20-20 SERVICES

2025 Preview Learning Course Guide

PRACTICE AREAS + COURSES

MORE COURSE INFORMATION

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Complete, High-End Audit Training Curriculum

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 contact  Beckie Reilly | 855.988.2020 | beckie.reilly@20-20services.com or  Jill Knez | 855.988.2020 | jill.knez@20-20services.com

Auditing & Accounting Courses

Level 1
New Hire Training

Level 4
Exp. In-Charge Training

Best Practices
in Risk-Based Auditing

Becoming a Data-Driven
Audit Practice
NEW

Level 2
Staff Training

Level 5
Supervisor Training

Audit Planning
Meeting Facilitation

Employee Benefit Plan
Training
NEW

Level 3
New In-Charge Training

Level 6
Manager Training

Project Management
for Auditors
NEW

Build Your Own
Audit Course

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): 21	
Communications and Marketing (COM): 2	
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
10 Credits
- Role of the new hire
- Audit process
- Internal control walkthroughs and understanding the entity
- Audit procedures
- Preparing audit documentation
- Introduction to sampling *

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

Professional Development
3 Credits
- Listening skills
- Professionalism and business writing

* 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

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 3

AUDIT TRAINING
New Hire 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. Technical topics covered include evaluating activity level controls, assessing and responding to risk, and performing tests of internal control. 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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Learn More

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
- Technical accounting research: revenue recognition

Professional Development
7.5 Credits
- Project management
- Supervision and feedback for auditors
- 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

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

LEVEL 4

AUDIT TRAINING

Experienced In-Charge Training

Experienced In-Charge Training is designed for individuals with experience as the in-field leader. Opening with a practical, hands-on case study related to risk assessment, this program challenges participants to develop a deeper understanding of 'the why' throughout the audit process. Technical topics covered include assessing and responding to risks of material misstatement, including risks arising from the use of IT and risks arising from deficiencies in entity level controls. Participants will be challenged to create and strengthen tailored audit responses to risks on their engagements. The program also provides robust research-based concepts 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**

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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

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 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): 10	
Personal Development (PD): 5	
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
3.5 Credits
- Leases
- Contemporary audit techniques — alternatives to sampling and the value of data visualization
- Current events in auditing | **NEW***

**In 2025, this module will include an overview of SAS 146 and the new updates to SQMS relevant to supervisors.*

Professional Development
7 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

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

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LEVEL 6

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 2025, 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

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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 contact**

Beckie Reilly | 855.988.2020 | beckie.reilly@20-20services.com or

Jill Knez | 855.988.2020 | jill.knez@20-20services.com

MEETING FACILITATION

AUDIT TRAINING

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 contact Beckie Reilly | 855.988.2020 | beckie.reilly@20-20services.com or Jill Knez | 855.988.2020 | jill.knez@20-20services.com

PROJECT MANAGEMENT

NEW FOR 2025

AUDIT TRAINING

Project Management for Auditors

Our Project Management for Auditors course offers auditors of all levels of experience the opportunity to explore project management concepts in the context of performing and leading audit engagements. The goal is to build consistency across the audit department and a common project management framework to apply to audit engagements going forward.

The content of this course can be tailored to your audit team's specific needs and goals. For example, the agenda could be designed to incorporate specific project management software tools or to focus on specific areas of inefficiency or confusion. Please contact us for more information.

While the course is highly customizable, an example agenda is to the right.

COURSE INFORMATION

CPE Credits **12 Credits**

Auditing (AUD): 6

Personal Development (PD): 6

LEARNING OBJECTIVES

- Summarize key project management concepts in the context of performing an audit
- Use a four-step process to effectively and efficiently manage audit engagements as projects
- Create a plan for proactive project management

TOPIC	MIN.	DESCRIPTION
Introduction	25	To create immediate engagement and participant buy-in, the session opens with an activity aimed identifying the current project management challenges participants are facing, including discussion of the potential adverse impact of subpar project management in auditing.
Project Management Foundations	75	Providing an overview of key project management terms and methods (including waterfall, agile, and lean), this section allows participants to put the content into the context of an audit via small group activities and discussions.
Phase 1: Define the Project	75	• Using input from leaders at the firm, as well as group discussion during the session, this section will begin by defining "what done means" to eliminate any mismatch in expectations between engagement team leaders and audit staff and seniors. • Next, participants will participate in activity and group discussion to identify all stakeholders in an audit engagement, including engagement team leaders and members, client personnel, quality control reviewers, auditor's specialists, and others. • This section will also cover techniques for holding a successful project management kick-off meeting, including discussion of how to incorporate key project management concepts into the audit planning meeting. • Participants will explore one or more of the following project management tools in this phase: Project Plan, Gantt Chart, Planning Meeting Agenda or Project Management Risk Register.
Phase 2: Plan the Project	100	• This section will focus on the value of budgeting and scheduling, both on an individual engagement level, as well as across the team or department. • Participants will identify specific practices they select to apply to ensure effective project management throughout the planning phase. • Additionally, participants will explore one or more of the following project management tools in this phase: Audit Engagement Budget or Scheduling Detail.
Phase 3: Manage the Project	100	This section focuses on project management as the audit moves into fieldwork and through review and completion, including the following topics: • Assigning Tasks • Using Agile Sprints to Track Progress • Monitoring Budget to Actual • Tracking Project Status • The Value of Time Blocking • Dealing with the Unexpected Participants will explore one or more of the following project management tools in this phase: Task Assignment List or Project Status Kanban Board.
Phase 4: Review the Project	25	Spotlighting the importance of reflecting on the successes and challenges of each audit engagement as quickly as possible after completing, this section will include techniques for capturing forward-looking feedback and holding engagement team members accountable for implementing future changes to respond to project management challenges. Also, participants will develop a post-project review checklist.
Solving Project Management Challenges	100	Participants will identify issues and challenges in the current project management processes in place before using problem solving techniques to further define problems and identify root causes. Then, participants will learn about and utilize brainstorming techniques to create potential solutions to the problems identified.
Closing	100	As a capstone to the training program, participants will work in small groups and then as a full class to create a summary of a Customized Project Management Process, including defining key steps, responsibilities, and tools the team agrees to use moving forward. This summary results in an action plan for participants that can be shared across the team after the session to implement techniques learned during the session.
Total	**600**	

