

# CCH<sup>®</sup> CPELink Webinars — 2023

DATE	TITLE	TIME ALL TIMES CT	SPEAKER	FIELD OF STUDY	CPE CREDIT
Dec 11, 2023	<a href="#">2023 Form 1099 Filing Update</a>	2 pm	Steven Mercatante	Taxes (2 hours)	2
Dec 11, 2023	<a href="#">Trust Fundamentals: A Practical Primer for Tax Practitioners</a>	11 am	Steven Siegel	Taxes (2 hours)	2
Dec 12, 2023	<a href="#">ASC 606 Revenue Recognition: Considerations for Identifying the Contract Part 2</a>	1 pm	Lynn Fountain	Accounting (2 hours)	2
Dec 12, 2023	<a href="#">Making Your Resolutions Work: Create Your 30 Day Personal Purpose Plan</a>	1 pm	Amy Vetter	Personal Development (2 hours)	2
Dec 12, 2023	<a href="#">Year-End Tax Update for Not-for-Profits</a>	11 am	Clark Nuber Frances Olson Jennifer Becker Harris	Taxes (2 hours)	2
Dec 13, 2023	<a href="#">2023 Tax Updates for Individuals</a>	10 am	Barbara Weltman	Taxes (1 hour)	1
Dec 13, 2023	<a href="#">Hot Tax Topics at Year End for 2023</a>	11 am	Annette Nellen	Taxes (2 hours)	2
Dec 13, 2023	<a href="#">New Quality Management Issues</a>	2 pm	Pat Patterson	Accounting (1 hour), Auditing (1 hour)	2
Dec 14, 2023	<a href="#">2023 Business Tax Update (Full-Day Webinar)</a>	9 am	Bradley Burnett	Taxes (8 hours)	8
Dec 14, 2023	<a href="#">2023 Estate &amp; Financial Planning Quarterly Update (Fall)</a>	1 pm	Klaralee Charlton	Taxes (2 hours)	2
Dec 14, 2023	<a href="#">Preparing Form 709: The Federal Gift Tax Return</a>	1 pm	Steven Siegel	Taxes (2 hours)	2
Dec 14, 2023	<a href="#">S Corporation Taxation Concepts and Planning Strategies: Part 2 (Half-Day Webinar)</a>	10 am	James Hamill	Taxes (4 hours)	4
Dec 15, 2023	<a href="#">Advanced Partnership Taxation Concepts (Half-Day Webinar)</a>	10 am	Greg White	Taxes (4 hours)	4
Dec 15, 2023	<a href="#">Tax Savings With Exports Using The Deduction for Foreign Derived Intangible Income and the IC-DISC</a>	11 am	Robert Misyey	Taxes (2 hours)	2
Dec 18, 2023	<a href="#">Regulatory Ethics Guidebook for CPAs: AICPA Code of Professional Conduct (Half-Day Webinar)</a>	2 pm	Allison McLeod	Regulatory Ethics (4 hours)	4
Dec 19, 2023	<a href="#">Dealing with Duplicate Data in Excel</a>	11 am	David Ringstrom	Computer Software & Applications (2 hours)	2
Dec 20, 2023	<a href="#">CCH ARM – ACCOUNTING &amp; AUDITING ON CCH ANSWERCONNECT</a>	11 am	PCS Instructor	Accounting (1 hour)	1
Dec 20, 2023	<a href="#">CPA's Guidebook for Ethical Behavior: Code of Professional Conduct</a>	1 pm	Allison McLeod	Regulatory Ethics (2 hours)	2
Dec 20, 2023	<a href="#">How to Properly Perform an Agreed-Upon Procedures Engagement</a>	2 pm	Salvatore Collemi	Auditing (2 hours)	2
Dec 20, 2023	<a href="#">The Biggest Mistakes Made During Tax Season that Trigger IRS Enforcement!</a>	11 am	Eric Green	Taxes (2 hours)	2
Dec 21, 2023	<a href="#">Electronic Data Analysis</a>	11 am	Robert Minniti	Auditing (2 hours)	2
