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See inside front cover

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See page 2.

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PRICING/FEATURES

Item	Download Format	CD-ROM Format
1st user	$349.00 ($449 after 6/30)	$375.00 ($475 after 6/30)
Additional Users	$169.00 each	$169.00 each
Optional Textbooks	$20.00 each	$20.00 each
Shipping*	N/A	$7.45
Includes Updates?	Yes	No
Online Exams	Yes	Yes
Instant CPE Certificates	Yes	Yes

**Additional S/H charges apply for textbooks.*

Course descriptions can be found at cpenow.com.

2009 LIBRARY COURSES	Code	CPE Hrs.
ACCOUNTING & AUDITING		
Asset Impairment & Retirement Acctg.	AAIM	2
Detecting & Preventing Fraud	ADPF	2
Analytical Review	AREV	2
Understanding FIN No. 48	AUTP	2
Current Developments in Acc. & Aud.	CDAA	12
OCBOA	CTBA	2
Accounting Standards Update	FAS2	2
Independence & Mgmt. Adv. Svcs.	IACS	2
Implementing FIN #46R	IFIN	2
Internal Control	INTC	2
Professional Dev. Update	PDEV	2
Quality Control in CPA Firms	QCTL	2
Risk-Based Auditing	RISK	2
SAS No. 99 Update	SASU	2
Guide to Comp & Review	SGFO	12
Sarbanes-Oxley Act	SOXL	4
Tax Positions	TPOS	2
Understanding Fair Value Accounting	UFVA	2
ETHICS		
Ethics & the Attest Function (4-hr)	EAF4	4
Ethics & the Attest Function (8-hr)	EAF8	8
Ethics & Attest Function & Fraudulent Fin. Reptg.	EFFR	2
Ethics for Florida	EFLA	4
General Ethics for Accountants	EGEN	4
Ethics for Mississippi	EMIS	4
Ethics for North Carolina	ENCA	4
Ethics for New York	ENYK	4
Ethics for Ohio	EOHI	4
Ethical Resp. in Tax Practice, Outsourcing & Indep.	EOUT	2
Ethical Resp. Under AICPA Code	ERAC	2
Ethics for Texas	ETEX	4
Ethical Consid. in Tax Practice: Part 1	ETX1	2
Ethical Consid. in Tax Practice: Part 2	ETX2	2
Ethics for Virginia	EVGA	2
Ethics for Washington	EWAS	4
TAX UPDATE		
S Corp, Limited Liability, & Partnership Update	BCPE	12
Estate Planning Update	BEUC	10
Federal Tax Update	BFTU	16
Individual Tax Update	BITU	12
Top Tax Topics	STTT	8
1040 Tax Season Survival Guide	TSSG	10
LLC/PARTNERSHIP/S AND C CORP		
Adv. Tax Issues for LLCs/Partnerships	ACTL	10
Adv. Tax Issues for S Corps	ACTS	10
Adv. Partnership/LLC Workshop	APLW	10
Top 50 Business Tax Mistakes	BTBB	8
Top Business Tax Planning Strategies	BTPS	20
Comparing Tax Aspects of Business Entities	CCTA	8
Adv. LLC & Partnership Structuring	CFOG	8
Liquidation of Business Entities	CGLB	12
Guide to Partnerships & LLCs	CLLC	12
Calc. Tax Basis for a Subchapter S Corp.	CTSS	2
Employment & Retirement Tax Issues	ERTI	2
Formation Issues of an S Corporation	FISC	2
Tax Issues in Formation of LLCs	FLLC	2
Gen. Oper. & Acctg. Methods of S Corps	GOAM	2
Introduction to LLCs	ILLC	2
Understanding Key Issues & Prep. S Corp Returns	IPSC	8
Introduction to S Corps	ISEE	2
Liquidation & Termination Issues of LLCs	LTIL	2
Prep. Corp. Tax Returns for New Staff	PCTR	10
Prep. LLC, Partnership & S Corp Returns	PLPS	16

2009 LIBRARY COURSES	Code	CPE Hrs.
ESTATE PLANNING		
Form 1041 Workshop	1041	16
Advanced Form 1041 Workshop	AP41	12
Top 50 Estate Planning Mistakes	EPBB	8
Adv. EP & Valuation Issues for Closely Held Business	EPVI	10
Bus. Succession Plng w/Life Ins.	ESLI	10
Admin. of Trusts & Estates	GATE	10
Forms 706 & 709 Workshop	GIFT	16
How to Settle an Estate	HSEO	2
Inc. Tax, Estate Tax, & Fin. Plng. Ideas	IEFP	12
Income Tax of Trusts & Estates	ITTE	2
Using Life Ins. Trusts in EP	LITP	2
Mastering Fundamentals of EP	MFEP	10
Post-Mortem Estate Planning	PMEP	12
Role of Executors & Trustees	RETU	2
Critical Issues for Estate Planners	SCEP	16
The Complete Trust Workshop	TCTW	20
RETIREMENT PLANNING/INVESTMENTS		
Elder Care Planning	CECP	8
Life Insurance Products & Planning	CIPP	10
Maximizing IRAs, Roths, SIMPLEs, & SEPs	CIRA	20
Retirement Plan Distributions	CRPD	10
How Much Money You Need to Retire	DRMM	16
Wall Street Investments & Their Tax Implications	GWSI	10
Tax Plng. Strategies Close to Retirement	REDZ	10
Tax Planning Using Roth IRAs	ROTH	2
401(k)s, SIMPLEs, Caf. Plans	RTSC	12
Small Business Retirement Plan Review	SBRP	12
Social Security and Medicare	SSRB	8
Tax Aspects of Distributions from IRAs	TADI	2
Tax Aspects of Profit Sharing Plans	TPSP	2
Understanding Traditional IRAs	UNRI	2
Understanding Tax Aspects of SIMPLE IRAs	UTAS	2
INDIVIDUAL TAX		
Guide to Personal Financial Planning	CGFP	10
Divorce: Tax Traps, Tricks, & Planning	DTTP	8
Individual AMT	IAMT	2
Top 50 Mistakes: Ind. Tax & Fin. Planning	INBB	8
Top Individual Tax Planning Strategies	ITPS	12
Prep. Ind. Tax Returns for New Staff	PITR	8
Tax Planning for Prin. Residence	PRVH	8
Saving for College	SCUS	2
Tax Aspects of Splitting Income w/Family	SIFM	2
Purchase & Sale of Principal Residence	TASR	2
Tax Benefits for College Education	TBCE	2
Guide to Tax-Deferred Exchanges	TXDE	2
BUSINESS & INDUSTRY		
Guide to Fringe Benefits	CGFB	12
Guide to Payroll Taxes & 1099 Issues	CGPT	16
Guide to Employment Issues	EIRE	8
Fringe Benefits & Payroll Taxes	ITGF	8
The Inventory Course	IVMU	8
Legal Toolkit for Business Owners	LTBO	8
Tax Aspects of Buying & Selling a Business	NTAB	12
Statutory Fringe Benefits	STFB	2
Health Benefits for Employers/Self-Employed	TAHC	2
SPECIALTY		
Tax Strategies for Real Estate Investors	GOLD	12
Top 50 Mistakes in Real Estate Investments	REBB	8
Guide to Tax Research	SGTR	8
Tax Malpractice	TMAL	8