DATA-DRIVEN

NEW FOR 2025

AUDIT TRAINING

Becoming a Data-Driven Audit Practice

This program provides the information needed to better leverage audit data analytics (ADAs) in the design and execution of financial statement audits. Designed for auditors at all levels, this program opens with broadly applicable topics such as data availability and reliability before moving into four topics covering audit data analytics in risk assessment and risk response. During each training section, participants will identify opportunities to incorporate data analytics into their client engagements, interact with practical examples, and develop a data-driven audit mindset. This program is designed to allow the use of various data analytics software tools and can be customized to feature specific software tools used by your firm.

COURSE INFORMATION

CPE Credits	**8 Credits**
Auditing (AUD): 8	
Prerequisite	**None**
Level of Instruction	**Basic**
Delivery Methods	**Group Live, Group Internet**
Advance Preparation	**None**

Part 1: The Data-Driven Audit

TOPIC	MIN.
Introduction	25
Foundational Data Analytics Concepts	50
Using ADAs in Understanding the Entity and Risk Assessment	100
Risk Response via ADAs: Testing the Operating Effectiveness of Internal Controls	50
Risk Response via ADAs: Substantive Analytical Procedures	75
Risk Response via ADAs: Testing Populations of Detailed Transactions	75
Closing	25
Total	**400**

Part 2: Taking Action: Brainstorming Sessions for Specific Audit Engagements

Through small group follow-up discussions scheduled virtually or in person, intact engagement teams will select a specific audit engagement to dive into more deeply. In light of the information covered during Part 1, our facilitator(s) will lead a brainstorming session for each selected audit engagement, allowing engagement team members at all levels to identify further specific opportunities to incorporate data analytics across both the risk assessment and risk response phases of the audit engagement. Engagement teams will leave these discussions with fresh ideas for utilizing data analytics on their engagement and additional experience shifting toward the data-driven audit mindset.

NEW FOR 2025

AUDIT TRAINING

Introduction to Employee Benefit Plan Audits

COURSE INFORMATION

Duration	**8 Hours**
Prerequisite	**None**
Level of Instruction	**Basic**
Delivery Methods	**Group Live** **Group Internet**
CPE Credits	**8 Credits**

Introduction to Employee Benefit Plans (AUD): 2.5
Participant Data Testing (AUD): 2
Distribution Testing (AUD): 2
Participant Loan Testing (AUD): 1.5

Advance Preparation	**None**

COURSE OUTLINE

This training, which can be delivered virtually or in person, introduces auditors to employee benefit plans (EBPs), how various types of plans function, and how EBPs are audited. The course is designed for new and experienced auditors who have no experience or limited experience in employee benefit plan audit engagements. The training addresses common risks and associated audit procedures for several core areas of EBP audits. A simulated case study allows participants to apply the concepts learned during the course. This program provides critical foundational skills and knowledge for auditors developing within the EBP practice area.

LEARNING OBJECTIVES

- Describe the types of ERISA employee benefit plans and related audit requirements
- Perform and document testing procedures related to common employee benefit plan audit areas
- Understand the risks associated with core areas of employee benefit plans and how they can be addressed

NEW FOR 2025

AUDIT TRAINING

Intermediate Employee Benefit Plan Training

COURSE INFORMATION

Duration	**8 Hours**
Prerequisite	**None**
Level of Instruction	**Basic**
Delivery Methods	**Group Live** **Group Internet**
CPE Credits	**8 Credits**

Leading Employee Benefit Plan Audits (AUD): 1
Common Technical Issues and Errors in EBP Audits (AUD): 1.5
Contributions Testing and Reconciliation (AUD): 1.5
Reviewing Employee Benefit Plan Workpapers (AUD): 2
Project Management and Delegating in EBP Audits (AUD): 2

Advance Preparation	**None**

COURSE OUTLINE

This training, which can be delivered virtually or in person, covers some of the more technical topics and challenging areas auditors encounter on EBP engagements. Designed for experienced staff, seniors, or managers who work on employee benefit plan audit engagements, this program addresses errors and challenges commonly encountered on benefit plan audits, provides practice opportunities in selected technical areas, and allows participants to practice the supervisory skills needed to lead an engagement effectively. A simulated case study allows participants to apply the concepts learned during the course.

LEARNING OBJECTIVES

- Describe the types of ERISA employee benefit plans and related audit requirements
- Perform and document testing procedures related to common employee benefit plan audit areas
- Understand the risks associated with core areas of employee benefit plans and how they can be addressed

ACCOUNTING AND AUDITING

2025 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 (Full-Day) or Group Internet-Based (Two, Half Days)[1]

