

## FALL 2012

### PUBLIC ACCOUNTANT, ENROLLED AGENT, AND OTHER TAX PRACTITIONER PROGRAM

The objective of the program is to broaden the knowledge of accountants and tax practitioners in order to relate particular specialties to the field of accounting and to examine developments in these professions.

**ATTENDANCE:** Accurate records of attendance will be maintained to verify and report continuing education hours. Three (3) Continuing Professional Education (CPE) units are awarded for each attended, for a possible total of thirty-six (36) CPEs. To ensure the integrity of the program, student attendance will be periodically monitored for late arrivals and hours attended will be adjusted accordingly. A summary sheet will be sent to each registered participant when the series is completed.

**REGISTRATION INFORMATION:** Choose the course number that corresponds to the location you plan to attend the most. If you have a schedule conflict you may attend class at one of the other locations. To receive CPE units, students MUST be registered/paid before they attend class. The course fee MUST be paid when you register. To register, complete the attached form and return to CCAC with a check or money order made payable to "CCAC" or call 412.369.3701 to register with a credit card at least one week before the course begins. Requests for refunds must be received 24 hours prior to the start of Week 1: Call 412.369.3701. Refunds will NOT be processed after the start of Week 1.

**COURSE NUMBERS AND LOCATIONS:**

<b>XGD079-5611</b>	CCAC, North Campus, Room 3002, 8701 Perry Hwy., Pittsburgh, PA 15237
<b>XGD079-5612</b>	CCAC, South Campus, Room TBA, 1750 Clairton Rd., West Mifflin, PA 15122
<b>XGD079-5613</b>	CCAC, Boyce Campus, Room TBA, 595 Beatty Rd., Monroeville, PA 15146
<b>XGD079-5614</b>	CCAC, West Hills Center, Room TBA, 1000 McKee Rd., Oakdale, PA 15071

**COST FOR THE 12 WEEKS - \$289.00 (Regardless of how many presentations you attend).**

#### CLASS INFORMATION:

**Week 1: The Public's Image of the CPA**

**Speaker: William McKendree, J.D.**

What is the public's perception of the CPA, their role and function in American society? How does this perception impact on how the individuals choose an accountant and what their expectations are of the accountant's services? How are accountants portrayed in the media? What impact do these portrayals have on creating stereotypes of the CPA, and how do these stereotypes impact society's perceptions and expectations of the CPA's?

**Category: Other (Intermediate)**

Thursday	9/13	North Campus	6:30-9:30 p.m.	Monday	9/17	Boyce Campus	6:30-9:30 p.m.
Saturday	9/15	South Campus	8:00-11:00 a.m.	Wednesday	9/19	West Hills Ctr.	6:30-9:30 p.m.

**Week 2: CPA Advance Health Care Directives, Cultural Considerations of Advance Health Care Directives and POLST**

**Speaker: Colin Adair Morgan**

This course will examine the basics of Advance Health Care Directives as well as delve into the history of the document and potential cultural considerations your clients face in executing them. This course will also present an overview on the Physician Orders for Life-Sustaining Treatment (POLST) and its utility to your clients.

**Category: Other (Basic)**

Thursday	9/20	North Campus	6:30-9:30 p.m.	Monday	9/24	Boyce Campus	6:30-9:30 p.m.
Saturday	9/22	South Campus	8:00-11:00 a.m.	Wednesday	9/26	West Hills Ctr.	6:30-9:30 p.m.

**Week 3: CPA Partnership Taxation**

**Speaker: Frederich Earl Liechti, J.D., CPA**

This course will cover IRS Internal Revenue Code sections 701 to 777, the partnership sections of the Internal Revenue Code.

**Category: Tax (Advanced)**

Thursday	9/27	North Campus	6:30-9:30 p.m.	Monday	10/1	Boyce Campus	6:30-9:30 p.m.
Saturday	9/29	South Campus	8:00-11:00 a.m.	Wednesday	10/3	West Hills Ctr.	6:30-9:30 p.m.

**Week 4: CPA Professional Ethics: An Analysis of the new PA Ethics Requirement**

**Speaker: Paul Skirtich, Esquire**

This course will feature a review of the reasons and causes for the increase in mandatory ethics credits for Pennsylvania practitioners. Participants will explore current disciplinary cases, both national and local, involving tax practitioners and the ramifications of fraud to the accounting profession.

**Category: Ethics (Intermediate)**

Thursday	10/4	North Campus	6:30-9:30 p.m.	Monday	10/8	Boyce Campus	6:30-9:30 p.m.
Saturday	10/6	South Campus	8:00-11:00 a.m.	Wednesday	10/10	West Hills Ctr.	6:30-9:30 p.m.

**Week 5: CPA Financial Crimes: Who is at Risk and How to Protect Yourself**

**Speaker: Jackelyn Weibel, CFE, Detective**

This course will provide the latest information and statistics relating to identity theft which is the fastest growing crime causing billions of dollars of losses worldwide each year. Information will be provided on the latest identity theft trends including medical identity theft, why children and the elderly are targeted as victims and how the rise of social media is escalating identity theft. Also offered will be preventive measures to protect individual and corporate identifying information.

