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CPE CATALOG
Fall/Winter 2011-2012

*NEW! 2011
Engagement
Letters*

See p. 4



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General Operations & Accounting Methods of S Corps.	GOAM	Basic	Taxes
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Ethics Courses

State Specific Ethics

Please Note: Each of these courses meets its state requirements and has been approved by the state board of accountancy, if applicable. The field of study for all courses is Regulatory Ethics, and the level for all courses is basic.

STATE	CODE	CPE CREDITS	DOWNLOAD	CD	TEXT	CD W/TEXT
Florida	EFLA	4	\$65.00	\$65.00	\$79.95	\$85.00
Mississippi	EMIS	4	\$65.00	\$65.00	\$79.95	\$85.00
New York	ENYK	4	\$65.00	\$65.00	\$79.95	\$85.00
North Carolina	ENCA	4	\$65.00	\$65.00	\$79.95	\$85.00
Ohio	EOHI	4	\$65.00	\$65.00	\$79.95	\$85.00
Washington	EWAS	4	\$65.00	\$65.00	\$79.95	\$85.00

General Ethics

Please Note: These courses do not cover state-specific issues and are not applicable in states that require courses to include state laws and regulations. The courses should apply in states that do not require state-specific coverage as part of their ethics requirement. Please check with your state board if you are in doubt. For the field of study and level of knowledge for each course, go to cpenow.com.

COURSE TITLE	CODE	CPE CREDITS	DOWN-LOAD	CD	TEXT	CD W/TEXT
Ethics and the Attest Function (4-hr.)	EAF4	4	\$65.00	\$65.00	\$79.95	\$85.00
Ethics and the Attest Function (8-hr.)	EAF8	8	\$125.00	\$125.00	\$139.95	\$145.00
Ethics and the Attest Function & Fraudulent Financial Reporting	EFFR	2	\$39.00	N/A	N/A	N/A
General Ethics for Accountants	EGEN	4	\$65.00	\$65.00	\$79.95	\$85.00
Ethical Responsibilities in Tax Practice, Outsourcing, and Independence	EOUT	2	\$39.00	N/A	N/A	N/A
Ethical Responsibilities Under the AICPA Code and Independence and Advisory Services	ERAC	2	\$39.00	N/A	N/A	N/A
Ethical Considerations in Your Tax Practice: Part 1	ETX1	2	\$39.00	N/A	N/A	N/A
Ethical Considerations in Your Tax Practice: Part 2	ETX2	2	\$39.00	N/A	N/A	N/A

Tax Update Courses

Order by Oct. 31 and save 15%!

NEW! What You Need to Do Now in Estate Planning Under the New Tax Law* (NLEP)

Practitioners need to rethink many of their estate-planning strategies and tactics. It is critical to fully understand these changes and new strategies to be employed so that practitioners can meet with clients to explore new options.

LEVEL: Update	CPE: 8 Credits, Taxes
ONLINE: \$125.00	CD-ROM: \$125.00
CD w/TEXT: \$145.00	TEXT: \$139.95

The Best S Corporation, Limited Liability, and Partnership Update Course by Surgent McCoy (SCPE)

Practitioners need to keep abreast of all tax changes affecting pass-through entities, and this course delivers. You will learn invaluable knowledge, strategies, techniques, innovative tax-planning concepts, and income-generating ideas along with other planning opportunities available to S corporations, partnerships, LLCs, and LLPs.

LEVEL: Update	CPE: 12 Credits, Taxes
ONLINE: \$169.95	CD-ROM: \$169.95
CD w/TEXT: \$189.95	TEXT: \$185.00

The Best Federal Tax Update Course by Surgent McCoy (BFTU)

Both business and individual clients are affected by the tax changes in 2011, requiring that the tax advisor practices extensive tax planning. Not only will you be updated on the most important tax issues and strategies that require your attention in 2011, but this course will also review major trends and changes in the case and regulatory law. Included is full coverage of recent tax reform, plus continuing coverage of health care and estate and gift-tax reform.

LEVEL: Update	CPE: 16 Credits, Taxes
ONLINE: \$189.95	CD-ROM: \$189.95
CD w/TEXT: \$209.95	TEXT: \$205.00

Surgent McCoy's 2011 Top Tax Topics (STTT)

This course identifies the most important tax topics for 2011. Any recent tax legislation is covered in detail. CPAs can rely on this course to help them meet client demands about these practical issues and thereby increase billings.

LEVEL: Intermediate	CPE: 8 Credits, Taxes
ONLINE: \$125.00	CD-ROM: \$125.00
CD w/TEXT: \$145.00	TEXT: \$139.95

The Best Individual Income-Tax Update Course by Surgent McCoy (BITU)

This highly informative course responds to the latest in tax law developments, including discussions of the planning opportunities available to your individual tax clients. This up-to-date knowledge will enable you to further discuss new developments and tax-saving ideas applicable to your clients and their growing needs.

LEVEL: Update	CPE: 12 Credits, Taxes
ONLINE: \$169.95	CD-ROM: \$169.95
CD w/TEXT: \$189.95	TEXT: \$185.00

Surgent McCoy's 1040 Tax Season Survival Guide (TSSG)

This course will help get you up-to-date with the changes and major issues in preparing individual income tax returns. Refresh your knowledge, cover the latest tax law changes, and learn about changes to forms as a result of new tax laws.

LEVEL: Update	CPE: 10 Credits, Taxes
ONLINE: \$149.95	CD-ROM: \$149.95
CD w/TEXT: \$169.95	TEXT: \$165.00

Updated for 2011!
Surgent's
Engagement and
Disengagement
Letters

Arm yourself for
busy season!

See page 4.

Nonprofit Tax Courses

Order by Oct. 31 and save 15%!

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

This course trains both new and experienced staff accountants and other preparers to deal with the challenging aspects relating to the filing of the Form 990 series of tax returns. This course offers a practical, hands-on approach to completing one of the most difficult tax forms.

LEVEL: Intermediate	CPE: 8 Credits, Taxes
ONLINE: \$125.00	CD-ROM: \$125.00
CD w/TEXT: \$145.00	TEXT: \$139.95

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

New applications for tax-exempt status are being analyzed more thoroughly, and Form 990 is being revised to provide more in-depth information that will enable both the IRS and donors to evaluate organizations. This unique course will enable CPAs to better serve their existing clients as well as open markets to this growing client base.

LEVEL: Intermediate	CPE: 8 Credits, Taxes
ONLINE: \$125.00	CD-ROM: \$125.00
CD w/TEXT: \$145.00	TEXT: \$139.95

Read full course descriptions at
www.cpenow.com.