Prerequisites: Basic knowledge of US GAAP and US GAAS

Advance Preparation: None

Level of Instruction: Update

Estimated Availability Date: May 15, 2025

OUTLINE OF BUNDLED MODULES

Module Title	DURATION H:MM	CPE CREDITS[2]	FIELD OF STUDY
INTRODUCTION AND THE STATE OF THE PROFESSION REPORT • Hot Topics from the News • AICPA Hires a New CEO • AICPA Audit Quality Initiative — Is Quality Improving? • Update on Efforts to Improve the CPA Pipeline • ESG and Sustainability — What's All the Fuss? • Timetable of FASB ASC Amendments with Imminent Effective dates for Private Companies • The Private Company Council — Current Developments	1:15	1.5	ACCT
JOINT VENTURE FORMATION-DATE ACCOUNTING AND DISCLOSURE • Introduction and Scope • Applying ASC 805 to the Joint Venture Accounting • Disclosure Requirements	1:15	1.5	ACCT
BEHAVIORAL ETHICS[3] • Corporate Fraud — A Walk Down Memory Lane — The WorldCom and Parmalot Frauds	0:50	1.0	BEHETH
ACCOUNTING FOR AND DISCLOSURE OF SOFTWARE COSTS • Current Practice and Reasons for Change • Generalized vs. Specialized Industry Rules • Scope of Codification Amendments • Accounting Protocols • Website Development Costs • Presentation and Disclosure	1:15	1.5	ACCT

[1] *We discourage hybrid presentations that are simultaneously in-person and virtual as we believe eight-hour virtual presentations are too lengthy to be instructionally sound*

[2] *Topics, duration, presentation sequence and the allocation of CPE credits between fields of study are subject to change to accommodate late-breaking developments and to tailor the program for the unique needs of the participants.*

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

ACCOUNTING AND AUDITING

2025 Accounting and Auditing Clinic™ (continued)

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.

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Delivery Methods Available: Group Live (Full-Day) or Group Internet-Based (Two, Half Days)[1]

Prerequisites: Basic knowledge of US GAAP and US GAAS

Advance Preparation: None

Level of Instruction: Update

Estimated Availability Date: May 15, 2025

OUTLINE OF BUNDLED MODULES

Module Title	DURATION H:MM	CPE CREDITS[2]	FIELD OF STUDY
QUALITY MANAGEMENT AND PEER REVIEW DEVELOPMENTS • Change is in the Air for Your A&A Practice • CAAS is Not Exempt • Dispensing with Spreadsheets and Canned Templates • Mandatory Quality Objectives, Identified Quality Risks • Timeline and Project Plan for 2025 and Beyond	1:15	1.5	AUD
OTHER PRIVATE COMPANY GAAP DEVELOPMENTS • Interim Reporting — Narrow Scope Improvements • Determining the Acquirer in an Acquisition of a VIE • Derivatives Scope Refinements • Government Grant and Credit Programs o Government Grants o Environmental Credit Programs	0:50	1.0	ACCT
Totals	**6:40**	**8.0**	

NEW THIS YEAR: Bundle this program with 20-20 Services Virtual Federal Income Tax Update [Insert promotional language from Tom Kiley about the length of the session and the topics being covered]

Tailor the coverage for your firm's needs. Pricing includes consultation with the author/instructor to discuss topic time allocations per your firm's distinctive needs.

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.

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

For more information contact  Beckie Reilly | 855.988.2020 | beckie.reilly@20-20services.com or  Jill Knez | 855.988.2020 | jill.knez@20-20services.com

Tax Courses

LEVEL 1 Tax Training	LEVEL 3 Tax Training	LEVEL 5 Tax Training	BOOTCAMP Estates, Gifts and Trust
LEVEL 2 Tax Training	LEVEL 4 Tax Training	BOOTCAMP LLCs and Partnerships	Build Your Own Tax Course

MORE INFO For more information contact Beckie Reilly | 855.988.2020 | beckie.reilly@20-20services.com or Jill Knez | 855.988.2020 | jill.knez@20-20services.com

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**

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

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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

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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 **1+ Years Professional Experience**

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

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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	**2+ 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
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	3+ 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

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LEVEL 5

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	**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): 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

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

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	**4+ 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	4+ 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

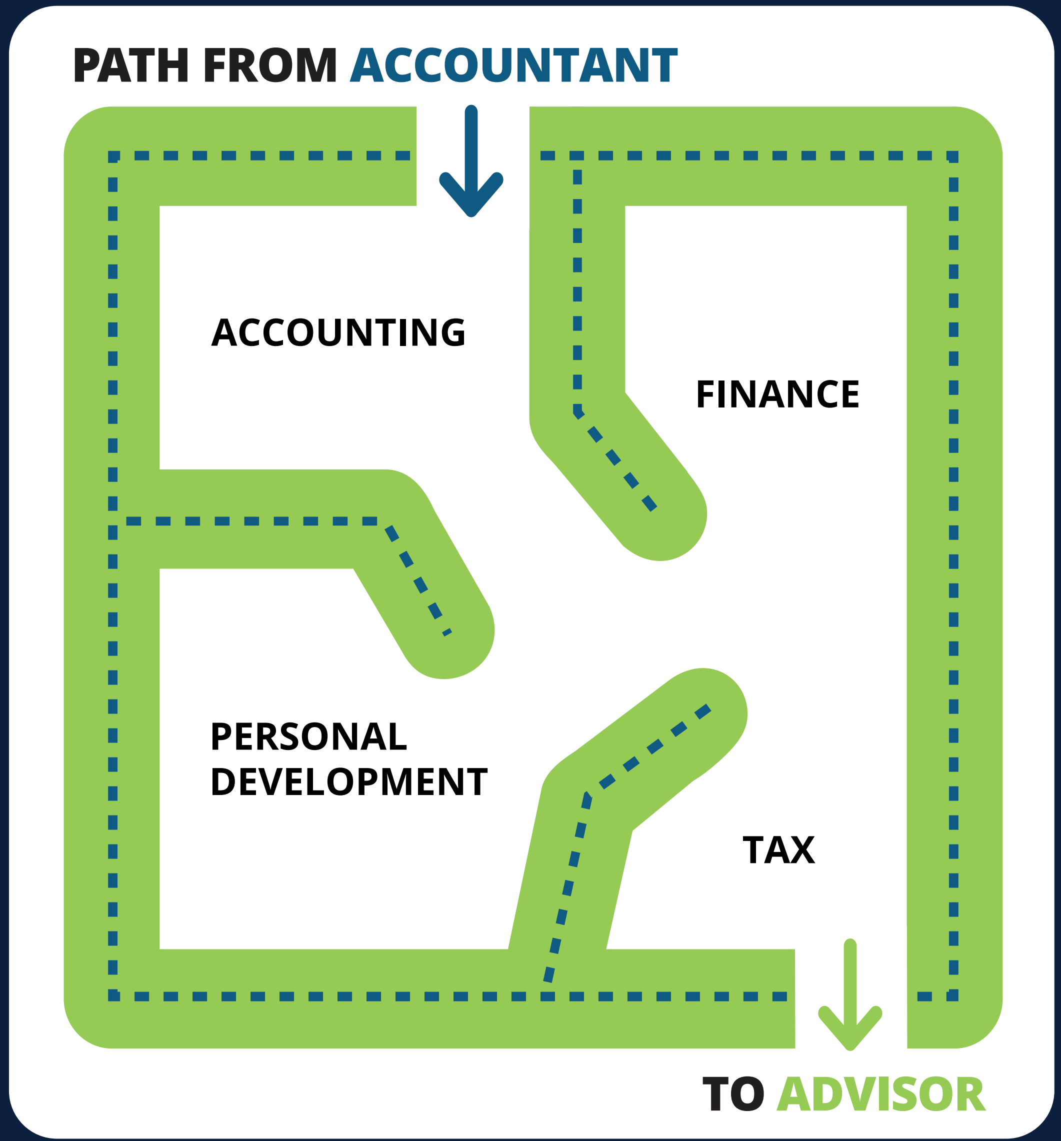
CE Continuing Education
Approved IRS Provider

