20-20 SERVICES

2024 LEARNING COURSE GUIDE

NEW

Client Accounting and Advisory Services (CAAS)

Audit Training

Tax Training

INTRODUCING

Professional Development

Accounting and Auditing

Executive Programs

Customized Programs/Build Your Own Menu

Material Licensing

NEW FOR 2024

Public Classes Scheduled for India Standard Time

IRS-Approved CE Vendor for Enrolled Agent Credit

DiSC-Certified Instruction

Business Combination Module

CLICK HERE FOR MORE UPDATES

MORE TRAINING INFO

Public Training Programs

Public Training Schedule

Webinars

Meet the Team

Pricing

REGISTER FOR PUBLIC COURSES

NEW FOR 2024

IRS-Approved CE Vendor for Enrolled Agent Credit

20-20 Services is now an IRS-approved continuing education provider. That means enrolled agents who participate in our tax training courses can also receive credit hours. Look for the logo indicating which sessions offer CE credit for this new professional group.

CE Continuing Education Approved IRS Provider

DiSC-Certified Instruction

Several 20-20 Services instructors are now DiSC certified. DiSC is a personal assessment tool used by more than a million people every year to help improve teamwork, communication and productivity in the workplace. Would you like incorporate DiSC into your firm's professional development training initiatives? Contact us for more information on how we can help.

Business Combination Module

Hot off of the presses! A new 3 CPE credit hour Business Combination accounting module is now available as a part of our *Audit Build Your Own Menu* library. You can include this module as a part of a larger curriculum, or offer it as a stand-alone webinar or lunch and learn. Contact 20-20 Services if you'd like to preview this new offering.

Professional Development Division

We are pleased to announce that 20-20 Services has established the Professional Development training division. While our audit and tax training curriculum has traditionally included some of these modules and will continue to, the demand for a stand-alone professional development curriculum has been steadily increasing for the past several years as firms have realized the importance of developing their team members' people skills as part of their recruitment and retention strategy.

By **clicking here**, you'll find our **Build Your Own Menu (BYOM) of Professional Development** modules with courses specifically designed for staff at various stages of their career. You will also find our Experienced Manager Program, a 2.5 day course dedicated exclusively to the people skills development of the manager in public accounting, in any discipline.

You will also find our offerings of presentations skills training courses focusing on the foundational skills necessary to become a more effective speaker, facilitator and/or trainer. These modules and courses include dedicated time for participants to practice their platform skills as well as deliver practice presentations for immediate feedback.

DID YOU KNOW?

20-20 Services has virtually trained more than 1,000 accounting professionals in India who work in the off-shore offices of many of our US-based accounting firm clients. If you have off-shore offices, contact us to find out how we can help with implementing a training curriculum.

PUBLIC CLASSES SCHEDULED FOR INDIA STANDARD TIME

New for 2024, 20-20 Services will be offering audit classes at times that are convenient for students located in India. See the classes offered by click on Public Training in our menu.

20-20 SERVICES TAX CERTIFIED TAX 5

Tax Level 5

This new course is designed to advance the skills of experienced senior accountants and/or new supervisors. The three-day program provides training in many tax technical areas across business and individual topics. Development Skills training is focused on conflict management and business development. The variety of topics covered makes this a valuable program for continued growth in the profession.

FOLLOW US ON SOCIAL MEDIA for the latest updates on course offerings, free webinars, discounts, case studies, new team members and more.

FAQ

CASE STUDIES AND FEATURED INSIGHTS | Have you checked out 20-20 Services **case studies** and **blog posts**? You'll find great information about industry-specific training and other useful knowledge to help you and your firm's team to grow.

Client Accounting and Advisory Services (CAAS)

> WANT TO *create a custom CAAS training program?*

Click Here

MORE INFO For more information or if you have any questions, contact Beckie Reilly at 855.988.2020 or email her at beckie.reilly@20-20services.com.

1–2 YEARS

Client Accounting and Advisory Services (CAAS) Staff Training

20-20 Services CAAS Staff Training is a series of four courses designed to help those with **one-to-three years of accounting experience** advance their knowledge of processes and analysis, basic compilation procedures, business writing, professional communications and tax basics.

COURSE INFORMATION

Duration	**Variable ***
Prerequisite	**None**
Level of Instruction	**Basic**
Delivery Methods	**Group Internet**
Blended Learning	
CPE Credits	**24 Credits**
Accounting (ACCT): 12	
Communications and Marketing (COM): 2	
Personal Development (PD): 2	
Taxes (TAX): 8	
Advance Preparation	**None**

* The 24-credit course is typically offered in four six-hour segments. This schedule can be modified, as appropriate.

COURSE OUTLINE

Accounting Processes and Financial Analysis
8 Credits
- Introduction to advisory services
- Common financial reports and statements
- Basic balance sheet and income statement analysis techniques
- Common issues in accounting transactions, including bank reconciliations, accounts receivable, payroll and benefits, accrual-based accounting issues, equity transactions and PandL issues

SSARS: Scope of Services and Performing Basic Compilations and Reviews
4 Credits
- Perform a basic compilation procedure
- Perform a basic review procedure
- Discuss common review issues found by supervisors
- Describe independence rules in performing various attest and non-attest services

Professional Development
2 Credit
- Effective business communications

2 Credit
- Time-management and organization

Introduction to Tax
8 Credits
- Compensation — W-2s, 1099s, etc.
- Self-employment
- Residential rental properties
- Introduction to business taxes
- Depreciation
- Schedule K and M-1

LEARNING OBJECTIVES

- Perform basic analysis of accounting systems and reports and identify common errors.
- Perform basic preparation, compilation and review projects, and describe differences between scope of services.
- Describe common tax issues, and apply strategies for individual and small business clients.

20-20 Services LLC is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State Boards of Accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org

3+ YEARS

Client Accounting and Advisory Services (CAAS) Senior Training

20-20 Services CAAS Senior Training (for those with **three or more years experience**) is a combination of four classes that cover key topics such as identifying accounting errors, cash-flow forecasting, how to apply SSARS 25, project management and supervisor skills, and tax training.

COURSE INFORMATION

Duration	**Variable ***
Prerequisite	**3+ Years of Professional Experience**
Level of Instruction	**Intermediate**
Delivery Methods	**Group Internet**
Blended Learning	
CPE Credits	**24 Credits**
Accounting (ACCT): 12	
Personal Development (PD): 4	
Taxes (TAX): 8	
Advance Preparation	**None**

* The 24-credit course is typically offered in four six-hour segments. This schedule can be modified, as appropriate.

COURSE OUTLINE

Accounting Processes and Financial Analysis
8 Credits
- Identifying accounting errors and advanced financial statement analysis
- Industry ratio analysis and budgeting techniques
- Financial and operational accounting, cash-flow forecasting and contribution margin analysis
- Working with lenders, interpreting and calculating loan covenants
- Creating and analyzing key performance indicators

SSARS: Supervising Preparation, Compilation and Review Services
4 Credits
- Preparation services, compilations of proforma and prospective F/S
- How to apply SSARS 25 — effective for periods ending on or after December 15, 2021
- Discuss independence issues that arise in performing various attest and non-attest services

Supervision Skills and Project Management
4 Credits
- Supervision styles and providing feedback
- Project management

Tax Training
8 Credits
- Advising on business creation
- Basis, at-risk and passive activities
- Schedule K and M-1
- Retirement contributions and distributions

LEARNING OBJECTIVES

- Perform analysis of accounting systems and reports and identify common errors.
- Identify complexities in preparation, compilation and review engagements, and apply best practices.
- Discuss tax issues and identify service opportunities for individual and business clients.

Complete, High-End Audit Training Curriculum

20-20 SERVICES COMPLETE AUDITOR MODEL

TECHNICAL SKILLS	SOFT SKILLS
Professional Judgments	Lead and Manage
Documentation and Review	Supervision
Accounting Foundation	Client Service
Audit Techniques	Communication
Audit Process	Professionalism

THE LENS OF PAST EXPERIENCE

20-20 Services provides a complete audit training curriculum to help develop your staff into well-rounded professionals who can take your firm to the next level. We have identified the key skill sets needed at various phases of a public accounting career and incorporated them into comprehensive training programs that offer both technical and soft-skills training. Our courses are tailored so that each module provides an opportunity to apply new skills right away. We use our experience in adult learning to design courses that share practical knowledge as well as engage and excite the participants. We encourage you to explore our unique offerings and ask us more about our training programs.

MORE INFO

For more information or if you have any questions, contact Beckie Reilly at 855.988.2020 or email her at  beckie.reilly@20-20services.com.

> *Build Your Own Audit Training Program* Click Here

LEVEL 1

AUDIT TRAINING

New Hire Training

New Hire Training is designed for individuals with limited practical experience on audits. The program provides critical skill training for new associates related to performing and documenting audit procedures. The program addresses the skills by examining and practicing audit procedures in the common audit areas assigned to newer associates. Utilization of the accounting records from a real small business creates a realistic simulation in the classroom. The program also provides training on certain key foundational skills necessary to be successful in the profession.

COURSE INFORMATION

Duration	**Variable**
Prerequisite	**0-1 Year Professional Experience**
Level of Instruction	**Basic**
Delivery Methods	**Group Live** **Group Internet** **Blended Learning**
CPE Credits	**24 Credits**

Auditing (AUD): 20

Communications and Marketing (COM): 3

Personal Development (PD): 1

Advance Preparation	**None**

DELIVER your training program using in-house professionals. 20-20 Services — via our Material Licensing program — can provide Leader's Guides and Participant materials.

Learn More

COURSE OUTLINE

Audit Concepts and Skills
9.5 Credits
- Role of the new hire
- Audit process
- Risk assessment procedures and walkthroughs
- Audit procedures
- Preparing audit documentation
- Introduction to sampling *

Audit Case Study
10.5 Credits
- Cash
- Accounts receivable
- Inventory observations
- Property, plant and equipment
- Accounts payable

Professional Development
4 Credits
- Listening skills
- Professionalism
- Business writing fundamentals

* This module can be tailored to include an overview of your firm-specific sampling form at no additional charge.

LEARNING OBJECTIVES

- Describe the general audit process, including the gathering of information, use of risk assessments, performance of procedures and the reporting process.
- Perform and document common basic audit procedures, such as vouching, tracing, confirming, inspecting and observing.
- Take instruction and complete common tasks and audit procedures in areas often assigned to newer associates, such as cash, accounts payable, inventory and accounts receivable.

> **WANT TO** *customize your training program? Pick and choose your modules from our library of content. Also, 20-20 Services can include your firm-specific sampling form at no additional charge.* Learn More

LEVEL 2

AUDIT TRAINING
Staff Training

Staff Training is designed for staff accountants with one busy season of experience. This program includes significant content targeted for tasks and procedures performed by the more experienced staff person on the engagement. Topics include updating internal control documentation, performing walkthroughs, sampling techniques, valuation testing for accounts receivable, and data analytics. In addition, the program provides skill training on select key foundational skills necessary for success in the public accounting profession.

COURSE INFORMATION

Duration	**Variable**
Prerequisite	**6-18 Months Professional Experience**
Level of Instruction	**Basic**
Delivery Methods	**Group Live** **Group Internet** **Blended Learning**
CPE Credits	**24 Credits**
Auditing (AUD): 22	
Accounting (ACCT): 1	
Communications and Marketing (COM): 1	
Advance Preparation	**None**

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COURSE OUTLINE

Audit Knowledge and Skills
15 Credits
- Role of audit staff
- Risk-based auditing
- Audit process
- Understanding the entity
- Understanding and documenting internal controls
- Beyond the basics
- Fraud
- Substantive analytical procedures
- Substantive sampling

Specialized Accounting and Auditing Topics
7 Credits
- Accounts receivable
- Auditing inventory
- Introduction to audit data analytics

Professional Development
2 Credits
- Performing effective inquiries

LEARNING OBJECTIVES

- Apply basic risk assessment procedures, including updating and validating activity-level control documentation and entity understanding.
- Effectively perform basic audit procedures, such as analytical procedures, sampling and fraud procedures, and address specific areas such as valuation of receivables, accounting for leases and revenue.
- Gather and share information with the client and audit team and demonstrate appropriate and ethical decision-making.

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LEVEL 3

20-20 SERVICES AUDIT CERTIFIED 3

AUDIT TRAINING
New In-Charge Training

New In-Charge Training is designed for individuals transitioning to the role of Senior or In-Charge on the audit engagement team. This program includes significant content on the audit process, data analytics, project management, supervision, and file review to prepare the participant for in-field leadership responsibilities. The program includes significant technical content related to evaluating activity level controls, assessing and responding to risk, and performing tests of controls. This program will challenge participants to put the audit process together and step into a more advanced role on the audit team.

COURSE INFORMATION

Duration	**Variable**
Prerequisite	**2+ Years Professional Experience**
Level of Instruction	**Intermediate**
Delivery Methods	**Group Live Group Internet Blended Learning**
CPE Credits	**24 Credits**
Auditing (AUD): 19	
Accounting (ACCT): 1	
Personal Development (PD): 2	
Management Services (MGMT): 2	
Advance Preparation	**None**

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COURSE OUTLINE

Audit Knowledge and Skills
13 Credits
- Role of the in-charge
- Audit process and understanding the entity
- Evaluating activity level controls
- Risk assessment
- Responding to risk
- Control testing
- Developing expectations for analytical procedures
- Reviewing audit documentation

Specialized Accounting and Auditing Topics
3.5 Credits
- Contemporary audit techniques — databases and structured data
- Revenue

Professional Development
7.5 Credits
- Project management
- Supervision styles and providing feedback
- Time management and organization
- Teaching and delegating

LEARNING OBJECTIVES
- Supervise, complete, or contribute to all required risk assessment procedures.
- Evaluate the design effectiveness of a client's activity level controls.
- Design, perform, and supervise the performance of key audit procedures, tests of controls, and analytical procedures, including appropriate use of data extraction software.
- Manage audit fieldwork, including organizing the project and supervising team members.

WANT TO *customize your training program? Pick and choose your modules from our library of content. Also, 20-20 Services can include your firm-specific sampling form at no additional charge.* Learn More

LEVEL 4

AUDIT TRAINING

Experienced In-Charge Training

Experienced In-Charge Training is designed for individuals with experience as the in-field leader. The program is designed to advance the skills and effectiveness of participants. The program addresses more advanced audit process steps, such as evaluating management and setting and responding to financial statement level risks, including those created from a lack of entity level controls. The program challenges participants to create custom responses to the risks on their engagements. The program provides a variety of training related to technical accounting and auditing topics. In addition, the program provides robust research-based content related to supervising for effective and efficient performance.