1-800-778-7436
selfstudy@cpenow.com

* Not included in Surgent McCoy's Comprehensive CPE Library.

Accounting and Auditing Courses

Order by Oct. 31 and save 15%!

IFRS for Smaller Entities vs. U.S. GAAP: A Study in How the Financial Statements Look and Feel Different* (ISBC)

Practical knowledge of IFRS for SMEs is important for professionals providing accounting, reporting, or attest services for private entities. Extensive case studies and exercises will be used to show the actual impact of variations between the two sets of standards.

LEVEL: Basic
ONLINE: \$125.00
CD w/TEXT: \$145.00

CPE: 8 Credits, Accounting
CD-ROM: \$125.00
TEXT: \$139.95

The Essential Audit Toolkit: Best Practices for Smaller Entities* (ATKN)

Complying with the various auditing standards and professional requirements in financial statement audits of nonpublic entities is a challenge. This course provides best practices for critical aspects of audits of smaller entities.

LEVEL: Basic
ONLINE: \$125.00
CD w/TEXT: \$145.00

CPE: 8 Credits, Auditing
CD-ROM: \$125.00
TEXT: \$139.95

Practical Materiality Decisions Under a Risk-Based Approach to Auditing* (HBIE)

Current auditing standards require auditors to make and document both materiality and tolerable misstatement decisions. This course explains and provides examples of four methods for making materiality decisions and illustrates three methods for converting these overall materiality decisions to tolerable misstatement decisions.

LEVEL: Intermediate
ONLINE: \$65.00
CD w/TEXT: \$85.00
TEXT: \$79.95

CPE: 2 Credits, Accounting/
2 Credits, Auditing
CD-ROM: \$65.00

The Top 50 Nonpublic Audit Mistakes Practitioners Make and How to Fix Them* (NABB)

Mistakes can have serious negative consequences for your practice. Protect yourself & avoid common slip-ups by learning from past real-life mistakes of other experienced professionals.

LEVEL: Intermediate
ONLINE: \$125.00
CD w/TEXT: \$145.00

CPE: 8 Credits, Auditing
CD-ROM: \$125.00
TEXT: \$139.95

NEW! Revenue Recognition: Where Are We Headed? (REVR)

Standard setters have struggled to keep pace with the ways in which innovative business models and marketing arrangements have left guidance essentially without dates and subject to structuring. The course provides a comprehensive analysis of the exposure draft and its impact on your company and/or clients.

LEVEL: Update
ONLINE: \$65.00
CD w/TEXT: \$85.00

CPE: 4 Credits, Accounting
CD-ROM: \$65.00
TEXT: \$79.95

The Sarbanes-Oxley Act and Corporate Governance (SOXL)

This course examines recent developments in accounting and finance and a series of corporate accounting scandals that have led to sweeping accounting guidelines, proposals, & legislation.

LEVEL: Overview
ONLINE: \$65.00
CD w/TEXT: \$85.00

CPE: 4 Credits, Auditing
CD-ROM: \$65.00
TEXT: \$79.95

IFRS for Nonissuers: What in the World is Happening?*(INON)

This course summarizes the anticipated impact of converging to IFRS, with emphasis on nonissuers that may ultimately desire to adopt the less complex *IFRS for Small- & Medium-Sized Entities*.

LEVEL: Basic
ONLINE: \$65.00
CD w/TEXT: \$85.00

CPE: 4 Credits, Auditing
CD-ROM: \$65.00
TEXT: \$79.95

Effectively and Efficiently Reviewing Audit Workpapers: The Line of Defense Against Deficient Audits* (ERAW)

It is presumed that experienced team members should review work done by less experienced staff. This course provides tips and techniques for effective and efficient audit workpaper review.

LEVEL: Intermediate
ONLINE: \$125.00
CD w/TEXT: \$145.00

CPE: 8 Credits, Auditing
CD-ROM: \$125.00
TEXT: \$139.95

Current Developments in Accounting, Auditing, and the Accounting Profession: An Overview for 2011 (CDAA)

This course provides an overview of new developments in the area of accounting and auditing. Coverage is continuously updated to reflect the most recently issued official pronouncements.

LEVEL: Update
ONLINE: \$169.95
CD w/TEXT: \$189.95
TEXT: \$185.00

CPE: 9 Credits, Accounting/
3 Credits, Auditing
CD-ROM: \$169.95

Surgent McCoy's 2011 FASB/SAS Update Course* (FASB)

This course emphasizes FASB statements and SAS pronouncement issues relevant to smaller firms with no SEC clients. Coverage will reflect recent authoritative literature.

LEVEL: Update
ONLINE: \$169.95
CD w/TEXT: \$189.95
TEXT: \$185.00

CPE: 9 Credits, Accounting/
3 Credits, Auditing
CD-ROM: \$169.95

Surgent McCoy's 2011 Guide to Compilation, Review, & the Cash & Tax Basis of Accounting (SCRO)

This course discusses some of the most urgent issues that the profession faces now. Content will focus on the CPA's role in providing accounting, consulting, and financial statement services.

LEVEL: Basic
ONLINE: \$169.95
CD w/TEXT: \$189.95
TEXT: \$185.00

CPE: 12 Credits, Accounting
CD-ROM: \$169.95

Revenue Recognition Basics – Incorporating New GAAP Codification* (RRIH)

Proper revenue recognition is a critical issue for accountants and auditors. This course reviews both GAAP and SEC requirements for revenue recognition. Case studies show problems companies have encountered and accountants' ethical responsibilities.

LEVEL: Basic
ONLINE: \$65.00
CD w/TEXT: \$85.00

CPE: 4 Credits, Accounting
CD-ROM: \$65.00
TEXT: \$79.95

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selfstudy@cpenow.com

* Not included in *Surgent McCoy's Comprehensive CPE Library*.

Accounting and Auditing Courses

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Practical Revenue Recognition Concepts – Incorporating New GAAP Codification* (ARRC)

This course clearly explains technical GAAP revenue recognition criteria for various situations. More than 20 practice problems are provided. References cite the new GAAP codification when appropriate.

LEVEL: Intermediate	CPE: 4 Credits, Accounting
ONLINE: \$65.00	CD-ROM: \$65.00
CD w/TEXT: \$85.00	TEXT: \$79.95

Accounting Challenges in the Current Economic Climate* (ACCC)

This course overviews how standards involving valuation and impairment of financial and nonfinancial assets as well as goodwill create reporting/disclosure responsibilities for preparers and auditors.