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Take your CPE in bite-sized snacks that are easy to swallow. Each course listed here qualifies for two hours of CPE credit and comes in an online download format. Take your CPE exam online for instant grading and CPE certificate. *NEW!* Purchase our CPE Snack Pack at cpenow.com and get all 93 courses here for the special introductory price of $299! (See page 11 for more information.)

COURSE	CODE	LEVEL	FIELD OF STUDY
ACCOUNTING:			
Asset Impairment and Retirement Accounting	AAIM	Intermediate	Accounting
Understanding FIN No. 48	AUTP	Intermediate	Accounting
Compilation and Review Update*	CARU	Update	Accounting
NEW! Comp. & Rev. of Personal Financial Statements*	CRFS	Intermediate	Accounting
OCBOA: Cash and Tax Basis Accounting	CTBA	Intermediate	Accounting
Accounting for Loans and Investments*	ELRS	Intermediate	Accounting
Accounting Standards Update	FAS2	Update	Accounting
Independence and Management Advisory Services	IACS	Intermediate	Accounting
NEW! Acctg. Issues in Current Economic Climate: Part 1*	ICEC	Intermediate	Accounting
Implementing FIN #46R	IFIN	Intermediate	Accounting
Guide to New Business Combination Standards*	NBCS	Intermediate	Accounting
NEW! Revenue Recognition* *(available June 2009)*	RREC	Intermediate	Accounting
NEW! SSARS Review Part 1: Update on Standards*	SAR1	Update	Accounting
NEW! SSARS Review Part 2: Practice Issues*	SAR2	Update	Accounting
Tax Positions	TPOS	Intermediate	Accounting
Understanding Fair Value Accounting	UFVA	Intermediate	Accounting
Global Financial Reporting: Where is FASB Headed?*	WFRH	Intermediate	Accounting
NEW! What Do I Need to Know Now About IFRS?*	WINI	Update	Accounting
AUDITING:			
NEW! Risk-Based Auditing & Closely Held Companies*	ACHC	Intermediate	Auditing
NEW! Avoiding Audit Wrap-Up Deficiencies*	ADED	Basic	Auditing
Fraud Update: Detecting & Preventing Fraud	ADPF	Update	Auditing
Analytical Review	AREV	Intermediate	Auditing
NEW! Update: What Is Happening at the ASB?*	ASBU	Update	Auditing
NEW! Evaluating the Design of Internal Controls*	EDIC	Basic	Auditing
Engagement Mgmt. in a Changing Audit Profession*	EMAP	Intermediate	Auditing
Establishing and Maintaining Client Relationships*	EMCR	Intermediate	Auditing
NEW! High-Impact Engagement Team Discussions*	HETD	Basic	Auditing
NEW! Eval. Results of Risk Assessment Audit Proc.*	IEDC	Basic	Auditing
NEW! Indep. & Objectivity for Attest Service Providers*	IIOC	Basic	Auditing
Internal Control: Preventing Misstatements	INTC	Intermediate	Auditing
NEW! Linking Audit Risk Assessments to an Audit Plan*	LARA	Basic	Auditing
NEW! Mastering Standards: Comp. & Rev. Engagements*	MCRE	Basic	Auditing
Professional Developments Update	PDEV	Update	Auditing
Quality Control in a Changing Audit Profession*	QCAP	Intermediate	Auditing
Quality Control in CPA Firms	QCTL	Intermediate	Auditing
Risk-Based Auditing: SAS 104 Through 111	RISK	Intermediate	Auditing
NEW! Required Auditor Communications*	RRAC	Basic	Auditing
Implementing SAS No. 112*	S112	Intermediate	Auditing
SAS No. 99 Update	SASU	Update	Auditing
Supervising Staff in a Changing Audit Profession*	SCSA	Intermediate	Auditing
Sarbanes-Oxley PCAOB Update*	SOPU	Intermediate	Auditing
ETHICS:			
Ethics & Attest Function & Fraudulent Fin. Reporting	EFFR	Update	Reg. Ethics
Ethical Resp. in Tax Prac., Outsourcing & Independence	EOUT	Update	Reg. Ethics
Ethical Resp. Under AICPA Code	ERAC	Update	Reg. Ethics
Ethical Considerations in Your Tax Practice: Part 1	ETX1	Intermediate	Reg. Ethics
Ethical Considerations in Your Tax Practice: Part 2	ETX2	Intermediate	Reg. Ethics
NEW! Ethics for Virginia	EVGA	Basic	Reg. Ethics

