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<td>Business Valuations: Income Approach</td>
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<td>Options for Clients Who Cannot Pay the IRS</td>
<td>11 am</td>
<td>Jim Buttonow</td>
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<td>Oct 18, 2022</td>
<td>Basis Basics for S Corporation Shareholders</td>
<td>1 pm</td>
<td>James Hamill</td>
<td>Taxes (1 hour)</td>
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<td>Oct 18, 2022</td>
<td>Governmental Accounting and Auditing Update: Single Audit Update</td>
<td>11 am</td>
<td>Kurt Schlicker</td>
<td>Accounting (Governmental) (1 hour), Auditing (Governmental) (1 hour)</td>
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<td>Oct 19, 2022</td>
<td>Costly Pitfalls in Old Estate Planning Documents</td>
<td>11 am</td>
<td>Klaralee Charlton</td>
<td>Taxes (2 hours)</td>
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<td>Oct 19, 2022</td>
<td>Private Foundation Pitfalls: Self-Dealing, Taxable Expenditures, and More</td>
<td>2 pm</td>
<td>Sarah Huang, Clark Nuber, Celia Davis</td>
<td>Taxes (2 hours)</td>
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<td>Leveraging Big Data for Public Accounting</td>
<td>11 am</td>
<td>Stephen Yoss</td>
<td>Information Technology (2 hours)</td>
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<td>Oct 20, 2022</td>
<td>Mastering Excel’s Custom Views Feature</td>
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<td>Oct 24, 2022</td>
<td>California Tax Update: Part 1</td>
<td>2 pm</td>
<td>Eva Rosenberg</td>
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<td>Oct 25, 2022</td>
<td>California Tax Update: Part 2</td>
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<td>Eva Rosenberg</td>
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<td>Oct 27, 2022</td>
<td>Monthly Tax Update (October)</td>
<td>11 am</td>
<td>Annette Nellen</td>
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<td>Nov 1, 2022</td>
<td>Funding the Marital Share</td>
<td>2 pm</td>
<td>Klaraee Charlton</td>
<td>Taxes (2 hours)</td>
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<td>Nov 1, 2022</td>
<td>Major Program Determination</td>
<td>11 am</td>
<td>Diane Edelstein</td>
<td>Auditing (Governmental) (2 hours)</td>
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<td>Nov 2, 2022</td>
<td>Analyzing Financial Efficiency and Performance</td>
<td>2 pm</td>
<td>Lynn Fountain</td>
<td>Auditing (2 hours)</td>
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<td>Nov 2, 2022</td>
<td>Form 1099-MISC Explained</td>
<td>11 am</td>
<td>Steven Mercatante</td>
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<td>Nov 3, 2022</td>
<td>How to Onboard the New IRS Representation Client</td>
<td>2 pm</td>
<td>Eric Green</td>
<td>Taxes (2 hours)</td>
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<td>Nov 4, 2022</td>
<td>2022 Form 1099 &amp; W9 Annual Update</td>
<td>2 pm</td>
<td>Miles Hutchinson</td>
<td>Taxes (2 hours)</td>
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<td>Nov 7, 2022</td>
<td>Handling Changes to W-8 and W-9</td>
<td>2 pm</td>
<td>Steven Mercatante</td>
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<td>How to Avoid the Most Common Errors in Tax Problem Solving</td>
<td>2 pm</td>
<td>Jim Buttonow</td>
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<td>Nov 9, 2022</td>
<td>CPAs Guidebook for Ethical Behavior: Code of Professional Conduct</td>
<td>2 pm</td>
<td>Allison McLeod</td>
<td>Regulatory Ethics (2 hours)</td>
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<td>Nov 9, 2022</td>
<td>Governmental Accounting and Auditing Update: Year-End Planning</td>
<td>11 am</td>
<td>Eric Berman</td>
<td>Accounting (Governmental) (1 hour), Auditing (Governmental) (1 hour)</td>
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<td>Nov 10, 2022</td>
<td>QuickBooks/Excel Report Speed Tips: Part 1</td>
<td>2 pm</td>
<td>David Ringstrom</td>
<td>Computer Software &amp; Applications (2 hours)</td>
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<td>Nov 15, 2022</td>
<td>Testing Internal Controls in a Single Audit</td>
<td>11 am</td>
<td>Diane Edelstein</td>
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<td>Nov 15, 2022</td>
<td>W-9 Best Practices</td>
<td>2 pm</td>
<td>Steven Mercatante</td>
<td>Taxes (2 hours)</td>
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<td>Nov 16, 2022</td>
<td>Taxation of the Family Home</td>
<td>11 am</td>
<td>Klaraee Charlton</td>
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<td>Nov 18, 2022</td>
<td>QuickBooks/Excel Report Speed Tips Part 2</td>
<td>2 pm</td>
<td>David Ringstrom</td>
<td>Computer Software &amp; Applications (2 hours)</td>
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<td>Nov 21, 2022</td>
<td>Tax Breaks, Tips, and Updates: Part 1</td>
<td>2 pm</td>
<td>Eva Rosenberg</td>
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<td>Nov 22, 2022</td>
<td>Basic Partnership Taxation (Half-Day Webinar)</td>
<td>10 am</td>
<td>James Hamill</td>
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<td>Nov 22, 2022</td>
<td>Tax Breaks, Tips, and Updates: Part 2</td>
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<td>Eva Rosenberg</td>
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<td>Nov 23, 2022</td>