LEVEL: Intermediate	CPE: 4 Credits, Accounting
ONLINE: \$65.00	CD-ROM: \$65.00
CD w/TEXT: \$85.00	TEXT: \$79.95

Surgent McCoy's Audit Workshop: Best Practices for Audits in Compliance with Government Auditing Standards and OMB Circular A-133* (AWAC)

Often, entities that require A-133 audits are the least-profitable clients for CPA firms. This course provides proven tips and techniques for performing a more effective and efficient audit of federal financial awards.

LEVEL: Intermediate	CPE: 8 Credits, Auditing
ONLINE: \$125.00	CD-ROM: \$125.00
CD w/TEXT: \$145.00	TEXT: \$139.95

Surgent McCoy's Audit Workshop: Best Practices in Planning and Designing a High-Quality and Profitable Audit* (AWPD)

The risk-assessment SASs provide enhanced standards and guidance for an auditor's application of the existing audit risk model. Proven tips and techniques taught in this course will enhance quality and help you manage profitability.

LEVEL: Intermediate	CPE: 8 Credits, Auditing
ONLINE: \$125.00	CD-ROM: \$125.00
CD w/TEXT: \$145.00	TEXT: \$139.95

Surgent McCoy's Practical Guide to Better Substantive Testing and Auditing of Internal Controls* (TAIC)

Now, more than ever, the risk of not performing the most effective audit procedures is significant. This course provides proven best practices for testing internal controls and performing substantive fieldwork for all your audit clients.

LEVEL: Intermediate	CPE: 8 Credits, Auditing
ONLINE: \$125.00	CD-ROM: \$125.00
CD w/TEXT: \$145.00	TEXT: \$139.95

Internal Controls Design, Evaluation, and Communication for Smaller Entities* (CDEC)

This course will provide practical guidance on exactly what a sound system of internal controls "looks like" and the resulting impact on the financial statement audit, particularly for smaller entities.

LEVEL: Intermediate	CPE: 8 Credits, Auditing
ONLINE: \$125.00	CD-ROM: \$125.00
CD w/TEXT: \$145.00	TEXT: \$139.95

New courses coming soon!

- A Complete Guide to the New 2011 Yellow Book
- I See It! Bringing into Focus the New Clarified Auditing Standards

Go to cpenow.com for complete details as they become available.



Audit Staff Training Courses

Order by Oct. 31 and save 15%!

Surgent McCoy's Basic Audit Staff Training – Level I* (AST1)

This course explains the basics of what new auditors are expected to know and do, including the nature, timing, and extent of common audit procedures. It is critical in establishing the groundwork for the expectation that all staff should analyze and understand the underlying purpose of procedures, as well as how to effectively and efficiently complete assigned tasks.

LEVEL: Basic CPE: 12.5 Credits, Auditing
ONLINE: \$189.95 3.5 Credits, Reg. Ethics
CD w/TEXT: \$209.95 CD-ROM: \$189.95
TEXT: \$205.00

Surgent McCoy's Experienced Audit Staff Training – Level II* (AST2)

Level II prepares new staff for assuming a greater level of responsibility on engagements. This course will include many real-life case studies for common audit areas assigned to staff with less than two years of experience with minimal supervision.

LEVEL: Basic CPE: 16 Credits, Auditing
ONLINE: \$189.95 CD-ROM: \$189.95
CD w/TEXT: \$209.95 TEXT: \$205.00

Surgent McCoy's Beginning In-Charge Training – Level III* (AST3)

This course builds on the technical experience of auditors to introduce them to the tips and techniques necessary to begin assuming client and engagement management responsibilities on smaller engagements.

LEVEL: Intermediate CPE: 16 Credits, Auditing
ONLINE: \$189.95 CD-ROM: \$189.95
CD w/TEXT: \$209.95 TEXT: \$205.00

Surgent McCoy's Experienced In-Charge Training – Level IV* (AST4)

Level IV focuses on building upon an auditor's basic supervisory experience, and digs deeper into improving people and multi-project management. This course will teach the non-technical skills necessary to improving the firm's profitability and ability to deliver high quality and value-added client service.

LEVEL: Intermediate CPE: 6 Credits, Auditing/
ONLINE: \$189.95 7 Credits, Comm./
CD w/TEXT: \$209.95 3 Credits, Bus. Mgmt.
TEXT: \$205.00 CD-ROM: \$189.95

Surgent McCoy's Management Skills Training – Level V* (AST5)

Level V focuses on helping professionals become more firm-focused, beyond improving the quality and efficiency of specific engagements. Proven tips and techniques, combined with hands-on practice, will help professionals enhance important soft skills necessary for developing firm leaders and long-term profitability.

LEVEL: Advanced CPE: 4 Credits, Marketing/
ONLINE: \$125.00 2 Credits, Human Resources/
CD w/TEXT: \$145.00 2 Credits, Mgmt. Adv. Svcs.
TEXT: \$139.95 CD-ROM: \$125.00

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Surgent's best selling
Tax EZ Tables!*

See page 5.

Fraud Courses

Order by Oct. 31 and save 15%!

Internal Control and Fraud Detection* (ICFD)

This course covers the essential tools you need to perform internal control-related services. It will take you through your clients' responsibility to design and implement programs and controls to prevent, deter, and detect fraud.

LEVEL: Basic CPE: 8 Credits, Auditing
ONLINE: \$125.00 CD-ROM: \$125.00
CD w/TEXT: \$145.00 TEXT: \$139.95

Protecting Your Clients Against Identity Theft, Investment Fraud, and Consumer Fraud* (IDIC)

People-to-people fraud is the most prevalent and fastest-growing type of fraud. This course discusses the various ways one individual defrauds another, as well as how to detect the schemes and protect yourself against them.

LEVEL: Basic CPE: 8 Credits, Specialized
ONLINE: \$125.00 Knowledge and App.
CD w/TEXT: \$145.00 CD-ROM: \$125.00
TEXT: \$139.95

Fraud: Catching the Crooks Who Cook the Books* (CCCB)

Fraud is a growing problem that costs the United States hundreds of billions of dollars each year. This course explores the nature of fraud, who commits it and why, and how to prevent it from occurring and detect it when it does.

LEVEL: Basic CPE: 10 Credits, Auditing
ONLINE: \$149.95 CD-ROM: \$149.95
CD w/TEXT: \$169.95 TEXT: \$165.00

Implementing SAS No. 99: Finding Fraudulent Financial Reporting and Asset-Misappropriation Schemes* (ISFR)

SAS No. 99 raises the bar that accountants have to meet. This course describes how SAS No. 99 dramatically changes how auditors must plan and perform an audit and helps them to better identify and respond to fraud.