Dec 22, 2023	<a href="#">2023 Federal Tax Update (Full-Day Webinar)</a>	9 am	Bradley Burnett	Taxes (8 hours)	8
Dec 27, 2023	<a href="#">2023 C Corporations Update</a>	11 am	Bradley Burnett	Taxes (2 hours)	2
Dec 27, 2023	<a href="#">Monthly Tax Update (December)</a>	2 pm	Annette Nellen	Taxes (2 hours)	2
Dec 27, 2023	<a href="#">Preparing Form 706: The Federal Estate Tax Return</a>	1 pm	Steven Siegel	Taxes (2 hours)	2

Dec 28, 2023	2023 Accounting and Auditing Update (Full-Day Webinar)	9 am	Pat Patterson	Accounting (4 hours), Auditing (4 hours)	8
Dec 29, 2023	2023 Fraud Update	11 am	Robert Minniti	Accounting (2 hours)	2
Jan 4, 2024	CCH ARM – ACCOUNTING & AUDITING ON CCH ANSWERCONNECT	11 am	PCS Instructor	Accounting (1 hour)	1
Jan 4, 2024	FATCA: How to Comply with Minimal Withholding, Tax, & Penalty Impact	2 pm	Miles Hutchinson	Taxes (2 hours)	2
Jan 8, 2024	The IRS Examination Process	1 pm	Susan Harper	Taxes (1 hour)	1
Jan 9, 2024	Accounts Payable Internal Controls to Protect Against Fraud and Promote Efficiency	11 am	Mary Schaeffer	Accounting (2 hours)	2
Jan 9, 2024	CCH ARM – ACCOUNTING & AUDITING ON CCH ANSWERCONNECT	1 pm	PCS Instructor	Accounting (1 hour)	1
Jan 10, 2024	Digital Assets - What to Ask Clients and What To Do with the Answers	2 pm	Annette Nellen	Taxes (2 hours)	2
Jan 11, 2024	2023 Individual Tax Update (Full-Day Webinar)	9 am	Bradley Burnett	Taxes (8 hours)	8
Jan 11, 2024	2023 Tax Updates for Businesses	10 am	Barbara Weltman	Taxes (1 hour)	1
Jan 11, 2024	The IRS Collection Process	1 pm	Susan Harper	Taxes (1 hour)	1
Jan 12, 2024	2023 Business Tax Update (Full-Day Webinar)	9 am	Bradley Burnett	Taxes (8 hours)	8
Jan 12, 2024	Obtaining Innocent Spouse Relief	1 pm	Eric Green	Taxes (2 hours)	2
Jan 15, 2024	Obtaining and Understanding Your Client's IRS Account Information	2 pm	Jim Buttonow	Taxes (2 hours)	2
Jan 15, 2024	The Controllership Series: Future Role of the Controller: Part 1	1 pm	Lynn Fountain	Accounting (2 hours)	2
Jan 16, 2024	PCI 4.0 Compliance and Credit Card Frauds	11 am	Robert Minniti	Accounting (2 hours)	2
Jan 17, 2024	2023 Tax Updates for Individuals	10 am	Barbara Weltman	Taxes (1 hour)	1
Jan 17, 2024	The Controllership Series: Future Role of the Controller: Part 2	1 pm	Lynn Fountain	Accounting (2 hours)	2
Jan 18, 2024	Excel 101: Pivot Tables Basics	11 am	David Ringstrom	Specialized Knowledge and Applications (2 hours)	2
Jan 19, 2024	2023 Federal Tax Update (Full-Day Webinar)	9 am	Bradley Burnett	Taxes (8 hours)	8
Jan 19, 2024	New Overtime Rules for 2024 & Worker Categorization	11 am	Robert Minniti	Accounting (2 hours)	2
Jan 22, 2024	California Tax Update: Part 1	11 am	Steven Gill	Taxes (2 hours)	2
Jan 22, 2024	Partnership Debt Sharing Under Section 752	11 am	James Hamill	Taxes (2 hours)	2
Jan 22, 2024	Roles of IRS - Stakeholder Liaison & National Taxpayer Advocate	1 pm	Susan Harper	Taxes (1 hour)	1
