self-Study
246	Personal Development	Business English: Part One	1.0	One's ability to communicate effectively in the professional workplace requires mastery of a number of different communication skill sets, and it is very important that those who work in such settings achieve such mastery. In organizations where effective communication is not the norm, otherwise avoidable problems typically ensue. Many of these problems, in turn, negatively impact employees' ability to perform their jobs and interact effectively with fellow employees, clients, customers, and other stakeholders effectively. The main goals of this course are to address the following topics: reading, writing mechanics, and business writing principles. 	03/31/2025	QAS Self-Study



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247	Personal Development	Delegation Skills for Managers and Supervisors v3.0	1.0	The goal of this course is to familiarize the user with the process of effective delegation. The course will discuss the strategies required for a manager to delegate effectively, including defining the task, delegating the task, and assuring results. The course will also discuss typical pitfalls a manager can encounter in the process of delegating.	04/30/2025	QAS Self-Study
248	Personal Development	Effective Communication in the Workplace v2.0	2.0	Achieving effective communication in the workplace should be a major goal of any organization. As can be imagined, in organizations where effective communication is not the norm, avoidable problems often ensue. Many of these problems negatively impact employees' ability to perform their jobs effectively and this, in turn, has negative effects on organizations. The main goal of this course is to address a number of topics pertaining to communicating at work. With this in mind, the course is broken into the following topics: Benefits of Effective Workplace Communication, Positive and Negative Workplace Communication, The Impact of Communication Technologies on Workplace Communication, Millennials' Communication Preferences in the Workplace, Communicating with Supervisors, Accepting Constructive Feedback Graciously, Asking for Help from a Co-worker, Barriers to Effective Communication in the Workplace, Improving Communication Organization-Wide in the Workplace, Improving Employee Communication in the Workplace, Communicating Nonverbally, Communicating in Writing, Communicating on Social Media, Giving Presentations, Listening Effectively.	01/31/24	QAS Self-Study
249	Personal Development	EQ Vs. IQ: The Secret To A CPA's Success v2.0	1.0	Many people still believe that Intelligence Quotient (IQ) outweighs Emotional Quotient (EQ) in the workplace and that success is dependent on our IQ level. Modern research, however, shows over and over that a high IQ might get you in the door, but a high EQ will get you ahead. In this course we will learn to understand IQ and EQ and why they both have their place in career success.	05/31/2025	QAS Self-Study



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250	Personal Development	How to Supervise People v3.0	1.0	The purpose of this course is to introduce the user to the concepts of supervising people. The program will cover how to: (i) contribute to the organization's overall success; (ii) develop company culture to motivate employees; (iii) effectively listen and coach colleagues to improve retention and promote career growth.	04/30/2025	QAS Self-Study
251	Personal Development	Identity Theft v2.0	1.0	This course provides an overview of identity theft and cyber crime, with a focus on why these threats keep growing more common and costly, and what you need to do to protect yourself. It describes profiles and methods of identity thieves and cyber criminals and how they use stolen information. It also covers the most important federal and state laws against identity theft.	02/29/24	QAS Self-Study
252	Personal Development	Influence and Persuasion in the Workplace	1.0	This program contains information pertaining to influence and persuasion in the workplace. The information focuses on the following major topics: Influencing Styles, Ways to Influence Others in the Workplace, Ways Business Managers Can Influence Employees, Ways Business Leaders Can Influence Employees, Influencing Clients and Customers, Types of Persuasion, Qualities of Exceptionally Persuasive People, How to be a Persuasive Negotiator, Persuasion Tips, and Ways to Overcome Barriers to Successful Persuasion. The terms influence and persuasion are defined and discussed in the "Course Introduction" section. You will benefit from the information presented in this course in the workplace. While the course content is directed specifically toward businesspeople, some of the suggestions are also applicable to <u>influencing and persuading others outside of the workplace in their personal</u>	11/30/23	QAS Self-Study
253	Personal Development	Inspire Like a Rock Star and Still Have Time for Lunch	1.0	None of us work alone. In fact, we all depend on others for support, input, data, ideas, and even inspiration. Studies have shown that we are only as good as our combined team. And happy teams showed more than twice the financial returns of their discontented counterparts. We can either lift each other up or pull each other down. This workshop focuses on the secrets behind the most successful teams. INSPIRE with excitement, MOTIVATE with recognition, and ENERGIZE with progress. These simple ideas will have a great <u>impact on you and your team.</u>	05/31/24	QAS Self-Study



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254	Personal Development	Know Your Impact! v1.1	1.00	This course provides an overview of the six internal needs that everyone attempts to satisfy and balance daily. This includes self-love, self-power, communication, solitude, equality, and influence. This course addresses the significance of the six needs and their direct impact on your personality as well as the positive outcomes derived when these needs are satisfied, and internal balance is achieved. IMPORTANT: This course, previously titled "Know Your Impact!" has been republished in our current course platform. Please be aware that the content is the same, with only minor updates. If you have already received credit for this course, you cannot receive credit again.	05/31/2024	QAS Self-Study
255	Personal Development	Listening Skills for 21st Century Organizations	1.0	This course explains what good listening skills consist of, why they are important and how you can improve them. How we listen is often a result of habits we created as early as childhood. These habits impact every area of your life, including your personal relationships and your career. The goal of this course is to bolster your passive, poor, listening habits into effective active listening skills that will bring improved workplace relationships and personal success in all areas of your life.	01/31/24	QAS Self-Study
256	Personal Development	Masterful Time Management v2.0	2.0	This course provides an overview of mastering time management. This includes a discussion of countering bad habits which contribute to time erosion as well as using principles of excellent time management. This course also addresses how to engage your time management tool regularly and how to manage your time both creatively and reactively.	05/31/24	QAS Self-Study
257	Personal Development	Organizational Communication	1.0	What is organizational communication? Basically, the term refers to the process by which people within organizations communicate with others to achieve common objectives and goals. The main goal of this course is to address a number of organizational communication topics. With this in mind, the course is broken into the following major topics: Formal & Informal Communication, Internal Communication, External Communication, Organizational Communication Plans, Organizational Communication Strategies, Organizational Communication Networks, Organizational Communication Flow, Organizational Communication Channels, Communication Assessment, Managing Organizational Communication, Barriers to Organizational Communication, Effective Organizational Communication, Millennial Workers' Communication Qualities and Workplace Preferences, and Communication Suggestions.	01/31/24	QAS Self-Study



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#	Field of Study	Title	CPE Credit	Course Description	Expiration Date	Delivery Method
258	Personal Development	Perform Like a Rock Star and Still Have Time for Lunch	1.0	This course is designed for busy professionals who juggle too many deadlines, multiple projects and conflicting demands, all of which have "top" priority. By revisiting the Rules of Time Management, identifying the real priorities and developing an action plan that ensures success, learners develop the habit of peak performance to maximize their productivity on a daily basis. This course will rock your world with new tips, techniques and strategies to achieve more than you ever thought possible.	05/31/24	QAS Self-Study
259	Personal Development	Professional Excellence: Appearance	1.0	This is the second course of a five-part series, A STAR is Born: Becoming a Professional of Excellence. Workplace excellence is defined by the expectations of employees to be appropriate - demonstrated by wise judgement and decision-making skills; believable - demonstrated through competence; and credible - demonstrated through integrity. The evidence of these skills occurs via the giving, receiving, or exchanging of information between individuals. This exchange happens continuously, and often unconsciously, in all workplace encounters through appearance. Professionals of Excellence (POE) use their appearance strategically to create positive <u>lasting impressions and take control of how others see them. The goal of the</u>	11/30/23	QAS Self-Study
260	Personal Development	Professional Excellence: Being Brand Awesome!	1.0	This is the fifth course of a five-part series, A STAR is Born: Becoming a Professional of Excellence. Effectively adopting and executing Dr. White's ABC Model of Professional Presence positions the individual contributor (IC) as a contender for progressive movement up the corporate ladder. The IC is now noticed by organization leadership as high potential. The IC is identified, <u>regarded, and appreciated as an asset, with the potential to positively affect</u>	02/29/24	QAS Self-Study
261	Personal Development	Professional Excellence: Body Language and Communication	1.0	This is the third course of a five-part series, A STAR is Born: Becoming a Professional of Excellence. Workplace excellence is defined by the expectations of employees to be appropriate—demonstrated by wise judgment and decision-making skills; believable—demonstrated through competence; and credible—demonstrated through integrity. The evidence of these skills occurs via the giving, receiving or exchanging of information between individuals. This exchange happens continuously and often <u>unconsciously, in all workplace encounters through body language and</u>	11/30/23	QAS Self-Study
262	Personal Development	Professional Excellence: Deliverables and Etiquette	1.0	This is the fourth course of a five-part series, A STAR is Born: Becoming a Professional of Excellence. Workplace excellence is defined by the expectations of employees to be appropriate-demonstrated by wise judgement and decision-making skills; believable-demonstrated through competence; and credible-demonstrated through integrity. The evidence of these skills occurs via the giving, receiving, or exchanging of information between individuals. This exchange happens continuously and often unconsciously, in all workplace encounters through deliverables, also known as work products, as well as etiquette and social skills. Professionals of Excellence (POE) use <u>deliverables, etiquette, and social skills strategically to</u>	01/31/24	QAS Self-Study