LEVEL: Basic CPE: 8 Credits, Auditing
ONLINE: \$125.00 CD-ROM: \$125.00
CD w/TEXT: \$145.00 TEXT: \$139.95

Read full course descriptions at
www.cpenow.com.

1-800-778-7436
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* Not included in Surgent McCoy's Comprehensive CPE Library.

Estate Planning Courses

Order by Oct. 31 and save 15%!

NEW! Comprehensive Accounting Issues of Estates and Trusts: Fiduciary Accounting and Tax Issues* (FACT)

This course will provide comprehensive coverage of fiduciary accounting. This course will help practitioners build a unique practice working with clients, attorneys, and estate planners.

LEVEL: Basic
ONLINE: \$125.00
CD w/TEXT: \$145.00

CPE: 8 Credits, Accounting
CD-ROM: \$125.00
TEXT: \$139.95

NEW! Advanced Selected Issues for Trusts, Estates, and Their Beneficiaries* (ITEB)

Changes in tax rates have made knowledge of trusts and estates even more important. This course examines more advanced tax issues that CPAs grapple with and explores how the new tax environment impacts planning for estates, trusts, and their beneficiaries. It also discusses the generation-skipping transfer tax.

LEVEL: Advanced
ONLINE: \$125.00
CD w/TEXT: \$145.00

CPE: 8 Credits, Taxes
CD-ROM: \$125.00
TEXT: \$139.95

Advanced Concepts in Estate Planning* (ACEP)

Estate planning has come roaring back in 2011; many clients who had escaped transfer taxes now find themselves in need of major planning. This course explores the current thinking of practitioners and the IRS on estate-planning strategies & techniques, updated to reflect the changing estate & gift tax rules and higher tax rates.

LEVEL: Advanced
ONLINE: \$125.00
CD w/TEXT: \$145.00

CPE: 8 Credits, Taxes
CD-ROM: \$125.00
TEXT: \$139.95

A Complete Guide to the Administration of Trusts and Estates (GATE)

This course familiarizes the CPA with the problems and issues that arise in the administration of trusts and estates. This how-to course focuses on the accountant's role as an executor, trustee, or adviser to a fiduciary.

LEVEL: Basic
ONLINE: \$149.95
CD w/TEXT: \$169.95

CPE: 10 Credits, Taxes
CD-ROM: \$149.95
TEXT: \$165.00

Mastering the Fundamentals of Estate Planning (MFEP)

This course examines the fundamentals of estate planning including critical concepts in marital deduction planning, credit shelter trusts, selection and powers of trustees, and titling and funding issues. The materials provide an in-depth analysis of will provisions, checklists, flow charts, and real-life examples.

LEVEL: Basic
ONLINE: \$149.95
CD w/TEXT: \$169.95

CPE: 10 Credits, Taxes
CD-ROM: \$149.95
TEXT: \$165.00

The Complete Trust Workshop! (TCW)

The use of trusts will undergo changes in response to the modified income tax rates and the dramatic changes in the estate and gift tax. Clients need to be informed why planning is essential in these changing times. This course gives insights and practical pointers concerning trusts of every shape and size.

LEVEL: Intermediate
ONLINE: \$205.00
CD w/TEXT: \$225.00

CPE: 20 Credits, Taxes
CD-ROM: \$205.00
TEXT: \$219.95

The Top 50 Mistakes Practitioners Make & How to Fix Them: Estate Planning & Administration (EPBB)

Estate planning and administration is one of the most complicated areas in the tax law. The liability for making a mistake can be huge, and mistakes are made every day. This course will help practitioners understand the key areas to watch out for and how to prevent mistakes, particularly in light of estate planning tax reform.

LEVEL: Intermediate
ONLINE: \$125.00
CD w/TEXT: \$145.00

CPE: 8 Credits, Taxes
CD-ROM: \$125.00
TEXT: \$139.95

Advanced Estate-Planning and Valuation Issues for the Closely Held Business Owner* (EPVI)

This course enables CPAs to advise the closely held business owner on estate-planning problems and opportunities. The course focuses on transfer of wealth, liquidity, and business continuation.

LEVEL: Advanced
ONLINE: \$149.95
CD w/TEXT: \$169.95

CPE: 10 Credits, Taxes
CD-ROM: \$149.95
TEXT: \$165.00

Estate and Business-Succession Planning Using Life Insurance* (ESLI)

This course enables the CPA to advise clients on choices of life insurance product design for their personal accumulation and estate-planning needs. The focus of the course is the creation, preservation, and transfer of wealth for high-net-worth individual and business clients.

LEVEL: Intermediate
ONLINE: \$149.95
CD w/TEXT: \$169.95

CPE: 10 Credits, Taxes
CD-ROM: \$149.95
TEXT: \$165.00

Federal Estate and Gift Tax Returns – Forms 706 and 709 Workshop (GIFT)

Estate tax and generation-skipping transfer tax have returned with a vengeance in 2011, and the gift tax is again unified with the estate tax. Changes in the transfer tax under new law are mirrored in the compliance requirements. Learn how to prepare Forms 706 and 709 in these circumstances.

LEVEL: Intermediate
ONLINE: \$189.95
CD w/TEXT: \$209.95

CPE: 16 Credits, Taxes
CD-ROM: \$189.95
TEXT: \$205.00

The Best Income Tax, Estate Tax, and Financial Planning Ideas of 2011 (IEFP)

Income and transfer tax rate changes have turned pre-2011 strategies on their head; clients will require extensive planning and reconsideration of appropriate tax strategies. CPAs must be ready for one of the most complex years in recent history. This course explores practical tax-planning ideas that can assist client's needs.

LEVEL: Intermediate
ONLINE: \$169.95
CD w/TEXT: \$189.95

CPE: 12 Credits, Taxes
CD-ROM: \$169.95
TEXT: \$185.00

Post-Mortem Estate Planning – Forms 706, 1041, and 1040 (PMEP)

Learn how to minimize taxes on estate and inheritance tax returns, estate income tax returns, and the decedent's final income tax return through practical examples, practice points, case examples, and checklists.

LEVEL: Intermediate
ONLINE: \$169.95
CD w/TEXT: \$189.95

CPE: 12 Credits, Taxes
CD-ROM: \$169.95
TEXT: \$185.00

Fiduciary Income Tax Returns – Form 1041 Workshop (1041)

As income tax rates rise on estates, trusts, and their beneficiaries, consideration of the income tax effects becomes more critical. This course explains the complicated income tax rules of estates and trusts, fiduciary accounting, and how to prepare Form 1041.

