2012 CALENDAR

*(*as of May 3, 2012)*

All programs are two hours and are held at
1PM – 3PM Eastern; Noon – 2PM Central; 11AM – 1PM Mountain; 10AM – Noon Pacific

DATE	PROGRAMS	SPEAKER	CATEGORY	AREA
2012-01-04	Schedule M-3 Reporting and Compliance Issues for the 2011 Filing Season	Cherie Hennig, CPA, Ph.D., M.B.A.	Tax	Federal Tax - Businesses
2012-01-05	Carryover Basis and Preparing the New Form 8939 for 2010 Deaths	Robert S. Keebler, CPA, M.S.T., AEP	Tax	Estates, Gifts and Trusts
2012-01-10	Understanding Foreign Subsidiaries and Completing Form 5471	Robert J. Misey, Jr., J.D., LL.M., M.B.A.	Tax	International Tax
2012-01-11	1040 Individual Income Tax Forms and Law Update	Claudia Hill, EA, M.B.A.	Tax	Federal Tax - Individuals
2012-01-12	PREPARERS BEWARE BEFORE YOU SIGN THAT TAX RETURN: What Every Tax Professional Needs to Know about Preparer Responsibilities and Penalties	Michael Goller, J.D.	Tax	Tax Practice and Procedure
2012-01-17	Construction Industry Tax Foundations – Summary of the Complicated Tax Accounting Methods for Construction Contractors	Eric P. Wallace, CPA	Tax	Construction Industry
2012-01-18	1120S S Corporation Tax Update and Review of Key Issues	Vicki Mulak, EA, CFP	Tax	Federal Tax - Businesses
2012-01-19	Getting Financially Challenging Situations onto the Tax Return (COD, Short Sales and Foreclosures)	Claudia Hill, EA, M.B.A.	Tax	Federal Tax - Individuals
2012-01-24	IC-DISCS: Practical Tax Planning and Compliance Considerations for Closely-Held Exporters	Robert J. Misey, Jr., J.D., LL.M., M.B.A.	Tax	International Tax
2012-01-25	Construction Industry Tax Update	Eric P. Wallace, CPA	Tax	Construction Industry
2012-01-26	TAX PRACTICE QUALITY CONTROL: Protect Your Practice, Please and Protect Your Clients	Kip Dellinger, CPA	Tax	Tax Practice and Procedure
2012-01-31	1065 Partnership-LLC Tax Update and Review of Key Issues	Vicki Mulak, EA, CFP	Tax	Federal Tax - Businesses
2012-02-01	Schedule C Hot Buttons	Claudia Hill, EA, M.B.A.	Tax	Federal Tax - Individuals
2012-02-02	INTERNATIONAL TAX TRAPS FOR THE UNWARY: What IRS Forms Should Be Filed By Taxpayers with Activities that Cross International Borders?	Robert J. Misey, Jr., J.D., LL.M., M.B.A.	Tax	International Tax
2012-02-07	Tax Season Update for Business Clients	Vern Hoven, CPA, EA, M.S.T. / Sharon Kreider, CPA, EA	Tax	Federal Tax - Businesses
2012-02-08	From Entity to Individual – From K-1 to 1040	Claudia Hill, EA, M.B.A.	Tax	Federal Tax - Individuals
2012-02-09	Capitalization of Tangible Assets: Understanding the New IRS Regulations	Eric P. Wallace, CPA	Tax	Federal Tax - Businesses
2012-02-14	Preparing the Decedent's Final Form 1040 - And Other Post-Death Elections and Decisions for Your Clients	Steve Siegel, J.D., LL.M. (Taxation)	Tax	Estates, Gifts and Trusts
2012-02-16	PREPARING FORM 709: The Federal Gift Tax Return	Steve Siegel, J.D., LL.M. (Taxation)	Tax	Estates, Gifts and Trusts