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#	Field of Study	Title	CPE Credit	Course Description	Expiration Date	Delivery Method
263	Personal Development	Professional Excellence: Overview	1.0	This is the first course of a five-part series, A STAR is Born: Becoming a Professional of Excellence. It is an introduction to Dr. White's ABC Model of Professional Presence, defined as being appropriate, believable and credible through appearance, body language, communication, deliverables (work product), and etiquette (dining and social skills). The goal of the first course is to explain the power of White's ABC Model of Professional Presence as the framework to becoming Professionals of Excellence (POE) via the mastery of impression management.	07/31/23	QAS Self-Study
264	Personal Development	Resolve Conflict Like a Rock Star and Still Have Time for Lunch	1.0	Whether in the workplace or the home, conflict is inevitable. If ignored or responded to ineffectively, conflict can create hostility and disconnect with others. If productively managed, however, conflict can promote personal growth, harmony in relationships and greater success at work. This course teaches the consummate formula for approaching and resolving conflict that creates a personal win-win and quality business outcomes.	05/31/24	QAS Self-Study
265	Personal Development	Stress Management Principles v2.0	1.0	This course provides an overview of stress and how stress can affect an individual's everyday life. The course also defines and provides examples of stress, describes the effect of stress on one's body, and list internal and external symptoms of stress. The course also provides techniques for reducing and releasing stress as well as how to cope with workplace stress.	09/30/23	QAS Self-Study
266	Personal Development	Using Principles of Critical Thinking: Part 1 - Substance and Structure	1.0	This course provides an overview of using principles of critical thinking. Part 1 of this course relates to substance and structure whereas the second part relates to highlighting ideas. Overall, this course seeks to address time-tested techniques to heighten message integrity, assess information to determine reliable and trustworthy conclusions, structure arguments precisely, and communicate based on scientific principles. IMPORTANT: This course, "Using Principles of Critical Thinking: Part 1 - Substance and Structure" has been republished in our current course platform. Please be aware that the content is the same, with only minor updates. If you have already received credit for this course, you cannot	07/31/24	QAS Self-Study
267	Personal Development	Using Principles of Critical Thinking: Part 2 - Reasoning and Refuting v1.1	1.0	This course provides an overview of using principles of critical thinking. It is the author's second course on the topic and deals with reasoning and refuting. Overall, this course provides information on how to argue logically from either side of a position, apply formal models of effective argumentation, and develop skills to avoid misleading or inaccurate wording. IMPORTANT: This course, previously titled "Using Principles of Critical Thinking: Part 2 - Reasoning and Refuting," has been republished in our current course platform. Please be aware that the content is the same, with only minor updates. If you have already received credit for this course, you cannot receive credit again.	07/31/24	QAS Self-Study



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#	Field of Study	Title	CPE Credit	Course Description	Expiration Date	Delivery Method
268	Personal Development	Writing in Plain Language v1.1	2.0	This course provides an overview of the principles and best practices of writing in plain language. The focus of this course is on using a plain language approach for a client-centered style, organizing ideas effectively with clear formatting techniques, as well as editing sentences for fluency and active voice. This course also addresses how to maintain conceptual and grammatical consistency in sentences, how to employ techniques to reduce verbiage and highlight key ideas, as well as translate jargon into common words. IMPORTANT: This course, previously titled "Writing in Plain Language," has been republished in our current course platform. Please be aware that the	07/31/24	QAS Self-Study
269	Personnel/Human Resources	Delegation, Coaching and Mentoring: Tools of Engagement and Empowerment	1.0	This course explains what good delegating, coaching and mentoring skills consist of, why they are important and how you can improve them. Due to the challenges and change inherent in 21st century organizations, the role of the manager becomes increasing complex. Too much work and too little time is now the norm for managers. Effective managers learn how to use the power of delegation, coaching and mentoring to efficiently achieve organizational outcomes. The goal of this course is to help you identify appropriate delegating tasks and help you empower your employees, so they are ready to complete the tasks on time and on budget.	01/31/24	QAS Self-Study
270	Personnel/Human Resources	Illinois Sexual Harassment Prevention Training v1.0	1.0	This course provides an overview of sexual harassment in the workplace. This includes a discussion of the Federal Laws related to sexual harassment as well as the Illinois Human Rights Act. This course also addresses types of sexual harassment, characteristics of a hostile work environment, what you should do if you experience sexual harassment, as well as certain protections against retaliation. Finally, this course concludes with a discussion of employer responsibilities and liabilities.	03/31/24	QAS Self-Study
271	Personnel/Human Resources	Millennials in the Workplace v2.1	1.00	People born in the United States between the early 1980s and early 2000s are commonly referred to as Millennials and among some, the we generation. Millennials represent approximately one-fourth of the U.S. population and are projected to represent nearly half of the world's workforce and 40 percent of the U.S. workforce by 2020 and 75 percent of it by 2025. This course will focus almost exclusively on that group of people referred to as Millennials and more specifically to issues ranging from recruiting to retaining them in the workplace. As you probably already know, these are not the easiest of challenges. Generally speaking, Millennials' attitudes and preferences regarding work, career advancement, and the workplace are not identical to	01/31/2025	QAS Self-Study



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#	Field of Study	Title	CPE Credit	Course Description	Expiration Date	Delivery Method
272	Personnel/Human Resources	Modern Supervision - Part 1 v2.0	4.0	This course (Parts 1 and 2) is especially designed to provide you with the knowledge that is essential to supervision and teach you about the key role that supervisors play in today's organizations. In most organizations it is recognized that a supervisory job is demanding and exacting. Success or failure of the entire organization is often contingent on the competency at the supervisory level. This course attempts to present and discuss those factors that are essential to being a successful supervisor. It is designed to meet the special needs of a person aspiring to a supervisory role, and the practicing supervisor. The course is applicable to all types of supervisory jobs whether in <u>manufacturing, service, or not-for-profit organizations. For the potential</u>	05/31/24	QAS Self-Study
273	Personnel/Human Resources	Modern Supervision - Part 2 v2.0	4.0	This course (Parts 1 and 2) is especially designed to provide you with the knowledge that is essential to supervision and teach you about the key role that supervisors play in today's organizations. In most organizations it is recognized that a supervisory job is demanding and exacting. Success or failure of the entire organization is often contingent on the competency at the supervisory level. This course attempts to present and discuss those factors that are essential to being a successful supervisor. It is designed to meet the	05/31/24	QAS Self-Study
274	Personnel/Human Resources	Sexual Harassment Prevention: What You Can Do v1.1	1.0	The floodgates are open, and an issue that, until recently, had been barely discussed is now out of the shadows and in the limelight. The subject of sexual harassment has gained unprecedented attention in the workplace, along with allegations against scores of high-profile executives. Patricia Reilly, chair of the employment and labor group at Murtha Cullina LLP, reminds financial executives of why they must be concerned with sexual harassment as well as what they can do to prevent it in their workplace.	03/31/2025	QAS Self-Study
275	Personnel/Human Resources	The Office of Tomorrow	1.5	2020 became the year of the virtual office. The velocity of change firms and private organizations experienced was jarring. What will tomorrow bring? We'll look towards the horizon to view trends and licensure changes impacting the future of our profession during this course. Author/Speaker: Frank Castillo	06/30/24	QAS Self-Study
276	Personnel/Human Resources	Wage and Hour Laws v2.1	1.0	This course provides an overview of the wage and hour laws as mandated by the U.S. Department of Labor (DOL) under the Fair Labor Standards Act. The course describes how the DOL enforces more than 180 federal labor laws, and how these mandates and the regulations that implement them cover many workplace activities. Areas of high concern include minimum wage, overtime pay, freedom from employment discrimination, unemployment insurance, and workers' compensation. In addition, the course examines the most recent significant change to the Fair Labor Standards Act that went into effect August 23, 2004 and is defined by the Department of Labor as the "FairPay rules." Speaker/Author: Colleen Neuharth McClain	05/31/24	QAS Self-Study