**Category: Accounting & Auditing (Basic)**

Thursday	10/11	North Campus	6:30-9:30 p.m.	Monday	10/15	Boyce Campus	6:30-9:30 p.m.
Saturday	10/13	South Campus	8:00-11:00 a.m.	Wednesday	10/17	West Hills Ctr.	6:30-9:30 p.m.

**Week 6: CPA Survey of Intellectual Property and Branding**

**Speaker: Gregg R. Zegarelli, Esquire**

This course will survey various intellectual properties, such as company names, copyrights, patents, trademarks, domain names, and privacy/likeness rights.

**Category: Other (Basic)**

Thursday	10/18	North Campus	6:30-9:30 p.m.	Monday	10/22	Boyce Campus	6:30-9:30 p.m.
Saturday	10/20	South Campus	8:00-11:00 a.m.	Wednesday	10/24	West Hills Ctr.	6:30-9:30 p.m.

**Week 7: CPA Estate and Gift Tax Planning in 2012 - What to do?**

**Speaker: John M. Hartzell, Jr., Esquire, CPA**

This course will discuss the current state of estate and gift tax planning and proposed changes to Federal tax laws. Such discussion will also offer suggestions on how to plan during periods of uncertainty, such as 2012, regarding the Federal estate tax. Basic, intermediate, and advanced gift and estate planning techniques and their benefits (tax and non-tax) will be outlined in detail.

**Category: Tax (Intermediate)**

Thursday	10/25	North Campus	6:30-9:30 p.m.	Monday	10/29	Boyce Campus	6:30-9:30 p.m.
Saturday	10/27	South Campus	8:00-11:00 a.m.	Wednesday	10/31	West Hills Ctr.	6:30-9:30 p.m.

**Week 8: CPA Accountants Role in Due Diligence**

**Speaker: Todd B. Fortier, CPA, M.B.A.**

This course will discuss the acquisition process, approach, and objectives of due diligence investigations and identification of deal breaker problems as well as accounting for business combinations.

**Category: Accounting & Auditing (Intermediate)**

Thursday	11/1	North Campus	6:30-9:30 p.m.	Monday	11/5	Boyce Campus	6:30-9:30 p.m.
Saturday	11/3	South Campus	8:00-11:00 a.m.	Wednesday	11/7	West Hills Ctr.	6:30-9:30 p.m.

**Week 9: CPA Designing and Mining QuickBooks**

**Speaker: Pam Falkner, Bus. Dev. Director, Bookminders**

This course is designed for accountants who want to better analyze and manipulate information in QuickBooks. The designing portion focuses on the importance of the QuickBooks file design setup including chart of accounts, class tracking, and job costing which leads to improve tax and audit preparation efficiency. The mining portion reviews how to navigate through the QuickBooks file, format reports, and how to assess the quality of a QuickBooks data file.

**Category: Accounting & Auditing (Intermediate)**

Thursday	11/8	North Campus	6:30-9:30 p.m.	Monday	11/12	Boyce Campus	6:30-9:30 p.m.
Saturday	11/10	South Campus	8:00-11:00 a.m.	Wednesday	11/14	West Hills Ctr.	6:30-9:30 p.m.

**Week 10: CPA Commercial Lending Overview**

**Speaker: Ed Wielgus, Divisional Vice President, Northwest Bank**

This course will discuss what small businesses need to know when they are considering borrowing money from a bank.

**Category: Accounting & Auditing (Intermediate)**

Thursday	11/15	North Campus	6:30-9:30 p.m.	Monday	11/19	Boyce Campus	6:30-9:30 p.m.
Saturday	11/17	South Campus	8:00-11:00 a.m.	Wednesday	11/28	West Hills Ctr.	6:30-9:30 p.m.

**Week 11: CPA Law and Fraud**

**Speaker: William J. Miller, Esquire, CPA**

This course will provide an overview of the legal system as it relates to the forensic accountant.

**Category: Accounting & Auditing (Overview)**

Thursday	11/29	North Campus	6:30-9:30 p.m.	Monday	12/3	Boyce Campus	6:30-9:30 p.m.
Saturday	12/1	South Campus	8:00-11:00 a.m.	Wednesday	12/5	West Hills Ctr.	6:30-9:30 p.m.

**Week 12: CPA The Essentials of Long Term Wealth Accumulation**

**Speaker: Joseph Hoover, Financial Planning/Investment Advisor**

This course will teach attendees the fundamentals of lifetime wealth accumulation from compound interest theory to long term asset returns. Additionally, investment manager performance evaluation will be reviewed as well as the issue of taxes in the accumulation formula.