2012-02-17	FORM 990-PF: Preparing the IRS Return for Private Foundations	Jane Searing, CPA, M.S. Taxation	Tax	Exempt Organizations
2012-02-21	MAXIMIZING FOREIGN TAX CREDITS ON FORM 1116 FOR CLOSELY-HELD BUSINESSES: What Every S Corporation, LLC and Partnership Paying Taxes Abroad Must Know	Robert J. Misey, Jr., J.D., LL.M., M.B.A.	Tax	International Tax
2012-02-22	GIFT CARDS: Tax Compliance and Financial Reporting Tips and Traps for Businesses	Christina Edson, J.D., LL.M (Taxation) / Mark Siegel, M.S.T., C.P.A.	Tax	State Tax
2012-02-23	PREPARING FORM 1041: U.S. Income Tax Return for Estates and Trusts	Steve Siegel, J.D., LL.M. (Taxation)	Tax	Estates, Gifts and Trusts
2012-02-24	FBAR/FATCA Compliance Update	Steven Toscher, J.D. / Michel R. Stein, J.D., LL.M.	Tax	International Tax
2012-02-28	PREPARING FORM 706: The Federal Estate Tax Return	Steve Siegel, J.D., LL.M. (Taxation)	Tax	Estates, Gifts and Trusts
2012-02-29	Tax Treatment of Cancellation of Indebtedness Income - S Corporations and Partnerships	Kathleen K. Wright, CPA, J.D., LL.M. (Taxation), M.B.A. (Taxation)	Tax	Federal Tax - Businesses
2012-03-01	Tax Treatment of Casualty and Disaster Losses	Steve Siegel, J.D., LL.M. (Taxation)	Tax	Federal Tax - Individuals
2012-03-02	Schedule D and Form 8949 - Reporting Rules and Issues	Karen Brosi, EA, CFP / Vern Hoven, CPA, EA, M.S.T.	Tax	Federal Tax - Individuals
2012-03-06	How to Handle Investment Theft Losses on Client Tax Returns	Robert S. Keebler, CPA, M.S.T., AEP / Eric Johnson CPA, M.S.T.	Tax	Federal Tax - Individuals
2012-03-07	Tax Treatment of Cancellation of Indebtedness Income - Individuals	Kathleen K. Wright, CPA, J.D., LL.M. (Taxation), M.B.A. (Taxation)	Tax	Federal Tax - Individuals
2012-03-08	Depreciation and Bonus Depreciation--Getting It Right	Eric P. Wallace, CPA	Tax	Federal Tax-Business
2012-03-13	Enterprise Risk Management: How to Meet the Challenges of an Uncertain World	Mark S. Beasley, CPA, Ph.D.	A&A	Accounting
2012-03-14	The New Yellow Book: Understanding the Revised Government Accounting Standards	Alan Anderson, CPA	A&A	Accounting
2012-03-16	Capitalization of Tangible Assets: Understanding the New IRS Regulations	Eric P. Wallace, CPA	Tax	Federal Tax-Business
2012-03-20	Protecting Your Tax Practice Tomorrow: Dealing with Preparer Penalty and Circular 230 Issues Today	Kip Dellinger, CPA	Tax	Tax Practice and Procedure
2012-03-21	Reporting Gifts In Kind - A Tax Perspective	Jane Searing, CPA, M.S. Taxation	Tax	Exempt Organizations
2012-03-22	PREPARING FORM 1041: U.S. Income Tax Return for Estates and Trusts	Steve Siegel, J.D., LL.M. (Taxation)	Tax	Estates, Gifts and Trusts
2012-03-27	Handling Net Operating Losses in the Multi-State Environment	Kathleen K. Wright, CPA, J.D., LL.M. (Taxation), M.B.A. (Taxation)	Tax	State Tax
2012-03-28	IFRS Revenue Recognition: What CFOs and Decision Makers Need to Know	Cecil K. Nazareth, CPA, M.B.A., ACA / Peter A. Margaritis, CPA, MAcc	A&A	Accounting
2012-03-29	Taxation of REITs as Partners: Tax Planning for Partnership Acquisitions, Continuing Operations, and Ultimate Dispositions	Robert J. Le Duc, J.D., LL.M. (Taxation)	Tax	Federal Tax - Businesses
2012-04-03	TRANSFER PRICING: Compliance, Protection, and Planning For Small and Mid-Sized Companies	Robert J. Misey, Jr., J.D., LL.M., M.B.A.	Tax	International Tax
2012-04-04	Compilations and Reviews Update and Key Issues	Mark Dauberman, CPA	A&A	Auditing
2012-04-05	Accounting Method Changes Under the Tangible Property Regs	Eric P. Wallace, CPA	Tax	Federal Tax-Business

