

# THOMSON REUTERS - Checkpoint Learning

## Corporate Advancement Package Upcoming Webinars

Complete Training and Continuing Education Solution for Corporate Tax & Accounting Professionals

DATE	TITLE	FIELD	ID	TIME (CST)	CPE CREDIT
7/12	Polish Your Presentation Skills: Best Practices of Dynamic Presenters	Personal Development	W278T	12:00pm-2:00pm	2
7/13	Quarterly SEC and PCAOB Update-Q3 2017	Accounting	W440T	2:00pm-3:00pm	1
7/18	M&A Due Diligence: Tapping the Strengths of Accounting Professionals	Specialized Knowledge	W434T	10:00am-12:00pm	2
7/18	Monthly Accounting Alert	Accounting	W158T	12:00pm-1:00pm	1
7/18	Monthly Corporate Tax Update	Taxes	W159T	1:00pm-2:00pm	1
7/20	Understanding the FASB's New Standard on Leases	Accounting	W379T	12:00pm-2:00pm	2
7/25	Revenue from Contracts with Customers: An Overview	Accounting	W394T	12:00pm-2:00pm	2
7/26	Monthly Tax Alert	Taxes	W87T	10:00am-12:00pm	2
8/1	Managing Virtual Teams: Best Practice Insights	Management Services	W471T	10:00am-12:00pm	2
8/4	Strategic Alliances: Creating Value and Gaining Knowledge through Corporate Partnership	Management Services	W433T	10:00am-12:00pm	2
8/10	Above the Line Thinking: The Power of Positive Leadership	Personal Development	W452T	2:00pm-4:00pm	2
8/17	Monthly Accounting Alert	Accounting	W158T	10:00am-11:00am	1
8/17	Monthly Corporate Tax Update	Taxes	W159T	11:00am-12:00pm	1
8/18	Quarterly Sales and Use Tax Update for Controllers and Financial Managers	Taxes	W148T	10:00am-12:00pm	2
8/18	Revenue From Contracts With Customers: Implementation Considerations	Accounting	W469T	12:00pm-2:00pm	2
8/22	Monthly Tax Alert	Taxes	W87T	2:00pm-4:00pm	2
8/24	Quarterly SEC and PCAOB Update-Q3 2017	Accounting	W440T	2:00pm-3:00pm	1
9/1	M&A Overview: The Acquisition Process and the Role of Accounting Professionals	Specialized Knowledge	W397T	12:00pm-2:00pm	2
9/5	Employee Engagement: Building Accountability Within Your Teams	Personal Development	W455T	2:00pm-4:00pm	2
9/7	Travel, Entertainment and Auto Expense	Taxes	W252T	12:00pm-2:00pm	2
9/12	Understanding the FASB's New Standard on Leases	Accounting	W379T	12:00pm-2:00pm	2
9/12	Monthly Accounting Alert	Accounting	W158T	2:00pm-3:00pm	1
9/12	Monthly Corporate Tax Update	Taxes	W159T	3:00pm-4:00pm	1
9/19	Quarterly SEC and PCAOB Update-Q3 2017	Accounting	W440T	2:00pm-3:00pm	1
9/20	M&A Due Diligence: Tapping the Strengths of Accounting Professionals	Specialized Knowledge	W434T	12:00pm-2:00pm	2
9/26	Revenue from Contracts with Customers: An Overview	Accounting	W394T	2:00pm-4:00pm	2
9/27	Monthly Tax Alert	Taxes	W87T	10:00am-12:00pm	2