Client Accounting and Advisory Services (CAAS)

Foundational Training (0-2 Yrs)

Intermediate Training (2+ Yrs)

Build Your Own CAAS Course



MORE INFO For more information contact  Beckie Reilly | 855.988.2020 | beckie.reilly@20-20services.com or  Jill Knez | 855.988.2020 | jill.knez@20-20services.com

0–2 YEARS

Client Accounting and Advisory Services (CAAS) Foundational Training

20-20 Services CAAS Foundational Skills Training is a series of courses in four subject matter areas designed to help those new to CAAS with **one-to-two 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 Live** **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 Statement 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

2+ YEARS

Client Accounting and Advisory Services (CAAS) Intermediate Training

20-20 Services CAAS Intermediate Training (for those with **two or more years experience**) is a combination of four subject matter areas that cover key topics such as identifying accounting errors, preparing and analyzing budgets and projections, cash-flow forecasting, how to apply SSARS 25, project management and supervisor skills, and tax training.

COURSE INFORMATION

Duration	**Variable ***
Prerequisite	**2+ Years of Professional Experience**
Level of Instruction	**Intermediate**
Delivery Methods	**Group Live** **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
- Perform budget and cash flow projections
- Identify complexities in preparation, compilation and review engagements, and apply best practices
- Discuss tax issues and identify service opportunities for individual and business clients

Professional Development

Building Blocks of Communication NEW

Coaching 101 NEW

DiSC® Suite of Products NEW

Business Presentation Skills

Mastering Core Competencies: Elevate Your Skills, Elevate Your Career NEW

Communicating Across Cultures NEW

PIFS 1.0
Presentation, Instruction and Facilitation Skills for Instructors

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

Empower Your Leadership NEW

Fostering an Inclusive Environment NEW

PIFS 2.0
Presentation, Instruction and Facilitation Skills for Instructors

Build Your Own Professional Development Course

Experienced Manager Program NEW

MORE INFO

For more information contact: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PROFESSIONAL DEVELOPMENT

Building Blocks of Communication

NEW FOR 2025

20-20 Services proudly offers a new foundational communication program. Building Blocks of Communication offers participants a valuable chance to enhance their communication skills through ample practice opportunities. Designed for individuals with 0-2 years of professional experience, this course explores topics such as business writing fundamentals, active listening skills, networking, verbal communication, receiving feedback, communication across teams and more.

COURSE INFORMATION

Duration	**14 Hours**
Prerequisite	**0 - 2 Years Experience**
Level of Instruction	**Basic**
Delivery Methods	**Group Live** **Group Internet**
CPE Credits	**14 Credits**
Communications and Marketing (COM): 14	
Advance Preparation	**None**

COURSE OUTLINE

Introduction Goal Setting and Review
1 Credit
- Identify communication challenges for those beginning their career

Business Writing Fundamentals
1 Credit
- Describe appropriate communication techniques, including basics of spoken and written correspondence
- Prepare appropriate, concise responses to clients and team members

Active Listening Skills
2 Credits
- Use listening skills to effectively take instruction from supervisors and others
- Organize thoughts to effectively share information with supervisors and clients

Verbal Communication
2 Credits
- Identify effective communication methods
- Exhibit confidence and share ideas and opinions with colleagues professional and effectively
- Prepare clear, concise, cohesive and timely communications
- Recognize the importance of pro activity

Networking Foundations
2 Credits
- Identify networking techniques, tactics, pitfalls and best practices
- Recognize the importance of trust building when in an advisory role
- Recognize ways to apply networking skills in all settings
- Identify individual networking goals and develop an action plan

Communicating Within and Across Teams
2 Credits
- List responsibilities and goals of team collaboration in order to determine and deliver high quality services
- Identify opportunities to improve team-wide communications
- Explain actions to improve communication within and across teams

Receiving Feedback
2 Credits
- Describe the benefits of feedback and define the feedback model
- Recognize blind spots and how to receive feedback
- Recognize the concept of feed forward

Time Management — Self Management Concepts
2 Credits
- Prioritize task completion based on importance as well as urgency
- List organization and prioritization techniques for effective time management
- Identify your time style and apply tips to manage your style

LEARNING OBJECTIVES

- Develop proficiency in verbal, written and team communication skills
- Apply effective strategies for communicating, fostering collaboration and building trust in diverse work environments
- Incorporate feedback and self-reflection as tools for personal and professional development
- Identify best practices for building and maintaining professional networks
- Boost productivity through effective time management

PROFESSIONAL DEVELOPMENT

NEW FOR 2025

Mastering Core Competencies: Elevate Your Skills, Elevate Your Career

Mastering Core Competencies is a new, intermediate skills-based program designed for individuals with 1-3 years of experience. This program is designed to take individual's skills to the next level by working on their critical thinking, problem solving, balance and emotional intelligence. The offering provides a dive into topics such as Mastering Emotional Intelligence, Critical Thinking, Time and Energy Management, Creative Problem Solving, Project Management and more.