COURSE INFORMATION

Duration	**Variable**
Prerequisite	**3+ Years Professional Experience**
Level of Instruction	**Intermediate**
Delivery Methods	**Group Live** **Group Internet** **Blended Learning**
CPE Credits	**24 Credits**
Auditing (AUD): 17	
Communications and Marketing (COM): 6	
Personal Development (PD): 1	
Advance Preparation	**None**

DELIVER your training program using in-house professionals. 20-20 Services — via our Material Licensing program — can provide Leader's Guides and Participant materials. Learn More

COURSE OUTLINE

Audit Knowledge and Skills
13.5 Credits
- Role of the senior and professional skepticism
- Planning for efficient quality audits
- Case study in risk assessment
- General information technology controls
- Auditing estimates
- Auditor's report and required auditor communications

Specialized Accounting and Auditing Topics
1.5 Credits
- Contemporary audit techniques — data acquisition and dual purpose testing

Professional Development
9 Credits
- Business writing for auditors
- Supervising and motivating team members
- Communicating within and across teams
- Creating business presentations
- Mentoring for the future

LEARNING OBJECTIVES

- Evaluate the design effectiveness of a client's entity level and technology controls.
- Design custom audit programs to respond to assessed risks.
- Address challenging accounting and auditing issues in areas such as advanced risk assessment and accounting for estimates.
- Assess self and other individuals' motivation and personal style for leading and communicating.
- Describe and utilize techniques for delivering an effective, compelling business presentation.

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LEVEL 5

AUDIT TRAINING
Supervisor Training

Supervisor Training is designed to advance the skills of experienced in-field auditors and begins the development of management level skills. This two-day program provides training in audit technical areas, as well as foundational skills essential for leading teams. The blend of skills and technical topics makes this a valuable program for continued growth in the profession.

COURSE INFORMATION

Duration	**Variable**
Prerequisite	**4+ Years Professional Experience**
Level of Instruction	**Intermediate**
Delivery Methods	**Group Live** **Group Internet** **Blended Learning**
CPE Credits	**16 Credits**
Accounting (ACCT): 1	
Auditing (AUD): 11	
Personal Development (PD): 4	
Advance Preparation	**None**

COURSE OUTLINE

Audit Knowledge and Skills
5.5 Credits
- Role of the supervisor
- Designing risk-based audit procedures
- Interim procedures, including internal control testing
- Auditing fair value and using the work of a specialist

Specialized Accounting and Auditing Topics
4.5 Credits
- Leases
- Contemporary audit techniques — alternatives to sampling and the value of data visualization
- Current events in auditing | **NEW***

**In 2024, this module will include an overview of SAS 146 and the new updates to SQMS relevant to supervisors.*

Professional Development
6 Credits
- Providing written and verbal feedback
- Conflict management
- Creative problem solving
- Leading change from the middle

LEARNING OBJECTIVES

- Design efficient and effective audit programs to respond to identified risks.
- Address challenging auditing issues in areas such as fair value, interim procedures, internal control testing, and leases (ASC 842).
- Increase effectiveness of interactions with clients and the team through consideration of conflict management, change management and supervisory approaches.

AUDIT TRAINING

Manager Training

Manager Training is designed for individuals who have recently transitioned or are preparing to transition to a managerial role. This two-day program contains technical auditing topics, with a focus on communicating findings and issues with the client, reviewing recent inspection report findings and data analytics. The program also contains content related to key foundational skills necessary to function as a manager within the public accounting profession.

COURSE INFORMATION

Duration	**Variable**
Prerequisite	**5+ Years Professional Experience**
Level of Instruction	**Intermediate**
Delivery Methods	**Group Live** **Group Internet** **Blended Learning**
CPE Credits	**16 Credits**
Auditing (AUD): 8	
Personal Development (PD): 6	
Management Services (MGMT): 2	
Advance Preparation	**None**

COURSE OUTLINE

Audit Knowledge and Skills
6 Credits
- Role of the manager
- The manager review
- Learning from inspection reports
- Trends and transformations in auditing*

Evaluating and Communicating Results
2 Credits
- Results of substantive audit procedures
- Uncorrected misstatements and control deficiencies

Professional Development
8 Credits
- Time management and organization
- Leadership and management
- Project management
- Business development

** In 2024, this module will include an overview of SAS 146 and the new updates to SQMS relevant to supervisors.*

LEARNING OBJECTIVES

- Perform managerial roles on audit engagements, including identifying quality issues, job specific project management and managing multiple overlapping projects.
- Analyze and report to the client all required information, including addressing financial misstatements and control deficiencies.

DELIVER your training program using in-house professionals. 20-20 Services — via our Material Licensing program — can provide Leader's Guides and Participant materials.

Learn More

WANT TO *customize your training program? Pick and choose your modules from our library of content. Also, 20-20 Services can include your firm-specific sampling form at no additional charge.*

Learn More

RISK-BASED AUDITING

AUDIT TRAINING

Best Practices in Risk-Based Auditing

Our newly updated Best Practices in Risk-Based Auditing course offers the opportunity for auditors of all levels of experience to take a fresh look at the value of risk-based auditing and its impact on audit quality and efficiency. The content and length of this course can be tailored to the specific needs and goals of your audit team. For example, the agenda could be designed to increase focus on areas of higher need for your team or expanded to dive more deeply into topics such as disaggregated risk assessment, using data analytics in planning, performing effective journal entry testing, or designing substantive procedures using automated tools and techniques. Please contact us for more information.

After completing this session, participants will be able to:

- Summarize key concepts in risk-based auditing
- Describe the value of adherence to the risk assessment standards as it relates to audit quality and efficiency
- Describe the most significant areas of opportunities for increasing audit quality and efficiency on your own engagements
- Apply key concepts in risk-based auditing to your own engagements to increase audit efficiency and effectiveness

While the course is highly customizable, below is an example agenda for a 12-hour version of the course:

TOPIC	MINUTES	DESCRIPTION
Introduction	30	
Understanding the Entity	75	This section is designed to demonstrate the value of gaining a thorough UTE (including preliminary analytical procedures).
Understanding the System of Internal Control	75	This section reinforces the downstream impact of the auditor's understanding of internal control — with a focus on why and how time spent in this area can drive audit quality and efficiency.
Risk Assessment	120	Risk assessment topics will include assessing financial statement level risks and assertion level risks, including significant risks. The content will spotlight recently updated guidance from SAS 145.
Responding to Financial Statement Level Risks	25	This section provides an overview of responses to financial statement levels risks, including the risk of management override of controls.
Responding to Assertion Level Risks	150	This section includes tests of details (sampling and non-sampling), analytical procedures and internal control testing.
Documentation	50	This topic can include a focus on one or more the following topics: linkage between risk assessment and risk response, documenting rationale for key decisions, and best practices for tick marks and review notes
Project Management	50	This topic includes budgeting, scheduling, supervision and review, and wrap-up/completion.
Closing	25	A review activity and goal setting will allow participants to reflect on the topics previously covered, increasing retention and impact of the content delivered during the session.
	600	

MORE INFO

For more information or if you have any questions, contact Beckie Reilly at 855.988.2020 or email her at  **beckie.reilly@20-20services.com**.

MEETING FACILITATION

Audit Planning Meeting Facilitation

Regulators and peer reviewers are laser-focused on audit quality. The war for talent makes audit efficiency more critical than ever. Unlock the power of risk assessment and tailored risk response with an Audit Planning Meeting Facilitation session.

Led by engaging facilitators with deep audit experience and highlighting recent risk assessment guidance from SAS 145, this day-long session allows your audit professionals to challenge previous assumptions and take a fresh look at a real-life audit engagement, including:

- An in-depth understanding of the entity
- Expanded consideration of the IT environment
- Extensive discussion of risk assessment concepts in the context of the selected audit engagement
- Critical assessment of designed responses to risk for one or more specific audit areas
- Identification of project management challenges and potential solutions

Your team will leave the session with:

- An actionable process that can be used to strengthen the impact of future planning meetings
- A renewed focus on risk, driving positive change in both audit quality and efficiency
- An updated, tailored audit response for one or more specific audit areas

Please contact us for more information.

MORE INFO For more information or if you have any questions, contact Beckie Reilly at 855.988.2020 or email her at  beckie.reilly@20-20services.com.

Comprehensive, Next-Level Tax Training Curriculum

20-20 SERVICES COMPLETE TAX MODEL

TECHNICAL SKILLS	SOFT SKILLS
Documentation and Review	Lead and Manage
Tax (Compliance) Foundation	Self-organization
Advising and Strategy	Client Service
Tax Research	Communication
Consultation	Professionalism

THE LENS OF PAST EXPERIENCE

20-20 Services provides a complete tax training curriculum to help develop your staff into well-rounded professionals who can take your firm to the next level. We have identified the key skill sets needed at various phases of a public accounting career and incorporated them into comprehensive training programs that offer both technical and soft-skills training. Our courses are tailored so that each module provides an opportunity to apply new skills right away. We use our experience in adult learning to design courses that share practical knowledge as well as engage and excite the participants. We encourage you to explore our unique offerings and ask us more about our training programs.

ALL 20-20 SERVICES TAX TRAINING SESSIONS NOW OFFER CE CREDIT FOR ENROLLED AGENTS.

CE Continuing Education
Approved IRS Provider

MORE INFO

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LEVEL 1

Tax Training

Level One is designed for individuals who are beginning their career. This highly interactive program focuses on developing critical thinking skills and exploring solutions to the most commonly encountered issues facing new staff. Participants will work through practical day-to-day scenarios while creating supporting workpapers and exploring common tax forms for individuals and businesses. The program concludes with the preparation and self-review of two tax returns using source documents from actual client scenarios. Participants will prepare one individual tax return and, at the choice of the firm, prepare either an LLC 1065 tax return or an S corporation 1120-S tax return.

COURSE INFORMATION

Duration	**Variable**
Prerequisite	**None**
Level of Instruction	**Basic**
Delivery Methods	**Group Live** **Group Internet** **Blended Learning**
CPE Credits	**24 Credits**
Taxes (TAX): 22	
Personal Development (PD): 2	
Advance Preparation	**None**

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CE Continuing Education
Approved IRS Provider

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COURSE OUTLINE

Individual Tax Return
11 Credits

- Filing status, dependents and basic information
- Compensation and retirement income
- Interest, dividends and capital gains/losses
- Self-employment
- Residential rental properties
- Schedule 1 income and adjustments
- Standard and itemized deductions
- Individual tax credits
- Documentation

Prepare an Individual Tax Return
4 Credits

Professional Development
2 Credits

- Critical thinking and taking ownership

Business Tax Topics
4 Credits

- Introduction to business taxes
- Schedules K and M-1
- Depreciation

Prepare a Business Tax Return
3 Credits

Choose one (1):
Limited Liability Company 1065
S Corporation 1120-S

LEARNING OBJECTIVES

- Discuss the important items and common mistakes related to Forms W-2, 1099, and combined investment statements.
- Explore commonly encountered issues related to personal income tax deductions and credits.
- Calculate schedule C profit or loss from business and schedule E residential rental income.
- Practice preparing an individual tax return, including reviewing inputs from automated systems or other team members.
- Explore common business tax scenarios, such as identifying book-to-tax differences and understanding depreciation options.
- Practice preparing either an LLC 1065 tax return or an S corporation 1120-S tax return with supporting documentation.
- Discuss the importance of critical thinking and what it means to take ownership of work

WANT TO *customize your training program? Pick and choose your modules from our library of content. Also, 20-20 Services can include your firm-specific sampling form at no additional charge.* Learn More

LEVEL 2

Tax Training

Level Two is designed for staff tax preparers. The program covers both individual and business tax subjects. It focuses on delivering a core understanding of the common tax topics that tax preparers encounter every day. The business tax section of the program covers the fundamental tax laws for each type of business entity as well as book-to-tax reconciliation, basis and depreciation. The program also trains skills related to communication, obtaining and organizing information, and time management. This program includes extension case study exercises and tax court case review.

COURSE INFORMATION

Duration	**Variable**
Prerequisite	**1+ Years Professional Experience**
Level of Instruction	**Intermediate**
Delivery Methods	**Group Live** **Group Internet** **Blended Learning**
CPE Credits	**24 Credits**
Taxes (TAX): 22	
Communications and Marketing (COM): 1	
Personal Development (PD): 1	
Advance Preparation	**None**

COURSE OUTLINE

Business Tax Topics
16 Credits
- C corporations
- S corporations
- Introduction to LLCs and partnerships
- Schedules K and M-1
- Basis fundamentals — S corporation
- Depreciation
- State apportionments

Individual Tax Topics
6 Credits
- Schedule 1 income and adjustments
- Selected schedule C and rental property topics
- Alternative minimum taxes

Professional Development
2 Credits
- Communication — business writing
- Self-management and organization

LEARNING OBJECTIVES

- Discuss the fundamental tax laws governing C Corporations, S Corporations, Limited Liability Companies and Partnerships.
- Calculate permanent differences, timing differences, taxable income, separately stated items and ordinary income.
- Review the tax principles of other business topics, such as basis, depreciation and state apportionments.
- Explore the tax treatment of selected individual income tax topics.
- Explore selected tax principles for rental property and self-employment income.
- Compute alternative minimum tax adjustments and preferences.
- Practice communication, business writing and organizational skills.

DELIVER your training program using in-house professionals. 20-20 Services — via our Material Licensing program — can provide Leader's Guides and Participant materials. Learn More

CE Continuing Education
Approved IRS Provider

20-20 Services LLC is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State Boards of Accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org

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LEVEL 3

Tax Training

Level Three is designed for individuals that are beginning the transition from tax preparer to tax reviewer and advisor. The program covers individual and business tax themes as well as an introduction to estate and trust tax law. This course is designed to challenge the participants' core tax knowledge needed to become a tax reviewer, including the finer points of performing tax research. The program also provides skills training designed for those juggling the role of preparer and reviewer.