LEVEL: Intermediate
ONLINE: \$189.95
CD w/TEXT: \$209.95

CPE: 16 Credits, Taxes
CD-ROM: \$189.95
TEXT: \$205.00

Advanced Form 1041 Practice Workshop (AP41)

The use of trusts must be re-evaluated in a post-tax reform world, with higher income tax rates for the trust and its beneficiaries. Practitioners who understand the basics of Subchapter J and Form 1041 compliance soon encounter complex problems requiring sophisticated applications. This course concentrates on difficult issues and is an essential offering for practitioners with high-powered clients.

LEVEL: Advanced
ONLINE: \$169.95
CD w/TEXT: \$189.95

CPE: 12 Credits, Taxes
CD-ROM: \$169.95
TEXT: \$185.00

Read full course descriptions at
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- **Live Webinars:** over 150 available, or customize a package for your firm
- **Self-Study:** over 250 courses, customizable packages
- **On-Demand Webcasts:** self-study versions of our live webinars
- **“Teach Your Own” courses:** using Surgent materials and a firm-provided instructor
- **Course licensing:** unlimited access to one or more courses for a full year



Find out more!

**Go to surgentmccoy.com, or contact
Kris Moretti at (610) 994-9626 or morettik@cpnow.com.**

LLC, Partnership, S Corporation,

Order by Oct. 31 and save 15%!

NEW! Advanced Tax Structures: Using Tiered Partnerships, Multiple Corporations, Series LLCs, and Disregarded Entities* (ADTS)

Many clients need multiple entities to realize both tax and non-tax objectives in an efficient way. Further, states are much more aggressive in pursuing nexus tax liability. Exploring when to run a business as a single entity or when to step up to multiple entities is a growing area of business and tax planning.

LEVEL: Advanced	CPE: 8 Credits, Taxes
ONLINE: \$125.00	CD-ROM: \$125.00
CD w/TEXT: \$145.00	TEXT: \$139.95

NEW! Choosing the Best Entity Structure Under the New Tax Law in 2011 (CBES)

Tax rates are an important factor in choosing the form of business organization, and fluid individual rates in 2013 and beyond demand a reconsideration of current businesses and a different analysis for new ventures. This unique course compares and contrasts the tax aspects of various entities and covers planning opportunities and pitfalls in developing a business structure.

LEVEL: Intermediate	CPE: 8 Credits, Taxes
ONLINE: \$125.00	CD-ROM: \$125.00
CD w/TEXT: \$145.00	TEXT: \$139.95

NEW! LLC Practitioner's Workshop: A Case Studies Approach* (LWRK)

This course uses a case study approach to show how to apply federal tax rules to a client's limited liability companies. It explores reasonably complex LLC issues and problems.

LEVEL: Intermediate	CPE: 8 Credits, Taxes
ONLINE: \$125.00	CD-ROM: \$125.00
CD w/TEXT: \$145.00	TEXT: \$139.95

NEW! S Corporation Practitioner's Workshop: A Case Studies Approach* (SWRK)

This course uses a case study approach to apply federal tax rules to a client's S corporations. Case studies based on real-life examples are the focal point.

LEVEL: Intermediate	CPE: 8 Credits, Taxes
ONLINE: \$125.00	CD-ROM: \$125.00
CD w/TEXT: \$145.00	TEXT: \$139.95

The Top 50 Business Tax Mistakes Practitioners Make and How to Fix Them (BTBB)

This course will explore the top errors made in compliance and tax planning for business entities. It will focus on how to avoid these missteps and plan for a better tax result. Experienced practitioners will benefit from a wealth of knowledge to apply to their practice.

LEVEL: Intermediate	CPE: 8 Credits, Taxes
ONLINE: \$125.00	CD-ROM: \$125.00
CD w/TEXT: \$145.00	TEXT: \$139.95

The Complete Guide to Partnerships and Limited Liability Companies (CLC)

Learn the most innovative way to conduct business on a tax-advantaged basis. This course discusses the tax issues of an LLC and a partnership from formation to liquidation. The material is vital for all practitioners in the business and investment sectors.

LEVEL: Basic	CPE: 12 Credits, Taxes
ONLINE: \$169.95	CD-ROM: \$169.95
CD w/TEXT: \$189.95	TEXT: \$185.00

Surgent McCoy's Top Ten Tax Issues in Dealing with LLCs and Partnerships* (LP10)

This course covers selected critical tax issues that practitioners need to know when working with partnerships and limited liability companies, with a focus on planning opportunities and pitfalls.

LEVEL: Intermediate	CPE: 8 Credits, Taxes
ONLINE: \$125.00	CD-ROM: \$125.00
CD w/TEXT: \$145.00	TEXT: \$139.95

Surgent McCoy's Guide to Understanding the Key Issues in Preparing S Corporation Tax Returns (IPSC)

This course guides accountants and staff through the fundamentals of S corporation rules from formation through distributions and how they impact the Form 1120S. It shows how S corporation income and expenses flow into the shareholder's returns. Numerous worksheets are included.

LEVEL: Basic	CPE: 8 Credits, Taxes
ONLINE: \$125.00	CD-ROM: \$125.00
CD w/TEXT: \$145.00	TEXT: \$139.95

Surgent McCoy's LLC and Partnership Tax Return Preparation Workshop* (LPPW)

This course provides CPAs with an understanding of tax return preparation issues for limited liability companies and partnerships, with emphasis on the preparation of Form 1065 and Schedule K-1. It also provides a thorough understanding of federal income-tax laws for LLCs and partnerships.

LEVEL: Basic	CPE: 8 Credits, Taxes
ONLINE: \$125.00	CD-ROM: \$125.00
CD w/TEXT: \$145.00	TEXT: \$139.95

Surgent McCoy's Handbook for Mastering Basis, Distributions, and Loss Limitation Issues for S Corporations, LLCs, and Partnerships (HMBI)

The most difficult concepts to master when dealing with flow-through business entities are the basis and distribution concepts. Major errors and malpractice issues occur if the CPA does not fully understand the impact of these rules. This course is designed to focus on the practical applications of these rules.

LEVEL: Intermediate	CPE: 8 Credits, Taxes
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Make Money for You and Your Clients: Surgent McCoy's Top Business Tax-Planning Strategies (BTPS)

This course is designed to provide real-world ideas that will increase revenue for you, your company, and your clients. Find out answers to tough questions regarding tax planning and strategies for the closely held business, and learn how to apply key techniques to make more money.