COURSE INFORMATION

Duration	**14 Hours**
Prerequisite	**1 - 3 Years of Professional Experience**
Level of Instruction	**Intermediate**
Delivery Methods	**Group Live** **Group Internet**
CPE Credits	**14 Credits**
Personal Development (PD): 14	
Advance Preparation	**Complete assigned DiSC assessment prior to the program**

COURSE OUTLINE

Introduction Goal Setting and Review
1 Credit
- Develop a self-awareness of participants knowledge and skill of interpersonal competencies included in the program

Critical Thinking
1.5 Credits
- Develop the ability to evaluate information objectively, identifying relevant facts, assessing sources and recognizing assumptions
- Break down complex issues into management parts, generating creative solutions and evaluating potential outcomes
- Consider multiple perspectives and making decisions based on logical reasoning and critical analysis

Building Accountability and Becoming Results Oriented
1.5 Credits
- Identify how to accomplish objectives, take initiative and be more proactive
- Develop an action plan for developing personal accountability
- Discover strategies for taking on greater ownership/responsibilities

Creative Problem Solving
1.5 Credits
- Apply a structured process to workplace problems and issues
- Apply idea generation techniques to generate both obvious and creative options
- Apply techniques to evaluate and select appropriate responses and strategies to solve problems.

Project Management and Work-Life Balance
2 Credits
- Discuss methods for increasing efficiency and client service through project management
- List the three foundations of strong project management
- Define a goal related to your personal work-life integration and identify habits to *achieve the goal*

Time and Energy Management
1.5 Credits
- Identify ways to incorporate actions to manage energy
- Allocate and balance time blocks between roles and responsibilities
- Describe how to prioritize tasks, roles and responsibilities

Mastering Emotional Intelligence
1.5 Credits
- Recognize emotions to understand their impact on oneself and others
- Develop strategies to manage stress, regulate emotions and maintain composure in challenging situations
- Cultivate empathy by active listening, understanding others and showing compassion

Everything DiSC Workplace
3.5 Credits
- Increase self-awareness (crucial in developing emotional intelligence)
- Gain insights into their own behaviors and those of others
- Create strategies for overcoming challenges when working with people of different personality styles

LEARNING OBJECTIVES

- Develop critical thinking skills to enhance your ability to make informed decisions
- Cultivate emotional intelligence and increase self-awareness to improve communication teamwork, and relationships
- Apply creative problem solving techniques to overcome workplace challenges
- Identify best practices for creating personal accountability and balance in a professional environment
- Apply best practices for managing time and energy to create personal and professional balance

PROFESSIONAL DEVELOPMENT

Empower Your Leadership

NEW FOR 2025

Empower Your Leadership is a new intermediate program designed to provide individuals with 3-5 years of experience with the leadership fundamentals necessary to take the next step in their career. This customizable course combines an overview of leadership skills combined with specific power skills necessary to motivate their teams, strategize new opportunities to grow business and perfect that elevator speech with clients and colleagues.

COURSE INFORMATION

Duration	**14 Hours**
Prerequisite	**3 - 5 Years Experience**
Level of Instruction	**Intermediate**
Delivery Methods	**Group Live** **Group Internet**
CPE Credits	**14 Credits**
Personal Development (PD): 14	
Advance Preparation	**None**

COURSE OUTLINE

Introduction Goal Setting and Review
1.5 Credit
- Identify techniques to improve teaching and delegating skills
- Practice the techniques for effective presentations
- Develop a plan to make feedback a regular and consistent habit

Leadership and Management
2 Credit
- Describe four management styles which incorporate the core skills required of a leader
- Define core competencies involved in leading and managing successfully
- Describe and apply multiple strategies and techniques for improving management and leadership

Teaching and Delegating
2 Credits
- Delegate effective using a four-step delegation model
- Provide quality instruction when delegating or teaching

Leadership Through Feedback
1.5 Credits
- Describe the importance of feedback that delivers results
- Identify communication patterns in feedback and how identify your own patterns
- Recognize techniques to avoid bias in your feedback
- Identify tips to use feedback to improve relationships
- Practice providing feedback using the feedback model.

Presentation Skills and Elevator Speech
3 Credits
- Define executive presence and apply it as a foundation to becoming a trusted advisor
- Describe five characteristics of effective business presentations
- List four foundations for all presenters to consider in honing their presentation skills
- Develop and practice an elevator speech.

Supervising and Motivating Team Members
2 Credits
- Recognize and describe five key skills of effective supervisors
- Describe four or more aspects that typically motivate individuals within the public accounting profession
- Reframe your approach to team development to increase motivation.