2012-04-10	A&A Update for Construction Contractors	Eric P. Wallace, CPA	A&A	Accounting
2012-04-11	Risk Assessment Standards: Practical Insight and Observations for Business and Industry	Alan Anderson, CPA	A&A	Auditing
2012-04-19	Planning with Intentionally Defective Grantor Trusts	Steve Siegel, J.D., LL.M. (Taxation)	Tax	Tax, Financial and Estate Planning
2012-04-20	Succession Planning and Valuation for the Small CPA Firm	Joel Sinkin	Practice Management	Practice Management
2012-04-24	A&A Fundamentals for Construction Contractors	Eric P. Wallace, CPA	A&A	Accounting
2012-04-25	Accounting for Income Taxes under IFRS: What Practitioners Need to Know	Cecil K. Nazareth, CPA, M.B.A., ACA	A&A	Auditing
2012-04-26	PREPARING CALIFORNIA FORM 540NR: Part-Year and Nonresident Income Tax Return	Kathleen K. Wright, CPA, J.D., LL.M. (Taxation), M.B.A. (Taxation)	Tax	State Tax
2012-05-01	Depreciation and Bonus Depreciation--Get it Right	Eric P. Wallace, CPA	Tax	Federal Tax
2012-05-02	Understanding the Taxation of Foreign Corporations and How to Prepare Form 1120-F	Robert J. Misey, Jr., J.D., LL.M., M.B.A.	Tax	International Tax
2012-05-03	Income Taxation of Trusts and Estates	Steve Siegel, J.D., LL.M. (Taxation)	Tax	Estates, Gifts and Trusts
2012-05-08	Understanding Portability under the Estate Tax Law	Robert S. Keebler, CPA, M.S.T., AEP	Tax	Estates, Gifts and Trusts
2012-05-09	Improving Audit Workflow for Efficiency and Effectiveness	Alan Anderson, CPA	A&A	Auditing
2012-05-10	Multistate Taxation of e-Commerce	John C. Healy, M.S.T., CPA / Joseph A. Pickart, J.D.	Tax	State Tax
2012-05-11	Managing Fraud Risk	Terrie Thamer, CPA, CFE, MPA	A&A	Fraud
2012-05-15	Foreign Financial Asset Reporting Requirements: Understanding FBAR and FATCA Compliance	Steven Toscher, J.D. / Michel R. Stein, J.D., LL.M.	Tax	International Tax
2012-05-16	Dealing with the IRS Collection Division	Eric Green, J.D., LL.M.	Tax	Tax Practice and Procedure
2012-05-17	THE EXPANDING CONCEPT OF NEXUS: Practical Insights on State Tax Nexus Issues and Trends	Kathleen K. Wright, CPA, J.D., LL.M. (Taxation), M.B.A. (Taxation)	Tax	State Tax
2012-05-18	Schedule D and Form 8949 - Reporting Rules and Issues	Karen Brosi, EA, CFP / Vern Hoven, CPA, EA, M.S.T.	Tax	Federal Tax - Individuals
2012-05-22	Advanced IRA Planning	Robert S. Keebler, CPA, M.S.T., AEP	Tax	Estates, Gifts and Trusts
2012-05-23	LIKE-KIND EXCHANGES: Document and Structure Successful Sec. 1031 Exchanges	Nancy N. Grekin, J.D.	Tax	Federal Tax Planning
2012-05-24	Intrafamily Transfers of Businesses: Tax and Non-Tax Considerations	Steve Siegel, J.D., LL.M. (Taxation)	Tax	Tax, Financial and Estate Planning
2012-05-30	Letters! We Get Letters… Responding to IRS Notices, Including CP-2000 Notices	Claudia Hill, EA, M.B.A.	Tax	Tax Practice and Procedure
2012-05-31	EMPLOYEE BENEFIT PLAN AUDITS: Striking the Right Balance of Risk, Efficiency and Effectiveness	Crystal Ekanyake, CPA, CEBS	A&A	Corporate
2012-06-05	Unrelated Business Income – Do I have it? What do I do with it?	Jane Searing, CPA, M.S. Taxation	Tax	Tax Exempt Organizations
2012-06-06	Fundamentals of U.S.-Canada Cross-Border Tax Planning for Closely-Held Businesses	Robert J. Misey, Jr., J.D., LL.M., M.B.A.	Tax	International Tax