Read full titles and course descriptions at cpenow.com.

them all in our Snack Pack for just $299!✯

COURSE	CODE	LEVEL	FIELD OF STUDY
TAX UPDATE:			
Depreciation Rules Under Recent Legislation*	ESDP	Intermediate	Taxes
Protecting Practitioners from Preparer Penalties*	PPES	Basic	Taxes
NEW! Using and Disclosing Tax Return Information*	UDTI	Update	Taxes
LLCs AND S CORPORATIONS:			
Calculating Tax Basis for a Subchapter S Corporation	CTSS	Intermediate	Taxes
Employment & Retirement Tax Issues for LLCs	ERTI	Intermediate	Taxes
Formation Issues of an S Corporation	FISC	Basic	Taxes
Tax Issues in Formation of LLCs	FLLC	Basic	Taxes
General Operations & Accounting Methods of S Corps	GOAM	Basic	Taxes
Introduction to LLCs	ILLC	Basic	Taxes
Introduction to S Corporations	ISEE	Basic	Taxes
Liquidation & Termination Issues of LLCs	LTIL	Intermediate	Taxes
NEW! Self-Employment Tax Issues*	SFEM	Intermediate	Taxes
ESTATE PLANNING:			
Review of Form 709: Gift-Tax Return*	709R	Basic	Taxes
How to Settle an Estate	HSEO	Basic	Taxes
Income Tax of Trusts & Estates	ITTE	Basic	Taxes
Using Life Insurance Trusts in Estate Planning	LITP	Intermediate	Taxes
Role of Executors & Trustees	RETU	Basic	Taxes
IRA / PENSION / RETIREMENT:			
Government, Business, & Personal Retirement Plans*	GBPR	Intermediate	Taxes
Tax Planning Using Roth IRAs	ROTH	Intermediate	Taxes
Tax Aspects of Distributions from IRAs	TADI	Intermediate	Taxes
Planning for Post-Retirement Distributions from IRAs*	TIPA	Intermediate	Taxes
Planning for Pre-Retirement Distributions from IRAs*	TIPB	Intermediate	Taxes
Tax Aspects of Profit Sharing Plans	TPSP	Basic	Taxes
Tax Planning Under Uniform Minimum Distribution Rules*	UMDR	Intermediate	Taxes
Understanding Traditional IRAs	UNRI	Basic	Taxes
Understanding Tax Aspects of SIMPLE IRAs	UTAS	Intermediate	Taxes
FINANCE:			
Successful Financial Planning Strategies*	GSFP	Basic	Finance
Legal/Tax/Economic Features of Life Insurance*	LIF1	Intermediate	Taxes/Finance
Determining Family & Business Life Insurance Needs*	LIF2	Intermediate	Taxes/Finance
Evaluating & Comparing Life Insurance Policies*	LIF3	Intermediate	Taxes/Finance
Life Insurance in Retirement Planning*	LIF4	Intermediate	Taxes/Finance
Business Life Insurance Plans*	LIF5	Intermediate	Taxes/Finance
HSAs, Long-Term Care, & Nursing Homes*	OHPI	Intermediate	Taxes/Finance
Retirement Money Mgmt. 1: Process & Concepts*	RMM1	Intermediate	Taxes/Finance
Retirement Money Mgmt. 2: Building the Nest Egg*	RMM2	Intermediate	Taxes/Finance
Retirement Money Mgmt. 3: Making It Last*	RMM3	Intermediate	Taxes/Finance
Tax Leverage & Tax-Planning Financial Applications*	TPFA	Intermediate	Taxes/Finance
INDIVIDUAL TAX:			
Individual AMT: Planning Issues	IAMT	Intermediate	Taxes
Saving for College Using CESAs and §529 Plans	SCUS	Basic	Taxes
Tax Aspects of Splitting Income with Family	SIFM	Intermediate	Taxes
Purchase & Sale of Principal Residence	TASR	Intermediate	Taxes
Tax Benefits for College Education	TBCE	Basic	Taxes
Guide to Tax-Deferred Exchanges	TXDE	Basic	Taxes
BUSINESS and INDUSTRY:			
Business Marketing & Management*	GBMM	Intermediate	Mktg/Mgmt. Adv. Svcs.
Statutory Fringe Benefits	STFB	Basic	Taxes
Health Benefits for Employers/Self-Employed	TAHC	Basic	Taxes

* *Not included in Comprehensive CPE Library.*

✯ *Price valid through 6/30/09. See page 11.*

Order now: 2009 Tax EZ tables!

Our bestselling reference tool returns this May, updated for all new changes!

This all-inclusive six-panel desk reference puts the latest key tax changes at your fingertips! Tax EZ is printed on durable glossy paper stock with a non-smudge finish and comes in a convenient 8½" x 11" folded size.

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Traditional training is also available for all courses. Contact our in-firm coordinator, Katie Surgent, at (610) 994-9609 or surgentk@cpenow.com.

OUR STIMULUS PACKAGE: Buy 3 courses, get 2 FREE!

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Not applicable on prior orders. If downloadable courses are included, your order must be placed online.
The two free courses are the least expensive of the courses ordered. Free shipping offer does not apply to additional courses or packages that are not part of the "buy 3, get 2 free" purchase.

NEW! Surgent McCoy's Accounting and Auditing Packages

GET JUST THE ACCOUNTING AND AUDITING TOPICS YOU WANT, AT A GREAT PRICE!

The five packages below are comprised of our best-selling two-hour courses in an online download format.