Business Development
2 Credits
- Describe How individuals can impact business development and firm growth
- Identify productive actions to aid in developing new business
- List strategies and methods to identify existing and new client needs and opportunities
- List five ways to grow the number of contacts and business relationships

LEARNING OBJECTIVES

- Develop leadership and management competencies to lead teams effectively
- Identify and apply teaching and delegating techniques
- Enhance communication through executive presence, presentation skills and compelling elevator speeches
- Identify best practices to supervise and motivate teams for optimal performance
- Identify and apply strategic planning skills to identify new business opportunities

PROFESSIONAL DEVELOPMENT

Experienced Manager Program

NEW FOR 2025

Experienced Manager Program (EMP) is designed for individuals who have one+ years of experience in the manager role in client services. This two-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 and business development. 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	**Advanced**
Delivery Methods	**Group Live** **Group Internet**
CPE Credits	**14 Credits**

Communications and Marketing (COM): 3.5

Personal Development (PD): 10.5

Advance Preparation **1+ Years Management Experience**

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

Leadership Communication
3.5 Credits
- Analyze the 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

Fostering an Inclusive Environment
2 Credits
- Define key concepts related to DEI and explain their importance
- Develop cultural competence and apply best practices for creating an inclusive environment
- 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
- 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

Coaching 101

NEW FOR 2025

COURSE INFORMATION

Duration	**2 Hours**
Prerequisite	**4+ Years Professional Experience**
Level of Instruction	**Intermediate**
Delivery Methods	**Group Live** **Group Internet**
CPE Credits	**2 Credits**
Professional Development: 2	
Advance Preparation	**None**

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

COURSE SUMMARY

Organizations talk about it, talent want it, and a culture thrives on it. Coaching is essential to building a strong, inclusive organization. But do you really know how to coach your people effectively?

Coaching 101 is designed to help participants fully understand the differences between coaching and other roles, enabling them to select the best approach for various situations. Attendees will learn and develop the core essential skills for workplace coaching while crafting their ideal image. This will be done through practical exercises and real-world scenarios ensuring participants will leave with the confidence and competence to support their colleagues and teams.

LEARNING OBJECTIVES

- Articulate the differences between coaching, mentoring, advising and consulting
- Describe the core skills required for coaching professionals in the workplace
- Identify your ideal image as a coach
- Practice coaching skills using real-world scenarios

Communicating Across Cultures

COURSE INFORMATION

Duration	**1 Hour**
Prerequisite	**None**
Level of Instruction	**Basic**
Delivery Methods	**Group Live** **Group Internet**
CPE Credits	**1 Credit**
Professional Development: 1	
Advance Preparation	**None**

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

COURSE SUMMARY

Today's globalized workplace requires us to work with others from different backgrounds and cultures. Effective communication in these settings is critical for building strong, cohesive teams. This course equips participants with the tools and strategies to overcome common barriers and challenges.

Through best practices and activities, participants will demonstrate effective communication strategies tailored toward cross-cultural conversations. By the end, attendees will create a personalized action plan for fostering better relationships and ensuring more connected and productive conversations.

LEARNING OBJECTIVES

- Identify common barriers to effective communication across cultures
- Manage culture and time zone challenges
- Articulate best practices
- Demonstrate effective communication strategies
- Develop an action plan for building better cross-cultural relationships

Fostering an Inclusive Environment

COURSE INFORMATION

Duration	**2 Hours**
Prerequisite	**1+ Years Management Experience**
Level of Instruction	**Intermediate**
Delivery Methods	**Group Live** **Group Internet**
CPE Credits	**2 Credits**
Professional Development: 2	
Advance Preparation	**None**

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

COURSE SUMMARY

Inclusive environment, psychological safety and cultural competence are more than just buzzwords. Their foundations for lasting success in your organization.

Fostering an inclusive environment is designed to equip participants with the foundational knowledge and practical tools necessary to foster a truly inclusive environment within their organization. Through a combination of insights and interactive discussions, attendees will explore key concepts related to Diversity, Equity, and Inclusion (DEI) and understand why they are vital to organizational success. The course delves into the impact of personal bias on inclusivity, encouraging participants to reflect on their own biases and how these may affect their workplace.

Participants will also develop cultural competence, learning how to navigate and appreciate diverse perspectives effectively. The course outlines best practices for creating an environment where everyone feels valued and respected. By the end of the session, attendees will create an actionable plan for implementing inclusive practices, ensuring sustained progress toward a more equitable and inclusive workplace culture.

LEARNING OBJECTIVES

- Define key concepts related to DEI and explain their importance
- Identify personal bias and describe how that impacts an inclusive environment
- Develop cultural competence
- Apply best practices for creating an inclusive environment
- Create an action plan for fostering an inclusive environment in your organization

PROFESSIONAL DEVELOPMENT

DiSC® Suite of Products

NEW FOR 2025

What is DiSC®? You have hired some of the brightest, most technically competent team members. Yet it seems like they just aren't gelling as a team, lacking the communicative, supportive and cohesive culture you hoped. That's where DiSC comes in. DiSC is a personal assessment tool used by more than one million people every year to help improve teamwork, communication and productivity in the workplace. Organizations and facilitators use these profiles as tools to help ignite cultural change, inspiring lasting behavior changes that positively shape their workforce. The 20-20 Services team has DiSC-certified Instructors who possess decades of experience in the day-to-day operations of accounting and advisory firms. With that industry experience, our engagement activities are specifically created to simulate real life experiences your team members will encounter. *We call it DiSC for accountants and advisors by accountants and advisors.*

COURSE INFORMATION

Duration	**Variable**
Prerequisite	**2+ Years Experience**
Level of Instruction	**Intermediate**
Delivery Methods	**Group Live** **Group Internet**
CPE Credits	**20 Credits**
Personal Development (PD): 20	

Advance Preparation

Complete assigned DiSC® assessment prior to the program and 2+ years experience

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

Everything DiSC® Workplace
6 Credits

Everything DiSC® Workplace offers critical interpersonal skills training to help learners:

- Increase self-awareness (crucial in developing emotional intelligence)
- Gain insights into their own behaviors and those of others
- Identify and appreciate the work styles of others
- Learn how to communicate and persuade more effectively
- Create strategies for overcoming challenges when working with people of different DiSC® styles

Everything DiSC® Productive Conflict
4 Credits

Conflict is an inevitable, sometimes destructive part of workplace interactions. It doesn't have to be. Everything DiSC® Productive Conflict helps you understand your conflict behaviors — and those of people you work with to improve your workplace relationships and results.