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#	Field of Study	Title	CPE Credit	Course Description	Expiration Date	Delivery Method
277	Regulatory Ethics	AICPA Ethics v3.0	4.0	This course is designed to satisfy the 4-hour ethics CPE requirement in most state jurisdictions. This ethics program will satisfy jurisdiction CPE requirements that are not state specific for a 4-hour regulatory ethics program based on the AICPA Code of Professional Conduct generally effective for periods after December 15, 2014. It addresses Ethics Code requirements for all members, members in public practice, members in business, and other members.	01/31/24	QAS Self-Study
278	Regulatory Ethics	Are You Independent?	1.0	This course provides an overview of the independence related rules and interpretations included within the American Institute of Certified Public Accountants (AICPA) Code of Professional Conduct. This Code prescribes a set of principles, rules, and interpretations that guide CPAs in performing their professional responsibilities. While this Code is applicable to both members in business and members in practice (an associate or affiliate member or international associate of the AICPA), this course focuses on the independence aspects for those members in public practice. A copy of the most recent AICPA Code of Professional Conduct is available on the AICPA website us.aicpa.org/research/standards/codeofconduct .	07/31/24	QAS Self-Study
279	Regulatory Ethics	California Regulatory Review for CPAs - Approval RRS-005-1110	2.0	This course is designed for California CPAs to meet the 2-hour Regulatory Review requirement. It includes a review of current the California Accountancy Act and the current California Board of Accountancy Regulations. Also included are historic and recent disciplinary actions taken by the Board to help illustrate how the acts and regulations are enforced. The course must be passed with a grade of at least 90 percent. The full California Accountancy Act and the California Board of Accountancy Regulations are included in the supplemental materials.	02/29/24	QAS Self-Study
280	Regulatory Ethics	CPA Ethics - General Standards And Acts Discreditable - 2023	1.0	This is an ethics course covering the general standards of professional conduct and business practices adhered to by CPAs in order to enhance their profession and maximize idealism, justice and fairness when dealing with the public, clients and other members of their profession. It presents general standards and acts discreditable found within the AICPA Code of Professional Conduct along with ethical dilemmas. This course fulfills a general ethics 1-hour requirement. It is suitable to fulfill the North Carolina ethics requirement. In Michigan, it is suitable as a 1-credit general ethics course to accompany the 1-credit state-specific course.	04/30/2025	QAS Self-Study
281	Regulatory Ethics	Ethics for Accountants (Updated 2021)	4.0	This is an ethics course covering standards of professional conduct and business practices adhered to by accountants such as CPAs in order to enhance their profession and maximize idealism, justice and fairness when dealing with the public, clients and other members of their profession. It also presents an approach - the threats and safeguards approach - to coping with ethical dilemmas. The Sarbanes-Oxley Act and its impact on business ethics, new internal control requirements, and the CPA's responsibilities are summarized. Finally, a brief discussion of the AICPA's Standards for Tax Service and the IMA's Statement of Ethical Professional Practice are included.	06/30/23	QAS Self-Study



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#	Field of Study	Title	CPE Credit	Course Description	Expiration Date	Delivery Method
282	Regulatory Ethics	Ethics for Alaska - 2021	4.0	This is an ethics course covering standards of professional conduct and business practices adhered to by accountants such as CPAs in order to enhance their profession and maximize idealism, justice and fairness when dealing with the public, clients and other members of their profession. It also presents an approach - the threats and safeguards approach - to coping with ethical dilemmas. The Sarbanes-Oxley Act and its impact on business ethics, new internal control requirements, and the CPA's responsibilities are summarized. Finally, a brief discussion of the AICPA's Standards for Tax Service and the IMA's Statement of Ethical Professional Practice are included.	07/31/23	QAS Self-Study
283	Regulatory Ethics	Ethics for Arizona - 2021	4.0	This is an ethics course for Arizona covering standards of professional conduct and business practices adhered to by accountants such as CPAs in order to enhance their profession and maximize idealism, justice and fairness when dealing with the public, clients and other members of their profession. It reviews and includes a minimum of one hour each on the AICPA Code of Professional Conduct and on the Arizona Statutes and Rules.	06/30/23	QAS Self-Study
284	Regulatory Ethics	Ethics for Arkansas - 2021	4.0	This general ethics course satisfies the 3 hour ethics requirement in the area of accounting professional conduct and ethics. CPAs must take an additional 1 hour of ethics from the Arkansas Board or their website to fulfill the 4 hours of ethics required for each renewal cycle. The course covers standards of professional conduct and business practices adhered to by accountants such as CPAs in order to enhance their profession and maximize idealism, justice and fairness when dealing with the public, clients and other members of their profession. It also presents an approach – the threats and safeguards approach – to coping with ethical dilemmas. The Sarbanes-Oxley Act and its impact on business ethics, new internal control requirements, and the CPA's	07/31/23	QAS Self-Study
285	Regulatory Ethics	Ethics for California - 2021	4.0	This is an ethics course covering standards of professional conduct and business practices adhered to by accountants such as CPAs in order to enhance their profession and maximize idealism, justice and fairness when dealing with the public, clients and other members of their profession. It also presents an approach - the threats and safeguards approach - to coping with ethical dilemmas. The Sarbanes-Oxley Act and its impact on business ethics, new internal control requirements, and the CPA's responsibilities are summarized. Finally, a brief discussion of the AICPA's Standards for Tax Service and the IMA's Statement of Ethical Professional Practice are included.	08/31/23	QAS Self-Study
286	Regulatory Ethics	Ethics For California - 2021	4.0	This is an ethics course covering standards of professional conduct and business practices adhered to by accountants such as CPAs in order to enhance their profession and maximize idealism, justice and fairness when dealing with the public, clients and other members of their profession. It also presents an approach - the threats and safeguards approach - to coping with ethical dilemmas. The Sarbanes-Oxley Act and its impact on business ethics, new internal control requirements, and the CPA's responsibilities are summarized. Finally, a brief discussion of the AICPA's Standards for Tax Service and the IMA's Statement of Ethical Professional Practice are included.	08/31/2023	QAS Self-Study



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#	Field of Study	Title	CPE Credit	Course Description	Expiration Date	Delivery Method
287	Regulatory Ethics	Ethics for Colorado - 2021	4.0	This is an ethics course for Colorado CPAs covering standards of professional conduct and business practices adhered to by accountants such as CPAs in order to enhance their profession and maximize idealism, justice and fairness when dealing with the public, clients and other members of their profession. It also presents an approach --the threats and safeguards approach --to coping with ethical dilemmas. Also included are some cases of AICPA ethics violations. Chapter 3 and the appendices cover Colorado Rules of the State Board of Accountancy, the Revised Statutes and Policies adopted by the Board. Note: This course does not fulfill the 2 CR&R Course for new or reactivating CPAs.	07/31/23	QAS Self-Study
288	Regulatory Ethics	Ethics for Connecticut - 2021	4.0	This is an ethics course covering standards of professional conduct and business practices adhered to by accountants such as CPAs in order to enhance their profession and maximize idealism, justice, and fairness when dealing with the public, clients, and other members of their profession. It also presents an approach - the threats and safeguards approach - to coping with ethical dilemmas.	08/31/23	QAS Self-Study
289	Regulatory Ethics	Ethics for Delaware - 2021	4.0	This is a Delaware ethics course covering standards of professional conduct and business practices adhered to by accountants such as CPAs in order to enhance their profession and maximize idealism, justice and fairness when dealing with the public, clients and other members of their profession. It also presents an approach - the threats and safeguards approach - to coping with ethical dilemmas. The Sarbanes-Oxley Act and its impact on business ethics, new internal control requirements, and the CPA's responsibilities are summarized.	07/01/23	QAS Self-Study
290	Regulatory Ethics	Ethics for Florida - 2020	4.0	This is an ethics course designed for Florida CPAs covering standards of professional conduct and business practices adhered to by accountants such as CPAs in order to enhance their profession and maximize idealism, justice and fairness when dealing with the public, clients and other members of their profession. It also presents an approach - the threats and safeguards approach - to coping with ethical dilemmas. Section 8 covers Florida Ethics, including a review of key sections within Chapter 61H1: Administrative Code, Chapter 473: Regulation of Professions and Occupations - Public Accountancy, and Chapter 455: Business and Professional Regulation: General Provisions.	06/30/23	QAS Self-Study