Jan 23, 2024	California Tax Update: Part 2	11 am	Steven Gill	Taxes (2 hours)	2
Jan 23, 2024	Sarbanes Oxley (SOX) Overview	11 am	Lynn Fountain	Auditing (1 hour), Accounting (1 hour)	2
Jan 23, 2024	Small Business Retirement Plans: Picking the Best Plan for Your Client	1 pm	Greg White	Taxes (2 hours)	2
Jan 24, 2024	Cash Versus Accrual Accounting	1 pm	Robert Minniti	Accounting (2 hours)	2
Jan 24, 2024	CCH ARM – ACCOUNTING & AUDITING ON CCH ANSWERCONNECT	12 pm	PCS Instructor	Accounting (1 hour)	1
Jan 24, 2024	Form 990PF: Tax Return Walk through and Overview of the Basics	11 am	Celia Davis Clark Nuber Lisa McCreedy	Taxes (2 hours)	2
Jan 25, 2024	Roles of IRS Criminal Investigation	1 pm	Susan Harper	Taxes (1 hour)	1
Jan 25, 2024	Understanding the New Forms K-2 and K-3	11 am	Allison McLeod	Taxes (2 hours)	2
Jan 26, 2024	High Interest Rate Estate Planning Opportunities	11 am	Klaralee Charlton	Taxes (2 hours)	2
Jan 29, 2024	Partnership Tax Updates	11 am	Allison McLeod	Taxes (2 hours)	2
Jan 31, 2024	Monthly Tax Update (January)	2 pm	Annette Nellen	Taxes (2 hours)	2
Jan 31, 2024	The Future of Accounting: Big Data and Artificial Intelligence	11 am	Cory Campbell	Information Technology (2 hours)	2
Feb 2, 2024	Can You and Should You Aggregate for Sections 465, 469, and 199A	11 am	James Hamill	Taxes (2 hours)	2
Feb 5, 2024	2023 Individual Tax Update (Full-Day Webinar)	9 am	Bradley Burnett	Taxes (8 hours)	8
Feb 5, 2024	IRS Audits and Appeals: A Practical and Technical Approach	11 am	Greg White	Taxes (2 hours)	2
Feb 6, 2024	2023 Business Tax Update (Full-Day Webinar)	9 am	Bradley Burnett	Taxes (8 hours)	8

Feb 6, 2024	Change Management - Making it Work	11 am	Robert Minniti	Specialized Knowledge and Applications (2 hours)	2
Feb 6, 2024	Federal Taxation of Cannabis	1 pm	Greg White	Taxes (2 hours)	2
Feb 7, 2024	Effectively Working with the IRS: Using IRS Transcripts and Current IRS Online Tools	2 pm	Jim Buttonow	Taxes (2 hours)	2
Feb 7, 2024	Taxation of Business Entities	11 am	Allison McLeod	Taxes (2 hours)	2
Feb 8, 2024	Sarbanes Oxley (SOX) Section 404	1 pm	Lynn Fountain	Accounting (1 hour), Auditing (1 hour)	2
Feb 8, 2024	Taking Your Accounts Payable Function Beyond Best Practice	11 am	Mary Schaeffer	Accounting (2 hours)	2
Feb 9, 2024	2023 Federal Tax Update (Full-Day Webinar)	9 am	Bradley Burnett	Taxes (8 hours)	8
Feb 12, 2024	Crypto Frauds 2024 Update	11 am	Robert Minniti	Accounting (2 hours)	2
Feb 13, 2024	Assets and Liabilities: State and Local Governments	11 am	Eric Berman	Accounting (2 hours)	2
Feb 14, 2024	Allowable Costs under Uniform Guidance	11 am	Diane Edelstein	Accounting (Governmental) (1 hour), Auditing (Governmental) (1 hour)	2
Feb 15, 2024	How the IRS's New Strategic Operating Plan Will Affect Tax Professionals and Their Clients	1 pm	Eric Green	Taxes (2 hours)	2
Feb 16, 2024	The Latest and Greatest in Helping Clients Claim Home Energy Credits	11 am	Annette Nellen	Taxes (2 hours)	2