Choose from any of the following five packages:

Current Accounting Standards (AA01-OL):
6 courses, 12 CPE hours
Price: $140.00

Current Auditing Issues (AA02-OL):
8 courses, 16 CPE hours
Price: $185.00

IFRS Accounting (AA05-OL):
4 courses, 8 CPE hours
Price: $90.00

Challenges Confronting the Accounting Profession (AA04-OL):
4 courses, 8 CPE hours
Price: $90.00

Compilaton and Review (AA03-OL):
7 courses, 14 CPE hours
Price: $160.00

See the list of courses included in each package, read course descriptions, and order at cpenow.com!

Tax Update Courses

NEW! The American Recovery and Reinvestment Act of 2009* (ARR4)

This course delves into the practical planning issues and advice that CPAs need to provide to clients. Many of the new provisions under the American Recovery and Reinvestment Act are quite complex, and a thorough analysis will be provided on extracting and maximizing the benefits now available. Plus, many of the provisions expire by Dec. 31, 2009, so it is critical to understand them now.

LEVEL: Update | CPE: 4 hrs., Taxes | ONLINE: $59.95
CD-ROM: $65.00 | CD w/TEXT: $85.00 | TEXT: $79.95

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

With many post-election changes looming, this course is essential for every successful practitioner. Not only will you be updated on the most important tax issues and strategies that require your attention in 2009, but this course will also review major trends and changes in the case and regulatory law.

LEVEL: Update | CPE: 16 hrs., Taxes
ONLINE: $185.00 | CD-ROM: $189.95
CD w/TEXT: $209.95 | TEXT: $205.00

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

If you are a practitioner who wants the latest information on tax changes affecting your business clients or employers, then you should take this enlightening course. 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 hrs., Taxes
ONLINE: $165.00 | CD-ROM: $169.95
CD w/TEXT: $189.95 | TEXT: $185.00

Surgent McCoy's 2009 Top Tax Topics (STTT)

This course identifies the most important tax topics for 2009. 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 hrs., Taxes
ONLINE: $119.95 | CD-ROM: $125.00
CD w/TEXT: $145.00 | TEXT: $139.95

The Best Estate-Planning Update Course by Surgent McCoy (BEUC)

Major changes are expected in 2009 legislation that will provide new and permanent estate-planning rules. This course uses practical examples to update practitioners on the latest developments and techniques in this area.

LEVEL: Update | CPE: 10 hrs., Taxes
ONLINE: $145.00 | CD-ROM: $149.95
CD w/TEXT: $169.95 | TEXT: $165.00

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

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

LEVEL: Update | CPE: 12 hrs., Taxes
ONLINE: $165.00 | 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 hrs., Taxes
ONLINE: $145.00 | CD-ROM: $149.95
CD w/TEXT: $169.95 | TEXT: $165.00

Read full course descriptions at cpenow.com.

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

NEW PRODUCT!

Using and Disclosing Client Tax Return Information: New Rules Under §7216 You Need to Know NOW (UDTI)

A variety of sample disclosure forms are included!

Being asked to provide tax return related information to third parties is very common for tax return preparers. **But beware!** New regulations under §7216 made tax return preparers subject to much stricter rules regarding use and disclosure of client tax return information. This program analyzes the circumstances when a disclosure is required and provides the specific language the IRS requires.

Just $39 for this great reference tool + 2 hours of CPE credit! Buy the download now at cpenow.com.

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 HRS.	DOWNLOAD	CD	TEXT	CD W/TEXT
Florida	EFLA	4	$59.95	$65.00	$79.95	$85.00
Mississippi	EMIS	4	$59.95	$65.00	$79.95	$85.00
New York	ENYK	4	$59.95	$65.00	$79.95	$85.00
North Carolina	ENCA	4	$59.95	$65.00	$79.95	$85.00
Ohio	EOHI	4	$59.95	$65.00	$79.95	$85.00
Texas	ETEX	4	$59.95	$65.00	$79.95	$85.00
NEW! Virginia	EVGA	2	$39.00	N/A	N/A	N/A
Washington	EWAS	4	$59.95	$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 AR, CO, CT, HI, IA, IN, KS, MA, MD, ME, MI, MN, MO, MT, NE, NH, NV, OK, and RI; however, 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 HRS.	DOWN-LOAD	CD	TEXT	CD W/ TEXT
Ethics and the Attest Function (4-hr.)	EAF4	4	$59.95	$65.00	$79.95	$85.00
Ethics and the Attest Function (8-hr.)	EAF8	8	$119.95	$125.00	$139.95	$145.00
Ethics and the Attest Function and Fraudulent Financial Reporting	EFFR	2	$39.00	N/A	N/A	N/A
General Ethics for Accountants	EGEN	4	$59.95	$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

Accounting and Auditing Courses

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

This course is an overview of the anticipated impact of converging to IFRS, with emphasis on nonissuers that may ultimately desire to adopt the less complex *IFRS for Private Entities*.

LEVEL: Basic
ONLINE: $59.95
CD w/TEXT: $85.00
CPE: 4 hrs., Auditing
CD-ROM: $65.00
TEXT: $79.95

Understanding Accounting Issues for Estates and Trusts: Meeting Your Accounting and Auditing CPE Requirements* (UAET)

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: $119.95
CD w/TEXT: $145.00
CPE: 8 hrs., Accounting
CD-ROM: $125.00
TEXT: $139.95

Current Developments in Accounting, Auditing, and the Accounting Profession: An Overview for 2009 (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: $165.00
CD w/TEXT: $189.95
TEXT: $185.00
CPE: 9 hrs., Accounting/ 3 hrs., Auditing
CD-ROM: $169.95

Surgent McCoy's 2009 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: $165.00
CD w/TEXT: $189.95
TEXT: $185.00
CPE: 9 hrs., Accounting/ 3 hrs., Auditing
CD-ROM: $169.95

Surgent McCoy's 2009 Guide to Compilation, Review, and the Cash and Tax Basis of Accounting (SGFO)

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

LEVEL: Basic
ONLINE: $165.00
CD w/TEXT: $189.95
CPE: 12 hrs., Accounting
CD-ROM: $169.95
TEXT: $185.00

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, and legislation.