COURSE INFORMATION

Duration	**Variable**
Prerequisite	**3+ Years Professional Experience**
Level of Instruction	**Intermediate**
Delivery Methods	**Group Live** **Group Internet** **Blended Learning**
CPE Credits	**24 Credits**
Taxes (TAX): 21	
Management Services (MGMT): 1	
Personnel/Human Resources (HR): 1	
Personal Development (PD): 1	
Advance Preparation	**None**

COURSE OUTLINE

Business Tax Topics
12 Credits
- Advising on business creation
- Basis
- Deferred taxes
- Passive activities and at-risk rules
- Section 461 all events test

Individual Tax Topics
4 Credits
- Retirement contributions and distributions
- Equity-based compensation

Estates, Trusts and Gift Taxes
2 Credits
- Intro to estates, gifts and trusts

Tax Research
2 Credits

Professional Development
4 Credits
- Reviewing tax returns
- Providing feedback
- Project planning
- Time management

LEARNING OBJECTIVES

- Discuss the advantages and disadvantages of the various types of business entities in order to advise on business creation.
- Review the principles of selected core business income tax topics.
- Explore the tax treatment of selected individual income tax topics.
- Identify the basics of estate/trust taxation as well as gift tax law.
- Discuss and share tax return review techniques, and learn to provide effective and constructive feedback.
- Examine methods for managing information, clients and projects more efficiently.
- Practice performing research on tax topics for clients.

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LEVEL 4

Tax Training

Level Four is designed to advance the skills and knowledge of participants. This program covers individual and business topics, such as foreign taxes and state nexus. Significant portions of the course focus on LLC and Partnership taxes, business sales and exchanges, as well as estate, gift and trust tax law. The program also provides Development Skills training focused on managing, supervising, training and delegating.

COURSE INFORMATION

Duration	**Variable**
Prerequisite	**4+ Years Professional Experience**
Level of Instruction	**Intermediate**
Delivery Methods	**Group Live** **Group Internet** **Blended Learning**
CPE Credits	**24 Credits**
Taxes (TAX): 21	
Communications and Marketing (COM): 1	
Personal Development (PD): 2	
Advance Preparation	**None**

COURSE OUTLINE

Business Tax Topics
11 Credits
- LLC and partnership tax issues
  – Basis and at-risk
  – Capital accounts
  – Partner distributions
  – Partner contributions
- Various tax elections
- State tax nexus
- Equity vs. asset sales and exchanges

Individual Tax Topics
6 Credits
- Foreign taxes
- Tax planning
- Cancellation of debt

Estates, Gifts and Trusts
4 Credits
- Estate tax law
- Types of trusts
- Gift taxes

Professional Development
3 Credits
- Supervising, training and delegating
- Work-life balance
- Meeting people and networking

LEARNING OBJECTIVES

- Explore the core limited liability company and partnership tax issues.
- Explore other advanced business income tax topics, such as state tax nexus, various tax elections, and business sales and exchanges.
- Review laws governing foreign taxes and cancellation of debt.
- Brainstorm tax planning strategies.
- Discuss estate and trust taxation, and multigenerational gifting strategies.
- Apply Development Skills of supervision, networking and work-life balance.

DELIVER your training program using in-house professionals. 20-20 Services — via our Material Licensing program — can provide Leader's Guides and Participant materials. Learn More

WANT TO *customize your training program? Pick and choose your modules from our library of content. Also, 20-20 Services can include your firm-specific sampling form at no additional charge.* Learn More

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LEVEL 5

NEW FOR 2024

Tax Training

Level Five is designed to advance the skills of experienced senior accountants and/or new supervisors. This three-day program provides training in many tax technical areas across business and individual topics. Development Skills training is focused on conflict management and business development. The variety of topics covered makes this a valuable program for continued growth in the profession.

COURSE INFORMATION

Duration	**Variable**
Prerequisite	**5+ Years Professional Experience**
Level of Instruction	**Intermediate**
Delivery Methods	**Group Live** **Group Internet** **Blended Learning**
CPE Credits	**24 Credits**
Taxes (TAX): 21	
Communications and Marketing (COM): 2	
Personal Development (PD): 1	
Advance Preparation	**None**

COURSE OUTLINE

Federal Tax Update and Hot Topics
2 Credits

Business Tax Topics
13 Credits

- Real estate topics
- Sections 199A and 163(j)
- Grouping and aggregating
- Converting limited liability companies
- S corporation built-in gains
- Section 263A UNICAP
- Intro to section 1202 qualified small business stock

Individual Tax Topics
6 Credits

- Various tax credits
- Retirement options
- Tax planning

Professional Development
3 Credits

- Conflict management
- Business development

LEARNING OBJECTIVES

- Analyze recent tax law changes for businesses and individuals and discuss current issues facing clients.
- Address challenging issues in the taxation for real estate entities.
- Discuss other business topics, such as converting the taxation of LLCs, section 1202 qualified small business stock, S corporation built-in gains, and section 263A UNICAP.
- Explore various tax credits available to all entity types, discuss options for retirement plans and brainstorm tax planning strategies.
- Explore communications with clients and co-workers through consideration of conflict management.
- Describe strategic activities to grow a professional network, including key people within your firm, and existing and potential clients.

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BOOTCAMP

TAX TRAINING

Bootcamp: LLCs and Partnerships

Bootcamp: LLCs and Partnerships is designed to help demystify the complexities of subchapter K and develop a cohesive understanding of partnership concepts. The materials cover both fundamental and nuanced partnership issues that arise in practice. The interactive approach includes lecture, group activities and comprehensive case studies, as well as vital leadership, communication and organization strategies.

COURSE INFORMATION

Duration	**Variable**
Prerequisite	**5+ Years Professional Experience**
Level of Instruction	**Intermediate**
Delivery Methods	**Group Live** **Group Internet** **Blended Learning**
CPE Credits	**24 Credits**
Taxes (TAX): 24	
Advance Preparation	**None**

COURSE OUTLINE

- **Hurdles to Deducting a Loss**
- **Capital Accounts**
- **Partner Contributions**
- **Partner Distributions**
- **Payments to Partners**
- **Special Allocations**
- **Family Partnerships**
- **Sale of Partnership Interest**
- **IRC 754 Election Adjustment**
- **Debt Allocations**
- **Introduction to 704(c)**
- **Partnership Agreement Review**

LEARNING OBJECTIVES

- Address the limitations on partner losses.
- Interpret how the partnership's activities affect the partners capital accounts.
- Analyze the tax implications of property entering and exiting the partnership.
- Differentiate between the substantial economic safe harbor and targeted allocations.
- Discuss the sale and redemption of a partnership interest.
- Explore common adjustments associated with partnership taxation.
- Review of the allocation of debt and non-recourse deductions.
- Recognize key provisions while performing a partnership agreement review.

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BOOTCAMP

TAX TRAINING

Bootcamp: Estates, Gifts and Trusts

Bootcamp: Estates, Gifts and Trusts is designed to provide the participants with an in-depth understanding of the multiple levels of taxation encountered in the area of estates, gifts and trusts. The material covers a range of topics from basic planning to detailed requirements of the asset transfer process. The interactive approach includes lecture and group activities as well as comprehensive case studies.

COURSE INFORMATION

Duration	**Variable**
Prerequisite	**5+ Years Professional Experience**
Level of Instruction	**Intermediate**
Delivery Methods	**Group Live** **Group Internet**
CPE Credits	**16 Credits**
Taxes (TAX): 16	
Advance Preparation	**None**

COURSE OUTLINE

Death of a Taxpayer
Estate Taxes
Gift Taxes
Generation-Skipping Transfer Tax
Fiduciary Taxes
Trust Agreements
Types of Trusts
Special Trusts
Grantor Trusts
Planning
Comprehensive Case Studies

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LEARNING OBJECTIVES

- Build an understanding of the steps and requirements when a client dies.
- Develop a foundation for the planning and information flow of asset transfers.
- Explore the use of trusts in the Estate and Probate planning arena and the income taxation issues that arise within.
- Review the tax principles of generation skipping transfers.
- Introduce the complex nature and intricate uses of grantor trusts.
- Explore the advanced tax issues encountered in asset transfers during life and at death.

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Approved IRS Provider

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Professional Development

BYOM
Build Your Own Menu

Experienced Manager Program

PIFS 1.0
Presentation, Instruction and Facilitation Skills for Instructors

PIFS 2.0
Presentation, Instruction and Facilitation Skills for Instructors

Business Presentation Skills

PIFS for Virtual Classrooms
Presentation, Instruction and Facilitation Skills for Instructors

MORE INFO

For more information or if you have any questions, contact Beckie Reilly at 855.988.2020 or email her at beckie.reilly@20-20services.com.

BUILD YOUR OWN MENU (BYOM)
EXPERIENCED MANAGER PROGRAM
PIFS 1.0 PRESENTATION, INSTRUCTION AND FACILITATION SKILLS
PIFS 2.0 PRESENTATION, INSTRUCTION AND FACILITATION SKILLS
BUSINESS PRESENTATION SKILLS
PIFS FOR VIRTUAL CLASSROOMS

PROFESSIONAL DEVELOPMENT

Build Your Own Menu (BYOM)

NEW FOR 2024

		CPE CREDITS	FIELD OF STUDY
✓	**Suggested Audience 0-2 Years Professional Experience**		
	From College Student to Professional [1]	1	PD
	Business Writing Fundamentals [1]	1	COM
	Listening Skills [1]	2	COM
	Verbal Communication	2	COM
	Receiving Feedback	2	PD
	Performing Effective Inquiries [2]	2	COM

✓	**Suggested Audience 2-4 Years Professional Experience**		
	Project Management [3]	2	PD
	Supervision Styles and Providing Feedback [3]	2	PD
	Time Management and Organization [3]	2	PD
	Teaching and Delegating [3]	2	PD
	Supervising and Motivating Team Members [4]	2	PD
	Communicating Within and Across Teams [4]	2	COM

✓	**Personal Development**		
	Leadership and Management [6]	2	PD
	Business Development [6]	2	PD
	Successful Communication [7]	3.5	COM
	Team Development and Feedback [7]	3	PD
	Building an Intentional Network [7]	2	PD
	Managing Energy and Stress [7]	2	PD
	Building Trust in a Diverse Organization [7]	2	PD

Experienced Manager Program

Experienced Manager Program is designed for individuals who have 1+ years of experience in the manager role in client services. This 2.5-day program will explore the skills necessary for seasoned managers to develop into future leaders of the organization. The EMP provides a deep dive on the topics relating to leading teams, crucial conversations, business development and a heavy emphasis on business presentation skills. Participants will have an opportunity to explore and build upon their strengths and to identify strategies to work through challenges.

COURSE INFORMATION

Duration	**Variable**
Prerequisite	**1+ Years Management Experience**
Level of Instruction	**Intermediate**
Delivery Methods	**Group Live** **Group Internet**
CPE Credits	**20 Credits**
Communications and Marketing (COM): 9.5	
Personal Development (PD): 10.5	
Advance Preparation	**Bring a presentation for delivery during the program**

COURSE OUTLINE

Introduction, Goal Setting and Review
1.5 Credits
- Identify challenges facing experienced managers
- List goals for implementing strategies discussed in the program
- Review concepts discussed in the program and set action plans

Successful Communication
3.5 Credits
- Analyze three components of successful communication; intentional communication, active listening skills and the role of non-verbal communication
- Analyze differences between electronic and in-person communications and how to become more effective at both
- Practice opportunities to implement the components of successful communication

Team Development and Feedback
3 Credits
- Analyze internal and external motivational factors and explore the impact of a team leader on the motivation of individual team members
- Describe best practices to conduct effective development conversations
- Examine strategies to better develop engagement team members
- List elements of the feedback model
- Review concept of feed-forward

Building an Intentional Network
2 Credits
- Delve into steps to take to begin conversations that lead to winning new business
- Explore network-building strategies with key people at your firm and external contacts

Managing Energy and Stress
2 Credits
- Identifying impacts on your own energy as well as energy of your team members
- Brainstorm strategies for managing mindset, energy and activities to improve performance and satisfaction
- Support team members through stressful times

Business Presentation Skills
6 Credits
- List essential skills for exceptional virtual presenters
- Identify best practices for setting up your virtual presentation studio
- List common tools for creating engagement and collaboration in your virtual presentations
- Practice delivering business presentations in a variety of settings

Building Trust
2 Credits
- List dimensions of diversity in self and others
- Define concepts related to diversity and inclusion as relevant to the workplace
- Review strategies to build trust within your teams

LEARNING OBJECTIVES

- Describe strategic activities to grow a professional network, including key people within your firm, and existing and potential clients.
- List and apply best practices for making successful presentations in a business setting.
- Analyze and practice best approaches to tackle difficult conversations with clients and team members.
- Demonstrate leadership skills by identifying and recognizing biases, building trust within your team, listing strategies to motivate the individuals on your engagement teams and prioritizing the professional development of staff.

PROFESSIONAL DEVELOPMENT

PIFS 1.0 Presentation, Instruction and Facilitation Skills for Instructors

20-20 Services proudly offers our popular PIFS program as a pillar of our presentation series offerings. This program provides significant opportunity for each participant to apply and practice the presentation skills and techniques taught during the program. The program is highly interactive and co-taught with an instructor-to-participant ratio of 8:1 or lower. The PIFS program can be customized to each firm's specific needs; however, our 1.0 PIFS offering is designed for public accounting professionals: Seniors — Partners who play a role in delivering training at the firm.

COURSE INFORMATION

Duration	**12 Hours**
Prerequisite	**1+ Years Professional Experience**
Level of Instruction	**Intermediate**
Delivery Methods	**Group Live** **Group Internet**
CPE Credits	**12 Credits**

Communications and Marketing: 12

Advance Preparation

Participants must bring materials for a 10-minute presentation to the course. Time to modify the presentation and prepare will be provided during the course.

COURSE OUTLINE

Core Presentation Concepts
1 Credit
- Identify characteristics and skills needed for success

Skills
7 Credits
- Platform and presentation skills, such as eye contact, use of voice, movement and others
- Instruction techniques and facilitation skills
- Multiple practice opportunities (varying lengths)

Designing Presentations
1 Credit
- Tips and suggestions for creating powerful presentation content and materials

Situational Best Practices
3 Credits
- Considering the various types of presentation and training delivery situations and generating best practices for designing, organizing and delivering in those settings

LEARNING OBJECTIVES

- List key characteristics and skills necessary for successful presentation, instruction and facilitation.
- Improve various platform and presentation skills.
- Describe and apply best practices for making presentations and training programs highly successful.

PROFESSIONAL DEVELOPMENT

PIFS 2.0 Presentation, Instruction and Facilitation Skills for Instructors

PIFS 2.0 is a follow-up to our popular PIFS: Presentation, Instruction and Facilitation Skills course. In this course, experienced instructors will hone their skills and take their teaching to the next level. The course combines a self-assessment of prior presentation experiences, best practices for classroom-style instruction, and practice presentations with video review and feedback. This is a highly interactive course that provides participants with practical skills they can apply in their next presentation to increase audience engagement.