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#	Field of Study	Title	CPE Credit	Course Description	Expiration Date	Delivery Method
291	Regulatory Ethics	Ethics for Hawaii - 2021	4.0	This is an ethics course covering standards of professional conduct and business practices adhered to by accountants such as CPAs in order to enhance their profession and maximize idealism, justice and fairness when dealing with the public, clients and other members of their profession. It also presents an approach - the threats and safeguards approach - to coping with ethical dilemmas. The Sarbanes-Oxley Act and its impact on business ethics, new internal control requirements, and the CPA's responsibilities are	07/31/23	QAS Self-Study
292	Regulatory Ethics	Ethics for Idaho - 2021	4.0	This is an ethics course for Idaho CPAs covering standards of professional conduct and business practices adhered to by accountants such as CPAs in order to enhance their profession and maximize idealism, justice and fairness when dealing with the public, clients and other members of their profession. It also presents an approach - the threats and safeguards approach - to coping with ethical dilemmas. Also included are some cases of AICPA ethics violations. Section 8 covers Idaho State Specific Ethics.	07/31/23	QAS Self-Study
293	Regulatory Ethics	Ethics for Illinois - 2021	4.0	This is an ethics course covering standards of professional conduct and business practices adhered to by accountants such as CPAs in order to enhance their profession and maximize idealism, justice and fairness when dealing with the public, clients and other members of their profession. It also presents an approach - the threats and safeguards approach - to coping with ethical dilemmas. The Sarbanes-Oxley Act and its impact on business ethics, new internal control requirements, and the CPA's responsibilities are summarized. Finally, a brief discussion of the AICPA's Standards for Tax	07/31/23	QAS Self-Study
294	Regulatory Ethics	Ethics for Indiana - 2021	4.0	This is an ethics course covering standards of professional conduct and business practices adhered to by accountants such as CPAs in order to enhance their profession and maximize idealism, justice and fairness when dealing with the public, clients and other members of their profession. It also presents an approach - the threats and safeguards approach - to coping with ethical dilemmas. The Sarbanes-Oxley Act and its impact on business ethics, new internal control requirements, and the CPA's responsibilities are summarized. Finally, a brief discussion of the AICPA's Standards for Tax Service and the IMA's Statement of Ethical Professional Practice are included.	07/31/23	QAS Self-Study
295	Regulatory Ethics	Ethics for Iowa - 2021	4.0	This is an ethics course covering standards of professional conduct and business practices adhered to by accountants such as CPAs in order to enhance their profession and maximize idealism, justice and fairness when dealing with the public, clients and other members of their profession. It also presents an approach - the threats and safeguards approach - to coping with ethical dilemmas. The Sarbanes-Oxley Act and its impact on business ethics, new internal control requirements, and the CPA's responsibilities are summarized. Finally, a brief discussion of the AICPA's Standards for Tax Service and the IMA's Statement of Ethical Professional Practice are included.	07/31/23	QAS Self-Study



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#	Field of Study	Title	CPE Credit	Course Description	Expiration Date	Delivery Method
296	Regulatory Ethics	Ethics For Kansas - 2023	2.0	This is an ethics course covering integrity, objectivity and independence ethical standards for CPAs in order to enhance their profession and maximize idealism, justice and fairness when dealing with the public, clients and other members of their profession. Using the AICPA Code of Professional Conduct, it presents an approach to coping with ethical dilemmas. It fulfills the 2-hour ethics requirement for Kansas CPAs.	04/30/2025	QAS Self-Study
297	Regulatory Ethics	Ethics for Kentucky - 2021	4.0	This is an ethics course covering standards of professional conduct and business practices adhered to by accountants such as CPAs in order to enhance their profession and maximize idealism, justice and fairness when dealing with the public, clients and other members of their profession. It also presents an approach - the threats and safeguards approach - to coping with ethical dilemmas. The Sarbanes-Oxley Act and its impact on business ethics, new internal control requirements, and the CPA's responsibilities are summarized. Finally, a brief discussion of the AICPA's Standards for Tax Service and the IMA's Statement of Ethical Professional Practice are included.	07/31/23	QAS Self-Study
298	Regulatory Ethics	Ethics for Maine - 2021	4.0	This is an ethics course covering standards of professional conduct and business practices adhered to by accountants such as CPAs in order to enhance their profession and maximize idealism, justice and fairness when dealing with the public, clients and other members of their profession. It also presents an approach - the threats and safeguards approach - to coping with ethical dilemmas. The Sarbanes-Oxley Act and its impact on business ethics, new internal control requirements, and the CPA's responsibilities are summarized. Finally, a brief discussion of the AICPA's Standards for Tax Service and the IMA's Statement of Ethical Professional Practice are included.	07/31/23	QAS Self-Study
299	Regulatory Ethics	Ethics for Maryland - 2021	4.0	This is an ethics course covering standards of professional conduct and business practices adhered to by accountants such as CPAs in order to enhance their profession and maximize idealism, justice and fairness when dealing with the public, clients and other members of their profession. It also presents an approach - the threats and safeguards approach - to coping with ethical dilemmas. The Sarbanes-Oxley Act and its impact on business ethics, new internal control requirements, and the CPA's responsibilities are summarized. Finally, a brief discussion of the AICPA's Standards for Tax Service and the IMA's Statement of Ethical Professional Practice are included.	07/31/23	QAS Self-Study



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300	Regulatory Ethics	Ethics for Massachusetts - 2021	4.0	This is an ethics course for Massachusetts covering standards of professional conduct and business practices adhered to by accountants such as CPAs in order to enhance their profession and maximize idealism, justice and fairness when dealing with the public, clients and other members of their profession. It also presents an approach – the threats and safeguards approach – to coping with ethical dilemmas. The Sarbanes-Oxley Act and its impact on business ethics, new internal control requirements, and the CPA’s responsibilities are summarized. Finally, rules and regulations from the Massachusetts Board of Public Accountancy are presented.	06/30/23	QAS Self-Study
301	Regulatory Ethics	Ethics for Minnesota - 2021	4.0	This is an ethics course covering standards of professional conduct and business practices adhered to by accountants such as CPAs in order to enhance their profession and maximize idealism, justice and fairness when dealing with the public, clients and other members of their profession. It also presents an approach - the threats and safeguards approach - to coping with ethical dilemmas. The Sarbanes-Oxley Act and its impact on business ethics, new internal control requirements, and the CPA's responsibilities are summarized. Finally, a brief discussion of the AICPA's Standards for Tax Service and the IMA's Statement of Ethical Professional Practice are included.	07/31/23	QAS Self-Study
302	Regulatory Ethics	Ethics for Mississippi - 2022-2025	4.0	This is an ethics course for Mississippi CPAs covering standards of professional conduct and business practices adhered to by accountants such as CPAs in order to enhance their profession and maximize idealism, justice and fairness when dealing with the public, clients and other members of their profession. The final sections of the course cover Mississippi Licensing Rules and Regulations. Author/Speaker: Steve Spafford, CPA	06/30/25	QAS Self-Study
303	Regulatory Ethics	Ethics for Missouri - 2021	4.0	This is an ethics course covering standards of professional conduct and business practices adhered to by accountants such as CPAs in order to enhance their profession and maximize idealism, justice and fairness when dealing with the public, clients and other members of their profession. It also presents an approach - the threats and safeguards approach - to coping with ethical dilemmas. The Sarbanes-Oxley Act and its impact on business ethics, new internal control requirements, and the CPA's responsibilities are summarized. Finally, a brief discussion of the AICPA's Standards for Tax Service and the IMA's Statement of Ethical Professional Practice are included.	07/31/23	QAS Self-Study
304	Regulatory Ethics	Ethics for Nebraska - 2021	4.0	This is an ethics course covering standards of professional conduct and business practices adhered to by accountants such as CPAs in order to enhance their profession and maximize idealism, justice and fairness when dealing with the public, clients and other members of their profession. It also presents an approach - the threats and safeguards approach - to coping with ethical dilemmas. The Sarbanes-Oxley Act and its impact on business ethics, new internal control requirements, and the CPA's responsibilities are summarized. Finally, a brief discussion of the AICPA's Standards for Tax	07/31/23	QAS Self-Study