LEVEL: Overview
ONLINE: $59.95
CD w/TEXT: $85.00
CPE: 4 hrs., Auditing
CD-ROM: $65.00
TEXT: $79.95

Revenue Recognition Is Hot … Don't Get Burned! Basics of Revenue Recognition* (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: $59.95
CD w/TEXT: $85.00
CPE: 4 hrs., Accounting
CD-ROM: $65.00
TEXT: $79.95

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: $119.95
CD w/TEXT: $145.00
CPE: 8 hrs., Auditing
CD-ROM: $125.00
TEXT: $139.95

Changing Your Audit Approach to Comply with the New Risk Assessment SASs* (NRAS)

The ASB issued significant Statements on Auditing Standards related to the auditor's assessment of risks of material misstatement in the financial statement audit. The auditor's application of the risk model and the resulting nature of audit procedures performed changed dramatically in most cases.

LEVEL: Intermediate
ONLINE: $119.95
CD w/TEXT: $145.00
CPE: 8 hrs., Auditing
CD-ROM: $125.00
TEXT: $139.95

Practical Guide to Advanced Revenue Recognition Concepts* (ARRC)

This course explains technical GAAP revenue recognition criteria for situations involving right of return, bill and hold, nonmonetary transactions, related party transactions, channel stuffing, software contracts, contingent income, & long-term construction contracts.

LEVEL: Intermediate
ONLINE: $59.95
CD w/TEXT: $85.00
CPE: 4 hrs., Accounting
CD-ROM: $65.00
TEXT: $79.95

How Big Is the Elephant You Should Be Looking for? Practical Materiality Decisions Under a Risk-Based Approach to Auditing* (HBIE)

New auditing standards require auditors to make and document materiality and tolerable error decisions. This course explains and illustrates methods that will help eliminate bad decisions.

LEVEL: Intermediate
ONLINE: $59.95
CD w/TEXT: $85.00
TEXT: $79.95
CPE: 2 hrs., Accounting/ 2 hrs. Auditing
CD-ROM: $65.00

YB 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
ONLINE: $119.95
CD w/TEXT: $145.00
CPE: 8 hrs., Auditing
CD-ROM: $125.00
TEXT: $139.95

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

The new 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
ONLINE: $119.95
CD w/TEXT: $145.00
CPE: 8 hrs., Auditing
CD-ROM: $125.00
TEXT: $139.95

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

With new SASs, 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
ONLINE: $119.95
CD w/TEXT: $145.00
CPE: 8 hrs., Auditing
CD-ROM: $125.00
TEXT: $139.95

YB 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
ONLINE: $119.95
CD w/TEXT: $145.00
CPE: 8 hrs., Auditing
CD-ROM: $125.00
TEXT: $139.95

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

Audit Staff Training Courses

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
ONLINE: $185.00
CD w/TEXT: $209.95
TEXT: $205.00

CPE: 12.5 hrs., Auditing
3.5 hrs., Reg. Ethics
CD-ROM: $189.95

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
ONLINE: $185.00
CD w/TEXT: $209.95

CPE: 16 hrs., Auditing
CD-ROM: $189.95
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
ONLINE: $185.00
CD w/TEXT: $209.95

CPE: 16 hrs., Auditing
CD-ROM: $189.95
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
ONLINE: $185.00
CD w/TEXT: $209.95
TEXT: $205.00

CPE: 6 hrs., Auditing/
7 hrs., Comm./
3 hrs., Bus. Mgmt.
CD-ROM: $189.95

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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
ONLINE: $119.95
CD w/TEXT: $145.00
TEXT: $139.95

CPE: 4 hrs., Mktg./
2 hrs., Human Resources/
2 hrs., Mgmt. Adv. Svcs.
CD-ROM: $125.00

Buy 3 courses, get 2 FREE! Plus, get FREE shipping on these courses through June 30! See page 5 for details.

Fraud Courses

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
ONLINE: $119.95
CD w/TEXT: $145.00

CPE: 8 hrs., Auditing
CD-ROM: $125.00
TEXT: $139.95

Protecting Your Clients Against Identity Theft, Investment Fraud, & 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
ONLINE: $119.95
CD w/TEXT: $145.00

CPE: 8 hrs., Spec. Know. & App.
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
ONLINE: $145.00
CD w/TEXT: $169.95

CPE: 10 hrs., Auditing
CD-ROM: $149.95
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
ONLINE: $119.95
CD w/TEXT: $145.00

CPE: 8 hrs., Auditing
CD-ROM: $125.00
TEXT: $139.95

Read full course descriptions at www.cpenow.com.

YB = Qualifies for Yellow Book CPE credit

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

Business and Industry Courses

NEW! 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 hrs., Finance
ONLINE: $199.95 — CD-ROM: $205.00
CD w/TEXT: $225.00 — TEXT: $219.95

NEW! Modern Budgeting for Profit Planning and Control* (BPPC)

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 hrs., Finance
ONLINE: $165.00 — CD-ROM: $169.95
CD w/TEXT: $189.95 — TEXT: $185.00

NEW! 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 hrs., Economics
ONLINE: $165.00 — CD-ROM: $169.95
CD w/TEXT: $189.95 — TEXT: $185.00

NEW! Managing & 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 hrs., Management Advisory Services
ONLINE: $145.00
CD w/TEXT: $169.95 — CD-ROM: $149.95
TEXT: $165.00

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 Corporation and S Corporations with this practical course designed for experienced practitioners.

LEVEL: Intermediate — CPE: 8 hrs., Taxes
ONLINE: $119.95 — CD-ROM: $125.00
CD w/TEXT: $145.00 — 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 hrs., Taxes
ONLINE: $119.95 — 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 hrs., Taxes/ 4 hrs., Accounting
ONLINE: $119.95
CD w/TEXT: $145.00 — CD-ROM: $125.00
TEXT: $139.95

Read full course descriptions at www.cpenow.com.