COURSE INFORMATION

Duration	**12 Hours**
Prerequisite	**PIFS Course or Equivalent**
Level of Instruction	**Intermediate**
Delivery Methods	**Group Live** **Group Internet**
CPE Credits	**12 Credits**

Communications and Marketing: 12

Advance Preparation

Participants must bring materials for a 10-minute presentation to the course. Time to modify the presentation and prepare will be provided during the course.

COURSE OUTLINE

Introduction Presentations
1 Credit
- Participants deliver a short presentation and are videotaped for review and feedback during the course.

Self-Assessment
1 Credit
- Participants will complete a self-assessment that provides information about their strengths and weaknesses in delivering presentations.

Presentation Principles
7 Credits
- The course explores six principles of outstanding presentations and provides practice opportunities throughout.

Topics include:

– Understanding and engaging the audience

– Creating impact in the classroom

– Presentation structure

– Managing visual aids

– Staging and preparation

Practice Presentations, Feedback and Post-Course Action Items
3 Credits
- Participants will deliver a final presentation to the class demonstrating the key principles explored throughout the course.
- Presentations will be videotaped for post-course review.

LEARNING OBJECTIVES

- Identify personal strengths and weaknesses in delivering classroom training.
- Describe common challenges in live group training and list strategies for managing those challenges.
- Deliver a highly engaging, informative, and professional presentation.

PROFESSIONAL DEVELOPMENT

Business Presentation Skills

As part of our Presentation Skills Series offerings, this 1.5-day course is designed for experienced professionals who deliver business presentations in a variety of settings, such as: board meetings, conferences, speeches, industry events, and working groups, client proposals and more. Each participant will have significant opportunity to apply the skills and techniques taught. This program allows participants to develop the necessary skills to deliver a business presentation with confidence.

COURSE INFORMATION

Duration	**12 Hours**
Prerequisite	**None**
Level of Instruction	**Intermediate**
Delivery Methods	**Group Live** **Group Internet**
CPE Credits	**12 Credits**

Communications and Marketing: 12

Advance Preparation

Participants must bring materials for a 10-minute presentation to the course. Time to modify the presentation and prepare will be provided during the course.

COURSE OUTLINE

Core Presentation Concepts
3 Credit
- Identify characteristics and skills needed for success

Skills
5 Credit
- Presentations skills such as eye contact, use of voice, movement and others
- Multiple practice opportunities (varying lengths)

Practice Presentations and Feedback
4 Credits
- Participants will deliver a final presentation to the class demonstrating the skills and best practices reviewed and feedback received throughout the program

LEARNING OBJECTIVES

- List key characteristics and skills necessary for successful business presentations.
- Describe and apply best practices for making successful business presentations.

PROFESSIONAL DEVELOPMENT

PIFS for Virtual Classrooms

Presentation Skills for Virtual Classrooms is an exciting new addition to 20-20 Services Presentation Skills curriculum! In this course, presenters of virtual classroom training programs will develop the skills necessary to instruct an engaging web-based training. This customizable course combines an overview of the tools and skills required to deliver an exceptional virtual training program, tips to keep the learner engaged, and opportunities to practice with feedback from instructors and peers. This is a highly interactive course that provides participants with practical skills to confidently lead programs in a virtual classroom setting.

COURSE INFORMATION

Duration	**Variable**
Prerequisite	**None**
Level of Instruction	**Basic**
Delivery Method	**Group Internet**
CPE Credits	**4+ Credits**
Communications and Marketing: 12	
Advanced Preparation	**None**

COURSE OUTLINE

Setting the Stage
1 Credit
- Identify helpful tips and tricks to enhance your video presence
- Learn ways to improve your audio communication
- Explore ideas for setting your virtual studio to a professional backdrop

Navigating the Platform
1 Credit
- Explore common tools and functionality for delivering presentations in a web-based classroom or webinar setting
- Use organizational tools to plan and deliver a successful course
- Discuss best practices for creating engagement using interactivity tools

Presenting in the Virtual Classroom
2 Credits
- Explore best practices of professional and engaging speakers in web-based programs
- Discuss tips to deliver programs that meet defined learning objectives
- Learn to troubleshoot common missteps in delivering virtual classroom courses

Practice Presentations (optional add-on)
Class-Size Dependent
- Explore best practices of professional and engaging speakers in web-based programs
- Deliver a mock virtual classroom presentation utilizing the tools, functionality and best practices explored throughout the course
- Consider feedback provided by instructor(s) and peers and create an action plan for continued growth

LEARNING OBJECTIVES

- Identify tools and best practices for delivering a training program in a virtual classroom setting.
- Describe common challenges in virtual classroom training and list strategies for managing those challenges.
- Deliver a highly engaging, informative and professional virtual presentation.

Accounting and Auditing Training

Accounting and Auditing Clinic™

Accounting for Leases Under ASC 842

MORE INFO

For more information or if you have any questions, contact Beckie Reilly at 855.988.2020 or email her at

beckie.reilly@20-20services.com.

ACCOUNTING AND AUDITING

2024 Accounting and Auditing Clinic™

COURSE SUMMARY

This course provides in-depth, hands-on coverage of recent developments in accounting, auditing, financial reporting, quality management, peer review and professional ethics. Strong emphasis is placed on the practical application of selected newly issued and/or effective authoritative pronouncements affecting practitioners who perform or supervise compilation, review and/or audit engagements for small and middle market, privately held businesses. The course is designed for a high level of interaction between the instructor and participants.

LEARNING OBJECTIVES

This course will enable participants to apply selected newly issued and effective technical accounting and auditing pronouncements and provide advisory services for clients on related implementation issues.

Delivery Methods Available: Group Live or Group Internet-Based

Prerequisites: Basic knowledge of US GAAP and US GAAS

Advance Preparation: None

Level of Instruction: Update

Estimated Availability Date: May 31, 2024

OUTLINE OF BUNDLED MODULES

Module Title	DURATION H:MM	CPE CREDITS[1]	FIELD OF STUDY
INTRODUCTION AND THE STATE OF THE PROFESSION REPORT • Artificial Intelligence — Proceeding with Caution • Crypto Currency and NFTs: Sorting It All Out • Sustainability and ESG: Assessing Opportunities • FASB ASC Amendments with Imminent Effective Dates for Private Companies	1:15	1.5	ACCT
ACCOUNTING FOR AND DISCLOSURE OF CRYPTO ASSETS • Current State and Necessity for Change • Criteria for Crypto Assets to be in Scope • Case Study • Presentation Requirements on Each of the Basic Financial Statements • Disclosures in Interim and Annual Financial Statements	1:40	2.0	ACCT
OTHER PRIVATE COMPANY GAAP DEVELOPMENTS • Removal of References to Concepts Statements • Joint Venture Formations — Application Example • Improvements to Income Tax Disclosures • Interim Reporting — Narrow-Scope Improvements • Common Control Lease Arrangements • Accounting for Contract Assets and Contract Liabilities in a Business Combination • Profits Interest Awards — Determining Relevant GAAP	1:40	2.0	ACCT
BEHAVIORAL ETHICS[2] • Accounting Fraud Case Study — Crazy Eddie — Fraud and the Tone at the Top	0:50	1.0	BEHETH
QUALITY MANAGEMENT: PREPARING FOR IMPLEMENTATION • What Is QM and Why Should I Care?	0:25	0.5	AUD
UDITING STANDARDS DEVELOPMENTS • Risk Assessment Diagnostic Review	0:50	1.0	AUD
Totals	6:40	8.0	

[1] *Topics, duration and the allocation of CPE credits between fifields of study are subject to change to accommodate late-breaking developments.*

[2] *Each state board of accountancy has the final authority on the acceptance of ethics-related content for credit.*

ACCOUNTING AND AUDITING

Accounting for Leases Under ASC 842

COURSE SUMMARY

This course provides comprehensive coverage of how to apply the provisions of ASC 842 from both the perspective of the lessee and the lessor. Among the features of the course materials are:

- ASC 842 navigation tool and catalog of examples
- Comprehensive examples of application to gross and net leases
- Tool for identifying lease components, nonlease components and noncomponents
- Model private company disclosure example
- White label, tailorable PowerPoint deck for presenting to clients, bankers, lawyers, sureties, prospects, referral sources and other interested parties

LEARNING OBJECTIVES

This course will enable participants to:

- Differentiate lease agreements with specified assets from service agreements that contain substantive substitution rights
- Determine the circumstances when a commercial contract contains an embedded lease that is to be accounted for separately under ASC 842 from the other contractual terms
- Apply the ASC 842 classification rules to determine the proper recognition, measurement, presentation and disclosure of leases of lessees and lessors
- Strongly encourage clients that do not have formal related party leases (that are under month-to-month arrangements) to execute formal leases with economically reasonable terms to avoid requirement to immediately amortize leasehold improvements in the month that such improvements are made
- Assist clients in implementing ASC 842 in the period it becomes effective including rendering advice regarding the various practical expedients available for transitioning entities
- Strongly encourage clients with extensive lease portfolios to: (a) properly plan and execute their implementation in a timely manner; and (b) avoid using spreadsheets due to the extent to which spreadsheets are error-prone and instead, obtain specialized software that is fit for purpose

Prerequisites: Basic knowledge of accounting for leases under former ASC Topic 840

Advance Preparation: None

Level of Instruction: Intermediate

CPE Credits and Field of Study: 8.0 CPE Credits in Accounting to be presented in either one full-day group live session or two virtual four-hour sessions *

** Topics, duration and the allocation of CPE credits between fields of study are subject to change to accommodate late-breaking developments.*

COURSE OUTLINE

Accounting by Lessees

Introductory Coverage

- Reasons for amendments to former lease accounting standard (context for standard)
- ASU 2016-02 Leases (ASC Topic 842)
  - Plethora of pre-implementation amendments by FASB
  - Reasons for single dissenting member of FASB
  - ASU navigation and research practice aid
  - Substantive difference between US GAAP and IFRS despite convergence efforts
  - Scope
  - Definition of right-of-use model and aspects derived from revenue standard
  - Does a contract contain a lease?
  - Flow diagram: Identifying a lease

Key questions in the application of ASC 842

Significant financial statement impact

Effects on lessee's financial statements

Principles-based lease classification criteria

- Determining the lease term
- Reasonably certain threshold
  - Factors to consider when considering reasonably certain threshold
- Accounting for initial direct costs

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ACCOUNTING AND AUDITING

Accounting for Leases Under ASC 842...*continued*

Initial determination of right-of-use (ROU) asset

Componentization and allocation of contractual payments

Computing lease payments to be discounted at commencement
- What are in-substance fixed payments?
- Examples of in-substance fixed payments
- Treatment of real estate taxes, insurance and common area maintenance (CAM)
- Amounts excluded from discounted lease payments
- Lease components, nonlease components and noncomponents
- Guide to analyzing the elements of a contract
- Composition of lease payments: The amount discounted to present value
- Variable lease payments
- The land component

Interest rate for discounting purposes
- Implicit interest rate
- Incremental borrowing rate
- Risk-free rate

Short-term lease election

Small-ticket leases

Leasehold improvements

Impairment of the ROU asset

Lease accounting walkthroughs
- Finance leases
  - Initial accounting balance sheet
  - Subsequent accounting statement of income
  - Subsequent accounting statement of cash flows
- Operating leases
  - Initial accounting balance sheet
  - Subsequent accounting statement of income
  - Subsequent accounting statement of cash flows
- Numeric example: Lessee operating lease
  - At-lease-inception entries
  - Subsequent accounting in year one

Comparison of income statement treatment of operating leases under US GAAP with corresponding treatment under IFRS

Lease case study: Real estate lease

Required lessee disclosures example

Weighted average lease term and weighted average discount rate

When is remeasurement of the lease payments required
- Lease modification events and required reassessment
- Lease concessions due to COVID-19 pandemic

Case study: Reading and analyzing contracts

Operating lease comprehensive example

Related party leases
- Avoidance of month-to-month and year-to-year arrangements
- Consideration of VIE rules
- Oral vs. written

Short-term lease election

Impairment of the ROU asset

Adverse effects on loan covenant compliance
- Operating leases-adverse effects on leverage-related loan covenants
- FASB commentaries on adverse effects

Is the FASB ASC theoretically sound and consistent — Executory contracts

Client dialogue with banks and sureties

Other lessee-related matters covered in ASC 842

Income tax considerations for taxpaying lessees

Tools and software

Accounting by Lessors

Lease classification categories
- Operating
- Sales-type
- Direct financing

Variable lease payments

Initial direct costs (IDCs)

Sales-type leases
- Recognition
- Initial and subsequent measurement
- Derecognition
- Financial statement presentation

Direct financing leases
- Recognition
- Initial and subsequent measurement
- Derecognition
- Financial statement presentation

Operating leases
- Recognition
- Initial and subsequent measurement
- Financial statement presentation

Lease modifications

Lease terminations

Practical expedients

Lessor disclosures

Other and Concluding Topics

Ongoing post-implementation review (PIR) process

Factile flash card review

About the Author/ Instructor

Ralph Nach is the author and instructional designer of the popular Accounting and Auditing Clinic™ presented annually across the U.S. for scores of firms and thousands of attendees. He is a sought-after conference speaker and course facilitator throughout the U.S. and internationally.

Ralph has served the accounting profession for over 45 years in a variety of capacities including audit partner, quality control director, and external peer reviewer. He also has served as a partner in the National Office of Accounting and Auditing of the fifth largest international accounting firm, the U.S. Chief Learning Officer for American Express Tax and Business Services, Inc., an adjunct lecturer in accounting, finance, and economics at Northwestern University in Evanston, Illinois, and the co-author, for a ten-year stint, of the annual updated editions of the popular handbook, *Wiley GAAP: Interpretation and Application of Generally Accepted Accounting Principles*.

In his current capacity, Ralph also serves as a technical quality control consultant and pre-issuance financial statement reviewer for CPA firms throughout the U.S.

20-20 Executive Programs, led by Bo Fitzpatrick, offers programs for businesses and their current and future leadership.

20-20 Executive Programs

SELF-CARE AND THE 'SEE' SUITE OF LEADERSHIP

Self-care is essential in allowing the best version of a leader to show up. By doing so, leaders are better able to maintain sustainability, effectiveness and enjoyability (or SEE) in their work life. 20-20 Executive Programs offers a two-hour, in-person session that introduces leaders to the power of self-care. This session is ideal as a part of a larger meeting, conference break-out or surgical strike for teams with the greatest needs.

LEADERSHIP DEVELOPMENT

Our executive leadership development program will help your firm's leaders develop the skills and strategies they need to lead your team to success. Over a six-month period, the cohort program brings together a small group of your leaders in workshop settings, guiding them through the phases of leading self, leading others and ultimately, leading the firm. This program includes one-on-one executive coaching and a 360-degree assessment for each participant.