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#	Field of Study	Title	CPE Credit	Course Description	Expiration Date	Delivery Method
305	Regulatory Ethics	Ethics for Nevada - 2021	4.0	This is an ethics course covering standards of professional conduct and business practices adhered to by accountants such as CPAs in order to enhance their profession and maximize idealism, justice and fairness when dealing with the public, clients and other members of their profession. It also presents an approach - the threats and safeguards approach - to coping with ethical dilemmas. The Sarbanes-Oxley Act and its impact on business ethics, new internal control requirements, and the CPA's responsibilities are summarized. Finally, a brief discussion of the AICPA's Standards for Tax Service and the IMA's Statement of Ethical Professional Practice are included.	07/31/23	QAS Self-Study
306	Regulatory Ethics	Ethics for New Hampshire - 2021	4.0	This is an ethics course covering standards of professional conduct and business practices adhered to by accountants such as CPAs in order to enhance their profession and maximize idealism, justice and fairness when dealing with the public, clients and other members of their profession. It also presents an approach - the threats and safeguards approach - to coping with ethical dilemmas. The Sarbanes-Oxley Act and its impact on business ethics, new internal control requirements, and the CPA's responsibilities are	07/31/23	QAS Self-Study
307	Regulatory Ethics	Ethics for New Mexico - 2021	4.0	This is an ethics course covering standards of professional conduct and business practices adhered to by accountants such as CPAs in order to enhance their profession and maximize idealism, justice and fairness when dealing with the public, clients and other members of their profession. It also presents an approach - the threats and safeguards approach - to coping with ethical dilemmas. The Sarbanes-Oxley Act and its impact on business ethics, new internal control requirements, and the CPA's responsibilities are summarized. Finally, a brief discussion of the AICPA's Standards for Tax	07/31/23	QAS Self-Study
308	Regulatory Ethics	Ethics for New York - 2021	4.0	This is an ethics course for New York CPAs covering standards of professional conduct and business practices adhered to by accountants such as CPAs in order to enhance their profession and maximize idealism, justice and fairness when dealing with the public, clients and other members of their profession. It also presents an approach - the threats and safeguards approach - to coping with ethical dilemmas. Also included are some cases of AICPA ethics violations. The last section deals specifically with New York State rules on ethics as found in the NYS Law, Rules and Regulations.	08/31/23	QAS Self-Study
309	Regulatory Ethics	Ethics for New York - Tax Concentration - 2021	4.0	This is an ethics course for New York CPAs with a taxation concentration covering standards of professional conduct and business practices adhered to by accountants such as CPAs in order to enhance their profession and maximize idealism, justice and fairness when dealing with the public, clients and other members of their profession. It also presents an approach - the threats and safeguards approach - to coping with ethical dilemmas. Also included are some cases of AICPA ethics violations. Section 6 covers the Standards for Tax Professionals and IRS Circular 230. Section 8 deals	07/31/23	QAS Self-Study
310	Regulatory Ethics	Ethics for Ohio - 2022	3.0	This is an ethics course for Ohio CPAs covering standards of professional conduct and business practices adhered to by accountants such as CPAs in order to enhance their profession and maximize idealism, justice and fairness when dealing with the public, clients and other members of their profession. It also presents an approach - the threats and safeguards approach - to	06/01/23	QAS Self-Study



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#	Field of Study	Title	CPE Credit	Course Description	Expiration Date	Delivery Method
311	Regulatory Ethics	Ethics for Oklahoma - 2021	4.0	This is an ethics course covering standards of professional conduct and business practices adhered to by accountants such as CPAs in order to enhance their profession and maximize idealism, justice and fairness when dealing with the public, clients and other members of their profession. It also presents an approach - the threats and safeguards approach - to coping with ethical dilemmas. The Sarbanes-Oxley Act and its impact on business ethics,	07/31/23	QAS Self-Study
312	Regulatory Ethics	Ethics for Oregon - 2022	4.0	This is an ethics course for Oregon CPAs covering standards of professional conduct and business practices for CPAs in order to enhance their profession and maximize idealism, justice and fairness when dealing with the public, clients and other members of their profession. It presents ethical reasoning and the AICPA Code of Professional Conduct to assist with coping with ethical dilemmas. Sections 6, 8 and 9 cover the Oregon Statutes, Rules, and Code of Professional Conduct. An overview of recent case studies pertaining to Board rules is included in the Appendix. Speaker/Author: Steve Spafford, CPA	06/01/23	QAS Self-Study
313	Regulatory Ethics	Ethics for Pennsylvania - 2021	4.0	This is an ethics course covering standards of professional conduct and business practices adhered to by accountants such as CPAs in order to enhance their profession and maximize idealism, justice and fairness when dealing with the public, clients and other members of their profession. It also presents an approach - the threats and safeguards approach - to coping with ethical dilemmas. The Sarbanes-Oxley Act and its impact on business ethics, new internal control requirements, and the CPA's responsibilities are summarized. Finally, a brief discussion of the AICPA's Standards for Tax Service and the IMA's Statement of Ethical Professional Practice are included.	07/31/23	QAS Self-Study
314	Regulatory Ethics	Ethics for Rhode Island - 2021	4.0	This is an ethics course covering standards of professional conduct and business practices adhered to by accountants such as CPAs in order to enhance their profession and maximize idealism, justice and fairness when dealing with the public, clients and other members of their profession. It also presents an approach - the threats and safeguards approach - to coping with ethical dilemmas. The Sarbanes-Oxley Act and its impact on business ethics, new internal control requirements, and the CPA's responsibilities are summarized. Finally, a brief discussion of the AICPA's Standards for Tax Service and the IMA's Statement of Ethical Professional Practice are included.	07/31/23	QAS Self-Study



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#	Field of Study	Title	CPE Credit	Course Description	Expiration Date	Delivery Method
315	Regulatory Ethics	Ethics for Utah - 2021	4.0	This is a 4 hour course for Utah covering standards of professional conduct and business practices adhered to by accountants such as CPAs in order to enhance their profession and maximize idealism, justice and fairness when dealing with the public, clients and other members of their profession. It also presents the AICPA Code of Professional Conduct and an approach - the threats and safeguards approach – to coping with ethical dilemmas. The course includes one CPE hour of education on the Utah Certified Public Accountant Licensing Act and Certified Public Accountant Licensing Act Rules.	07/31/23	QAS Self-Study
316	Regulatory Ethics	Ethics for Vermont - 2021	4.0	This is an ethics course covering standards of professional conduct and business practices adhered to by accountants such as CPAs in order to enhance their profession and maximize idealism, justice and fairness when dealing with the public, clients and other members of their profession. It also presents an approach - the threats and safeguards approach - to coping with ethical dilemmas. The Sarbanes-Oxley Act and its impact on business ethics, <u>new internal control requirements, and the CPA's responsibilities are</u>	07/31/23	QAS Self-Study
317	Regulatory Ethics	Ethics for Washington CPAs - 2023	4.0	This is an ethics and regulations course for Washington CPAs covering standards of professional conduct and business practices adhered to by accountants such as CPAs in order to enhance their profession and maximize idealism, justice and fairness when dealing with the public, clients and other members of their profession. It covers the specific Washington Public Accountancy Act and the Board's rules and policies, <u>the profession's Code of</u>	01/01/2024	QAS Self-Study
318	Regulatory Ethics	Ethics Training for Texas CPAs - 2022	4.0	This is an ethics course for Texas CPAs covering standards of professional conduct and business practices adhered to in order to enhance their profession and maximize idealism, justice and fairness when dealing with the public, clients, and other members of their profession. It provides a <u>background on ethical principles and values, ethical codes and requirements</u>	03/31/24	QAS Self-Study
319	Regulatory Ethics	Ethics Training For Texas CPAs - 2023	4.00	This is an ethics course for Texas CPAs covering standards of professional conduct and business practices adhered to in order to enhance their profession and maximize idealism, justice and fairness when dealing with the public, clients, and other members of their profession. It provides a <u>background on ethical principles and values, ethical codes and requirements included in the AICPA Code of Professional Conduct, and a focus on the Texas</u>	11/30/24	QAS Self-Study
320	Regulatory Ethics	Ethics: The Regulatory Environment	1.0	Accounting practitioners, both near and far, would be quick to agree that regulatory ethics is the bedrock of our profession. But where to begin? Countless regulatory agencies exist, each with their own set of rules and standards. During this session, will examine each of the regulatory bodies that practitioners should be mindful of, along with overarching standards pronounced by each agency. Additionally, we'll address changes to the <u>current CPA licensure model along with global trends in business ethics.</u>	01/31/2025	QAS Self-Study