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The Complete Guide to Fringe Benefits (CGFB)

Explore tax advantages and potential pitfalls of providing fringe benefits to employees. This course offers a clear overview of this area of tax law on compensation issues.

LEVEL: Basic — CPE: 12 hrs., Taxes
ONLINE: $165.00 — 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 hrs., Business Law
ONLINE: $119.95 — CD-ROM: $125.00
CD w/TEXT: $145.00 — TEXT: $139.95

Industry Tax Guide to Fringe Benefits and Selected Payroll Issues (ITGF)

This course reviews significant tax issues for controllers, including statutory fringe benefits, medical insurance, HRAs and HSAs, life insurance, COBRA, and much more.

LEVEL: Basic — CPE: 8 hrs., Taxes
ONLINE: $119.95 — CD-ROM: $125.00
CD w/TEXT: $145.00 — TEXT: $139.95

The Complete Guide to Employment Issues – Reducing the Employer's Risk (EIRE)

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

LEVEL: Basic — CPE: 6 hrs., Business Law/2 hrs., Taxes
ONLINE: $119.95
CD w/TEXT: $145.00 — CD-ROM: $125.00
TEXT: $139.95

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

The IRS has announced that uncovering noncompliance on payroll taxes by employers ranks high on its audit list for 2009. This course reviews federal payroll taxes, Form 1099 & related compliance issues.

LEVEL: Basic — CPE: 16 hrs., Taxes
ONLINE: $185.00 — 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 offers a comprehensive analysis of the business and tax aspects of buying and selling a business. It is a practical guide to help practitioners and industry CPAs understand structuring techniques.

LEVEL: Intermediate — CPE: 12 hrs., Taxes
ONLINE: $165.00 — 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 hrs., Management Advisory Services
ONLINE: $59.95
CD w/TEXT: $85.00 — CD-ROM: $65.00
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 hrs., Management Advisory Services
ONLINE: $59.95
CD w/TEXT: $85.00 — CD-ROM: $65.00
TEXT: $79.95

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

NEW! The Essential Toolkit for Audits of Smaller Entities

Even after a few years of implementing the Risk Assessment Standards, public accounting firms continue to struggle with appropriately documenting the basis for the most important professional judgements, audit decisions, and required communications. ***This essential toolkit provides various useful documents, including:***

- Illustrative client letters
- Simple explanations of frequently misapplied risk assessment concepts
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**Price valid through June 30, 2009*

Estate Planning Courses

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	CPE: 10 hrs., Taxes
ONLINE: $145.00	CD-ROM: $149.95
CD w/TEXT: $169.95	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	CPE: 10 hrs., Taxes
ONLINE: $145.00	CD-ROM: $149.95
CD w/TEXT: $169.95	TEXT: $165.00

Fiduciary Income Tax Returns – Form 1041 Workshop (1041)

This course explains the complicated tax rules of estates and trusts, fiduciary accounting, and how to prepare Form 1041. The practical materials are an excellent reference source for your practice.

LEVEL: Intermediate	CPE: 16 hrs., Taxes
ONLINE: $185.00	CD-ROM: $189.95
CD w/TEXT: $209.95	TEXT: $205.00

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

Estate planning and administration is one of the most complicated areas in the tax law. This course is fully up-to-date with all new tax law changes, and it will help practitioners understand the key areas to watch out for and how to prevent costly mistakes.

LEVEL: Intermediate	CPE: 8 hrs., Taxes
ONLINE: $119.95	CD-ROM: $125.00
CD w/TEXT: $145.00	TEXT: $139.95

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

This course enables the CPA to advise the closely held business owner on special estate-planning problems and opportunities. The focus of this course is on the transfer of wealth, liquidity, and business continuation.

LEVEL: Advanced	CPE: 10 hrs., Taxes
ONLINE: $145.00	CD-ROM: $149.95
CD w/TEXT: $169.95	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 use of life insurance in a business environment will also be discussed. The focus of the course is the creation, preservation, and transfer of wealth for high-net-worth individual and business clients.

LEVEL: Intermediate	CPE: 10 hrs., Taxes
ONLINE: $145.00	CD-ROM: $149.95
CD w/TEXT: $169.95	TEXT: $165.00

Read full course descriptions at www.cpenow.com.

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

This practical course teaches the preparation of Forms 706 and 709. The manual guides the CPA through the complex issues in completing these forms. The materials also include a comprehensive case study with filled-in forms.

LEVEL: Intermediate	CPE: 16 hrs., Taxes
ONLINE: $185.00	CD-ROM: $189.95
CD w/TEXT: $209.95	TEXT: $205.00

The Best Income Tax, Estate Tax, and Financial Planning Ideas of 2009 (IEFP)

This course explores practical tax-planning ideas in light of tax reform that practitioners can use to assist clients with their needs. This course is crucial for CPAs who are looking for good ideas that can save clients money!

LEVEL: Intermediate	CPE: 12 hrs., Taxes
ONLINE: $165.00	CD-ROM: $169.95
CD w/TEXT: $189.95	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	CPE: 12 hrs., Taxes
ONLINE: $165.00	CD-ROM: $169.95
CD w/TEXT: $189.95	TEXT: $185.00

The Complete Trust Workshop! (TCTW)

This course explores the many beneficial uses of trusts. Trusts remain an essential element in estate planning. This course gives insights and practical pointers concerning trusts of every shape and size.