# CHECKPOINT LEARNING CORPORATE ADVANCEMENT PACKAGE

## WEBINARS INCLUDED IN THIS PACKAGE

TITLE	FIELD	DESCRIPTION	CPE CREDIT
Above the Line Thinking: The Power of Positive Leadership	Personal Development	Positive leadership has been defined by some as helping others "see" more in their potential, "do" more to facilitate desired results, and thus "become" more on a personal and professional level, than they ever could have on their own. During this webinar we will explore the concept of how our thinking affects our actions, specifically the way we lead and influence others. By learning to think "above the line" participants can improve their ability to provide positive, forward looking, solution oriented leadership.	2
Advance Googling for Accountants	Specialized Knowledge	The course provides a concise overview of how accountants can optimize their Google experience and search smarter and more efficiently. You'll learn how to unlock new value streams in Google, save hundreds of hours of research time, find online information faster and earlier, and automate your online discovery. Even if you've been googling many years and think you're Internet savvy, you're guaranteed to learn new search strategies, techniques and tools that will take you to the next level of online intelligence gathering.	2
Advanced Topics in Financial Statement Preparation	Accounting	The basic financial statements package includes a balance sheet, statement of comprehensive income, statement of retained earnings or changes in stockholder's equity, and statement of cash flows. The notes to financial statements are considered part of the basic financial statements. This webinar covers the basic and some advanced topics for preparing financial statements.	2
Avoiding Common Errors with Special Purpose Framework (OCBOA) Reporting and Disclosures	Accounting	This webinar will highlight common errors encountered in reporting under Special Purpose Frameworks (OCBOA), such as Modified Cash Basis, Tax Basis, Regulatory Basis, etc. The instructor will share insights and discuss SSARS 19 requirements when your clients report their financials on a basis of accounting other than GAAP. The new SSARS 21 requirements will also be discussed.	2
Basis Calculations – S Corporations, Partnerships, LLCs	Taxes	Basis in the world of pass-through taxation determines the availability of losses, the taxability of distributions, and an owner's ultimate gain (or loss) on disposition. For S corporation shareholders this session will address how initial basis is determined and how basis is maintained and calculated annually. It will also discuss the restrictive rules on shareholder debt highlighting the regulations affecting open account debt. We will analyze the "economic outlay" requirement in light of the proposed regulations under IRC Sec. 1366. A significant potential advantage for partners and LLC members is how the entity's debt may be allocated for owner basis purposes. This webinar will review outside (and at-risk) basis, including how recourse, nonrecourse and qualified nonrecourse debts are allocated to owners. It will also examine how personal guarantees and DROs (deficit restoration orders) may affect owner basis.	2
Budgeting and Forecasting for Financial Professionals	Finance	In this webinar we will discuss best practices in the process of budgeting and forecasting. Good planning is a key factor in the success of any endeavor or enterprise. We will review the use of budgeting and forecasting as planning tools that can be used to monitor current and predict future economic conditions and quantify the probable impact of related business decisions. Nearly every company that prepares a budget, forecast or business plan will find it necessary to apply the best practices, tools and techniques discussed in this webinar!	2
Business Ethics in Corporate Accounting	Regulatory Ethics	This webinar is designed for corporate CPAs and addresses both corporate ethical responsibilities and updates relevant to AICPA members. This discussion provides the participant with examples and practical tools that will aid in addressing ethical issues encountered in day-to-day business encounters.	2
Business Intelligence for Accountants: A New Frontier	Finance	This webinar is designed to introduce Accountants, both in public practice and in industry to the concept of Business Intelligence, its purpose, features and benefits. It asks the Accounting Professional to think out of the box and change their perspective on data, its creation and usage in improving business performance of companies and clients. Attendees will understand the context of Business Intelligence in terms of fast evolving technology, the cloud computing environment and the availability of substantial data that can be advantageously used by businesses. The webinar also focuses specifically on how SMEs (small to mid size Entities) can benefit from Business Intelligence; including tools available today that can be used by businesses of any size.	2
Choice of Business Entity	Taxes	When Congress enacts new tax laws, the rules and approaches change when it comes to selecting the choice of business entity. In this course, we will examine the pros and cons of selecting either a sole proprietorship (including single member LLCs), partnership, S-Corporation, C-Corporation, or LLC so that you can best guide your clients with this very important decision.	2
Creating Engaging PowerPoint Presentations	Communications and Marketing	Tired of spending countless hours creating presentations that don't "wow" your audience? Learn to create dynamic, professional and engaging PowerPoint slides for your next meeting! During this webinar you will learn presentation best practices and essential tools and techniques to quickly create Microsoft® PowerPoint slides that enhance your message and maximize the impact of your presentation.	2
Data Security and Privacy	Information Technology	This webinar is designed to introduce Accounting Professionals to the concepts of data security, privacy and data encryption. The attendee will become familiar with the evolution and trends of information technology and the related security issues that this has created. The webinar will discuss best practices to ensure data security and privacy for firm clients & businesses and the CPA's role for the same. An overview of data protection regulations will also be provided.	2
Delegating for Results	Personal Development	Have you ever assigned a task or project that required significant rework? You are not alone! Delegation is a skill that requires all leaders to use a structured approach to empower professionals to achieve more effective and efficient results. Learn real-world delegation and communication techniques that will reduce stress and improve overall individual and team productivity.	2