**Category: Other (Intermediate)**

Thursday	12/6	North Campus	6:30-9:30 p.m.	Monday	12/10	Boyce Campus	6:30-9:30 p.m.
Saturday	12/8	South Campus	8:00-11:00 a.m.	Wednesday	12/12	West Hills Ctr.	6:30-9:30 p.m.

**SATURDAY TAX SEMINARS**

**Location: CCAC North Campus, Room 3002, 8701 Perry Highway, Pgh., PA 15237**

* BUSINESS TAX	XGD202-5610	11/3/12	8:00 a.m. - 12:00 p.m.	Speaker: Philip Cook Jr., Esquire
* ESTATE, GIFT, INHERITANCE TAX	XGD200-5611	11/3/12	1:00 p.m. - 5:00 p.m.	Speaker: William J. Miller, Esquire, CPA
* SALES AND USE TAX AUDIT TECHNIQUES	XGD204-5612	11/10/12	8:00 a.m. - 12:00 p.m.	Speaker: James E. Hall, CPA
* INDIVIDUAL TAX	XGD203-5613	11/10/12	1:00 p.m. - 5:00 p.m.	Speaker: William McKendree, J.D.

COST FOR EACH 4 HOUR SEMINAR: **\$49.00**      4 credits each      FOR OUT OF STATE RATES CALL 412.369.3701

# CCAC CONTINUING EDUCATION REGISTRATION FORM N12FA

MONTH      DATE      YEAR  
  -   -

BIRTH DATE REQUIRED FOR ENROLLMENT

LAST NAME (SKIP A SPACE) FIRST NAME (SKIP A SPACE) MIDDLE INITIAL

STREET ADDRESS

APT. NO.

TOWN/CITY

STATE

ZIP CODE

-    -

AREA CODE

HOME TELEPHONE

-    -

AREA CODE

ALTERNATE TELEPHONE

Place of Permanent Address (check one)

- Allegheny County (1)
- Out-of-State (5) \_\_\_\_\_
- Out-of County \_\_\_\_\_

THIS INFORMATION IS COMPILED BY THE COLLEGE FOR STATISTICAL PURPOSES ONLY AND NO PERSONALLY IDENTIFIABLE INFORMATION WILL BE RELEASED RACIAL CLASS - OPTIONAL-  
**Do you consider yourself to be Hispanic/Latino/Spanish Origin?**  
 Yes  
 No  
 In addition, select one or more of the following racial categories to describe yourself:  
 American Indian/Alaskan Native  
 Asian  
 Black or African American  
 Native Hawaiian or Pacific Islander  
 White  
**SEX & MARITAL STATUS**  
 MALE     FEMALE  
 SINGLE     MARRIED     DIVORCED  
 SEPARATED     WIDOWED  
 NEW ADDRESS  
 E-Mail Address: \_\_\_\_\_

To register, complete the attached form and return to CCAC with a check or money order made payable to "CCAC" or call 412.369.3701 to register with a credit card at least one week before the course begins.  
 Call 412.369.3701 for Out-of-State rates.

Course Number										Semester	Course Title	Location	Cost	
X	G	D	0	7	9	5	6			N12FA	Public Accountant, Enrolled Agent, and other Tax Practitioner Program		\$289.00	

Student Signature (Required for Enrollment) \_\_\_\_\_ Date \_\_\_\_\_

Make check or money order payable to "CCAC" and mail with this form to: CPA Program, CCAC, West Hills Center, 1000 McKee Road, Oakdale, PA 15071 or call 412.369.3701 to register with a credit card.

Requests for refunds must be received 24 hrs. prior to the start of Week 1: Call 412.369.3701.



The Community College of Allegheny County makes every effort to provide accessible facilities and program for individuals with disabilities. For accommodations please contact the Office of Supportive Services for Students with Disabilities at your campus of choice. Allegheny Campus - 412-237-4612; Boyce Campus - 724-325-6620; North Campus - 412-369-3696; South Campus - 412-469-6215. This publication is available in alternate formats. Call the PROFESSIONAL CONTINUING EDUCATION PROGRAM AT 412-788-7383. CCAC website address: [http://www.ccac.edu/wf\\_train](http://www.ccac.edu/wf_train)  
 In implementing its equal employment opportunity policy regarding non-discrimination, it is the policy of the Community College of Allegheny County not to discriminate in its programs of education, employment, purchasing of goods and services, and all other activities. The College does not discriminate on the basis of sex, age, race, color, religion, sexual orientation, national origin, handicap/disability, or veteran status. Any complaints of discrimination should be directed to the Affirmative Action Officer, Community College of Allegheny County, 800 Allegheny Avenue, Pittsburgh, PA 15233 (412.323.2323).



CCAC, West Hills Center  
 1000 McKee Road  
 Oakdale, PA 15071

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**Of Allegheny County**

## CERTIFIED PUBLIC ACCOUNTANT FALL 2012



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**PROFESSIONAL CONTINUING EDUCATION PROGRAM**  
 Phone: 412.788.7383