FACILITATION SERVICES

Our meeting facilitation services will ensure that your team's strategic meetings are productive, efficient, and action oriented. We'll work with you to set clear agendas, establish roles and responsibilities, and manage group dynamics to make sure that all voices are heard, and decisions are made efficiently. This allows the leader of the team to be as much participant as contributor, with an experienced facilitator guiding the day.

EXECUTIVE COACHING

Our executive coaching services are designed to help your firm's leaders to reach their full potential in a one-on-one relationship. Sometimes, individuals need a boost to get to where they want to be or help in addressing areas needed to fully embrace the partner's role. Selected leaders will also obtain a 360° assessment allowing the leader and coach to zero in on key areas.

MORE INFO

For more information or if you have any questions, contact Beckie Reilly at 855.988.2020 or email her at  beckie.reilly@20-20services.com.

Get to Know Bo

Bo Fitzpatrick, CPA is a seasoned professional with over 30 years of experience in and around the public accounting profession — as a practicing accountant and consultant. Prior to rejoining 20-20 Services, he was managing partner at the Washington, DC offices of Citrin Cooperman, a top 25 accounting firm.

In his new role, Bo will lead the Executive Programs group working with firm and business leaders on the offerings presented above. During his career, he has held various roles, including founder/president of 20-20 Services, AuditWatch president and COO, and senior manager at Ernst & Young.

In addition to Bo's experience in public accounting, his career includes serving as director of finance at privately and publicly held businesses. He is a graduate of the University of Maryland, College Park and has a certification in Leadership Coaching from Georgetown University. He is a member of the AICPA and Maryland Association of CPAs being recognized by Accounting Today as one of its *Top 100 Most Influential People in Accounting* in 2004. He is also a member of the International Coaching Federation (ICF).

2024 EXECUTIVE PROGRAMS

20-20 Services Leadership Development Program for New Partners

20-20 Services Leadership Development Program for New Partners will help your firm's leaders develop the skills and strategies needed to lead your team to success. Over a six-month period, the cohort program brings together a small group of your new leaders in workshop settings, guiding them through the phases of leading self, leading others and ultimately, leading the firm. This program includes one-on-one executive coaching and a 360° assessment for each participant.

FORMAT
In-person meetings and five 1:1 coaching sessions

CLASS SIZE
Attendance will be limited to no more than 16 participants

WORKSHOPS
Workshop 1: Leading Self

Workshop 2: Leading Others

Workshop 3: Leading the Firm

Click here for the 20-20 Executive Programs overview.

MORE INFO For more information or if you have any questions, contact Beckie Reilly at 855.988.2020 or email her at beckie.reilly@20-20services.com.

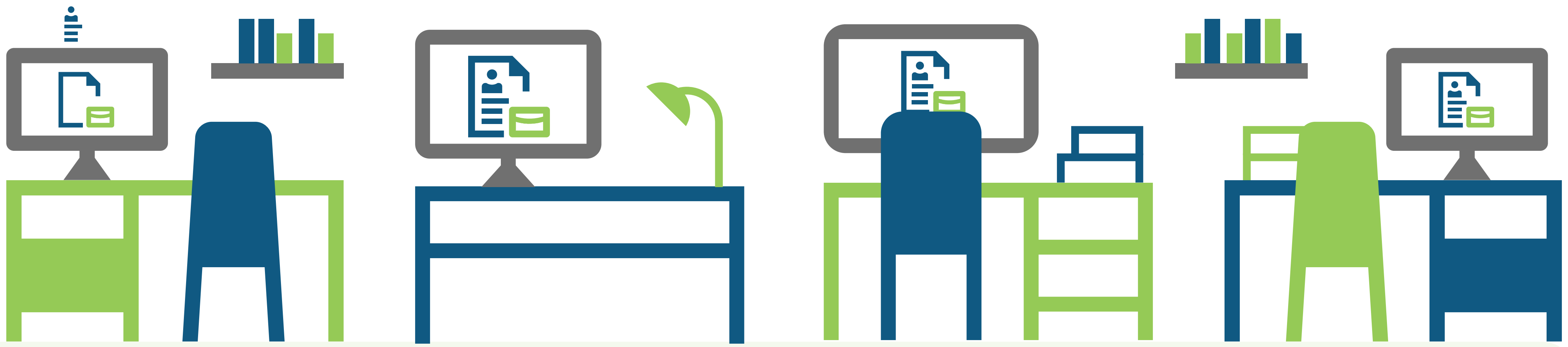
Customized Programs

CUSTOM COURSE INSTRUCTIONAL DESIGN SERVICES

20-20 Services has an in-house team of instructional designers that create and modify course content to meet firms' specific needs!

Our team includes subject matter experts in accounting, auditing, tax and professional development as well as experienced instructional designers. If you'd like to modify course content or create a new course, please reach out to our team to discuss the details!

Our Training



Examples of projects completed by our Customization Group include:

- Modifying course content to include firm-specific forms and guidance
- Adding messaging from other trainings to reinforce concepts and increase consistency
- Modifying examples in a course to more closely reflect a firm's client base
- Creating custom agendas for courses of different lengths
- Working with firm SMEs to create a new course or module on a special topic
- Modifying group live training content for a virtual classroom environment

MORE INFO

For more information or if you have any questions, contact Beckie Reilly at 855.988.2020 or email her at  beckie.reilly@20-20services.com.

BUILD YOUR OWN

CUSTOMIZED PROGRAMS

BUILD YOUR OWN

Client Accounting and Advisory Services (CAAS) Program Menu

✓	Accounting Processes and Financial Analysis	CPE Credits	Field of Study
	Introduction to CAAS [1]	1	ACCT
	Accounting Systems, Financial Reports and Analysis [1]	3	ACCT
	Common Mistakes in Accounting Transactions [1]	4	ACCT
	Common Accounting Adjustments [2]	2	ACCT
	Cash Flow Planning and Projections [2]	2	ACCT
	Budgeting Preparation [2]	2	ACCT
	Establishing Accounting Policies and Procedures *	2	ACCT
	Creating and Analyzing Key Performance Indicators *	2	ACCT
	Variance Analysis *	2	ACCT
	Cost Analysis *	2	ACCT
	Establishing Effective Accounting Policies and Procedures *	2	ACCT
	Did I Just Uncover a Fraud? *	2	ACCT
	Payroll Accounting *	2	ACCT
	In-Depth Financial Statement Analysis *	2	ACCT

✓	SSARS: Scope of Services and Performing Basis Compilations and Reviews	CPE Credits	Field of Study
	Staff SSARS [1]	4	ACCT
	Senior SSARS [2]	4	ACCT

✓	Communication	CPE Credits	Field of Study
	Effective Listening Skills [1]	2	COM
	Effective Business Communications *	2	COM
	Business Writing Fundamentals *	2	COM

✓	Professional Development	CPE Credits	Field of Study
	Time Management and Organization [1]	2	PD
	Conflict Management *	2	PD

✓	Tax	CPE Credits	Field of Study
	Compensation — W-2s, 1099s, etc. [1]	1	TAX
	Self Employment [1]	1	TAX
	Residential Rental Properties [1]	1.5	TAX
	Intro to Business Taxes [1]	1	TAX
	Depreciation [1]	2	TAX
	Schedule K and M-1 [1]	1.5	TAX
	Advising on Business Creation [2]	2	TAX
	Basis [2]	2	TAX
	Passive Activities and At Risk [2]	1	TAX
	Retirement Contributions and Distributions [2]	2	TAX
	Section 461 [2]	1	TAX

✓	Engagement Management	CPE Credits	Field of Study
	Project Management [2]	2	PD

✓	Must-Have Professional Development for CAAS Supervisors and Managers	CPE Credits	Field of Study
	Supervision Styles and Providing Feedback [2]	2	PD
	Teaching and Delegating [2]	2	PD
	Building Teams That Want to Work for You *	2	PD
	Building Trust in a Diverse Workforce *	2	PD
	The Balanced Leader/Manager *	2	PD
	Maximizing the Four Layers of Communication to Your Advantage *	2	COM
	Business Presentation Essential Skills *	6	COM

KEY

[1] = CAAS Staff

[2] = CAAS Senior

* = Sessions Are Not Included in Off-the-Shelf Options

CUSTOMIZED PROGRAMS

BUILD YOUR OWN

Audit Program Menu

✓	Communication	CPE Credits	Field of Study
	Listening Skills (Basic) [1]	2	COM
	Performing Effective Inquiries (Basic) [2]	2	AUD/COM
	Communicating Within and Across Teams (Int) [4]	2	COM
	Creating Business Presentations (Int) [4]	2	COM
	Business Writing Fundamentals (Basic) [1]	1	COM
	Business Writing for Auditors (Int) [4]	2	COM

✓	Supervision	CPE Credits	Field of Study
	Leading Change from the Middle (Int) [5]	1.5	PD
	Supervision Styles and Providing Feedback (Int) [3]	2	AUD
	Teaching and Delegating (Int) [3]	1.5	AUD
	Supervising and Motivating Team Members (Int) [4]	2	AUD
	Mentoring for the Future (Int) [4]	1	PD
	Providing Written and Verbal Feedback (Adv) [5]	2	AUD
	Conflict Management (Adv) [5]	1.5	PD
	Leadership and Management (Adv) [6]	2	PD
	Leading Virtual Teams (Group Internet Delivery)	2	PD

✓	Audit Procedures	CPE Credits	Field of Study
	Audit Procedures (Basic) [1]	2	AUD
	Cash (Basic) [1]	3	AUD
	Inventory Observations (Basic) [1]	2	AUD
	Auditing Inventory (Basic) [2]	2	AUD/ACCT
	Accounts Receivable (Basic) [1]	2	AUD
	Accounts Receivable (Int) [2]	2	AUD
	Property, Plant and Equipment (Basic) [1]	2	AUD
	Accounts Payable (Basic) [1]	2	AUD
	Substantive Analytical Procedures (Basic) [2]	2	AUD
	Developing Expectations for Analytical Procedures (Int) [3]	2	AUD
	Analytical Procedures (Adv) *	2	AUD
	Fraud (Basic) [2]	2	AUD
	Introduction to Sampling (Basic) [1]	1	AUD
	Substantive Sampling (Basic) [2]	2	AUD
	Beyond the Basics (Int) [2]	1	AUD
	Control Testing (Int) [3]	1.5	AUD

✓	Audit Procedures *continued*	CPE Credits	Field of Study
	Estimates (Int) [4]	2	AUD
	Commitments and Contingencies (Int) *	1.5	AUD/ACCT
	Auditing Fair Value and Using the Work of a Specialist (Adv) [5]	1	AUD
	Interim Procedures, Including Internal Control (Adv) [5]	2	AUD
	Broader Impact of CECL: Accounts Receivable Case Study (Basic) [5]	1.5	ACCT
	Revenue Recognition Fundamentals (Basic) *	2	AUD
	Revenue (Int) [3]	2	ACCT/AUD
	Lease Accounting Fundamentals (Basic) *	2	AUD/ACCT
	Leases (Adv) [5]	1.5	ACCT/AUD
	Foundations of Accounting for Business Combinations (Basic) *	3	ACCT/AUD
	Designing Risk-Based Audit Procedures (Adv) [5]	2	AUD
	Results of Substantive Audit Procedures (Adv) [6]	1	AUD

KEY

[1] = Level 1 Course
[2] = Level 2 Course
[3] = Level 3 Course
[4] = Level 4 Course
[5] = Level 5 Course
[6] = Level 6 Course
* = Session Not Included in Any Level Programs

MORE AUDIT PROGRAMS >>

CUSTOMIZED PROGRAMS

BUILD YOUR OWN
Audit Program Menu... *continued*

✓	Audit Process	CPE Credits	Field of Study
	Audit Process (Basic) [1]	2	AUD
	Audit Process and Risk Assessment Procedures (Basic) *	2	AUD
	Audit Process (Int) [2]	2	AUD
	Audit Process and Understanding the Entity (Int) [3]	1.5	AUD
	Risk-Based Auditing (Basic) [2]	1	AUD
	Risk-Based Audit (Adv) *	1	AUD
	Preparing Audit Documentation (Basic) [1]	2	AUD
	Reviewing Audit Documentation (Int) [3]	2.5	AUD
	The Manager Review (Adv) [6]	1	AUD
	Uncorrected Misstatements and Control Deficiencies (Adv) [6]	2	AUD
	The Auditor's Report and Required Auditor Communications (Int) [4]	2	AUD
	Learning from Inspection Reports (Adv) [6]	2	AUD

✓	Professional Development	CPE Credits	Field of Study
	Professionalism (Basic) [1]	1	PD
	Business Ethics (Basic) *	1	BETH
	Business Etiquette (Basic) *	1	PD
	Time Management and Organization (Int) [3]	2	PD
	Meeting People and Networking (Int) *	1	PD
	Interpersonal Skills (Int) *	2	PD
	Building Trust in a Diverse Workplace (Int) *	2	PD
	Creative Problem Solving (Adv) [5]	2	PD
	Time Management and Organization (Adv) [6]	2	PD
	Business Development and Networking (Adv) [6]	2	PD

✓	Engagement Management	CPE Credits	Field of Study
	Project Management (Int) [3]	2	MGMT
	Project Management (Adv) [6]	2	MGMT

✓	Risk Assessment and Internal Controls	CPE Credits	Field of Study
	Understanding the Entity (Basic) [2]	2	AUD
	Understanding and Documenting Internal Controls (Basic) [2]	2	AUD
	Risk Assessment Procedures and Walkthroughs (Basic) [1]	2	AUD
	Evaluating Activity Level Controls (Int) [3]	2	AUD
	Risk Assessment (Int) [3]	1.5	AUD
	General Information Technology Controls (Int) [4]	2	AUD
	Planning for Efficient Quality Audits (Int) [4]	2	AUD
	Case Study in Risk Assessment (Int) [4]	4	AUD
	Best Practices in Risk-Based Auditing (Int) *	8-16	AUD

✓	Automated Tools and Techniques	CPE Credits	Field of Study
	Introduction to Data Analytics in the Audit (Basic) [2]	3	AUD
	Databases and Structured Data (Int) [3]	1.5	AUD
	Data Acquisition and Dual Purpose Testing (Int) [4]	1.5	AUD
	Alternatives to Sampling & the Value of Data Visualization [5]	1.5	AUD

✓	Current Events in Assurance	CPE Credits	Field of Study
	Current Events in Auditing (Int) [5]	1	AUD
	Trends and Transformations in Auditing (Adv) [6]	2	AUD