LEVEL: Intermediate	CPE: 20 hrs., Taxes
ONLINE: $199.95	CD-ROM: $205.00
CD w/TEXT: $225.00	TEXT: $219.95

Advanced Federal Income Taxation of Estates, Trusts, and Beneficiaries and Advanced 1041 Return Preparation Issues* (AFIT)

This course provides comprehensive coverage of federal income tax provisions for estates, trusts, and beneficiaries. It includes a concise and practical explanation of Subchapter J and related sections in the Internal Revenue Code.

LEVEL: Advanced	CPE: 8 hrs., Taxes
ONLINE: $119.95	CD-ROM: $125.00
CD w/TEXT: $145.00	TEXT: $139.95

Advanced Form 1041 Practice Workshop (AP41)

Practitioners understanding the basics of Subchapter J and Form 1041 compliance may find complex problems requiring sophisticated applications. This course builds upon our intermediate-level 1041 course to concentrate on the most difficult issues in practice. This is essential for the practitioner with high-powered clients.

LEVEL: Advanced	CPE: 12 hrs., Taxes
ONLINE: $165.00	CD-ROM: $169.95
CD w/TEXT: $189.95	TEXT: $185.00

Selected Critical Issues for the Estate Planner (SCEP)

This course explores the current thinking of practitioners, commentators, and the IRS regarding estate-planning strategies and techniques. It reviews current cases, regulations, rulings, and articles with a view toward practical applications.

LEVEL: Advanced	CPE: 16 hrs., Taxes
ONLINE: $185.00	CD-ROM: $189.95
CD w/TEXT: $209.95	TEXT: $205.00

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

Retirement Planning & Investment Courses

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: $145.00
CD w/TEXT: $169.95
CPE: 10 hrs., 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: $145.00
CD w/TEXT: $169.95
TEXT: $165.00
CPE: 5 hrs.,Taxes/5 hrs., Admin. Practice
CD-ROM: $149.95

Small Business Retirement Plan Review: New Roth 401(k)s, KEOGHs, Traditional 401(k)s, IRAs, SEPs, and SIMPLEs (SBRP)

Small businesses don't have Fortune 500 budgets to design and implement their retirement plan. Tax practitioners need to know the new opportunities available and to provide ongoing tax-planning services to this important segment of their client base.

LEVEL: Basic
ONLINE: $165.00
CD w/TEXT: $189.95
CPE: 12 hrs., Taxes
CD-ROM: $169.95
TEXT: $185.00

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

This course provides both the background information on the Social Security system and the strategies that baby-boomer clients need in dealing with it.

LEVEL: Basic
ONLINE: $119.95
CD w/TEXT: $145.00
CPE: 8 hrs., 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: $199.95
CD w/TEXT: $225.00
CPE: 20 hrs., 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
ONLINE: $145.00
CD w/TEXT: $169.95
CPE: 10 hrs., Taxes
CD-ROM: $149.95
TEXT: $165.00

Determining How Much Money You Need to Retire, and Tax Ideas and Money Management in Retirement (DRMM)

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
ONLINE: $185.00
CD w/TEXT: $209.95
TEXT: $205.00
CPE: 8 hrs., Admin. Practice/8 hrs., Taxes
CD-ROM: $189.95

What Every Professional Should Know About Elder Care Planning (CECP)

This course's topics include nursing-home care insurance, Medicare and Medicaid, Social Security benefits, and estate-planning issues for the aged or incapacitated.

LEVEL: Basic
ONLINE: $119.95
CD w/TEXT: $145.00
CPE: 8 hrs., Taxes
CD-ROM: $125.00
TEXT: $139.95

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: $165.00
CD w/TEXT: $189.95
CPE: 12 hrs., 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: $145.00
CD w/TEXT: $169.95
TEXT: $165.00
CPE: 7 hrs., Admin. Practice/3 hrs., Taxes
CD-ROM: $149.95

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

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 hrs., Taxes
ONLINE: $165.00	CD-ROM: $169.95
CD w/TEXT: $189.95	TEXT: $185.00

Surgent McCoy's Guide to Understanding the Key Issues and 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 hrs., Taxes
ONLINE: $119.95	CD-ROM: $125.00
CD w/TEXT: $145.00	TEXT: $139.95

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

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 hrs., Taxes
ONLINE: $119.95	CD-ROM: $125.00
CD w/TEXT: $145.00	TEXT: $139.95

Preparing Corporate 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 hrs., Taxes
ONLINE: $145.00	CD-ROM: $149.95
CD w/TEXT: $169.95	TEXT: $165.00

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 hrs., Taxes
ONLINE: $185.00	CD-ROM: $189.95
CD w/TEXT: $209.95	TEXT: $205.00

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 hrs., Taxes
ONLINE: $119.95	CD-ROM: $125.00
CD w/TEXT: $145.00	TEXT: $139.95

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 hrs., Taxes
ONLINE: $119.95	CD-ROM: $125.00
CD w/TEXT: $145.00	TEXT: $139.95

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 hrs., Taxes
ONLINE: $199.95	CD-ROM: $205.00
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Surgent McCoy's Case Studies in the Life Cycle of a LLC* (LCLL)

This course uses one continuous sample case to show how to apply federal tax rules to a client's limited liability companies. After completing the course, you will be able to understand tax saving and planning opportunities during the entire life cycle of a typical LLC.

LEVEL: Intermediate	CPE: 8 hrs., Taxes
ONLINE: $119.95	CD-ROM: $125.00
CD w/TEXT: $145.00	TEXT: $139.95

Surgent McCoy's Case Studies in the Life Cycle of an S Corporation* (LCSC)

This course uses one continuous sample case to apply federal tax rules to a client's S corporations. This case deals with complex S corporation issues for analysis and problem solving.

LEVEL: Intermediate	CPE: 8 hrs., Taxes
ONLINE: $119.95	CD-ROM: $125.00
CD w/TEXT: $145.00	TEXT: $139.95

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 the closely held corporation.