Feb 20, 2024	Internal Auditing - 2023 Review & 2024 Preview	11 am	Robert Minniti	Auditing (2 hours)	2
Feb 21, 2024	CCH ARM – ACCOUNTING & AUDITING ON CCH ANSWERCONNECT	12 pm	PCS Instructor	Accounting (1 hour)	1
Feb 21, 2024	International Tax Treaties	11 am	Allison McLeod	Taxes (2 hours)	2
Feb 22, 2024	20 Essential Tax Problem Solving Tips	2 pm	Jim Buttonow	Taxes (2 hours)	2
Feb 22, 2024	Predictive Accounting: Driver-Based Budgeting and Rolling Financial Forecasts	2 pm	Gary Cokins	Accounting (2 hours)	2
Feb 23, 2024	Fraud Evaluations: A Guide for The Compliance Professional	11 am	Lynn Fountain	Auditing (2 hours)	2
Feb 26, 2024	Advanced PivotTable Techniques	11 am	David Ringstrom	Specialized Knowledge and Applications (2 hours)	2
Feb 27, 2024	CCH ARM – ACCOUNTING & AUDITING ON CCH ANSWERCONNECT	11 am	PCS Instructor	Accounting (1 hour)	1
Feb 27, 2024	Monthly Tax Update (February)	11 am	Annette Nellen	Taxes (2 hours)	2
Feb 28, 2024	Embracing Innovation: Blockchain and Smart Contracts in Financial Record Keeping	11 am	Cory Campbell	Information Technology (2 hours)	2
Mar 4, 2024	Reviewing Partnership Agreements to Identify Key Tax Issues	11 am	James Hamill	Taxes (2 hours)	2
Mar 6, 2024	Accounting Fraud & Embezzlement: Case Studies from the Trenches	11 am	Allison McLeod	Regulatory Ethics (2 hours)	2
Mar 8, 2024	Auditing Excel Spreadsheets	11 am	David Ringstrom	Specialized Knowledge and Applications (2 hours)	2
Mar 8, 2024	Partnership Tax Filing Issues	11 am	James Hamill	Taxes (2 hours)	2
Mar 11, 2024	IRS Compliance Trends and 10 Actions You Should Take To Help Your Client	2 pm	Jim Buttonow	Taxes (2 hours)	2
Mar 12, 2024	Tax Strategies for Passive Activities	1 pm	Greg White	Taxes (2 hours)	2
Mar 12, 2024	The 10 Best (and 3 Worst) Excel Features for Accountants	11 am	David Ringstrom	Specialized Knowledge and Applications (2 hours)	2
Mar 13, 2024	CCH ARM – ACCOUNTING & AUDITING ON CCH ANSWERCONNECT	12 pm	PCS Instructor	Accounting (1 hour)	1

Mar 13, 2024	Resolving Payroll Tax Issues	1 pm	Eric Green	Taxes (2 hours)	2
Mar 18, 2024	GASB-94, 96 and 99 for Calendar Year Governments	11 am	Eric Berman	Accounting (Governmental) (2 hours)	2
Mar 19, 2024	CCH ARM – ACCOUNTING & AUDITING ON CCH ANSWERCONNECT	1 pm	PCS Instructor	Accounting (1 hour)	1
Mar 20, 2024	The Schedule of Expenditures of Federal Awards (SEFA)	11 am	Diane Edelstein	Auditing (Governmental) (2 hours)	2
Mar 21, 2024	Tax Liens and Levies	1 pm	Eric Green	Taxes (2 hours)	2
Mar 25, 2024	Analytics-Based Enterprise Performance Management (EPM)	2 pm	Gary Cokins	Finance (2 hours)	2
Mar 26, 2024	By the Numbers Update on IRS Compliance Enforcement Initiatives	2 pm	Jim Buttonow	Taxes (2 hours)	2
Mar 26, 2024	CCH ARM – ACCOUNTING & AUDITING ON CCH ANSWERCONNECT	12 pm	PCS Instructor	Accounting (1 hour)	1