2012-06-12	ESBTs and Other S Corporation Allowed Trusts (QSSTs and Grantor Trusts)	Steve Siegel, J.D., LL.M. (Taxation)	Tax	Tax, Financial and Estate Planning
2012-06-13	THE NEW WORLD OF STATE TAX APPORTIONMENT: Understanding the Sales Factor	Kathleen K. Wright, CPA, J.D., LL.M. (Taxation), M.B.A. (Taxation)	Tax	State Tax
2012-06-14	Understanding the Federal Gift Tax	Steve Siegel, J.D., LL.M. (Taxation)	Tax	Estates, Gifts and Trusts
2012-06-19	Circular 230 and Preparer Penalty Issues in Estate & Gift Tax Planning and Preparation	Kip Dellinger, CPA	Tax	Tax Practice and Procedure
2012-06-20	Evolving Risk Landscape	Alan Anderson, CPA	A&A	Accounting
2012-06-26	DIVORCE AND SEPARATION: Tax Issues	Steve Siegel, J.D., LL.M. (Taxation)	Tax	Federal Tax - Individuals
2012-07-10	Planning with GRATs and GRUTs	Steve Siegel, J.D., LL.M. (Taxation)	Tax	Tax, Financial and Estate Planning
2012-07-11	TAXATION OF FOREIGN INTERESTS IN U.S. REAL PROPERTY: Planning for Acquisitions, Continuing Operations, and Ultimate Dispositions	Robert J. Misey, Jr., J.D., LL.M., M.B.A.	Tax	International Tax
2012-07-12	Harvesting Gains and Other Critical Tax Planning Considerations for 2012	Robert S. Keebler, CPA, M.S.T., AEP	Tax	Tax, Financial and Estate Planning
2012-07-17	Fraud Issues for Construction Contractors	Eric P. Wallace, CPA	A&A	Construction Industry
2012-07-18	LIQUIDATIONS AND DISSOLUTIONS: Tax Issues and Considerations	Kathleen K. Wright, CPA, J.D., LL.M. (Taxation), M.B.A. (Taxation)	Tax	Federal Tax - Businesses
2012-07-19	Planning with Dynasty Trusts	Steve Siegel, J.D., LL.M. (Taxation)	Tax	Tax, Financial and Estate Planning
2012-07-24	Filing Amended Returns - How, When and Why	Claudia Hill, EA, M.B.A.	Tax	Tax Practice and Procedure
2012-08-01	Understanding Foreign Subsidiaries and Completing Form 5471	Robert J. Misey, Jr., J.D., LL.M., M.B.A.	Tax	International Tax
2012-08-02	Choosing the Business Entity	Steve Siegel, J.D., LL.M. (Taxation)	Tax	Federal Tax - Businesses
2012-08-07	Accounting Method Changes and the Proper Preparation of IRS Form 3115	Eric P. Wallace, CPA	Tax	Federal Tax - Businesses
2012-08-15	The Sales Factor and Market Based Sourcing	Kathleen K. Wright, CPA, J.D., LL.M. (Taxation), M.B.A. (Taxation)	Tax	State Tax
2012-08-16	BUYING AND SELLING A BUSINESS: Practical Considerations	Steve Siegel, J.D., LL.M. (Taxation)	Tax	Federal Tax - Businesses
2012-09-06	Understanding the Generation-Skipping Tax	Steve Siegel, J.D., LL.M. (Taxation)	Tax	Estates, Gifts and Trusts
2012-09-12	Auditing Standards Update	Alan Anderson, CPA	A&A	Auditing
2012-09-19	TAX PLANNING FOR FOREIGN OPERATIONS: Tips and Tools of the Trade	Robert J. Misey, Jr., J.D., LL.M., M.B.A.	Tax	International Tax
2012-09-20	Construction Industry Tax Update	Eric P. Wallace, CPA	Tax	Construction Industry
2012-09-25	TRUST FUNDAMENTALS: A Practical Primer for Tax Practitioners	Steve Siegel, J.D., LL.M. (Taxation)	Tax	Estates, Gifts and Trusts
2012-09-27	State Taxation of Telecommuters and the Mobile Work Force	Kathleen K. Wright, CPA, J.D., LL.M. (Taxation), M.B.A. (Taxation)	Tax	State Tax
2012-10-02	Construction Industry Tax Foundations: Understanding the Complicated Tax Accounting Methods for Construction Contractors	Eric P. Wallace, CPA	Tax	Construction Industry

2012-10-18	Retirement Plans for the Self Employed	Steve Siegel, J.D., LL.M. (Taxation)	Tax	Tax, Financial and Estate Planning
2012-11-07	Successful Audit Planning	Alan Anderson, CPA	A&A	Auditing
2012-11-08	YEAR-END TAX PLANNING: The Tried and True--The Creative and New	Steve Siegel, J.D., LL.M. (Taxation)	Tax	Tax, Financial and Estate Planning
2012-11-14	Overview of the CA income tax system for business entities	Kathleen K. Wright, CPA, J.D., LL.M. (Taxation), M.B.A. (Taxation)	Tax	State Tax
2012-11-29	Depreciation and Bonus Depreciation--Get It Right	Eric P. Wallace, CPA	Tax	Federal Tax-Business
2012-12-04	Nexus for State and Local Tax	John C. Healy, M.S.T., CPA / Joseph A. Pickart, J.D.	Tax	State Tax
2012-12-06	Your Clients' Homes: Tax Rules, Issues and Planning Opportunities	Steve Siegel, J.D., LL.M. (Taxation)	Tax	Federal Tax - Individuals
2012-12-11	Capitalization of Tangible Assets: Understanding the New IRS Regulations	Eric P. Wallace, CPA	Tax	Federal Tax - Businesses
2012-12-12	CALIFORNIA TAX UPDATE	Kathleen K. Wright, CPA, J.D., LL.M. (Taxation), M.B.A. (Taxation)	Tax	State Tax
2012-12-19	Ethics for Tax Professionals	Kathleen K. Wright, CPA, J.D., LL.M. (Taxation), M.B.A. (Taxation)	Ethics	Regulatory Ethics
2012-12-27	Estates and Trusts Tax Law and Planning Update	Steve Siegel, J.D., LL.M. (Taxation)	Tax	Tax, Financial and Estate Planning

** Program dates and topics are subject to change*