LEVEL: Intermediate	CPE: 20 Credits, Taxes
ONLINE: \$205.00	CD-ROM: \$205.00
CD w/TEXT: \$225.00	TEXT: \$219.95

The Complete Guide to Preparing Limited Liability Company, Partnership, and S Corporation Federal Income Tax Returns (PLPS)

This course will enable the practitioner to learn how to prepare LLC, S corporation, and partnership tax returns. It focuses on an identical trial balance to completed tax return case study prepared on Form 1120S and Form 1065, to explore the similarities and differences of these popular entity structures.

LEVEL: Basic	CPE: 16 Credits, Taxes
ONLINE: \$189.95	CD-ROM: \$189.95
CD w/TEXT: \$209.95	TEXT: \$205.00

Preparing C Corporation Tax Returns for New Staff and Para-Professionals (PCTR)

This course trains new staff accountants, data processing employees, para-professionals, and bookkeepers to prepare a complicated federal corporate income tax return. It provides coverage of tax areas affecting all business entities, providing training that may be carried to other business entity returns.

LEVEL: Basic	CPE: 10 Credits, Taxes
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and C Corporation Courses

Surgent McCoy's Case Studies in the Life Cycle of a Closely Held C Corporation* (LCCC)

This course uses one continuous sample case to show how to apply federal tax rules to a client's closely held corporation and shareholder problems. The case starts with a sole proprietor and follows the family business owners through the entire process, beginning with the incorporation decision and ending with the complete liquidation of a closely held corporation.

LEVEL: Intermediate CPE: 8 Credits, Taxes
ONLINE: \$125.00 CD-ROM: \$125.00
CD w/TEXT: \$145.00 TEXT: \$139.95

Surgent McCoy's Advanced Critical Tax Issues for LLCs and Partnerships (ACTI)

This course provides an in-depth discussion of selected advanced-level issues affecting LLCs and partnerships in light of the changes in the income tax.

LEVEL: Advanced CPE: 10 Credits, Taxes
ONLINE: \$149.95 CD-ROM: \$149.95
CD w/TEXT: \$169.95 TEXT: \$165.00

Advanced Partnership/LLC Workshop: How to Do Optional Step-Up in Basis under §754 and Related Provisions* (APLW)

Changes in the individual tax rates require more complex planning for clients invested in partnerships. This course explores the practical issues in the many instances in which a step-up in basis can create tax advantages for partners and members. This course includes case studies to illustrate the critical points.

LEVEL: Advanced CPE: 10 Credits, Taxes
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The Complete Guide to Liquidation of Business Entities (CGLB)

Explore in-depth the technical tax and business issues in liquidating C corporations, S corporations, partnerships, and limited liability companies. This course is essential for anyone planning to sell a business.

LEVEL: Intermediate CPE: 12 Credits, Taxes
ONLINE: \$169.95 CD-ROM: \$169.95
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Surgent McCoy's Advanced Critical Tax Issues for S Corporations (ACTS)

What impact do the higher tax rates have on S corporations? This course goes past the basics and addresses important practical issues concerning S corporations that experienced practitioners must know.

LEVEL: Advanced CPE: 10 Credits, Taxes
ONLINE: \$149.95 CD-ROM: \$149.95
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Clearing the Fog in Advanced LLC and Partnership Structuring* (CFOG)

This course is essential for any tax staff members who prepare partnership or LLC returns. It familiarizes them with the required and discretionary operating-agreement provisions from both a tax and a business perspective and helps them understand the relationship between what is said in the operating agreement and the preparation of Form 1065 and Schedule K-1.

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Learn tax-planning strategies that can be implemented to save money when acquiring, operating, or selling real estate. This unique course is filled with tax tips, remedies, checklists, and audit-reduction strategies.

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The Top 50 Tax Mistakes Practitioners Make in Real Estate Investments & How to Fix Them (REBB)

Real estate is a complicated investment, and it is likely that a number of mistakes are made throughout the life cycle of the investment. This course focuses on the mistakes made by others...so that you're not doomed to repeat them.

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The IRS has dramatically ramped-up its examination of individuals and small business taxpayers. CPAs need clients to understand the need for documentation and procedures to substantiate what IRS auditors are pursuing. Learn the high audit risk areas and ways to help clients survive an IRS audit with little or no change.

LEVEL: Intermediate CPE: 8 Credits, Taxes
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MBA in a Day!* (MBAD)

This course helps CPAs develop a complete business finance and management background to better manage their own businesses and help their clients make better financial decisions.

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ONLINE: \$169.95 4 Credits, Marketing/
CD w/TEXT: \$189.95 2 Credits, Economics
TEXT: \$185.00 CD-ROM: \$169.95

The Top 50 Mistakes Practitioners Make and How to Fix Them: Dealing with the IRS* (IRSM)

Tax practice and the resolution of tax problems with the IRS can be tedious and outright challenging. This course will show practitioners how to navigate through the confusing IRS system, help them save time, and enable them to avail their clients of all the rights to which they are entitled. The techniques and tools this course provides will make tax practice less "taxing."

LEVEL: Intermediate CPE: 8 Credits, Taxes
ONLINE: \$125.00 CD-ROM: \$125.00
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Individual Tax Courses

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NEW! Strategies and Tactics in the New War Against Higher Individual Taxes (IWAR)

With significant tax changes now in place, clients need to review their best options for action. This course focuses on practical, innovative ideas and techniques that you and your clients can put into action today.

LEVEL: Intermediate CPE: 12 Credits, Taxes
ONLINE: \$169.95 CD-ROM: \$169.95
CD w/TEXT: \$189.95 TEXT: \$185.00

Surgent McCoy's Complete Guide to Personal Financial Planning (CGPF)

This course provides CPAs with a roadmap to personal financial planning engagements. It is essential for any CPA looking to establish or enhance a personal financial planning practice.

LEVEL: Basic CPE: 5 Credits, Taxes/
5 Credits Admin. Prac.
ONLINE: \$149.95
CD w/TEXT: \$169.95 CD-ROM: \$149.95
TEXT: \$165.00

Preparing Individual Tax Returns for New Staff and Para-Professionals (PIPR)

This course trains new staff accountants, data processing employees, para-professionals, and bookkeepers to prepare a complicated federal individual income tax return. The practical, hands-on course material covers the latest tax law changes, making it essential for your new staff.

LEVEL: Basic CPE: 8 Credits, Taxes
ONLINE: \$125.00 CD-ROM: \$125.00
CD w/TEXT: \$145.00 TEXT: \$139.95

Surgent McCoy's Individual Income Tax School* (SITS)

This course will take new and administrative staff from the most basic concepts to a full understanding of individual tax return preparation. Coverage includes the impact of recent tax legislation.