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321	Regulatory Ethics	Professional Ethics for CPAs	4.0	This course provides an overview of the American Institute of Certified Public Accountants (AICPA) Code of Professional Conduct. The AICPA Code of Professional Conduct is a set of principles, rules and interpretations that guides CPAs in the performance of their professional responsibilities. The course includes a discussion of those principles applicable to all members as well those that are applicable to members in business, members in public practice, and members in neither business nor public practice. A full copy of	01/31/24	QAS Self-Study
322	Regulatory Ethics	Regulatory Ethics: Practical Guidance	1.0	Ethical standards pronounced by the AICPA and the Department of the Treasury serve as needed guardrails designed to regulate professional behaviors for individuals working in both public accounting and in industry. During this session, we'll review two important publications issued by these rule making bodies: The AICPA Code of Professional Conduct Circular 230, Regulations Governing Practice before the Internal Revenue Service. Additionally, we'll examine the tenets of accounting ethics including a	01/31/2025	QAS Self-Study
323	Regulatory Ethics	Regulatory Ethics: Professional Standards Overview	2.0	Regulatory Ethics serves both the public as well as our own collective interests. Accounting practitioners are commonly referred to by our clients as their "most trusted advisor". However, that description can only be earned when our professional foundation is rooted in ethical behavior. This session provides learners with an essential overview of our regulatory ethics environment including: A discussion of the central tenets of accounting	01/31/2025	QAS Self-Study
324	Regulatory Ethics	Tax Ethics v3.0	2.0	This course discusses ethical issues associated with the performance of tax services. It addresses Treasury Department Circular 230, the AICPA's Standards for Tax Services, tax preparer penalties, and related sections of the AICPA's Code of Professional Conduct.	03/31/2025	QAS Self-Study
325	Regulatory Ethics	Understanding and Applying the AICPA Code of Professional Conduct	2.0	This course provides a high-level overview of the American Institute of Certified Public Accountants (AICPA) Code of Professional Conduct. This Code prescribes a set of principles, rules and interpretations that guide CPAs in performing their professional responsibilities. The course highlights principles that are applicable to all members (an associate or affiliate member or international associate of the AICPA) as well those applicable to members in business, members in public practice, and members in neither business nor public practice. A copy of the most recent AICPA Code of Professional Conduct is available on the AICPA website, us.aicpa.org/research/standards/codeofconduct . Speaker/Author: Kelen F. Camehl, CPA, MBA	07/31/24	QAS Self-Study
326	Specialized Knowledge	Guide To Commercial Real Estate and Finance - Part 1	3.00	This course series is designed to help both working CPAs and financial personnel develop the knowledge and techniques required to review a variety of financing activities pertinent to businesses and commercial and residential real estate endeavors. The course series focuses on the basic principles, concepts, terminology and instruments to learn and understand how to	12/31/24	QAS Self-Study



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#	Field of Study	Title	CPE Credit	Course Description	Expiration Date	Delivery Method
327	Specialized Knowledge	Guide to Commercial Real Estate and Finance - Part 2	2.50	This course series is designed to help both working CPAs and financial personnel develop the knowledge and techniques required to review a variety of financing activities pertinent to businesses and commercial and residential real estate endeavors. The course series focuses on the basic principles, concepts, terminology and instruments to learn and understand how to review a client or loan, and also delineates the various services available in	12/31/2024	QAS Self-Study
328	Specialized Knowledge	Guide to Commercial Real Estate and Finance - Part 3	2.00	This course series is designed to help both working CPAs and financial personnel develop the knowledge and techniques required to review a variety of financing activities pertinent to businesses and commercial and residential real estate endeavors. The course series focuses on the basic principles, concepts, terminology and instruments to learn and understand how to	12/31/24	QAS Self-Study
329	Taxes	Auto Rules - 2022	2.0	Operating costs for vehicles used in the course of a taxpayer's business are deductible. Thus, when taxpayers use their vehicles in their businesses or employment, they can deduct that portion of the cost of operating their vehicle. Such costs that can be deducted are property taxes that are paid on their vehicle if deductions are itemized on Schedule A. This course reviews apportionment of personal and business use, the actual cost method, the standard mile-age method, and expensing. Moreover, this course informs	06/30/23	QAS Self-Study
330	Taxes	Auto Rules - 2022	2.00	Operating costs for vehicles used in the course of a taxpayer's business are deductible. Thus, when taxpayers use their vehicles in their businesses or employment, they can deduct that portion of the cost of operating their vehicle. Such costs that can be deducted are property taxes that are paid on their vehicle if deductions are itemized on Schedule A. This course reviews	06/30/2023	QAS Self-Study
331	Taxes	Bankruptcy Tax Issues - 2023	2.00	The Bankruptcy Abuse Prevention and Consumer Protection Act was enacted to minimize abuse of the bankruptcy system. Included in this Act were tax law changes and other changes that individuals, partnerships, and corporations will see in the bankruptcy procedures and qualifications. This mini-course	02/29/2024	QAS Self-Study
332	Taxes	Basic Fringe Benefits - 2022	3.5	This course is an overview of basic fringe benefits and examines their mechanics, compensation methods, valuation, withholding, and accounting. Achievement awards, term life insurance, medical reimbursement, meals & lodging, educational assistance, dependent care, employer-provided automobiles, interest-free loans, etc. are identified. Employer and employee economic and tax considerations are recognized. Fringe benefit requirements and limits are specified and ERISA compliance requirements are determined. Speaker/Author: Danny Santucci	07/31/23	QAS Self-Study



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333	Taxes	Basic Fringe Benefits - 2023	3.50	This course is an overview of basic fringe benefits and examines their mechanics, compensation methods, valuation, withholding, and accounting. Achievement awards, term life insurance, medical reimbursement, meals & lodging, educational assistance, dependent care, employer-provided automobiles, interest-free loans, etc. are identified. Employer and employee economic and tax considerations are recognized. Fringe benefit requirements and limits are specified and ERISA compliance requirements are determined.	02/29/2024	QAS Self-Study
334	Taxes	Basic Marital Tax Matters -2023	2.0	In this course, initial marital tax matters such as living together, property rights, premarital agreements, filing status, exemptions, and dependents are explored. The detailed support test for children of divorced or separated parents, the tax treatment of back child support, the deduction of divorce costs, and estimated tax payments are reviewed. Emphasis is given to marital property rules, married versus unmarried tax rate comparison, head of household status, and treatment of refunds and deficiencies.	02/29/2024	QAS Self-Study
335	Taxes	Business Travel & Entertainment - 2023	2.00	Taxpayers are once again looking to CPAs for guidance and planning related to travel and entertainment expenses. This comprehensive course examines and explains the practical aspects of business travel and entertainment deductions. To determine the expenses that taxpayers are able to deduct, fundamentals are reviewed and planning opportunities are identified. Practitioners will learn to master the proper administration of these complex and often cumbersome provisions.	02/29/2024	QAS Self-Study
336	Taxes	Corporate Taxation – 2023	2.00	This course examines and explains the basics of corporate taxation. The focus is on regular or C corporations, their formation, and operation under tax law. The advantages and disadvantages of corporations are examined; incorporation and capitalization issues are discussed; and, basic tax rates and specialty taxes are reviewed. The tax treatment of operational expenses and deductions is outlined, and accounting periods and methods are explored. Finally, the dangers of multiple corporations and corporate distributions are	02/29/2024	QAS Self-Study
337	Taxes	Deductions for Business Use of a Home	1.00	This course provides an overview of deductions for business use of a home. This includes a discussion of the impact of renting a vacation home for a certain number of days as well as ways to maximize a taxpayer's home office deductions. This course also addresses the importance of an accountable plan.	09/30/2023	QAS Self-Study