<td>Automation for Increasing Personal Efficiency and Effectiveness</td>
<td>2 pm</td>
<td>Stephen Yoss</td>
<td>Information Technology (2 hours)</td>
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<td>Nov 23, 2022</td>
<td>Regulatory Ethics Guidebook for CPAs: AICPA Code of Professional Conduct (Half-Day Webinar)</td>
<td>10 am</td>
<td>Allison McLeod</td>
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<td>Nov 29, 2022</td>
<td>Intermediate Partnership Taxation (Half-Day Webinar)</td>
<td>10 am</td>
<td>James Hamill</td>
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<td>Nov 30, 2022</td>
<td>Accountants and Malpractice: Can We Get Sued for This?</td>
<td>2 pm</td>
<td>Allison McLeod</td>
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<td>Nov 30, 2022</td>
<td>Monthly Tax Update (November)</td>
<td>11 am</td>
<td>Annette Nellen</td>
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<td>Dec 1, 2022</td>
<td>Bringing Artificial Intelligence to Your Organization</td>
<td>2 pm</td>
<td>Stephen Yoss</td>
<td>Information Technology (2 hours)</td>
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<td>Dec 2, 2022</td>
<td>2022 Best Practices: W2 &amp; W4 Update</td>
<td>2 pm</td>
<td>Miles Hutchinson</td>
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<td>Governmental Accounting and Auditing Update: SAS 134-145 Update</td>
<td>11 am</td>
<td>Kurt Schlicker</td>
<td>Accounting (Governmental) (1 hour), Auditing (Governmental) (1 hour)</td>
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<td>Dec 5, 2022</td>
<td>Making Your Resolutions Work: Create Your 30 Day Personal Purpose Plan</td>
<td>2 pm</td>
<td>Amy Vetter</td>
<td>Personal Development (2 hours)</td>
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<td>Dec 5, 2022</td>
<td>Obtaining and Understanding Your Client’s IRS Account Information</td>
<td>11 am</td>
<td>Jim Buttonow</td>
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<td>Dec 6, 2022</td>
<td>2022 Form 1099 Filing Update</td>
<td>11 am</td>
<td>Steven Mercatante</td>
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<td>Dec 6, 2022</td>
<td>S Corporation Taxation Concepts and Planning Strategies: Part 1 (Half-Day Webinar)</td>
<td>10 am</td>
<td>James Hamill</td>
<td>Taxes (4 hours)</td>
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<td>Time</td>
<td>Speaker</td>
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<td>Making Your Client More Appealing: Taking the Client’s Case to Appeals</td>
<td>2 pm</td>
<td>Eric Green</td>
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<td>Dec 7, 2022</td>
<td>Reporting in a Single Audit</td>
<td>11 am</td>
<td>Diane Edelstein</td>
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<td>Dec 8, 2022</td>
<td>Introduction to Business Intelligence (BI)</td>
<td>2 pm</td>
<td>Lynn Fountain</td>
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<td>Dec 8, 2022</td>
<td>Preparing Form 1065: Part 1 (Half-Day Webinar)</td>
<td>10 am</td>
<td>Greg White</td>
<td>Taxes (4 hours)</td>
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<td>Dec 8, 2022</td>
<td>Tackling Excel's Table Feature</td>
<td>11 am</td>
<td>David Ringstrom</td>
<td>Computer Software &amp; Applications (2 hours)</td>
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<td>Dec 9, 2022</td>
<td>Preparing Form 1065: Part 2 (Half-Day Webinar)</td>
<td>10 am</td>
<td>Greg White</td>
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<td>2022 Estate &amp; Financial Planning Quarterly Update (Fall)</td>
<td>11 am</td>
<td>Klaralee Charlton</td>
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<td>2022 GAAP Update</td>
<td>2 pm</td>
<td>Lewis Fisher</td>
<td>Accounting (2 hours)</td>
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<td>S Corporation Taxation Concepts and Planning Strategies: Part 2 (Half-Day Webinar)</td>
<td>10 am</td>
<td>James Hamill</td>
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<td>Dec 14, 2022</td>
<td>State and Local Reporting: 1099 and SALT Issues</td>
<td>11 am</td>
<td>Steven Mercatante</td>
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<td>Dec 16, 2022</td>
<td>FATCA: How to Comply with Minimal Withholding, Tax. &amp; Penalty Impact</td>
<td>2 pm</td>
<td>Miles Hutchinson</td>
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<td>CPA's Guidebook for Ethical Behavior: Code of Professional Conduct</td>
<td>2 pm</td>
<td>Allison McLeod</td>
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<td>Annette Nellen</td>
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<td>Advanced Partnership Taxation Concepts (Half-Day Webinar)</td>
<td>10 am</td>
<td>Greg White</td>
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<td>Dec 22, 2022</td>
<td>Excel Nuances</td>
<td>11 am</td>
<td>David Ringstrom</td>
<td>Computer Software &amp; Applications (2 hours)</td>
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<td>Mastering Adobe Acrobat for Financial Professionals</td>
<td>2 pm</td>
<td>Stephen Yoss</td>
<td>Computer Software &amp; Applications (2 hours)</td>
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<td>Regulatory Ethics Guidebook for CPAs: AICPA Code of Professional Conduct (Half-Day Webinar)</td>
<td>10 am</td>
<td>Allison McLeod</td>
<td>Regulatory Ethics (4 hours)</td>
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