



# FALL 2024 CPA PROGRAM

PUBLIC ACCOUNTANT  
ENROLLED AGENT  
OTHER TAX PRACTITIONER

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 monitored by the instructors throughout each presentation. A certificate will be available at the end of the course that you will be able to print directly from your own computer through Turbine.

**COURSE NUMBERS AND DAYS:** XGD-079-5301 Mondays 6:30pm – 9:30pm  
XGD-079-5302 Wednesdays 6:30pm – 9:30pm

**All classes will be presented on Zoom and administered through Turbine**



**COST FOR THE 12 WEEKS - \$349.00 (Regardless of how many presentations you attend).**

**REGISTRATION INFORMATION:** Choose the course number that corresponds to the day you plan to attend the most. **If you have a schedule conflict you may attend class at one of the two days offered.** 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 412.788.7546 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 412.788.7546. Refunds will **NOT** be processed after the start of Week 1.

To Register Online go to our Website: [Cpa Professional Continuing Ed Program \(ccac.edu\)](http://Cpa Professional Continuing Ed Program (ccac.edu))

## Week 1: SECURE Act

**Speaker: Brian Bohn, CPWA®, CFP®, CFPA**

**Category: Tax (Intermediate)**

**Mon 9/23 & Wed 9/25**

This course will discuss the impact of the SECURE Act and the recent guidance provided by the IRS.

## Week 2: Aspects of Ethics for Accountants

**Speaker: Matthew Robinowitz, JD**

**Category: Ethics (Basic)**

**Mon 9/30 & Wed 10/2**

The course will cover the rules governing practice before the Internal Revenue Service, as contained in Circular 230. The course will also cover aspects of the AICPA Code of Professional Responsibility.

### **Week 3: Future Planning – What to Consider when Someone Has a Disability**

**Speaker: Christine Brookins,  
Financial Advisor\*, Oakbridge Advisor Group**

**Category: Other (Basic)**

**Mon 10/7 & Wed 10/9**

This course will discuss the special consideration when planning for someone with a disability. Topics will include Disability Etiquette, Communication and Accommodations.

*\*Securities and investment advisory services offered through **Osaic Wealth, Inc.** member FINRA/SIPC. **Osaic Wealth** is separately owned and other entities and/or marketing names, products or services referenced here are independent of Osaic Wealth.*

### **Week 4: Changes in Medicare for 2025**

**Speaker: William McKendree, JD**

**Category: Other (Basic)**

**Mon 10/14 & Wed 10/16**

2025 promises to be a year of significant change for the Medicare system - affecting the quality, quantity and cost for people relying on the various parts of Medicare for their health insurance coverage. This presentation will look at the more recognized (announced) changes and the unannounced "what's behind the curtain" changes and the impact these changes will have on Medicare beneficiaries, healthcare providers, and the agencies and programs serving Medicare enrolled individuals.

### **Week 5: Accessing Prescription Drugs under the Medicare System - Radical Transformation or an Impending Disaster**

**Speaker: William McKendree, JD**

**Category: Other (Basic)**

**Mon 10/21 & Wed 10/23**

This presentation is about the issues faced by individuals in Medicare as they try to access their prescription medications. The single greatest concern expressed by a majority of Americans enrolled in Medicare, is being able to obtain their prescription drugs at an affordable price. Unfortunately, the current process under Medicare reveals significant problems in that regard. And recognizing these problems is essential to understanding and anticipating Medicare's limitations – especially for the individuals relying on Medicare's coverage.

This presentation will examine the characteristics of Medicare's prescription drug coverage: how it works, how it's failing and why it's failing, and how that failure impacts Medicare beneficiaries in obvious and not-so-obvious ways. And we will definitely look at how recent federal law (The Inflation Reduction Act of 2022) seeks to reform the current process of Medicare's coverage of prescription drug costs, and (spoiler alert) the inherent limitations and potential failings of this new legislation.

### **Week 6: The Latest Tax Information from Harrisburg - 2024**

**Speaker: Barry Gerber, Attorney at Law, CPA**

**Category: Tax (Basic)**

**Mon 10/28 & Wed 10/30**

This course will provide an update for CPAs on the latest 2024 "policies and procedures" from the PA Department of Revenue ("DOR") and tentative DOR responses given to the October 2024 written list of tax questions.

**Week 7: Internal Audits****Speaker: Brian Pietrandrea****Category: Accounting & Auditing (Basic)****Mon 11/4 & Wed 11/6**

This course will cover the roll of an internal audit and the potential benefits.

**Week 8: Process Audit Approach - Part 1****Speaker: Nancy Lilling, CPA, CIA, CFE****Category: Accounting & Auditing (Basic)****Mon 11/11 & Wed 11/13**

This course will teach the basic steps to develop a risk-based audit plan and to complete a process audit including planning, risk and control identification, developing and documenting testing steps, presentation of potential findings, and audit wrap up.

**Week 9: Process Audit Approach - Part 2****Speaker: Nancy Lilling, CPA, CIA, CFE****Category: Accounting & Auditing (Basic)****Mon 11/18 & Wed 11/20**

This course is a continuation of Part 1. Additionally, the course will teach high level risk considerations, the changes to the IIA's Internal Auditing Standards, and the role of quality assurance.



**No Class This Week – Happy Thanksgiving!**

**Week 10: Corporate Controller and CAO Hot Topics****Speaker: Brian Pietrandrea****Category: Accounting & Auditing (Basic)****Mon 12/2 & Wed 12/4**

This course covers 10 major challenges financial executives face right now.

**Week 11: Estate Planning Methods and Documents****Speaker: Matthew Kikta, CELA****Category: Other (Intermediate)****Mon 12/9 & Wed 12/11**

This course will discuss the broad concepts of Estate Planning. This will include common documents used, planning techniques and touch upon certain government benefit programs and links to estate planning.

**Category: Ethics (Basic)**

**Mon 12/16 & Wed 12/18**

This is an introductory course that is designed to give accountants an overview of how the criminal justice system operates. The course will review provisions of the United States and Pennsylvania Constitutions that apply to criminal prosecutions. The course will also review federal and state criminal statutes that govern prosecutions in white collar crime as well as prosecutions for violations of federal tax law. Finally, the course will explain how a criminal prosecution proceeds through the Pennsylvania courts.