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#	Field of Study	Title	CPE Credit	Course Description	Expiration Date	Delivery Method
338	Taxes	Deductions for Business Use of Home	1.0	This course provides an overview of deductions for business use of a home. This includes a discussion of the impact of renting a vacation home for a certain number of days as well as ways to maximize a taxpayer's home office deductions. This course also addresses the importance of an accountable plan.	09/30/23	QAS Self-Study
339	Taxes	Divorce Transfers & Settlements - 2023	2.00	Participants will learn how to apply, implement, and evaluate the strategic tax aspects of marital dissolutions and living together arrangements. Current perspectives on property transfers and asset divisions are examined with an emphasis on planning considerations. This course reviews property settlements and other transfers incident to divorce. Basis allocation, third party transfers, and purchases between spouses are also examined. Common	02/29/2024	QAS Self-Study
340	Taxes	Employee Compensation and Benefits - 2022	3.0	The various ideas, methods, and techniques to optimize the overall compensation package for key employees and principals are examined in this mini-course. Generally, businesses may deduct employees' pay including wages, salaries, and other perks. Certain fringe benefits that can provide an unusually tax-favored manner of supplementing compensation are described and evaluated. In addition, equity participation is explored through stock sales, repurchase agreements, incentive stock options, ESOT's, stock options,	06/30/23	QAS Self-Study
341	Taxes	Employee Compensation And Benefits - 2023	3.00	The various ideas, methods, and techniques to optimize the overall compensation package for key employees and principals are examined in this course. Generally, businesses may deduct employees' pay including wages, salaries, and other perks. Certain fringe benefits that can provide an unusually tax-favored manner of supplementing compensation are described and evaluated. In addition, equity participation is explored through stock sales, repurchase agreements, incentive stock options, ESOTs, stock options, and	02/29/2024	QAS Self-Study
342	Taxes	Employee vs Independent Contractor: Part 1 - Classification	1.0	This course provides an overview of the factors that you should consider when classifying your worker as either an employee or an independent contractor. This includes a discussion of the common law test, behavioral aspects, and the type and degree of instruction provided. This course also addresses topics such as the method of payment, type of relationship, and permanency of the relationship, along with the 20-factor test.	09/30/23	QAS Self-Study
343	Taxes	Employee vs Independent Contractor: Part 1 - Classification	1.00	This course provides an overview of the factors that you should consider when classifying your worker as either an employee or an independent contractor. This includes a discussion of the common law test, behavioral aspects, and the type and degree of instruction provided. This course also addresses topics such as the method of payment, type of relationship, and permanency of the relationship, along with the 20-factor test.	09/30/2023	QAS Self-Study
344	Taxes	Employee vs Independent Contractor: Part 2 - Exception to the Worker Classification Criteria	1.00	This course provides an overview of the exceptions to the worker classification criteria. This includes an understanding of the differences between statutory and non-statutory employees as well as information regarding the safe harbor criteria under Section 530 of the Revenue Act 1978..	09/30/2023	QAS Self-Study



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345	Taxes	Employee vs Independent Contractor: Part 2-Exception to the Worker Classification Criteria	1.0	This course provides an overview of the exceptions to the worker classification criteria. This includes an understanding of the differences between statutory and non-statutory employees as well as information regarding the safe harbor criteria under Section 530 of the Revenue Act 1978. Speaker/Author: Dr. Inibehe Adesanya	09/30/23	QAS Self-Study
346	Taxes	Family Tax Planning -- 2022	2.0	While the nuclear family remains the center point of society, today it is under tremendous economic and social pressure. This course is designed to cover "hot" topics having a direct impact on the practitioner who represents any client with family issues. The emphasis is on using tax solutions to ease family economic concerns permitting the practitioner to be a real tax hero. Author/Speaker: Danny Santucci	06/30/23	QAS Self-Study
347	Taxes	Family Tax Planning - 2023	2.0	While the nuclear family remains the center point of society, today it is under tremendous economic and social pressure. This course is designed to cover "hot" topics having a direct impact on the practitioner who represents any client with family issues. The emphasis is on using tax solutions to ease family economic concerns permitting the practitioner to be a real tax hero.	02/29/2024	QAS Self-Study
348	Taxes	Fast Track Retirement Planning - 2022	3.0	We are all (including tax practitioners) getting older, and the need for effective retirement planning has never been greater. This mini-course is essential for participants who wish to attain a comfortable retirement for themselves and their clients by maximizing tax saving strategies. Retirement income needs are analyzed; Social Security benefits are determined, and	06/30/23	QAS Self-Study
349	Taxes	Fast Track Retirement Planning - 2023	3.0	We are all (including tax practitioners) getting older, and the need for effective retirement planning has never been greater. This course is essential for participants who wish to attain a comfortable retirement for themselves and their clients by maximizing tax saving strategies. Retirement income needs are analyzed; Social Security benefits are determined, and distribution options from IRAs and retirement plans are explored.	02/29/2024	QAS Self-Study
350	Taxes	FMN - 2022/December, Seg 2 - Transfer Pricing: Controversy and Compliance	2.0	According to the results of a 2020 Global Multinational Corporation (MNC) Tax Survey, transfer pricing ranks at the top of the complexity scale. In this segment Grant Thornton's Steven Wrappe tries to make it more understandable by offering an innovative seven-step approach to transfer pricing. He also discusses the controversies surrounding this challenging topic and reviews recent trends and their implications on corporations today.	07/12/2024	QAS Self-Study



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351	Taxes	FMN - 2022/December, Seg 3 - Statements on Standards for Tax Services: New Rules	2.0	Statements on Standards for Tax Services, or SSTs, are tax standards that apply to all members of the AICPA. In August of 2022, the AICPA released an Exposure Draft that would update the SSTs and create new standards around data protection, reliance on tools and representation before taxing	07/12/2024	QAS Self-Study
352	Taxes	FMN - 2023/February, Seg 4 - Tax Update: What We Need to Know	2.00	The Consolidated Appropriations Act, 2023, finalized the government's budget for fiscal year 2023. Barbara Weltman, a prolific speaker and author on tax issues, reviews the Act and provides an update on a number of tax issues impacting business. Topics include SECURE Act 2.0, the R&D credit, clean energy credits, uncertain tax positions, new government rates for 2023, and revisions to some tax forms.	09/14/24	QAS Self-Study
353	Taxes	FMN Plus-2023/April, Seg 1 - Congratulations, You've Got a Foreign Corporation!	2.0	Form 5471 and its accompanying schedules are used to satisfy the reporting requirements of transactions between foreign corporations and U.S. persons. Attorney Phillip Hodgen reviews who has to file a Form 5471, what's important to know, and how to avoid mistakes when filing the form. He also provides examples from his personal experience with the damage control process when dealing with this complex subject area.	11/14/2024	QAS Self-Study
354	Taxes	FMN Plus-2023/April, Seg 6 - Tax Update for Your Business	2.0	There have been a number of pronouncements and decisions from the IRS and the courts that impact the deduction of expenses for federal taxes. Tax expert Barbara Weltman reviews the latest developments impacting business and individual tax preparation. Topics include vehicle expenses, retirement plans, advertising expenses, the research credit, and digital assets. She also reviews what's new related to e-filing, the IRIS portal, and the CAP program.	11/14/2024	QAS Self-Study
355	Taxes	FMN Plus-2023/May, Seg 2 - Captive Insurance Companies: Operations and Taxation	2.0	The cost of insurance is going sky high. One option that many companies employ to control costs is creating a captive. In fact, 90% of Fortune 1000 companies currently use them. Greg Domareki, a Tax Principal with the accounting and consulting firm Wipfli, reviews all aspects of setting up and maintaining a captive insurance company. Topics include performing a feasibility assessment, determining the proper structure, and selecting the domicile location. The benefits and tax advantages of being a captive is also	12/14/2024	QAS Self-Study
356	Taxes	FMN Plus-2023/May, Seg 6 – Implications of the 2024 Budget Proposal, the CHIPS Act, Scams, and Other Issues	2.0	In March, President Biden presented his budget proposed for the fiscal year 2024. It includes a number of potential tax increases for corporate America. Tax expert Barbara Weltman reviews these potential changes as well as other proposed actions that would impact certain sectors of the economy. Other topics discussed include the IRS Dirty Dozen list of scams and new developments related to the the CHIPS Act, Form 1099-K, and corporate transparency	12/14/2024	QAS Self-Study
357	Taxes	Inflation Reduction Act of 2022	2.00	For most of 2022, it was doubtful that Congress would enact any tax legislation. However, Democrats were finally able to negotiate and pass the Inflation Reduction Act (IRA) in August 2022. This course summarizes the tax legislation embodied in the IRA permitting students to advise clients on how these changes can impact tax planning. This course is an overview providing reference to selected individual, business, and corporate tax provisions enacted, extended, or modified by the IRA. The resulting major tax changes carry special meaning to the tax practitioner and return preparer. The course	02/29/2024	QAS Self-Study