<< MORE AUDIT PROGRAMS

KEY
[1] = Level 1 Course
[2] = Level 2 Course
[3] = Level 3 Course
[4] = Level 4 Course
[5] = Level 5 Course
[6] = Level 6 Course
* = Session Not Included in Any Level Programs

CUSTOMIZED PROGRAMS

BUILD YOUR OWN
Tax Program Menu

		Level	CPE Hours
✓	**Individual Taxes**		
	Compensation and Retirement Income	Level 1	1
	Filing Status, Dependents and Basic Information	Level 1	1
	Individual Tax Credits	Level 1	1
	Interest, Dividends and Capital Gains/Losses	Level 1	2
	Schedule 1 Income and Adjustments	Level 1	2
	Rental Properties	Level 1	1
	Self-Employment	Level 1	1
	Standard and Itemized Deductions	Level 1	2
	Alternative Minimum Taxes	Level 2	2
	Cancellation of Debt	Level 4	2
	Selected Schedule C and Rental Property Topics	Level 2	1
	Equity-Based Compensation	Level 3	2
	Passive Activities and At-Risk Rules	Level 3	2
	Retirement Contributions and Distributions	Level 3	2
	Tax Planning	Level 4	2
	Foreign Taxes	Level 4	2
	Preparation of an Individual Tax Return	Level 1	4
	Various Tax Credits	Level 5	2

		Level	CPE Hours
✓	**Professional Development**		
	Professionalism	Level 1	2
	Documentation	Level 1	1
	Self Management and Organization	Level 2	2
	Communication — Business Writing	Level 2	2
	Time Management	Level 3	1
	Providing Feedback	Level 3	1
	Reviewing Tax Returns	Level 3	1
	Project Planning	Level 3	1
	Work-Life Balance	Level 4	1
	Supervision — Delegating and Teaching	Level 4	2
	Meeting People and Networking	Level 4	1
	Critical Thinking and Taking Ownership	Level 1	2

		Level	CPE Hours
✓	**Corporate Taxes**		
	Introduction to Business Tax Topics	Level 1	1
	Schedules K and M-1	Level 1	2
	Depreciation	Level 1	1
	C Corporations	Level 2	3
	S Corporations	Level 2	2
	Basis Fundamentals — S Corporation	Level 2	2
	Depreciation	Level 2	2
	Schedules K and M-1	Level 2	2
	State Apportionments	Level 2	1
	Advising on Business Creation	Level 3	3
	Basis	Level 3	3
	Deferred Taxes	Level 3	2
	Section 263A UNICAP	Level 5	2
	State Tax Nexus	Level 4	1
	Various Tax Elections	Level 4	2
	Prepare an S Corporation Tax Return	Level 1	3

		Level	CPE Hours
✓	**Other Material**		
	Introduction to Estates, Gifts and Trusts	Level 3	2
	Estates, Gifts and Trusts	Level 4	4
	Tax Research	Level 3	2

		Level	CPE Hours
✓	**LLC and Partnerships**		
	Introduction to LLCs and Partnerships	Level 2	3
	Basis and At-Risk	Level 4	2
	Capital Accounts	Level 4	1
	Partner Distributions	Level 4	1
	Partner Contributions	Level 4	1
	Payments to Partners	Bootcamp	2
	Sale of Partnership Interest	Bootcamp	2
	Special Allocations	Bootcamp	2
	IRC 754 Election Adjustments	Bootcamp	3
	Prepare an LLC Tax Return	Level 1	3
	Family Partnerships	Bootcamp	2
	Debt Allocations	Bootcamp	2
	Intro to 704(c)	Bootcamp	2
	Partnership Agreement Review	Bootcamp	2
	Hurdles to Deducting a Loss	Bootcamp	2

MORE INFO For more information or if you have any questions, contact Beckie Reilly at 855.988.2020 or email her at  beckie.reilly@20-20services.com.

PROFESSIONAL DEVELOPMENT

Build Your Own Menu (BYOM)

NEW FOR 2024

		CPE CREDITS	FIELD OF STUDY
✓	**Suggested Audience 0 - 2 Years Professional Experience**		
	From College Student to Professional [1]	1	PD
	Business Writing Fundamentals [1]	1	COM
	Listening Skills [1]	2	COM
	Verbal Communication	2	COM
	Receiving Feedback	2	PD
	Performing Effective Inquiries [2]	2	COM
✓	**Suggested Audience 2 - 4 Years Professional Experience**		
	Project Management [3]	2	PD
	Supervision Styles and Providing Feedback [3]	2	PD
	Time Management and Organization [3]	2	PD
	Teaching and Delegating [3]	2	PD
	Supervising and Motivating Team Members [4]	2	PD
	Communicating Within and Across Teams [4]	2	COM
✓	**Personal Development**		
	Leadership and Management [6]	2	PD
	Business Development [6]	2	PD
	Successful Communication [7]	3.5	COM
	Team Development and Feedback [7]	3	PD
	Building an Intentional Network [7]	2	PD
	Managing Energy and Stress [7]	2	PD
	Building Trust in a Diverse Organization [7]	2	PD

Material Licensing Program

Material Licensing Program/ Do It Yourself (DIY)

Many CPA firms choose to license 20-20 Services learning content and use formally trained in-firm instructors as discussion leaders. In addition to you delivering the training when you choose, licensing/DIY 20-20 Services training materials allow a firm to address three critical practice management issues:

1. **Developing a well-rounded skill set for the next generation of leaders**
2. **Producing a unique professional development path for highly valued staff**
3. **Reducing training costs paid to external service providers**

THE DO-IT-YOURSELF/LICENSING ADVANTAGE

Features

20-20 Services provides a complete set of materials, including detailed leader's guides, PowerPoint slides, case studies, exercises and solutions guides.

You identify firm personnel most qualified to teach the materials.

20-20 Services conducts a train the trainers session to improve their instructing skills, and prepare these instructors for classroom success.

Your instructors deliver firm-specific training to your staff.

Benefits

Deliver firm-specific, customized training experiences that reflect firm methodologies, policies and values.

Reduce external training spend and redirect savings to provide the additional training desired, but never in the budget.

Provide firm-wide exposure and a unique professional opportunity for a select group of future leaders.

Deliver training when and where you want.

Results

Build unique firm culture and enable consistent application of firm-specific methodologies and policies.

Create a cadre of future leaders with the poise, communication skill and experience necessary for business development.

Improve retention of high-value staff.

Highly tailor training for your professionals.

MORE INFO For more information or if you have any questions, contact Beckie Reilly at 855.988.2020 or email her at  beckie.reilly@20-20services.com.

MATERIAL LICENSING PROGRAM PRICING

AUDIT

	LEVELS 1, 2, 3 AND 4	LEVELS 5 AND 6
1–49 Participants	**Three-Day Programs**	**Two-Day Programs**
Per Participant	$345	$275
Per Instructor	$625	$440
50–99 Participants	**Three-Day Programs**	**Two-Day Programs**
Per Participant	$309	$240
Per Instructor	$625	$440
100–149 Participants	**Three-Day Programs**	**Two-Day Programs**
Per Participant	$275	$207
Per Instructor	$625	$440
150–199 Participants	**Three-Day Programs**	**Two-Day Programs**
Per Participant	$262	$192
Per Instructor	$625	$400
200+ Participants	**Three-Day Programs**	**Two-Day Programs**
Per Participant	$247	$177
Per Instructor	$625	$440

CAAS and TAX

	LEVELS 1, 2, 3 AND 4
1–49 Participants	**Three-Day Programs**
Per Participant	$461
Per Instructor	$625
50–99 Participants	**Three-Day Programs**
Per Participant	$418
Per Instructor	$625
100–149 Participants	**Three-Day Programs**
Per Participant	$392
Per Instructor	$625
150–199 Participants	**Three-Day Programs**
Per Participant	$350
Per Instructor	$625
200+ Participants	**Three-Day Programs**
Per Participant	$331
Per Instructor	$625

Each additional instructor guide per level is 50% of initial price.

There is a minimum purchase of five participant manuals and one instructor guide for each level licensed. Participant purchases are cumulative when determining manual pricing. *(For example, purchasing for 25 Level 2 Audit participants and 55 Level 4 participants would result in cumulative purchase of 80 participants resulting in a $309 price per participant per the above pricing table.)*

Orientation and **train-the-trainer** program pricing varies depending on your needs and goals. Please call us to discuss further.

MORE INFO For more information or if you have any questions, contact Beckie Reilly at 855.988.2020 or email her at

beckie.reilly@20-20services.com.

PUBLIC TRAINING

2024 Public Training Programs

Serving The East And West Coast Time Zones. New In 2024 India Standard Time!

Again this year, many of our popular training programs are available in a virtual format! Your staff can plan to attend our sessions from either the comfort of their own homes or from your offices. We're serving both the eastern time zone and the pacific time zone as well as two audit offerings in India Standard Time. Our virtual Zoom classrooms offer numerous engagement tools for our learners! Depending on the length of the program, the classes will either be run over three or four consecutive days for approximately six hours a day. Our public training programs are a terrific training option for numerous reasons. Most of the firms who participate in our public programs are small to mid-sized firms where bringing us in-house would not be cost effective. By joining us in our virtual classrooms, your professionals can attend the training program that matches their specific level of experience. By removing the travel costs associated with attending in-person sessions, we hope many of you will consider registering your professionals to attend our most popular training programs! We will continue to limit the size of our classrooms so that we can provide the same level of instructor-to-learner ratios as we do in our group live sessions.

NEW TO 20-20?

If your organization is new to 20-20 Services public course offerings, we have a terrific offer that will allow you to test us and our abilities. New clients can receive **one free seat** (up to a total of three free registrations) **in each of our divisional public training program offerings**. This includes our Audit, Tax and CAAS public training offerings. This offer is for new clients only.

MORE INFO For more information or if you have any questions, contact Beckie Reilly at 855.988.2020 or email her at  beckie.reilly@20-20services.com.

2024 Public Training Registration

CLICK HERE

SHARE WITH A COLLEAGUE

Know a public accounting professional who might be interested in learning more about 20-20 Services courses? Click here to point them to our latest catalog.

PUBLIC COURSES FAQ

20-20 Services LLC is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State Boards of Accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org

PUBLIC TRAINING

Public Training Registration CLICK HERE

2024 Public Training Schedule | AUDIT

AUDIT	CPE HRS	TUITION	START DATE	END DATE	START TIME	END TIME
SESSION 1:						
Level One	24	$1,155	12/09/2024	12/12/2024	08:30 a.m. ET	02:30 p.m. ET
Level Two	24	$1,155	10/28/2024	10/31/2024	08:30 a.m. ET	02:30 p.m. ET
Level Three	24	$1,155	11/11/2024	11/14/2024	08:30 a.m. ET	02:30 p.m. ET
Level Four	24	$1,155	12/03/2024	12/06/2024	08:30 a.m. ET	02:30 p.m. ET
Level Five	16	$1,155	10/28/2024	10/30/2024	11:30 a.m. ET	05:00 p.m. ET
Level Six	16	$1,155	12/09/2024	12/11/2024	11:30 a.m. ET	05:00 p.m. ET
SESSION 2:						
Level One	24	$1,155	12/02/2024	12/05/2024	11:30 a.m. ET	05:30 p.m. ET
Level Two	24	$1,155	10/21/2024	10/24/2024	11:30 a.m. ET	05:30 p.m. ET
Level Three	24	$1,155	11/04/2024	11/07/2024	11:30 a.m. ET	05:30 p.m. ET
Level Four	24	$1,155	11/18/2024	11/21/2024	11:30 a.m. ET	05:30 p.m. ET
Level Five*	16	$775	10/28/2024 11/04/2024 11/11/2024	10/28/2024 11/04/2024 11/11/2024	11:00 a.m. ET 11:00 a.m. ET 11:00 a.m. ET	04:00 p.m. ET 04:00 p.m. ET 04:00 p.m. ET
Level Six*	16	$775	10/25/2024 11/01/2024 11/08/2024	10/25/2024 11/01/2024 11/08/2024	11:00 a.m. ET 11:00 a.m. ET 11:00 a.m. ET	04:00 p.m. ET 04:00 p.m. ET 04:00 p.m. ET

* Level Five session is running three consecutive Mondays from 11 a.m.-4 p.m. ET and Level Six session is running three consecutive Fridays from 11 a.m.-4 p.m ET.

INDIA						
AUDIT	**CPE HRS**	**TUITION**	**START DATE**	**END DATE**	**START TIME**	**END TIME**
SESSION 1:						
Level Two* **	24	$1,155	11/11/2024	11/15/2024	08:30 a.m. IST	12:30 p.m. IST
Level Three* **	24	$1,155	12/16/2024	12/20/2024	08:30 a.m. IST	12:30 p.m. IST

* Blended

** These programs will be delivered via a blended learning delivery format. Six of the 24 hours will be delivered outside of the synchronous delivery in a pre-work, homework or post-work assignments.

CANCELLATION AND SUBSTITUTION POLICIES

30 Days or More Notice | $100 cancellation fee or substitution for another available class at no cost

29-10 Days Notice | $250 cancellation fee or substitution for another available class at no cost

Less Than 10 Days Notice | 50% refund or substitution for another available class at no cost

No Show | Tuition is 100% forfeited — no refund and no class substitutions

NOTE: *Substitutions can be made for any participant, course type (Audit, Tax or CAAS), course level or session date. All class substitutions are based on class availability.*

PUBLIC COURSES FAQ

20-20 Services LLC is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State Boards of Accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org

MORE INFO

For more information or if you have any questions, contact Beckie Reilly at 855.988.2020 or email her at  beckie.reilly@20-20services.com.