- Uncover the reasons behind destructive responses to conflict and learn how to reframe them to become more constructive and useful
- Recognize the unique personalities of your coworkers and use healthy conflict to help solve business problems
- Develop actionable strategies to engage in more productive and positive workplace conflict

Everything DiSC® Management
6 Credits

Everything DiSC® Management starts by uncovering the natural management preferences and priorities of the manager. It then builds on that knowledge to help dramatically improve the quality of the management experience and build more effective, rewarding, and inspiring relationships.

- Learn valuable insights for becoming a better motivator
- Explore more effective strategies for directing and delegating
- Learn how to create a more inspirational environment
- Expand your abilities to develop others based upon their unique potentials
- Improve working relationships with your own supervisors

Everything DiSC® Agile EQ Emotional Intelligence
4 Credits

There are four domains of EQ; self-awareness, self-management, social awareness and relationship management. Agile emotional intelligence is the ability to read the emotional and interpersonal needs of a situation and respond accordingly.

The Everything DiSC® Agile EQ profile offers peronalized content to help learners understand their EQ strengths, recgnize their EQ potential and committ to customized strategies for building agility.

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 **1+ Years Professional Experience**
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	**6 Credits**
Communications and Marketing: 6	

Advanced Preparation

Participants must bring materials for a 3-5 minute presentation to the course. Time to modify the presentation and prepare will be provided during the course.

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
2 Credits
- 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

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 contact Beckie Reilly | 855.988.2020 | beckie.reilly@20-20services.com or Jill Knez | 855.988.2020 | jill.knez@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.

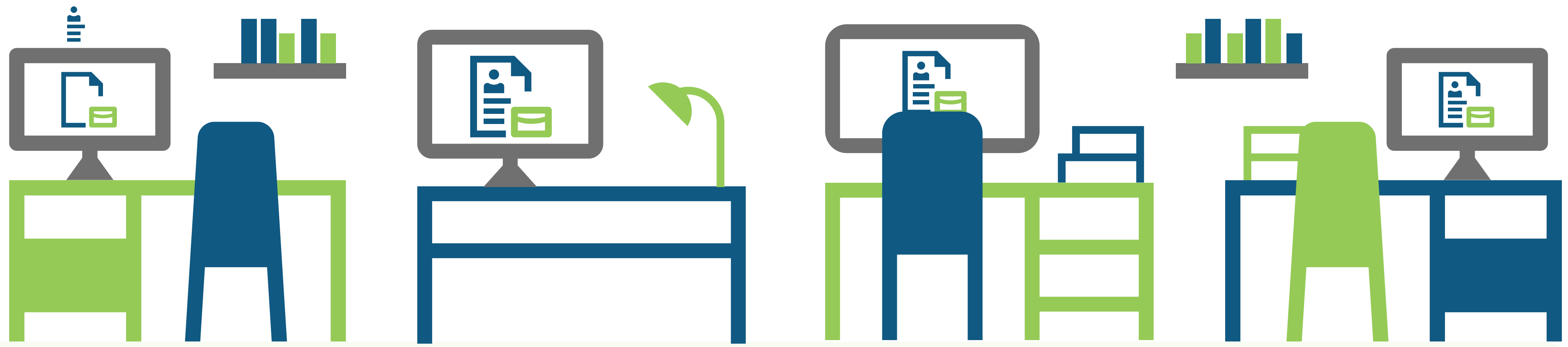
MORE INFO For more information contact Beckie Reilly | 855.988.2020 | beckie.reilly@20-20services.com or Jill Knez | 855.988.2020 | jill.knez@20-20services.com

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!



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 contact  Beckie Reilly | 855.988.2020 | beckie.reilly@20-20services.com or  Jill Knez | 855.988.2020 | jill.knez@20-20services.com

CUSTOMIZED PROGRAMS

BUILD YOUR OWN COURSE

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 COURSE

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		
	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		
	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		
	Current Events in Auditing (Int) [5]	1	AUD
	Trends and Transformations in Auditing (Adv) [6]	2	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 COURSE

Tax Program Menu

✓ Individual Taxes	Level	CPE Hours
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

✓ Professional Development	Level	CPE Hours
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

✓ Corporate Taxes	Level	CPE Hours
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

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

✓ LLC and Partnerships	Level	CPE Hours
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 contact  Beckie Reilly | 855.988.2020 | beckie.reilly@20-20services.com or  Jill Knez | 855.988.2020 | jill.knez@20-20services.com

BUILD YOUR OWN COURSE

Client Accounting and Advisory Services (CAAS) Program Menu

		CPE Credits	Field of Study
✓	**Accounting Processes and Financial Analysis**		
	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
	Shoring Up Your Client's Internal Controls *	2	ACCT
	Creating and Analyzing Key Performance Indicators That Matter *	2	ACCT
	Viewing Your Client's Financial Statements Through the Eyes of Their Banker *	2	ACCT
	Managing Cash Flow *	2	ACCT
✓	**SSARS: Scope of Services and Performing Basic Compilations and Reviews**		
	Foundational SSARS [1]	4	ACCT
	Intermediate SSARS [2]	4	ACCT
✓	**Communication**		
	Effective Listening Skills [1]	2	COM
	Effective Business Communications *	2	COM
	Business Writing Fundamentals *	2	COM
✓	**Professional Development**		
	Time Management and Organization [1]	2	PD
	Conflict Management *	2	PD
	Developing Critical Thinking	2	PD
	Mastering Emotional Intelligence	2	PD