LEVEL: Basic CPE: 16 Credits, Taxes
ONLINE: \$189.95 CD-ROM: \$189.95
CD w/TEXT: \$209.95 TEXT: \$205.00

How to Avoid Getting Burned in a Divorce: Tax Traps, Tricks, and Planning (DTTP)

This course explores the practical tax and financial issues that arise as a result of divorce or separation. It is essential for practitioners who are seeking solutions to benefit both parties.

LEVEL: Intermediate CPE: 8 Credits, Taxes
ONLINE: \$125.00 CD-ROM: \$125.00
CD w/TEXT: \$145.00 TEXT: \$139.95

The Top 50 Mistakes Practitioners Make and How to Fix Them: Individual Tax and Financial Planning (INBB)

This course focuses on the law in order to break down 50 situations in which a taxpayer has attempted to "twist" a tax plan or idea. The study of the law underlying the tax mistakes made will assist practitioners in satisfying their professional standards of practice.

LEVEL: Intermediate CPE: 8 Credits, Taxes
ONLINE: \$125.00 CD-ROM: \$125.00
CD w/TEXT: \$145.00 TEXT: \$139.95

Critical Tax Planning Strategies and Issues in Owning a Principal Residence or Vacation Home (PRVH)

This course provides an analysis of the significant tax-planning advantages and strategies related to owning a principal residence and/or vacation home. Understand why residential real estate is one of the best tax-advantaged investments and help your client maximize the benefits of home ownership.

LEVEL: Intermediate CPE: 8 Credits, Taxes
ONLINE: \$125.00 CD-ROM: \$125.00
CD w/TEXT: \$145.00 TEXT: \$139.95

Surgent McCoy's Advanced Individual Income Tax Return Issues* (SRI)

There are always a number of issues that come up in busy season of which experienced practitioners wish they had more knowledge. This course is designed to explore the tough tax issues for experienced CPAs and help them provide better planning strategies and results for their higher-income clients.

LEVEL: Advanced CPE: 12 Credits, Taxes
ONLINE: \$169.95 CD-ROM: \$169.95
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International Tax Issues for Individuals – Going Overseas and Coming to the United States* (IIO)

This course provides insight on the major tax issues of U.S. citizens who work or invest overseas. It also deals with the taxation of foreign nationals who come to or invest in the United States.

LEVEL: Basic CPE: 10 Credits, Taxes
ONLINE: \$149.95 CD-ROM: \$149.95
CD w/TEXT: \$169.95 TEXT: \$165.00

International Tax Issues for Small- and Medium-Sized Businesses – Going Overseas and Coming to the United States* (IICO)

Nonpublicly traded companies are becoming more involved in international transactions due to Internet sales and increasingly liberal trade policies. This course will focus on major tax issues affecting nonpublic companies doing business overseas.

LEVEL: Basic CPE: 10 Credits, Taxes
ONLINE: \$149.95 CD-ROM: \$149.95
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The Accountant's Guide to Financial Management* (AGFM)

This course is designed for accountants who must have financial knowledge but have not had formal training in finance. It includes checklists, guidelines, rules of thumb, diagrams, graphs, and tables to aid your comprehension of the subjects discussed.

LEVEL: Basic CPE: 20 Credits, Finance
ONLINE: \$205.00 CD-ROM: \$205.00
CD w/TEXT: \$225.00 TEXT: \$219.95

Modern Budgeting for Profit Planning and Control* (BPCC)

A budget is a formal expression of plans, goals, and objectives of management that covers all aspects of operations. This course explains what budgets are, how they work, how to prepare and present them, and how to analyze budget figures and results.

LEVEL: Basic CPE: 12 Credits, Finance
ONLINE: \$169.95 CD-ROM: \$169.95
CD w/TEXT: \$189.95 TEXT: \$185.00

Economic Analysis for Business and Strategic Decisions* (EABD)

This course focuses on the fundamentals and essentials needed to understand how business decisions are made. It shows how to apply economic concepts to solving real-life business problems and how to use economic thinking in making strategic decisions.

LEVEL: Intermediate CPE: 12 Credits, Economics
ONLINE: \$169.95 CD-ROM: \$169.95
CD w/TEXT: \$189.95 TEXT: \$185.00

Managing and Improving Your Cash Flow* (MICF)

Sound cash management is the key to the survival of any business. This course 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.

LEVEL: Basic CPE: 10 Credits, Mgmt.
ONLINE: \$149.95 Advisory Services
CD w/TEXT: \$169.95 CD-ROM: \$149.95
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The Complete Guide to Employment Issues – Reducing the Employer's Risk (EIRE)

In a troubled economy, CPAs as advisers and controllers must deal with even more complex employee issues. Learn, in-depth, the legal and tax issues associated with all aspects of employment.

LEVEL: Basic CPE: 6 Credits, Business
ONLINE: \$125.00 Law/2 Credits, Taxes
CD w/TEXT: \$145.00 CD-ROM: \$125.00
TEXT: \$139.95

Surgent McCoy's Comprehensive Guide to Tax Depreciation, Amortization, & Property Transactions from Acquisition to Exchange or Disposition* (TDAP)

This course provides an in-depth analysis of the complex maze of rules dealing with depreciation, amortization, and sale of property, with emphasis on identifying special planning opportunities and pitfalls.

LEVEL: Intermediate CPE: 8 Credits, Taxes
ONLINE: \$125.00 CD-ROM: \$125.00
CD w/TEXT: \$145.00 TEXT: \$139.95

The Inventory Course – Valuations, Methods, and Uniform Capitalization (IVMU)

This course analyzes aspects involved in selecting a method of valuing inventory for all businesses. Examples illustrate important concepts of this complex area of financial and tax reporting.

LEVEL: Basic CPE: 4 Credits, Taxes/
ONLINE: \$125.00 4 Credits, Accounting
CD w/TEXT: \$145.00 CD-ROM: \$125.00
TEXT: \$139.95

The Complete Guide to Fringe Benefits (CGFB)

Greater planning considerations are needed for increases in tax rates & possible surtaxes. This course discusses tax advantages and potential pitfalls of providing fringe benefits to employees.

LEVEL: Basic CPE: 12 Credits, Taxes
ONLINE: \$169.95 CD-ROM: \$169.95
CD w/TEXT: \$189.95 TEXT: \$185.00

Legal Toolkit for Business Owners, Controllers, and CPAs (LTBO)

This course gives the professional an understanding of the legal environment of the business community, and explores ways to identify areas that can expose a business to liability.