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358	Taxes	Internal Revenue Service Tax Audit Resolution	1.00	This course provides an overview of IRS tax audit resolution. This includes a discussion of the meaning of an IRS audit, how the IRS audit process works, as well as how to resolve IRS audit issues. This course also addresses the differences between a correspondence audit and an in-person audit.	09/30/2023	QAS Self-Study
359	Taxes	Is Your Business a Hobby? Tax Implication of the Wrong Classification	1.0	This course provides an overview of business vs. hobby considerations and the resulting tax implications. This course includes a discussion of the necessary steps to take for your hobby to be classified as a business by addressing the specific factors considered in determining if a hobby is a business. Speaker/Author: Dr. Inibehe Adesaanya	09/30/23	QAS Self-Study
360	Taxes	Is Your Business a Hobby? Tax implication of the wrong classification	1.00	This course provides an overview of business vs. hobby considerations and the resulting tax implications. This course includes a discussion of the necessary steps to take for your hobby to be classified as a business by addressing the specific factors considered in determining if a hobby is a business.	09/30/2023	QAS Self-Study
361	Taxes	Medical, Charitable, and Casualty Deductions - 2022	2.5	We may all confront issues that directly impact how much we can deduct. This course is designed for participants who want to explore and examine the tax consequences of medical costs, charitable contributions, and casualty and theft losses, especially in relation to their deductibility. The emphasis is examining a wide variety of situations related to these items and the extent to which they may or may not result in a deduction and what limitations on deductibility may be imposed.	09/30/23	QAS Self-Study



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As of: 06/02/23

#	Field of Study	Title	CPE Credit	Course Description	Expiration Date	Delivery Method
362	Taxes	Out-of-State Sales & Nexus After South Dakota v. Wayfair	1.0	This course provides an overview of the implications of expanding business to different states. This includes a discussion of the term nexus, the different types of nexus, as well as the impacts from South Dakota v. Wayfair, Inc. – 138 S. Ct. 2080 (2018) on sales tax. Author/Speaker: Ini Adesanya	09/30/23	QAS Self-Study
363	Taxes	Out-of-State Sales and Nexus After South Dakota v. Wayfair	1.00	This course provides an overview of the implications of expanding business to different states. This includes a discussion of the term nexus, the different types of nexus, as well as the impacts from South Dakota v. Wayfair, Inc. - 138 S. Ct. 2080 (2018) on sales tax.	10/01/2023	QAS Self-Study
364	Taxes	Passive Loss and At-Risk Rules - 2022	2.5	With the adoption of the passive loss limitation rules, taxpayers are looking to CPAs for guidance related to what deductions are allowed, disallowed, or suspended. Updating practitioners on the practical aspects of §469, this course addresses the needed skill to handle these pragmatic issues. Fundamentals are reviewed, planning opportunities are identified, and creative strategies are discussed and evaluated along with remaining traditional approaches. The goal of this instructive course is to understand and solve client problems under §469, with emphasis on tax savings ideas.	09/30/23	QAS Self-Study
365	Taxes	Passive Loss and At-Risk Rules – 2023	2.5	With the adoption of the passive loss limitation rules, taxpayers are looking to CPAs for guidance related to what deductions are allowed, disallowed, or suspended. Updating practitioners on the practical aspects of §469, this course addresses the needed skill to handle these pragmatic issues. Fundamentals are reviewed, planning opportunities are identified, and creative strategies are discussed and evaluated along with remaining	02/29/2024	QAS Self-Study
366	Taxes	Property Dispositions - 2022	2.0	Tax reform provisions have frequently changed the tax on profits realized from the disposition of real estate. This has forced investors to seek “escape hatches” from fluctuating capital gains taxes. Tax-deferred exchanges permit the disposition of property often with the taxpayer receiving significant cash but without the payment of any tax. Functionally, an exchange is a “bridge” over the normally taxable event of moving from one property to another. This course alerts the practitioner to the different planning opportunities that	07/31/23	QAS Self-Study



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#	Field of Study	Title	CPE Credit	Course Description	Expiration Date	Delivery Method
367	Taxes	Retirement Plans - 2022	3.0	We are all (including tax practitioners) getting older, and the need for effective retirement planning has never been greater. This course is essential for participants who wish to attain a comfortable retirement for themselves and their clients by maximizing tax-saving strategies. Designed to improve the quality of services to clients and the profitability of engagements, this presentation integrates federal taxation with retirement planning. The emphasis is on practical simplicity in dealing with the self-employed and	09/30/23	QAS Self-Study
368	Taxes	S Corporations - 2022	3.0	In this course, the intricacies of setting up and terminating an S corporation are detailed and taxation is discussed. The numerous advantages and disadvantages of this entity are identified to help practitioners determine whether the S corporation is most suitable for their clients. Eligible domestic corporations can avoid double taxation by electing to be treated as an S corporation under the rules of Subchapter S. Subchapter S provides an optional method of corporate taxation and allows small business corporations	07/31/23	QAS Self-Study
369	Taxes	Selected Business Expenses – 2023	2.00	Business expenses are the costs of carrying on a trade or business, and they are usually deductible if the business is operated to make a profit. This course reviews various expenses that businesses may deduct and the requirements that must be met for those expenses to qualify for deduction. Furthermore, practitioners can use this as a guide to determine which of their clients' taxes are deductible as business expenses.	02/29/2024	QAS Self-Study
370	Taxes	Tax Benefits - Research and Development	1.00	This course provides an overview of the tax benefits of research and development (R&D). This includes a discussion of the different tax benefits for developing intellectual property versus acquiring intellectual property as well as what expenses qualify as R&D expenses. This course also includes a discussion of the R&D tax credit.	09/30/2023	QAS Self-Study
371	Taxes	Tax Benefits-Research & Development	1.0	This course provides an overview of the tax benefits of research and development (R&D). This includes a discussion of the different tax benefits for developing intellectual property versus acquiring intellectual property as well as what expenses qualify as R&D expenses. This course also includes a discussion of the R&D tax credit. Author/Speaker: Ini Adesanya	09/30/23	QAS Self-Study



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#	Field of Study	Title	CPE Credit	Course Description	Expiration Date	Delivery Method
372	0	Cyber and Expense Payment Frauds v2.1	1.0	Technology is making a huge impact on every facet of the business world. The expense reporting function is no exception. It is making it easier for employees to play games, but at the same time it provides companies the tools they need to identify that game playing without spending a fortune. This course takes a deep dive into the developing expense reporting issues and reveals the way savvy companies can effectively deal with them. The issues evaluated in this course are critical to those who want to run a cost-effective, efficient, and fraud-resistant expense reimbursement function.	03/31/2025	QAS Self-Study
373	0	How Much is My Business REALLY Worth? Exploring Business Valuation Fundamentals	2.50	What makes a business valuable? Who determines value? What are the key factors that make businesses valuable? In this course, we explore the different ways to value a business. We will apply foundational valuation and corporate finance concepts to real world examples, in an effort to see what makes up an investment's price.	05/31/2024	QAS Self-Study
374	0	How You Can Manage Cyber Threats from Within v1.1	1.0	As we experience an unprecedented surge in the frequency and magnitude of cyber attacks, more organizations are focusing increased attention and resources on enterprise security. Yet, many businesses overlook the fact that "insiders" can do much more severe damage to their systems and data than could external sources. Ron Temske, vice president of security solutions for Logicalis U.S., explains what you can do to manage cyber threats from within your own organization.	03/31/2025	QAS Self-Study
375	0	Your Ethics Program: How To Make It Work v1.1	1.0	It almost goes without saying that organizations, and their financial executives, do want to act ethically. Yet, why do so many corporate ethics programs fail to have an impact on worker conduct? Here, Mary Jo Green and Susan Koski-Grafer, who serve on the board of advisors of H.S. Grace & Company, explain why your success at building and maintaining ethical behavior requires much more than simply talking about integrity or issuing guidelines for moral conduct.	03/31/2025	QAS Self-Study