# CHECKPOINT LEARNING CORPORATE ADVANCEMENT PACKAGE

## WEBINARS INCLUDED IN THIS PACKAGE

TITLE	FIELD	DESCRIPTION	CPE CREDIT
Employee Engagement: Building Accountability Within Your Teams	Personal Development	What does it take to create a team that consistently works synergistically, is accountable for results and meets deadlines? Managing multiple teams, working virtually and increased complexity in our business environment demand that we maximize team engagement and performance. As leaders, we often miss opportunities to make important adjustments and course corrections with our teams when it really matters. This course is designed to help busy leaders gain insights and identify ways to maximize team engagement, accountability and results.	2
Fair Value Accounting Rules	Accounting	This webinar will review the latest FASB pronouncements and other guidance on fair value. We will take a practical approach in presenting measurement of fair value and the significant impact that has on financial statements. The discussion of fair value concepts continues to be refined as the standard setters are clarifying and issuing new guidance frequently. This webinar reviews important information for both accountants and auditors alike.	2
Internal Controls for Financial Professionals – Best Practice Basics	Business Management and Organization	Every financial professional responsible for understanding, developing or enforcing internal controls knows how important the basics are. The purpose of this webinar is to review the basics of establishing and maintaining internal controls to ensure they are designed to meet the specific compliance needs of the organization.	2
Introduction to Business Combinations and Consolidations	Accounting	This webinar provides an overview of the many rules and considerations with business combinations and consolidations; including variable-interest entities, equity-method accounting and combined financial statements. Designed as an introductory or refresher course, the discussion aims to help you to identify the issues, key information needs and next steps as you encounter issues in this area.	2
Introduction to Derivatives and Hedging	Accounting	This webinar provides an introduction to accounting for derivatives and hedging. A focus of the webinar is the basic accounting for derivatives and qualifying criteria of fair value and cash flow hedges. The webinar also includes examples of the common derivatives and hedging activities in small and medium-size entities.	2
IRS Audits of Business Returns	Taxes	As you have probably heard, the IRS is increasing both its audit staff and the number of audits to be performed. The webinar on "IRS Audits of Business Returns" will help you prepare for and assist your client in the event of an audit.	2
Issues for Preparing a Statement of Cash Flows	Accounting	The statement of cash flows is one of the most valuable components of the basic financial statement package. In this webinar we will discuss the preparation of the Statement of Cash Flows and the required disclosures that are made in the statement. Topics include the direct and indirect method for preparation of the statement, the three main components of the statement and the transactions included in each (Operating, Financing and Investing).	2
LinkedIn for Accountants	Communications and Marketing	The course provides a concise overview of LinkedIn, a leading social network for business professionals, and how accountants can use the platform to showcase their credentials, develop new contacts, and identify new job and business opportunities.	2
M&A Due Diligence: Tapping the Strengths of Accounting Professionals	Specialized Knowledge	Acquisitions are major contributors to the growth strategy of many businesses. Critical drivers of the success of an acquisition are efficient and effective diligence planning and execution, and the development of usable findings from the due diligence effort. Accounting professionals play a critical role in ensuring a process that meets those criteria. This webinar is designed to provide detailed guidance on pre-diligence planning, objective-oriented execution, and actionable outputs.	2
M&A Overview: The Acquisition Process and the Role of Accounting Professionals	Specialized Knowledge	Acquisitions are a staple of corporate activity. They are one of the key ways in which corporations attempt to increase shareholder value. Research has repeatedly shown that a significant percentage of acquisitions do not meet the strategic and financial objectives of the acquirer. However, there are prudent measures that can be taken to by acquirers to significantly improve their chances of success. Accounting professionals play a key role in implementing those measures. This webinar will provide those professionals with an understanding of the pitfalls and the success factors associated with the acquisition process.	2
M&A Overview: The Corporate Divestiture Process and the Role of Accounting Professionals	Specialized Knowledge	Corporate divestitures – the sale of a discrete business unit, such as a division, a subsidiary, or a product line- are common among firms attempting to realign their business portfolios with their strategies and their markets. In practice they occur quite frequently, accounting for fully one-third of all M&A activity in the last several decades. Despite their frequency of occurrence and the significance of the value at risk to the seller, there is a dearth of professional guidance and literature on the implementation of these transactions – transactions which have significantly different characteristics than their buy-side counterparts (acquisitions). Accounting professionals play a key role in executing these transactions. This webinar will provide those professionals with an understanding of the unique dynamics of divestitures, as well as the pitfalls and the success factors associated with their execution.	2
Managing Virtual Teams: Best Practice Insights	Management Services	Managing high performance remote teams creates dynamics that require the development of unique professional competencies. This webinar explores specific opportunities and challenges that professional services teams face working in a virtual environment and shares best practices to maximize team performance.	2
Monthly Accounting Alert	Accounting	This short monthly webinar will bring you up to date on the latest developments in accounting and financial reporting. Topics will be focused on activities of the FASB; including new pronouncements, the status of exposure drafts, etc. Other topics affecting accountants in public practice, such as significant developments with auditing standards, will also be discussed.	1
Monthly Corporate Tax Update	Taxes	This monthly webinar will bring you up to date on the latest business entity tax issues; including the impact of recent legislation. Updated each month and presented at a high level, the information in this webinar is designed to keep you informed about the developments that are most likely to affect your business.	1