LEVEL: Overview CPE: 8 Credits, Bus. Law
ONLINE: \$125.00 CD-ROM: \$125.00
CD w/TEXT: \$145.00 TEXT: \$139.95

Surgent McCoy's Guide to Assets and Stock Sales, Mergers, and Reorganizations* (MERG)

Understand the technical tax issues and planning in various types of business acquisitions for C Corporations and S Corporations with this practical course designed for experienced practitioners.

LEVEL: Intermediate CPE: 8 Credits, Taxes
ONLINE: \$125.00 CD-ROM: \$125.00
CD w/TEXT: \$145.00 TEXT: \$139.95

The Complete Guide to Payroll Taxes and 1099 Issues (CGPT)

(Updated version available 10/15)

Employment taxes are often overlooked as an area where more planning may be effective. This course reviews federal payroll taxes, Form 1099 and related compliance issues.

LEVEL: Basic CPE: 16 Credits, Taxes
ONLINE: \$189.95 CD-ROM: \$189.95
CD w/TEXT: \$209.95 TEXT: \$205.00

Negotiations and Tax Aspects of Buying and Selling a Business (NTAB)

This course is a comprehensive analysis of the business and tax aspects of buying/selling a business. It is also a guide to help practitioners and industry CPAs understand structuring techniques.

LEVEL: Intermediate CPE: 12 Credits, Taxes
ONLINE: \$169.95 CD-ROM: \$169.95
CD w/TEXT: \$189.95 TEXT: \$185.00

Customer Loyalty: Cost vs. Benefits – A Quantitative Approach* (CULO)

Learn how to evaluate customer's economic profit potential, identify customers that create the most value for a company, and cultivate and retain the most valuable customers.

LEVEL: Basic CPE: 4 Credits, Mgmt.
ONLINE: \$65.00 Advisory Services
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TEXT: \$79.95

Free Cash Flow: A Tool to Manage Your Business More Effectively* (FCFL)

Accounting and financial professionals will get a firm understanding of what free cash flow is, and how it can be used as a financial metric to make better business decisions.

LEVEL: Intermediate CPE: 4 Credits, Mgmt.
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With the income tax changes affecting businesses and individuals, retirement plans offer unique opportunities that clients may need to maximize. More than ever, tax practitioners need to know how to communicate these ideas effectively, and to provide ongoing tax planning services to the most important segment of their client base.

LEVEL: Basic
ONLINE: \$169.95
CD w/TEXT: \$189.95

CPE: 12 Credits, Taxes
CD-ROM: \$169.95
TEXT: \$185.00

NEW! Advanced Tips and Tricks of Investment Tax Management to Enhance Client Wealth Accumulation and Retirement Security* (TER4)

This course discusses how to apply a host of specific investment and financial tax planning money management tips and tricks, both before and after retirement, to sculpt your clients' strategies and tactics to our changing and dynamic tax, economic, and political environment.

LEVEL: Intermediate
ONLINE: \$65.00
CD w/TEXT: \$85.00

CPE: 4 Credits, Taxes
CD-ROM: \$65.00
TEXT: \$79.95

Within the Red Zone of Your Retirement: Tax Planning Strategies for Getting to the Goal Line Without Fumbling (REDZ)

This course explores in-depth topics that will get practitioners over the top in knowing the tricks and traps of tax planning for retirement.

LEVEL: Intermediate
ONLINE: \$149.95
CD w/TEXT: \$169.95

CPE: 10 Credits, Taxes
CD-ROM: \$149.95
TEXT: \$165.00

What Every CPA Should Know About Life Insurance Products and Planning (CIPP)

This course prepares CPAs for this complicated and misunderstood need for client counseling. It cuts to the heart of critical planning issues with proper assessment of alternatives and tax-related consequences.

LEVEL: Basic
ONLINE: \$149.95
CD w/TEXT: \$169.95
TEXT: \$165.00

CPE: 5 Credits, Taxes/
5 Credits, Admin. Prac.
CD-ROM: \$149.95

Social Security, Medicare, and Prescription Drug Retirement Benefits: What Every Baby Boomer Needs to Know Now (SSRB)

Social Security seems poised for changes in benefits and eligibility age. This course provides tax and financial planning professionals with background information on the Social Security system and the strategies clients will need in dealing with it.

LEVEL: Basic
ONLINE: \$125.00
CD w/TEXT: \$145.00

CPE: 8 Credits, Taxes
CD-ROM: \$125.00
TEXT: \$139.95

Complete Strategies for Maximizing Contributions, Rollovers, Distributions, & Estate Planning of IRAs, Roth IRAs, SIMPLEs, & SEPs (CIRA)

Most individuals will accumulate a significant amount of wealth through contributions or rollovers from qualified plans into IRAs. The rules in this area are very complex. This course provides insight into this important area of practice.

LEVEL: Intermediate
ONLINE: \$205.00
CD w/TEXT: \$225.00

CPE: 20 Credits, Taxes
CD-ROM: \$205.00
TEXT: \$219.95

Everything You Need to Know About Retirement Plan Distributions* (CRPD)

This course will enable CPAs to expand their retirement planning services into one of the fastest growing segments of financial planning. The focus is on the crucial tax and financial planning issues facing clients as they approach retirement.

LEVEL: Intermediate
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CPE: 10 Credits, Taxes
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This course gives CPAs the tools and knowledge required to help their clients implement tax-effective investment and portfolio strategies for successful wealth accumulation and real after-tax retirement income maintenance.

LEVEL: Intermediate
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CPE: 8 Credits, Taxes
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Surgent McCoy's Guide to Designing and Administering the New Roth 401(k), Traditional 401(k), SIMPLE, and Cafeteria Plans* (RTSC)

Salary reduction plans are being created in record numbers across the country. This course focuses on how to meet the IRS and Department of Labor standards and manage these plans effectively.

LEVEL: Intermediate
ONLINE: \$169.95
CD w/TEXT: \$189.95

CPE: 12 Credits, Taxes
CD-ROM: \$169.95
TEXT: \$185.00

Surgent McCoy's Guide to Wall Street Investments and Their New Tax Implications (GWSI)

This course will provide financial services professionals with a thorough knowledge of the investment and tax aspects of products marketed by Wall Street. It will enable practitioners to help clients achieve their goals of wealth accumulation.

LEVEL: Update
ONLINE: \$149.95
CD w/TEXT: \$169.95
TEXT: \$165.00

CPE: 7 Credits, Admin.
Prac./3 Credits, Taxes
CD-ROM: \$149.95

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