LEVEL: Intermediate	CPE: 8 hrs., Taxes
ONLINE: $119.95	CD-ROM: $125.00
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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 hrs., Taxes
ONLINE: $119.95	CD-ROM: $125.00
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and C Corporation Courses

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

This course provides an in-depth discussion of selected advanced-level issues affecting LLCs and LLPs. The focus is to analyze unresolved issues of these emerging business forms.

LEVEL: Advanced	CPE: 10 hrs., Taxes
ONLINE: $145.00	CD-ROM: $149.95
CD w/TEXT: $169.95	TEXT: $165.00

Comparing and Contrasting the Tax Aspects of S Corporations, Partnerships, C Corporations, Sole Proprietorships, and LLCs (CCTA)

This unique course compares and contrasts the tax aspects of these various entities. The choice of business organizations has undergone upheaval in recent years. This in-depth course will cover planning opportunities and potential pitfalls in developing a business structure.

LEVEL: Intermediate	CPE: 8 hrs., Taxes
ONLINE: $119.95	CD-ROM: $125.00
CD w/TEXT: $145.00	TEXT: $139.95

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 hrs., Taxes
ONLINE: $165.00	CD-ROM: $169.95
CD w/TEXT: $189.95	TEXT: $185.00

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

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 hrs., Taxes
ONLINE: $145.00	CD-ROM: $149.95
CD w/TEXT: $169.95	TEXT: $165.00

Surgent McCoy's Advanced Critical Tax Issues for S Corporations (ACTS)

This course goes beyond the basics and addresses important practical issues concerning S corporations that experienced practitioners must know, including any recent rulings and law changes affecting S corporations.

LEVEL: Advanced	CPE: 10 hrs., Taxes
ONLINE: $145.00	CD-ROM: $149.95
CD w/TEXT: $169.95	TEXT: $165.00

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.

LEVEL: Advanced	CPE: 8 hrs., Taxes
ONLINE: $119.95	CD-ROM: $125.00
CD w/TEXT: $145.00	TEXT: $139.95

Real Estate Courses

Surgent McCoy's Gold Mine of Great Tax Strategies for the Real Estate Investor (GOLD)

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.

LEVEL: Intermediate	CPE: 12 hrs., Taxes
ONLINE: $165.00	CD-ROM: $169.95
CD w/TEXT: $189.95	TEXT: $185.00

The Top 50 Tax Mistakes Practitioners Make in Real Estate Investments and 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.

LEVEL: Intermediate	CPE: 8 hrs., Taxes
ONLINE: $119.95	CD-ROM: $125.00
CD w/TEXT: $145.00	TEXT: $139.95

Specialty Courses

NEW! Tax Malpractice: Understanding Your Risk and Protecting Yourself and Your Firm (TMAL)

This important course will open CPAs' eyes to all of the various issues that can create a tax malpractice issue. It surveys the different kinds of tax services in which CPAs are involved to analyze where potential problems may lie and how to avoid them.

LEVEL: Intermediate	CPE: 8 hrs., Taxes
ONLINE: $119.95	CD-ROM: $125.00
CD w/TEXT: $145.00	TEXT: $139.95

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.

LEVEL: Intermediate	CPE: 6 hrs., Finance/
ONLINE: $165.00	4 hrs., Marketing/
CD w/TEXT: $189.95	2 hrs., Economics
TEXT: $185.00	CD-ROM: $169.95

Surgent McCoy's Guide to Tax Research: Doing it Smarter, Better, and Faster (SGTR)

This course will help CPAs do tax research more efficiently by providing a practical understanding of what creates tax law, where to find it, and how to use available resources.

LEVEL: Intermediate	CPE: 8 hrs., Taxes
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Individual Tax Courses

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

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
ONLINE: $145.00
CD w/TEXT: $169.95
TEXT: $165.00
CPE: 5 hrs., Taxes/ 5 hrs., Admin. Practice
CD-ROM: $149.95

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

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
ONLINE: $119.95
CD w/TEXT: $145.00
CPE: 8 hrs., Taxes
CD-ROM: $125.00
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
ONLINE: $185.00
CD w/TEXT: $209.95
CPE: 16 hrs., Taxes
CD-ROM: $189.95
TEXT: $205.00

Make Money for You and Your Clients: Surgent McCoy's Top Individual Tax-Planning Strategies (ITPS)

With significant tax changes in light of recent legislation, clients need to review their best planning options. This course focuses on practical, innovative ideas and techniques that you and your clients can put into action today.

LEVEL: Intermediate
ONLINE: $165.00
CD w/TEXT: $189.95
CPE: 12 hrs., Taxes
CD-ROM: $169.95
TEXT: $185.00

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
ONLINE: $119.95
CD w/TEXT: $145.00
CPE: 8 hrs., Taxes
CD-ROM: $125.00
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
ONLINE: $119.95
CD w/TEXT: $145.00
CPE: 8 hrs., Taxes
CD-ROM: $125.00
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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
ONLINE: $119.95
CD w/TEXT: $145.00
CPE: 8 hrs., Taxes
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Surgent McCoy's Advanced Individual Income Tax Return Issues* (STRI)

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
ONLINE: $165.00
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CPE: 12 hrs., Taxes
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International Tax Courses

International Tax Issues for Individuals – Going Overseas and Coming to the United States* (ITIO)

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
ONLINE: $145.00
CD w/TEXT: $169.95
CPE: 10 hrs., Taxes
CD-ROM: $149.95
TEXT: $165.00

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

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
ONLINE: $145.00
CD w/TEXT: $169.95
CPE: 10 hrs., Taxes
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TEXT: $165.00

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- Stuffit Expander (Mac users only, for online courses)

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The 24-hour yellow book requirement calls for auditors to obtain CPE in subjects directly related to government auditing or the specific environment in which the audited entity operates. The courses on page 8 (AWPD, TAIC, AWAC, and CDEC) will qualify in most cases. If you have questions, go to www.gao.gov.

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