FALL 2025 CPA PROGRAM

PUBLIC ACCOUNTANT
ENROLLED AGENT
OTHER TAX PRACTITIONER

The objective of the program is to broaden the knowledge of accountants and tax practitioners in order to relate particular specialties to the field of accounting and to examine developments in these professions.

ATTENDANCE: Accurate records of attendance will be maintained to verify and report continuing education hours. Three (3) Continuing Professional Education (CPE) units are awarded for each attended, for a possible total of thirty-six (36) CPEs. To ensure the integrity of the program, student attendance will be monitored by the instructors throughout each presentation. A certificate will be available at the end of the/ course that you will be able to print directly from your own computer through Turbine.

COURSE NUMBERS AND DAYS:	**XGD-079-5301**	**Mondays**	**6:30pm – 9:30pm**
	XGD-079-5302	**Wednesdays**	**6:30pm – 9:30pm**

All classes will be presented on Zoom and administered through Turbine

COST FOR THE 12 WEEKS - $359.00 (Regardless of how many presentations you attend).

REGISTRATION INFORMATION: Choose the course number that corresponds to the day you plan to attend the most. If you have a schedule conflict you may attend class at one of the two days offered. To receive CPE units, students MUST be registered/paid before they attend class. The course fee MUST be paid when you register. To register, complete the attached form and return to CCAC with a check or money order made payable to "CCAC" or call 412.788.7546 to register with a credit card at least one week before the course begins. Requests for refunds must be received 24 hours prior to the start of Week 1: Call 412.788.7546. Refunds will NOT be processed after the start of Week 1.

To Register Online go to our Website: Cpa Professional Continuing Ed Program

Week 1: Title: Navigating Feedback and Criticism with Integrity

Speaker: Lindsay Pfister, EdD, SHRM SCP and PCC

Category: Ethics (Basic) **Mon 9/15 & Wed 9/17**

Giving and receiving feedback is a part of everyday professional life — but doing it with integrity requires intention, skill, and ethical awareness. The way we offer criticism, respond to it, and handle apologies shape not only our working relationships but also our reputation and professional culture.

Navigating Feedback and Criticism with Integrity is an interactive 3-hour ethics course designed to explore the essential, yet often overlooked, ethical dimensions of communication. You'll learn how to offer feedback in a way that promotes trust and accountability, how to receive criticism without defensiveness, and how to engage in meaningful apologies that repair rather than deflect.

Through practical discussion, real-world scenarios, and guided reflection, you'll leave with actionable strategies and a stronger understanding of how integrity shows up in everyday conversations. Whether you're leading a team or working within one, these tools can help you foster a more honest, respectful, and ethically grounded workplace.

Week 2: Working in a Professional Practice What to Consider When Someone Has a Disability

Speaker: Christine Brookins, Financial Advisor*, Oakbridge Advisor Group

Category: General **Mon 9/22 & Wed 9/24**

Course 1:
Working in a Professional Practice - What to Consider When Someone Has a Disability

Uniqueness, Dignity & Belonging
- **Maintaining Trust, Respect and Professionalism**
- **Engaging the Disability Community**
- **The Power Behind "Disability"**
- **Visible and Invisible Disabilities**
- **Engagement Strategie• Considerations**

Continued on next page

- **Accommodations**

Making a Difference
- **Does this impact my client?**
- **How do I know?**
- **What is different about Special Needs Planning?**
- **Key Planning Phases**
- **Factors of Special Needs Planning**

Securities and investment advisory services offered through **Osaic Wealth, Inc. member FINRA/SIPC. **Osaic Wealth** is separately owned and other entities and/or marketing names, products or services referenced here are independent of Osaic Wealth.*

Week 3: Ultra High Net Worth Investment Strategies with Tax Considerations

Speaker: Brian Bohn, CPWA®, CFP®, CFPA

Category: Tax **Mon 9/29 & Wed 10/1**

This course will discuss modern investment strategies for ultra-high-net-worth clientele. This will include specific strategies that are well suited from a personal tax perspective.

Week 4: Property Taxation in Pennsylvania Update

Speaker: Michael J. Suley, CRB, CRS

Category: Property Taxes (Basic) **Mon 10/6 & Wed 10/8**

Pennsylvania is the only state that doesn't require cyclical reassessment. Some counties haven't updated values in 50 years. Who is paying too much in taxes? There are ways to see if you are paying your fair share. Reassessment and Appeals procedures in Allegheny County and surrounding counties.

Mike Suley is the Chairman of the Allegheny County Board of Property Assessment Appeals and Review

Week 5:   Health Care Issues as Part of Retirement Planning for Your Clients

Speaker: William McKendree, JD

Category: Other (Intermediate) **Mon 10/13 & Wed 10/15**

Why healthcare decisions are an essential of any comprehensive and effective lifetime planning. Transitioning from employer provided healthcare coverage to the Medicare system. How to use the Medicare system effectively is an essential part of transition planning for individuals 65 or older-what options are available, how to access them and how to evaluate which options will work best.

Week 6: Internal Auditing Part 1

Speaker: Nancy Menold, CPA, CIA, CFE

Category: Accounting & Auditing (Basic) **Mon 10/20 & Wed 10/22**

This course will discuss internal auditing basics including the purpose of internal auditing, planning and executing risk-based audits, documenting testing results, communicating audit results to the client, and the role of quality assurance.

