SPRING 2026 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 - $379.00 (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: Ethics Under Pressure: Managing Client, Employer, and Time-Based Stress

Speaker: Lindsay Pfister, EdD, SHRM-SCP and PCC

Category: Ethics **Mon 2/9 & Wed 2/11**

Description:

This course examines how ongoing pressure from clients, employers, and deadlines can erode ethical judgment, even for experienced CPAs. Going beyond rules and technical standards, the course explores ethical blind spots, "just this once" decision-making patterns, and effective boundary-setting and communication strategies. Participants gain practical tools to protect integrity, exercise sound professional judgment, and meet ethical responsibilities in fast-paced accounting environments.

Week 2: Auditing Inventory

Speaker: Judy Corasaniti, MBA

Category: Accounting & Auditing **Mon 2/16 & Wed 2/18**

Description:

1. **The purpose and benefits of an audit of inventory**
2. **The importance of staying in compliance from both the IFRS (International Financial Reporting Standards) and GAAP (General Accepted Accounting Principles)**
3. **Evidence - the importance of auditing inventory**
4. **The inventory auditing procedure**

Week 3: Disability Considerations in a Professional Practice 2026

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

Category: General **Mon 2/23 & Wed 2/25**

Description:

This course equips CPAs with practical, real-world guidance for working effectively with clients, families, and colleagues when disability is part of the picture. Building on foundational awareness, the course focuses on applied decision-making, compliance risk, and advisory opportunities related to disability, caregiving, and government benefits. Participants will explore how disability intersects with tax, payroll, estate, and advisory work; learn to distinguish key benefit programs such as SSI and SSDI; and examine planning considerations unique to multi-generational and special needs situations. Through case examples and professional practice scenarios, CPAs will gain tools to enhance client trust, reduce risk, and provide more inclusive, competent service.

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 4: Health Care Decisions- As Part of Retirement Planning

Speaker: William McKendree, JD

Category: General **Mon 3/2 & Wed 3/4**

Description:
It might appear to be straightforward – unfortunately, it's not. The process for transitioning from employment based (or self-employment based) healthcare benefits to post-employment benefits is definitely not *simple*, *straight forward*, and *quickly resolved*. It's a series of complex decisions that require knowing and understanding how the rules work and how long the process takes.
This presentation, then, will examine that process (for your clients and yourself) -
1. **The rules of transition**
2. **The timeline**
3. **Where to turn for objective and effective help in navigating the process (instead of a transactional product sale)**

Week 5: Strategic Cost Management, Cultivating a Diverse and Inclusive Workplace

Speaker: Judy Corasaniti, MBA

Category: Accounting & Auditing **Mon 3/9 & Wed 3/11**

Description:

Special Topics: Strategic Cost Management, Cultivating a Diverse and Inclusive Workplace

The focus is on aligning rather than cutting costs:

The Analysis Steps

1. Value Chain Analysis

2. Strategic Positioning

3. Cost Driven Analysis

Steps in the Continuous Process

1. Resource Planning

2. Estimations

3. Budgeting

4. Controlling

Week 6: Failures in Long Term Care Planning

Speaker: William McKendree, JD

Category: General **Mon 3/16 & Wed 3/18**

Description:

The old adage 'those who fail to plan, plan to fail' is valid, but it needs a corollary 'those who plan badly deserve the disaster that's waiting for them'. So often, people postpone care planning decisions till it's too late. But possibly just as often, people make incomplete and ineffective decisions regarding their quality of life when capacity for independence diminishes. This presentation will examine the myths and failings perpetrated by well-meaning (and not so well-meaning) lcare planning and estate planning 'experts'.

Week 7: Effective Communication and Collaboration 2026

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

Category: General **Mon 3/23 & Wed 3/25**

Description:

This course examines the essential role of effective communication and interdisciplinary collaboration in modern accounting practice. This course explores how CPA's can strengthen communication with clients and collaborate more effectively with financial advisors and attorneys to deliver integrated, client-centered solutions. Participants will examine real-world scenarios involving tax planning, investments, estate planning, and business decision-making, while learning practical strategies to reduce misunderstandings, manage expectations, and uphold ethical standards. Emphasis is placed on the CPA's role as a key member of the professional advisory team and how strong communication and collaboration improve client outcomes, compliance, and long-term professional relationships.

Week 8: How to Navigate the medicare.gov Website

Speaker: William McKendree, JD

Category: General **Mon 3/30 & Wed 4/1**

Description:

The Medicare website is an indispensable tool for Medicare enrollment; this presentation will look at the function and operation of the website and do hypothetical scenarios for enrolling in various Medicare components.

Week 9: What is Risk Management and Why is it Important?

Speaker: Travis Squyres

Category: Accounting & Auditing **Mon 4/6 & Wed 4/8**

Description:

Learn about the foundations of Risk Management including risk governance, risk appetite, core risk categories, controls, monitoring, and emerging-risk awareness—essentially how enterprise risk framework is structured and operated day to day. Learn how risk management elevates on organization by focusing on strategic, enterprise risk leadership: integrating risk appetite with business strategy, strengthening cross-functional governance, evaluating complex and emerging risks, enhancing scenario analysis, and improving board-level reporting and communication. Discover how risk management can be a new career path for experienced auditors.

NO CLASS April 13-17 due to Tax Week

Week 10: Ethical Decision-Making for CPAs in Complex, Real-World Scenarios

Speaker: Lindsay Pfister, EdD, SHRM-SCP and PCC

Category: Ethics **Mon 4/20 & Wed 4/22**

Description:

This course helps CPAs navigate ethical challenges in ambiguous, high-pressure situations where professional judgment is critical. Moving beyond what is technically permissible, the session emphasizes ethical decision-making grounded in integrity, responsibility, and sound professional judgment. Through practical discussion and analysis of realistic scenarios, participants strengthen their ability to identify ethical risk, document decisions appropriately, and respond with confidence to complex judgment calls in today's accounting environment.

Week 11: Chat GPT

Speaker: Dr. Lori Paluti

Category: General **Mon 4/27 & Wed 4/29**

Description:

Are you hearing of Chat GPT and Artificial Intelligence? Want to learn more? This beginner's workshop will give you the basics in understandable terms and how to use it appropriately. We'll learn what it is, what it does and how it can help you in your daily life.

Week 12: Tax Planning Seminar 2026

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

Category: Tax **Mon 5/4 & Wed 5/6**

Description:

This seminar featured updated 2026 tax information and covers key planning topics including related investing strategies, retirement account considerations, charitable giving approaches, and basic gifting strategies.