PUBLIC TRAINING

Public Training Registration CLICK HERE

2024 Public Training Schedule | TAX & CAAS

TAX	CPE HRS	TUITION	START DATE	END DATE	START TIME	END TIME
SESSION 1:						
Level One	24	$1,155	06/10/2024	06/14/2024	01:00 p.m. ET	05:30 p.m. ET
Level Two	24	$1,155	06/24/2024	06/28/2024	01:00 p.m. ET	05:30 p.m. ET
Level Three	24	$1,155	06/17/2024	06/21/2024	01:00 p.m. ET	05:30 p.m. ET
Level Four	24	$1,155	06/24/2024	06/28/2024	01:00 p.m. ET	05:30 p.m. ET
SESSION 2:						
Level One	24	$1,155	01/06/2025	01/10/2025	01:00 p.m. ET	05:30 p.m. ET
Level Two	24	$1,155	10/21/2024	10/25/2024	01:00 p.m. ET	05:30 p.m. ET
Level Three	24	$1,155	10/28/2024	11/01/2024	01:00 p.m. ET	05:30 p.m. ET
Level Four	24	$1,155	11/04/2024	11/08/2024	01:00 p.m. ET	05:30 p.m. ET
Level Five	24	$1,155	12/16/2024	12/19/2024	12:00 p.m. ET	05:30 p.m. ET
LLCs and Partnerships Bootcamp	24	$1,155	12/09/2024	12/13/2024	01:00 p.m. ET	05:30 p.m. ET
SESSION 3:						
Level Two	24	$1,155	01/13/2025	01/17/2025	01:00 p.m. ET	05:30 p.m. ET
Level Three	24	$1,155	12/09/2024	12/13/2024	01:00 p.m. ET	05:30 p.m. ET

CAAS	CPE HRS	TUITION	START DATE	END DATE	START TIME	END TIME
SESSION 1:						
Staff	24	$1,155	11/11/2024	11/15/2024	12:00 p.m. ET	5:00 p.m. ET
Senior	24	$1,155	11/18/2024	11/22/2024	12:00 p.m. ET	5:00 p.m. ET

CANCELLATION AND SUBSTITUTION POLICIES

30 Days or More Notice | $100 cancellation fee or substitution for another available class at no cost
29-10 Days Notice | $250 cancellation fee or substitution for another available class at no cost
Less Than 10 Days Notice | 50% refund or substitution for another available class at no cost
No Show | Tuition is 100% forfeited — no refund and no class substitutions

NOTE: *Substitutions can be made for any participant, course type (Audit, Tax or CAAS), course level or session date. All class substitutions are based on class availability.*

Webinars

Four-Part Webinar Series: The Accountant — The Business Integrator

Data Analytics: Deeper Dive Six-Hour Workshop

Four-Part Webinar Series on Mindfulness

Sunish Mehta, The Mindful-CPA

Specialty Webinars

MORE INFO

For more information or if you have any questions, contact Beckie Reilly at 855.988.2020 or email her at

beckie.reilly@20-20services.com.

BUSINESS MANAGEMENT

MINDFUL CPA

Four-Part Webinar Series: The Accountant — The Business Integrator

Sunish Mehta, The Mindful-CPA

COURSE INFORMATION

Duration	**Four Two-Hour Sessions**
Prerequisite	**1-2 Years Busy Season Experience**
Level of Instruction	**Intermediate**
Delivery Methods	**Group Internet**
CPE Credits	**2 Credits Per Session**
Business Management (BM): 8	
Advance Preparation	**None**

Today's accountant is facing a changing world at a faster pace more than ever before! Changes in how businesses work and transformational technology has brought challenges to our industry but also created incredible opportunities! It's no longer a choice but rather an imperative that we pivot and realize what our role can be and should be — improving business performance. No one has a better overall perspective of an organization from the ground-level up to the top than an accountant who can play the role of this business integrator. This four-part webinar series directly addresses this new, cutting-edge role the accountant can embrace with a practical 'rubber-meets-the-road' approach. From day-to-day operations to boardroom discussions, from inventory movement to key performance indicators, from becoming Lean to risk management, the accountant is today's business integrator!

SESSION 1: The Accountant — A Business Intelligist

2 Credits

- Defining a business intelligist and their role in the context of business intelligence (BI) ecosystems and landscapes
- Best practices for organizations of all sizes in managing big data, mining data, using cloud infrastructures and using Microsoft Excel in BI harvesting

SESSION 2: Controlling — The Art of Business Improvement

2 Credits

- Defining the art of controlling and the imperative of integrating finance with operations
- Best practices on using controlling to improve business performance and the performance measurement

SESSION 3: People. Process. Technology. A Change Management Approach

2 Credits

- Defining change management and the P.P.T. Approach™ (People. Process. Technology.)
- The five phases of change management and associated practical tools

SESSION 4: Lean: The Accountant's Initiative

2 Credits

- Defining Lean in today's business environment as a hybrid of Kaizen and Six Sigma (developed by Toyota and Motorola)
- The application of Lean to finance transformation and operations

LEARNING OBJECTIVES

- Familiarizing yourself with business intelligence, data mining and big data.
- Using managerial tools to integrate finance with the operations of an entity.
- Learning how to play a key role in helping business performance and improvement.
- Learning how to be a key agent of change as an accountant.
- Learning key concepts of widely practiced Lean methodologies to harness finance transformation and operational efficiencies at client organizations.
- Using Excel as a key tool to harvest data, perform analytics and effectively communicate with key stakeholders.

DATA ANALYTICS

KETCHBROOK ANALYTICS and 20-20 SERVICES

Data Analytics: Deeper Dive Six-Hour Workshop

This course provides students a chance to get their hands dirty with data analytics in a way that moves beyond theoretical content. Students will get a chance to learn and apply the concepts of: data reliability, data access, data preparation and data visualizations through two hands-on projects that showcase the end-to-end lifecycle of data analytics in an audit setting. Using Excel, students will connect to both flat files and databases containing thousands of rows of data, leverage data cleaning techniques to turn message data into a usable format, and learn how to evaluate and apply the correct graphical technique(s) to use with the data at hand. Additionally, students will understand relevant data reliability questions to ask the client — both when requesting and after being presented with a dataset. After completing this course, students will have the tools they need to perform intermediate analysis against data that they encounter in their everyday work.

COURSE INFORMATION

Duration	**6 Hours**
Prerequisite	**None**
Level of Instruction	**Intermediate**
Delivery Methods	**Group Internet**
CPE Credits	**6 Credits**

Auditing (AUD); 6

Advance Preparation

Students need to come to class with a version of Microsoft Excel that has Power Query.

Data Reliability

Students will learn strategies for assessing and ensuring the reliability of client-provided data. This material will teach the proper questions to ask a client both when requesting data and after receiving data. This section will conclude with a series of multiple choice and open-ended discussion questions on how auditors should evaluate the reliability of datasets provided by a client.

Data Access

Students will learn theoretical approaches to accessing different types of data (both structure and storage), and then apply their new knowledge to two real-life examples by accessing data stored in a delimited flat file and a relational database. The topic of data reliability will also present itself in this section, as students will revisit what makes the live data they are accessing reliable or unreliable. Lastly, students will learn the fundamentals of a database query, including reading and interpreting simple queries written in two of the most popular query languages (SQL and Access).

Data Preparation

Students will learn about and discuss examples of the qualities that make data useful for analysis. Students will then transform raw data into clean, usable data by employing the appropriate data preparation tools in Excel's Power Query engine functionality. During this hands-on exercise, students will encounter various issues with messy data, each of which will require a unique solution.

Data Visualization

The webinar will conclude with a deep dive into how to properly visualize prepared data in order to gain the most useful insight in relation to the audit objective and the nature of the data at hand. Visualizations created will be both tabular and graphical, and students will learn when it is most appropriate to apply each visualization technique.

LEARNING OBJECTIVES

- Students understand questions to ask the client when requesting and or receiving client data.
- Students are comfortable accessing data that is stored in databases or presented in formats other than Excel.
- Students understand what clean data looks like and know techniques for preparing messy data into clean data.
- Students recognize which types of tables or charts should be used to present differing types of data.

MINDFUL CPA

Four-Part Webinar Series on Mindfulness

Sunish Mehta, The Mindful-CPA

COURSE INFORMATION

Duration	**Four Two-Hour Sessions**
Prerequisite	**None**
Level of Instruction	**Basic**
Delivery Methods	**Group Internet**
CPE Credits	**2 Credits Per Session**
Business Management (BM): 8	
Advance Preparation	**None**

In today's world of ever-changing demands and dynamics of the workplace, it is imperative that we use a method to help us bring focus, creativity, energy and balance in all we do at work and at home. Mindfulness is an easy and effective tool to help us with this. This Mindful-CPA program is designed specifically for finance and accounting professionals. Throughout this program, you will learn the fundamental principles of mindfulness, a simple eight-minute, daily mindfulness practice for awakening our internal algorithm, creative, fun ways to apply mindfulness to work activities, effective overall strategies to bring a renewed approach of fun and ease to our daily activities, and in-session and post-session exercises and activities to enhance your skills in mindfulness.

SESSION 1:
Introduction to The Mindful-CPA
2 Credits

- Defining mindfulness and its application in daily life
- Introduction to the *8-minute CPA Mindfulness Practice*™ (Construct. Practice. Awaken.) — our internal algorithm
- The honesty of mono-tasking and the science of neurology

SESSION 2:
The Mindful-CPA Approach
2 Credits

- Mindful leadership, time management, consistency in quality control and Lean initiatives
- Being mindful vs. mindFULL
- Building on the *8-minute CPA Mindfulness Practice*™
- Introduction to the P.P.T.™ Factor (People. Process. Technology.)

SESSION 3:
The Mindful-CPA Client Relationship Management
2 Credits

- Mindfulness and overall customer relationship management, including client continuance, business development and negotiations
- A mindful approach to personal brand development and marketplace presence
- Building on the *8-minute CPA Mindfulness Practice*™
- Becoming a zen superhero

SESSION 4:
The Mindful-CPA Firm Management
2 Credits

- Mindful professional due care — where the rubber meets the road, including mindful utilization, retention, co-creation and documentation
- Mindful health/work balance
- Building on the *8-minute CPA Mindfulness Practice*™
- Mindful Re-Learning: The Challenge of Teaching and Learning

About the Author and Program Presenter

Sunish Mehta, CPA and founder of The Mindful-CPA, has been a practitioner and instructor of mindfulness for over 20 years and has worked with several mindfulness organizations to date. Having studied with some of the top mindfulness teachers in the world, including His Holiness, the Dalai Lama, Sunish has integrated mindfulness into his learning and consulting work with the focused goal to helping conscious professionals bring focus, creativity and balance to their professional and personal lives.

LEARNING OBJECTIVES

- Using mindfulness as a tool to enhance creativity, energy, balance and strength.
- Applying mindfulness to key aspects of a CPA's personal and professional environment.
- Learning a series of mindfulness practice techniques.
- Leading the path of a Mindful CPA.

SPECIALTY WEBINARS

Our webinars will be unique in that the titles will be extremely relevant and timely. They will vary in length, and we'll be offering them to both individuals, and firms or associations to purchase for in-house delivery to their professionals. Our subject matter will cross all disciplines; audit, accounting, tax, and soft skills. Please find below a listing of our initial offerings and short descriptions. Keep in touch with us via our website 20-20services.com for additional program titles and public program delivery dates. If you have any questions in regarding our webinar series, please feel free to contact **Beckie Reilly** at **855.988.2020** or beckie.reilly@20-20services.com.

Leading Teams in a Hybrid Environment

COURSE INFORMATION

CPE Hours	**2 Hours**
CPE Designation	**PD**

Most all of us are now operating in a hybrid work environment as the pandemic continues to shift directions. We will likely be operating in a hybrid environment going forward. Most of us have not been trained on how to lead a hybrid team efficiently. In this webinar, we'll share strategies on managing professionals in such a work environment. Topics will include inclusivity, communication, motivation, teamwork and engagement as well as a few technology solutions to positively aid in the hybrid work environment.

Leading Virtual Teams

COURSE INFORMATION

CPE Hours	**2 Hours**
CPE Designation	**PD**

The world as we know it has been turned upside down. People need practical tools to lead virtually across barriers like time zones, cultures, business units, personal needs and technology. In this course, we show leaders how to build effective virtual teams by building avenues for clear communication, creating and sustaining trust on a virtual team, staying attuned to team dynamics in the absence of physical connections, developing transparency with clearly defined roles and responsibilities, and leveraging technology.

FOR OUR COMPLETE LIST OF AVAILABLE WEBINARS, GO TO WWW.20-20SERVICES.COM/WEBINARS

MORE INFO For more information or if you have any questions, contact Beckie Reilly at 855.988.2020 or email her at  beckie.reilly@20-20services.com.

20-20 SERVICES WEBINAR SERIES WITH GARTH SHERIFF

Blockchain the Movie

COURSE INFORMATION

CPE Hours	**1 Hour**
CPE Designation	**IT**

The amazing origin story of blockchain rising from the financial crisis to the introduction of Bitcoin and now saving the world!

Blockchain has been described as a transformative technology that will fundamentally change our relationships with third-party intermediaries, including banks, lawyers and accountants. Blockchain technology has the potential to be a significant disruptor in terms of how business transactions are initiated, authorized and recorded. It has been compared in magnitude to the introduction of the internet. But what is blockchain, how does it work, and why should we care?

Artificial Intelligence

COURSE INFORMATION

CPE Hours	**1 Hour**
CPE Designation	**IT**

Are we handing over our professional judgment to machine learning?!

Artificial Intelligence (AI) has been in our collective awareness since the introduction of the villainous computer HAL 9000 in Stanley Kubrick's classic film, *2001: A Space Odyssey*. AI has had a few moments in popular culture, such as supercomputer IBM Watson's appearance on Jeopardy in 2011, but has typically been more science fiction than reality. Today, we are interacting with AI more than we ever have and more than we might realize. Common interactions with AI include the use of Google Home, Netflix and Amazon. The future is now for AI.

Professional Ethics

COURSE INFORMATION

CPE Hours	**2 Hours**
CPE Designation	**RE**

In this webinar, we will examine specific areas of the AICPA code of professional conduct 'code' and use case studies to highlight key learning objectives. The program will also introduce a critical thinking methodology that will be applied to an ethical decision-making framework. We will use case studies to demonstrate the implementation of the tool.

Finally, the course will explore current events relevant to the professional to understand how to apply lessons learned to deepen our ethical decision-making framework.

Bridging the Generational Gap

COURSE INFORMATION

CPE Hours	**1 Hour**
CPE Designation	**PD**

In this webinar (designed specifically for accounting and finance professionals) we will explore the perceptions of the generational differences between Baby Boomers, Generation X, Millennials and Generation Z (our newest generational workforce).

We use current research to identify the areas of misconceptions between generations and implement tools to increase empathy and communication across our diverse generational team members.

20-20 SERVICES WEBINAR SERIES WITH GARTH SHERIFF

Improv for Business Communication

COURSE INFORMATION

CPE Hours	**1 Hour**
CPE Designation	**PD**

Most people have interacted with leaders who they would say are great at thinking on their feet. They would describe these individuals as having an ability to handle any challenging conversation or question with grace and aplomb. In this way, the ability to 'think on your feet' has typically been seen as something leaders are born with. However, the ability to react to a challenging dialogue in real-time to achieve an optimal outcome can be learned. Theatre improv offers us tools that can be practiced that will help leaders respond with confidence and calmness to the unexpected.