Week 7: Internal Auditing Part 2

Speaker: Nancy Menold, CPA, CIA, CFE

Category: Accounting & Auditing (Basic) **Mon 10/27 & Wed 10/29**

This course is a continuation of Part 1. Additionally, the course will discuss what happens after the audit is completed, Board and executive management's expectations of internal audit, and how to foster open communication across all levels of management throughout the organization.

Week 8:   Cybersecurity for the Users

Speaker: Charmaine Sample, Ph.D.

Category: Tax (Basic) **Mon 11/3 & Wed 11/5**

Cybersecurity stories routinely capture headlines. Seemingly innocuous behaviors resulting in fraud, theft and abuse can cast fear, uncertainty and doubt, aka FUD, amongst the user community. This course seeks to de-mystify cybersecurity, while offering concrete cybersecurity basics that can be understood by all users, from novice to expert.

Week 9: COBRA

Speaker: William McKendree, JD

Category: Employee Benefits **Mon 11/10 & Wed 11/12**

COBRA (the law, not the snake) is an abbreviation of Consolidated Omnibus Budget Reconciliation Act. It gives employees (and their families) the capacity to choose to continue group health benefits for limited periods of time under certain circumstances. This presentation will be an overview of how COBRA works: who it applies to, its guarantee of coverage, its duration of coverage, and how it integrates with other health benefits (Medicare in particular).

Week 10: Effective Communication and Collaboration Clients and Professional Team

Speaker: Christine Brookins, Financial Advisor*, Oakbridge Advisor Group

Category: General **Mon 11/17 & Wed 11/19**

Course 2: Effective Communication & Collaboration for Accountants - Enhancing Professional Relationships with Financial Advisors, Lawyers, and Clients

Learning Objectives
• Comprehend the Critical Role of Communication in Accounting
• Identify Key Collaborative Strategies Among Financial and Legal Professionals
• Master Best Practices for Client Communication
• Develop Skills to Enhance Professional Networking
• Implement Ethical Communication Standards

Why is communication important?
• Beyond Numbers: The Human Element
• Preventing Miscommunication
• Building Trust with Clients
• Facilitating Team Collaboration
• Adapting to Diverse Audiences

Key Communication Skills
• Active Listening
• Clarity and Conciseness
• Emotional Intelligence
• Persuasion and Negotiation
• Adaptability

The Growing Need for Collaboration
• Complex Financial Landscapes
• Client Expectations for Integrated Services
• Aligning Professional Goals
• Enhancing Service Offerings
• Staying Competitive in the Market

The Role of Accountants in Financial Teams
• Tax Expertise

NO CLASS November 24 and 26 due to Thanksgiving Week

Week 11: 2025   The Latest from the PA Dept. of Revenue

Speaker: Barry Gerber, Attorney at Law, CPA

Category: Tax **Mon 12/1 & Wed 12/3**

Tax rules from PA Department of Revenue, including current and prior questions and answers.

Week 12:

Speaker: Matthew Robinowitz, JD

Category: Ethics (Basic) **Mon 12/8 & Wed 12/10**

The course will cover the rules governing practice before the Internal Revenue Service, as contained in Circular 230. The course will cover also cover aspects of the AICPA Code of Professional Responsibility.

SEE NEXT PAGE FOR REGISTRATION FORM

PROFESSIONAL CONTINUING EDUCATION NON-CREDIT REGISTRATION FORM

Please print. Complete and return this form with payment (if applicable). No further notice will be provided. N25FA

Date of Birth (*required for enrollment*) MM/DD/YYYY:							
Last Name:		First Name:				Middle Initial:	
Street Address:						Apt:	
City:		State:		Zip:		County:	
Home Phone:				Alternate Phone:			
Email Address:						New Address (X):	☐

Have you ever served in the Military (circle one)? No Yes (see below)
Are you a dependent of a Veteran (circle one)? No Yes (see below)

NOTE: If YES to either question, please contact the CCAC Veterans Services Office at 412.237.6503.

Veteran Benefits:
☐ 35 Dependent ☐ Chapter 33 Post 9/11 Gi Bill ☐ Veteran not using benefits

Place of Permanent Address (check one)
- Allegheny County (1)
- Out-of-State (5)
- Out-of County

This voluntary information is compiled by the college for statistical purposes only and no personally identifiable information will be released.

Marital Status:
- Single
- Married
- Divorced
- Separated
- Widowed

Sex:
☐ Male ☐ Female

Do you consider yourself to be Hispanic/Latino/Spanish Origin?
- Yes
- No

In addition, select one or more of the following racial categories to describe yourself:
- American Indian/Alaskan
- Asian
- Black or African American
- White or Caucasian
- Native Hawaiian or Pacific Islander

Payment Must Be E nclosed (if applicable)

Print Phone Number on Check or Money Order (Checks Payable to CCAC).

Mail To: CPA Program
CCAC West Hills Center – Room N1200
1000 McKee Road
Oakdale, PA 15071-1099

<u>TO REGISTER</u>:
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<u>REFUND POLICY</u>:
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Course Number	Semester	Course Title	Course Day	Cost (if applicable)
XGD-079-5301	N25FA	CPA Professional Continuing Education Program	Monday	$359.00
XGD-079-5302	N25FA	CPA Professional Continuing Education Program	Wednesday	$359.00

Student Signature (Required for enrollment)		Date	

I agree that once I register, I become legally bound by and agree to the terms of Community College of Allegheny County Student Financial Responsibility Agreement and as such become responsible for all charges incurred, unless I drop classes during the designated refund period.