Mar 27, 2024	Monthly Tax Update (March)	11 am	Annette Nellen	Taxes (2 hours)	2
Mar 29, 2024	Big Data Unleashed: Opportunities and Challenges in Accounting	11 am	Cory Campbell	Information Technology (2 hours)	2
Apr 10, 2024	Cybersecurity implications for the Accounting Profession	11 am	Cory Campbell	Information Technology (2 hours)	2
Apr 11, 2024	GASB-100, 101 and 102	11 am	Eric Berman	Accounting (Governmental) (2 hours)	2
Apr 23, 2024	Audits of Cash Businesses	1 pm	Eric Green	Taxes (2 hours)	2
Apr 24, 2024	Monthly Tax Update (April)	11 am	Annette Nellen	Taxes (2 hours)	2
Apr 29, 2024	IRAs and Conversions	1 pm	Greg White	Taxes (2 hours)	2
Apr 30, 2024	Excel Macros versus Power Query	11 am	David Ringstrom	Computer Software & Applications (2 hours)	2
May 7, 2024	Sec. 199A Cutting Edge Tax Strategies for Rental Real Estate	11 am	Greg White	Taxes (2 hours)	2
May 8, 2024	Essential Knowledge to Resolve the Most Common Tax Problems	2 pm	Jim Buttonow	Taxes (2 hours)	2
May 9, 2024	IRS Penalties and Abatements	11 am	Allison McLeod	Taxes (2 hours)	2
May 9, 2024	Sec. 199A Cutting Edge Tax Strategies for Specified Service Trades or Businesses (SSTBs)	1 pm	Greg White	Taxes (2 hours)	2
May 10, 2024	Trends in How We Work and Do Business and Their Tax Relevance	11 am	Annette Nellen	Taxes (2 hours)	2
May 13, 2024	S Corporation and Shareholder Tax Reporting	11 am	James Hamill	Taxes (2 hours)	2
May 14, 2024	Breaking Down Excel Formulas	11 am	David Ringstrom	Specialized Knowledge and Applications (2 hours)	2
May 14, 2024	Sec. 199A Cutting Edge Tax Strategies for Wage, Property, and Other Limits	1 pm	Greg White	Taxes (2 hours)	2
May 15, 2024	Criminal Tax For Accountants: What Every Practitioner Needs to Know	1 pm	Eric Green	Taxes (2 hours)	2
May 16, 2024	CCH Access Client Collaboration - End User	10 am	PCS Instructor	Taxes (2 hours)	2
May 16, 2024	Sec. 199A Cutting Edge Tax Strategies: The Ground Rules and Planning to Optimize the QBID	1 pm	Greg White	Taxes (2 hours)	2
May 16, 2024	Top 7 Trends in Management Accounting	2 pm	Gary Cokins	Accounting (2 hours)	2
May 21, 2024	Regulatory Ethics Guidebook for CPAs: AICPA Code of Professional Conduct (Half-Day Webinar)	2 pm	Allison McLeod	Regulatory Ethics (4 hours)	4
May 21, 2024	RPA Implementation for Accountants: Best Practices and Case Studies	1 pm	Cory Campbell	Information Technology (2 hours)	2
May 24, 2024	Introduction to Power BI	11 am	David Ringstrom	Specialized Knowledge and Applications (2 hours)	2
May 28, 2024	CCH Access Client Collaboration - End User	12 pm	PCS Instructor	Taxes (2 hours)	2
May 29, 2024	Monthly Tax Update (May)	11 am	Annette Nellen	Taxes (2 hours)	2

Jun 4, 2024	Everyday Tax Rules: Tax Tips from 38 Years in the Trenches	11 am	Greg White	Taxes (2 hours)	2
Jun 5, 2024	Avoiding the Most Common Missteps in Tax Problem Solving	2 pm	Jim Buttonow	Taxes (2 hours)	2