# CHECKPOINT LEARNING CORPORATE ADVANCEMENT PACKAGE

## WEBINARS INCLUDED IN THIS PACKAGE

TITLE	FIELD	DESCRIPTION	CPE CREDIT
Monthly Tax Alert	Taxes	Struggling to keep up to date on constantly changing tax legislation, regulations and news? Our monthly tax alert series is designed to give you the hottest and most up-to-date information happening in the tax environment. Each month we'll discuss what's happened in the last month so that you can keep current and advise your clients with the most relevant information. This webinar is your one-stop shop for everything that's new. Since it's brand new material each month you know you're on the cutting edge of the profession. This webinar will cover news relevant to business entities, individuals, estate and gift taxation, and tax practice administrative matters.	2
New Regulations - Capitalization or Repairs plus a discussion of Partial Asset Dispositions	Taxes	The IRS' final regulations under IRC Sec. 162(a) and Sec. 263(a) affect all taxpayers that acquire, produce or improve property. The final regulations provide a framework for distinguishing capital expenditures from supplies, repairs, maintenance, and other deductible business expenses. A second set of final regulations under IRC Sec. 168 was issued in 2014 and addresses partial dispositions of MACRS assets. This webinar will explore the treatment of materials and supplies, the new de minimis expensing allowances, the routine maintenance safe harbors for personal and real property, and the new Reg. 1.263(a)-3 rules for amounts paid for the improvement of tangible property. The webinar will also examine Reg. 1.168(i)-8 and the resulting tax implications of the disposition of a portion of a MACRS asset.	2
Operational Finance for Accounting Professionals	Finance	This webinar is designed to introduce Accounting Professionals to the core concepts of Operational Finance and its importance to the performance of businesses, regardless of size. Emphasis is placed on how the accounting function is central and key to efficient management of operational finance. The webinar will discuss all the major business cycles and how they integrate with finance and accounting. Cycles will include Supply Chain Management and others. The attendee will also become familiar with how best to leverage Operational Finance to achieve audit efficiencies, both from the client and the CPA's perspectives.	2
Polish Your Presentation Skills: Best Practices of Dynamic Presenters	Personal Development	This webinar will help you improve skills and confidence in speaking before groups. It focuses on content and delivery techniques to enhance your presentation power and impact.	2
Quarterly Sales and Use Tax Update for Controllers and Financial Managers	Taxes	Times are tough. States need money. And one place that they are looking to generate tax revenue is sales and use tax. This webinar covers some of the hot button topics in this area.	2
Quarterly SEC and PCAOB Update	Accounting	This webinar provides the participant with an overview of the recent and proposed SEC and PCAOB regulatory actions related to accounting and auditing for public companies. Specifically, the webinar covers recent SEC proposed rules, final rules, other orders and notices, and staff interpretations. It also covers recent regulatory activities of the PCAOB including proposed releases and final releases related to: auditing standards, ethics and independence standards, quality control standards and attestation standards; and, PCAOB guidance related to these standards, including: concept and other releases, proposed other releases, results of recent PCAOB Inspection reports, Staff Audit Practice Alerts, and Staff FAQ's.	1
Revenue from Contracts with Customers: An Overview	Accounting	ASU 2014-09 – Revenue from Contracts with Customers is the most significant change to revenue recognition financial reporting standards in recent years. This webinar provides an overview of the guidance with a focus on those provisions likely to result in substantive changes to practice. The discussion includes illustrative examples and is focused on helping you understand the scope of changes and how they are likely to affect you.	2
Revenue From Contracts With Customers: Implementation Considerations	Accounting	This webinar is a follow up to the webinar Revenue From Contracts with Customers: An Overview; taking a deeper dive into the guidance in ASC 606 (ASU 2014-09 or Revenue from Contracts with Customers). Topics include details of the five-step model, financial statement disclosures, intellectual property, gross vs. net revenue recognition, warranties, contract-related costs, analysis of pre-implementation ASUs, and more. This webinar also covers industry-specific considerations as published by the AICPA's various revenue recognition task forces and is updated periodically to incorporate new guidance as it	2
Risk Management for Financial Professionals	Management Services	This webinar is designed for professionals looking for an introduction to and best practices in risk management. Our instructor will guide you through what you need to know to better manage your own company's risks or to better advise your clients on ways to improve their processes.	2
S-Corp Update	Taxes	With an ever changing tax environment including looming potential for tax rate increases at the shareholder level, planning for S-Corporation entities including year-end tax planning continues to be very important. Items discussed in this 2 hour webinar will include basis, AAA, and distribution issues and planning opportunities. Also included will be various compliance issues including reasonable compensation issues including FICA (S/E tax) issues, increased IRS scrutiny of S-Corporations, and other year-end tax planning opportunities.	2
Strategic Alliances: Creating Value and Gaining Knowledge through Corporate Partnership	Management Services	Strategic alliances have become a staple of corporate activity. They enable corporations to enter new markets, as well as to build market knowledge and technical expertise. Unfortunately, research has shown that a significant percentage of these partnerships do not meet the strategic and financial objectives of the partnering entities. However, there are measures that can be taken by partnering firms to significantly improve their chances of success. And, accounting professionals can play a key role in implementing those measures. This webinar will provide those professionals with an understanding the nature of these relationships and the pitfalls and the success factors associated with alliance planning, preparation and execution.	2