This webinar will explore why we may have varied reactions to these unexpected moments and introduce improv as a tool that can help us move toward greater consistency and confidence in the outcome.

De-Stress for Success!

COURSE INFORMATION

CPE Hours	**1 Hour**
CPE Designation	**PD**

In this webinar (designed specifically for accounting and finance professionals) we will explore root causes of stress and pressure that negatively impact our professional and personal health.

The workshop will then provide you with established tools and techniques that can be implemented immediately to help address these stressors and improve your quality of life. The learning objectives of this webinar include: Identifying the root causes of stress for accounting and finance professionals; understanding the health consequences of 'bad' stress over prolonged periods; and applying the De-Stress for Success toolkit.

Employment Engagement: Providing and Receiving Effective Feedback

COURSE INFORMATION

CPE Hours	**1 Hour**
CPE Designation	**PD**

In this webinar, we will use the latest research in providing and receiving effective feedback. This webinar will provide SMART action goals to help develop your staff and improve employee retention.

How to be Effective on Camera (for CPAs)

COURSE INFORMATION

CPE Hours	**1 Hour**
CPE Designation	**PD**

Working on camera is no longer a skill only needed by actors. Accounting and finance professionals regularly find themselves being filmed for training courses, marketing, social media and while delivering presentations. This interactive webinar will provide practical tips on how to properly address and gain confidence in front of a camera.

20-20 SERVICES WEBINAR SERIES WITH RALPH NACH

Revenue Recognition: Avoiding the Pitfalls Encountered by Others

COURSE INFORMATION

CPE Hours	**2 Hours**
CPE Field of Study	**ACCT**

Much can be learned from studying the issues that have arisen in companies that implemented ASC 606 prior to the effective date for privately held businesses and not-for-profit organizations. This course explores these issues in order to assist CPAs in assisting their clients in avoiding similar experiences.

Dynamic Agreed-Upon Procedures Engagements — Standards Provide Flexibility to Practitioners

COURSE INFORMATION

CPE Hours	**1.5 Hours**
CPE Field of Study	**AUD**

Coverage of the AICPA Auditing Standards Board's (ASB's) Statement on Standards for Attestation Engagements (SSAE) No. 19 on agreed-upon procedures engagements.

The AICPA Financial Reporting for Small and Medium-Sized Entities: Is It Worth a Second Look?

COURSE INFORMATION

CPE Hours	**2 Hours**
CPE Field of Study	**ACCT**

The big GAAP/little GAAP issue has returned due to the cost and complexity related to new FASB standards on revenue, leases and credit losses. This session introduces the AICPA financial reporting framework for small- and medium-sized entities (FRF-SME) as an alternative to GAAP reporting for privately held, entrepreneur owned and operated businesses.

SSARS 25, Materiality in a Review of FS and Adverse Conclusions

COURSE INFORMATION

CPE Hours	**2 Hours**
CPE Field of Study	**ACCT**

Since the introduction of review engagements in December 1978, there has been controversy over whether the accountant is required to determine materiality similar to the process followed on audits. With the issuance of SSARS 25 in February 2020, the issue has been settled. This session provides guidance on determining and documenting materiality on a review engagement and on situations that might warrant issuance of an adverse conclusion on the financial statements.

20-20 SERVICES WEBINAR WITH GEORGE ZOGLIO

Unique Risks in Auditing Not-For-Profit Organizations

COURSE INFORMATION

CPE Hours	**1.5 Hours**
CPE Designation	**AUD**

Not-for-profit organizations have quite different strategic objectives as compared to commercial enterprises. They often have differing and unique risks. In this webinar, we will discuss those unique risks and, most importantly, we will discuss what the auditor can do to respond to those risks and by doing so reduce the audit risk in various areas.

20-20 SERVICES WEBINAR RYAN STANDIL, WRITE TO EXCITE

Business Writing for Accountants

COURSE INFORMATION

CPE Hours	**1.5 Hours**
CPE Designation	**COM**

In this series of four webinars, these webinars will provide the learner with the tools to become a proficient writer. By attending these courses, you will develop a writing style that is clear, concise and convincing.

The four webinar titles are:

- Clarity in business writing
- Conciseness and attention to detail
- Email etiquette
- Readability throughout your report

These webinars may be purchased separately or as a package of all four.

MORE INFO For more information or if you have any questions, contact Beckie Reilly at 855.988.2020 or email her at  beckie.reilly@20-20services.com.

2024 STAFF TRAINING PRICING

2024 Pricing for Staff Audit, Tax and CAAS Training Programs

Delivery Methods	STANDARD Per CPE Credit Hour	BLENDED | CUSTOMIZED Per CPE Credit Hour
Group Live *	$605	$688
Virtual Classroom **	$578	$656

Additional Participants >24	$35	$35

Course Materials		
Audit		
24 CPE credits	$60	Variable
16 CPE credits	$45	Variable
Tax		
24 CPE credits	$144	Variable
16 CPE credits	$96	Variable

Pricing shown above is per CPE credit hour delivered. Refer to examples.
** 20-20 Services is CPE sponsor. Price includes virtual classroom platform, attendance monitoring and CPE processing.
* 20-20 Services is CPE sponsor.

Peak Season Example #1
Standard Tax Level 2 | 24 CPE Credit Hours | 20 Participants (**Group Live**)

24 CPE Credit Hours x $605 =	$14,520
Course Materials: $144 x 20 =	$2,880
Total:	$17,400
+ Out of Pocket Travel Expenses (Airfare, Lodging, Meals, etc.)	

Peak Season Example #2
Customized Audit Level 3 | 24 CPE Credit Hours | 28 Participants (**Virtual Delivery**)

24 CPE Credit Hours x $656 =	$15,744
Additional Participants: ($435 x 24) x 4 =	$3,360
Course Materials: $60 x 28 =	$1,680
Total:	$20,784

Non-Peak Season Example #3
Standard Audit Level 4 | 15 Participants (**Virtual Delivery**)

24 CPE Credit Hours x $520 =	$12,480
Course Materials: $60 x 15 =	$900
Total:	$13,380

20-20 SERVICES

WE OFFER 10% DISCOUNT
DURING 2024 NON-PEAK PERIODS
AUGUST 26 – OCTOBER 11

MORE INFO

For more information or if you have any questions, contact Beckie Reilly at 855.988.2020 or email her at  beckie.reilly@20-20services.com.

20•20 SERVICES LLC

Meet the Team

Jessica Sacchetti
President

jessica.sacchetti@20-20services.com

jessica-sacchetti

20-20 Services' president Jessica Sacchetti is passionate about developing learning programs that help professionals meet their goals. With her 20 years of accounting industry experience, she works closely with employers and individuals to create learning solutions that address key organizational and individual needs. Prior to her role as president, Jessica led the product development efforts at 20-20 Services, specializing in creating and customizing training programs. Her career started at Deloitte & Touche where she served as an audit manager. She is a CPA, licensed in Massachusetts, and is a member of the AICPA. She holds a bachelor's degree in accounting from Stonehill College in Easton, MA and a master's degree in taxation from Bentley University in Waltham, MA. Jessica has also served as an adjunct faculty member in the Stonehill College business department.

Tom Kiley
Director of Tax Training

tom.kiley@20-20services.com

thomas-kiley

Tom Kiley is the lead developer of 20-20 Services tax training course material. He has been creating and delivering professional CPA education training programs in his entertaining style since 2004. He has delivered training/authored material for 14 of the Top 30 accounting firms in the U.S. Prior to launching 20-20 Services' tax training, Tom was a contributing tax courses author and instructor for ThomsonReuters and led the creation of TaxWatch University. He has 20+ years of public accounting experience at various firms. In 2006, Tom launched his own firm, Kiley + Company. In 2013, he was recognized in Rhode Island's 40 Under 40 list of local business leaders. He's a member of the AICPA and the Rhode Island Society of CPAs. He earned his bachelor's degree in accounting from Bryant University.

Beckie Reilly
Executive Vice President, Client Experience

beckie.reilly@20-20Services.com

beckie-reilly

Since the launch of 20-20 Services in July of 2010, Beckie has led the sales efforts as the EVP of client experience. She is passionate about ensuring the highest level of client experience throughout the sales process as well as the execution of the training programs or consulting projects. Beckie is a member of the 20-20 Services Executive Leadership team, working closely with division leaders in the area of audit, tax, CAAS, professional development and executive programs. She brought relevant experience as the former vice president of sales at AuditWatch, where she played an integral role in the successful 2001 launch of the company's core-level audit training product, AuditWatch University. Beckie's nearly three decades of experience includes seven years at AuditWatch as vice president of sales, five years of public accounting experience at KPMG's Washington, DC, office and five years as a finance and accounting recruiter. She's a graduate of Marymount University with a BBA in accounting. Beckie resides in Fairfax, VA with her two adult children.

more teammates>>>

20•20 SERVICES LLC

Meet the Team

Bo Fitzpatrick
20-20 Executive Programs | Director

bo.fitzpatrick@20-20services.com

bo-fitzpatrick

Bo Fitzpatrick, CPA is a seasoned professional with over 30 years of experience in and around the public accounting profession, both in practice and as a consultant. Prior to rejoining 20-20 Services, from June 2018 through December 2022 he was the managing partner of the Washington DC offices of Citrin Cooperman, a Top 25 accounting firm.

At 20-20, Bo will lead the Executive Programs group working with firm and business leaders on leadership development, business strategies, 1:1 coaching, and the facilitation of strategic meetings. During his career he has held various roles including Founder/President at 20-20 Services, President and COO of AuditWatch, and Senior Manager at Ernst & Young. In addition to Bo's experience in public accounting, his career includes serving as director of finance at privately and publicly held businesses.

He is a graduate of the University of Maryland, College Park and has a certification in Leadership Coaching from Georgetown University. He is a member of the AICPA and the Maryland Association of CPAs being recognized by Accounting Today as one of its Top 100 Most Influential People in Accounting in 2004. He is also a member of the International Coaching Federation (ICF).

Joshua Yorra
Director of Instructional Development

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Josh is the Director of Instructional Development at 20-20 Services LLC. In this role, Josh leads all our instructors in mastering their craft in the live and virtual classroom. Josh also brings 15 years of experience in the accounting and auditing industry into his classroom, teaching courses ranging from New Hire to New Manager trainings. Prior to his role as the Director of Instructional Development, Josh was the Director of our Audit Curriculum, updating and customizing content for our clients. Josh's career includes working in the Accounting Department at Steward Health Care and the Internal Audit Department at Staples. He started his career at Deloitte & Touché LLP. Josh is a CPA, licensed in Massachusetts. Josh earned a Bachelor of Science in Business Administration and a Master of Science in Accounting from Northeastern University in Boston, MA. Josh currently resides in Medford, Massachusetts. In his spare time, he enjoys traveling, attending concerts, playing golf and is a devoted Boston sports fan, being a Celtics season ticket holder for the past 15+ years.

George Zoglio
Director of Professional Development and Client Accounting & Advisory Services (CAAS)

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After nearly a decade as a contracted 20-20 Services instructor, George joined the management team to lead the Professional Development and Client Accounting & Advisory Services (CAAS) training divisions. In addition to his instructor responsibilities, he is heavily involved in program and business development for these divisions.

George brings 25+ years' experience in the fields of accounting, auditing, budgeting, reporting, financial planning and analysis and taxation. He has served in leadership roles at both CPA firms as well as private industry. Most recently he was the founder and principal of his own consulting firm, Zoglio Financial Management Solutions, where he provided outsourced CFO/controller, consulting and business advisory services. This unique set of skills, knowledge and expertise combined with a deep passion in learning and development for both technical and people skills is the perfect match to lead these divisions.

A resident of Boston, MA, he is a graduate of Bryant University, receiving both a BS in Accounting as well as an MBA in Management. He is a member of the AICPA and the Massachusetts Society of CPAs.

more teammates>>>

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Meet the Team... *continued*

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Erica Guatieri
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more teammates>>>

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Meet the Team... *continued*

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Case Studies

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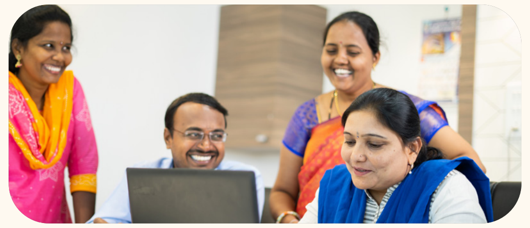

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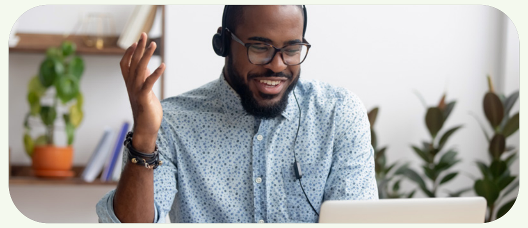

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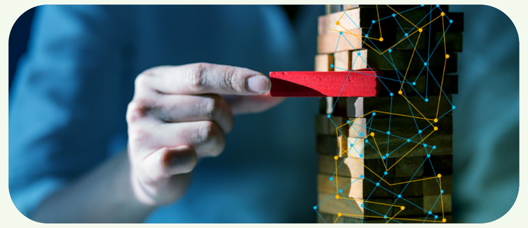

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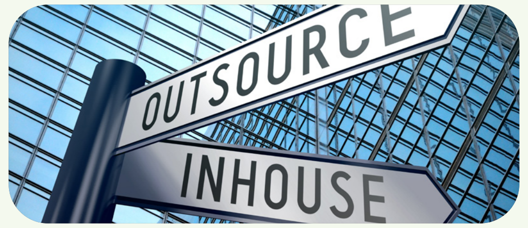

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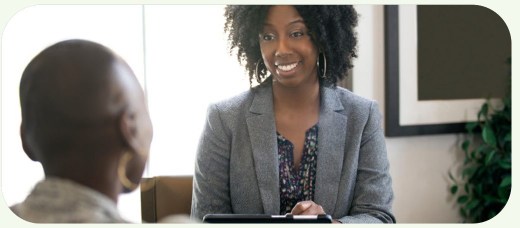

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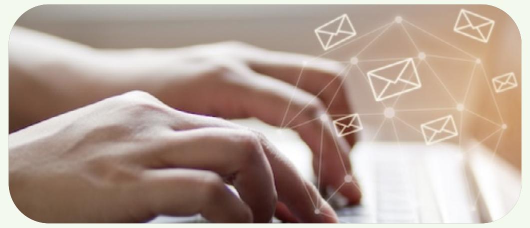

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Measuring ROI in Training Programs for Accounting Firm

Engaging Your Participants in a Virtual Environment