Jun 10, 2024	Ethics Checklist for Tax Practitioners	11 am	Annette Nellen	Regulatory Ethics (2 hours)	2
Jun 12, 2024	Business Analytics for the CFOs Function	2 pm	Gary Cokins	Finance (2 hours)	2
Jun 13, 2024	CCH Access Client Collaboration - End User	1 pm	PCS Instructor	Taxes (2 hours)	2
Jun 14, 2024	Opportunity Zones	11 am	James Hamill	Taxes (2 hours)	2
Jun 17, 2024	Digging Deeper Into the IRS Dirty Dozen	11 am	Annette Nellen	Taxes (2 hours)	2
Jun 19, 2024	AI and Microsoft Excel	11 am	David Ringstrom	Specialized Knowledge and Applications (2 hours)	2
Jun 19, 2024	Tax Procedure	3 pm	Allison McLeod	Taxes (2 hours)	2
Jun 20, 2024	Basics of Nexus: Understanding State Tax Issues	11 am	Annette Nellen	Taxes (2 hours)	2
Jun 25, 2024	CCH Access Client Collaboration - End User	1 pm	PCS Instructor	Taxes (2 hours)	2
Jun 25, 2024	CPA's Guidebook for Ethical Behavior: Code of Professional Conduct	11 am	Allison McLeod	Regulatory Ethics (2 hours)	2
Jun 26, 2024	Monthly Tax Update (June)	11 am	Annette Nellen	Taxes (2 hours)	2
Jun 27, 2024	Business Performance: KPIs and KRIs	11 am	Cory Campbell	Information Technology (2 hours)	2
Jun 28, 2024	Introduction to Python in Excel	11 am	David Ringstrom	Statistics (2 hours)	2
Jul 31, 2024	Embracing Transformation: Change Management in the Accounting World	11 am	Cory Campbell	Information Technology (2 hours)	2
Aug 14, 2024	Utilizing the IRS Offer in Compromise Program for your Financially Distressed Client	2 pm	Jim Buttonow	Taxes (2 hours)	2
Aug 20, 2024	Overview of Uniform Guidance	11 am	Diane Edelstein	Auditing (Governmental) (2 hours)	2
Aug 30, 2024	Developing a Digital Mindset	11 am	Cory Campbell	Information Technology (2 hours)	2
Sep 16, 2024	IRS Collection Trends and the 4 Alternatives When Your Clients Owe Back Taxes	2 pm	Jim Buttonow	Taxes (2 hours)	2
Sep 17, 2024	Overview of Yellow Book	11 am	Diane Edelstein	Auditing (Governmental) (2 hours)	2
Sep 25, 2024	IRS Compliance by Notice: How to Resolve the Most Common IRS Notices	2 pm	Jim Buttonow	Taxes (2 hours)	2
Sep 30, 2024	Blockchain-Based Audit Trails: A Paradigm Shift in Accounting	11 am	Cory Campbell	Information Technology (2 hours)	2
Oct 14, 2024	10 Actions You Must Take in an IRS Field Audit	2 pm	Jim Buttonow	Taxes (2 hours)	2
Oct 24, 2024	Representing Your Client in an IRS Audit	2 pm	Jim Buttonow	Taxes (2 hours)	2
Oct 30, 2024	Embracing Technology Change in Accounting	11 am	Cory Campbell	Information Technology (2 hours)	2
Nov 12, 2024	IRS Compliance Enforcement Update and Trends	2 pm	Jim Buttonow	Taxes (2 hours)	2
Nov 20, 2024	Intelligent Accounting: Exploring AI and RPA Applications	11 am	Cory Campbell	Information Technology (2 hours)	2
Dec 16, 2024	How to Handle the Top 10 Issues in an IRS Small Business Audit	2 pm	Jim Buttonow	Taxes (2 hours)	2
Dec 18, 2024	Accounting Oversight: Recognizing and Addressing Blind Spots	11 am	Cory Campbell	Information Technology (2 hours)	2