# CHECKPOINT LEARNING CORPORATE ADVANCEMENT PACKAGE

## WEBINARS INCLUDED IN THIS PACKAGE

TITLE	FIELD	DESCRIPTION	CPE CREDIT
Strategies for Developing High Performing Teams	Personal Development	Today's demanding business world requires work teams to exceed expectations. Is your team motivated and empowered to perform at their highest potential? The purpose of this course is to provide strategic leaders with techniques to create synergy, enhance motivation and improve communication within their teams to achieve excellent results, every time.	2
The ABCs for LLCs	Taxes	Limited Liability Companies (LLCs) are a popular choice of business entity for many clients. This course will discuss the pros and cons of choosing an LLC as a business entity, contributions of capital, self-employment tax rules applied to LLC members, loss limitations and much more.	2
The Mobile Web for Accountants	Personal Development and Information Technology	The webinar highlights how accountants and financial professionals can take full advantage of the mobile revolution. You'll learn how to leverage smartphones and tablets for maximum productivity and efficiency in your professional and personal life. You'll discover how to use your wireless gadgets not just as portable communication tools but as your default, go-to, mission-critical devices for all your work and computing. This information is especially timely and relevant for accountants who are increasingly expected to be plugged in at all times, work on the fly, collaborate online, and respond immediately anytime from anywhere as never before.	2
Total Cash Management	Management Services	Total cash management (TCM) is a comprehensive, coordinated program to both maximize available cash and ensure its optimal use, giving an organization a strong, competitive advantage. This webinar provides you with an overview of TCM, its advantages and disadvantages, allowing you to better consider implementation at your organization.	2
Total Payroll Management	Finance and Taxation	This webinar addresses the top issues in employee compensation and taxation from the employer viewpoint for CFOs or the practicing accountant. Topics range from taxation of executive compensation; including payroll taxes, payroll reporting issues for the Affordable Care Act and deferred compensation.	2
Travel, Entertainment and Auto Expense	Taxes	The rules for deducting travel, entertaining and auto expenses are complex, subject to numerous limitations and are frequently changing. This webinar will review these requirements and will bring tax professionals up to date with regard to recent changes.	2
Understanding the FASB's New Standard on Leases	Accounting	ASU 2016-02 – The FASB's new standard on leases is a significant change to lease accounting; requiring, among other things, nearly all leases to be presented on the balance sheet. This webinar provides an overview of the guidance for both lessees and lessors with a focus on those provisions representing major substantive changes to financial reporting. The discussion includes illustrative examples and is focused on helping you understand the scope of changes and how they are likely to affect you.	2