		CPE Credits	Field of Study
✓	**Tax**		
	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]	2	TAX
	Retirement Contributions and Distributions [2]	2	TAX
	Section 461 [2]	1	TAX
✓	**Engagement Management**		
	Project Management [2]	2	PD
✓	**Must-Have Professional Development for CAAS Supervisors and Managers**		
	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 an Inclusive Workforce *	2	PD
	The Balanced Leader/Manager *	2	PD
	Leadership Communication *	2	COM
	Business Presentation Essential Skills *	6	COM

KEY

[1] = Included in CAAS Foundational program

[2] = Included in CAAS Intermediate program

* = Not included in Foundational or Intermediate programs

CUSTOMIZED PROGRAMS

BUILD YOUR OWN COURSE
Professional Development

✓	Suggested Audience 0-2 Years Professional Experience	CPE CREDITS	FIELD OF STUDY
	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	CPE CREDITS	FIELD OF STUDY
	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
	Communicating Across Cultures [7]	1	PD
	Developing Critical Thinking [7]	1.5	PD
	Effective Conflict Resolution [7]	2	PD

✓	Personal Development	CPE CREDITS	FIELD OF STUDY
	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
	Fostering an inclusive Environment [7]	2	PD
	Coaching 101 [7]	2	PD
	Mastering Emotional Intelligence [7]	2	PD

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

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.

2024 Public Training Registration

CLICK HERE

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.

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.

MORE INFO For more information contact  Beckie Reilly | 855.988.2020 | beckie.reilly@20-20services.com or  Jill Knez | 855.988.2020 | jill.knez@20-20services.com

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 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 Four	24	$1,155	11/18/2024	11/21/2024	11:30 a.m. ET	05:30 p.m. ET

INDIA						
AUDIT	**CPE HRS**	**TUITION**	**START DATE**	**END DATE**	**START TIME**	**END TIME**
SESSION 1:						
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.*

2025 PUBLIC COURSE SCHEDULE
COMING IN EARLY JANUARY 2025

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 2:						
Level One	24	$1,155	01/06/2025	01/10/2025	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:						
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.*

2025 PUBLIC COURSE SCHEDULE
COMING IN EARLY JANUARY 2025

Approved IRS Provider — CE Continuing Education

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 contact  Beckie Reilly | 855.988.2020 | beckie.reilly@20-20services.com or  Jill Knez | 855.988.2020 | jill.knez@20-20services.com

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 contact  Beckie Reilly | 855.988.2020 | beckie.reilly@20-20services.com or  Jill Knez | 855.988.2020 | jill.knez@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	$362	$289
Per Instructor	$656	$462
50–99 Participants	**Three-Day Programs**	**Two-Day Programs**
Per Participant	$324	$252
Per Instructor	$656	$462
100–149 Participants	**Three-Day Programs**	**Two-Day Programs**
Per Participant	$289	$217
Per Instructor	$656	$462
150–199 Participants	**Three-Day Programs**	**Two-Day Programs**
Per Participant	$275	$202
Per Instructor	$656	$462
200+ Participants	**Three-Day Programs**	**Two-Day Programs**
Per Participant	$259	$186
Per Instructor	$656	$462

CAAS and TAX

	LEVELS 1, 2, 3 AND 4
1–49 Participants	**Three-Day Programs**
Per Participant	$484
Per Instructor	$656
50–99 Participants	**Three-Day Programs**
Per Participant	$439
Per Instructor	$656
100–149 Participants	**Three-Day Programs**
Per Participant	$412
Per Instructor	$656
150–199 Participants	**Three-Day Programs**
Per Participant	$368
Per Instructor	$656
200+ Participants	**Three-Day Programs**
Per Participant	$348
Per Instructor	$656

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 $324 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 contact  Beckie Reilly | 855.988.2020 | beckie.reilly@20-20services.com or  Jill Knez | 855.988.2020 | jill.knez@20-20services.com

2025 STAFF TRAINING PRICING

2025 Pricing for Staff Audit, Tax and CAAS Training Programs

Delivery Methods	STANDARD Per CPE Credit Hour	BLENDED | CUSTOMIZED Per CPE Credit Hour
Group Live *	$635	$722
Virtual Classroom **	$607	$689

Additional Participants >24	$35	$35

Course Materials		
Audit		
24 CPE credits	$65	Variable
16 CPE credits	$50	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 $635 =	$15,240
Course Materials: $144 x 20 =	$2,880
Total:	$18,120
+ 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 $689 =	$16,536
Additional Participants: ($35 x 24) x 4 =	$3,360
Course Materials: $65 x 28 =	$1,820
Total:	$21,716

Non-Peak Season Example #3

Standard Audit Level 4 | 15 Participants (**Virtual Delivery**)

24 CPE Credit Hours x $546 =	$13,104
Course Materials: $65 x 15 =	$975
Total:	$14,079

20-20 SERVICES

WE OFFER 10% DISCOUNT

DURING 2025 NON-PEAK PERIODS

JANUARY 27 – APRIL 25

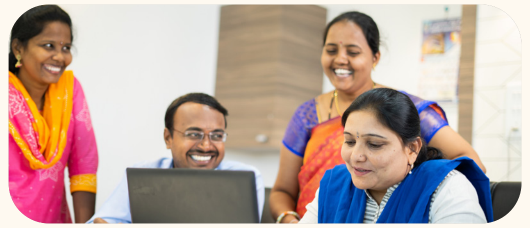
AUGUST 31 – OCTOBER 9

MORE INFO For more information contact  Beckie Reilly | 855.988.2020 | beckie.reilly@20-20services.com or  Jill Knez | 855.988.2020 | jill.knez@20-20services.com

Case Studies

Revolutionizing State Auditing: How a New Bootcamp Program Transformed Team Efficiency and Job Satisfaction

Customized Professional Development Curriculum Creation and Design for Multiple Levels of Experience

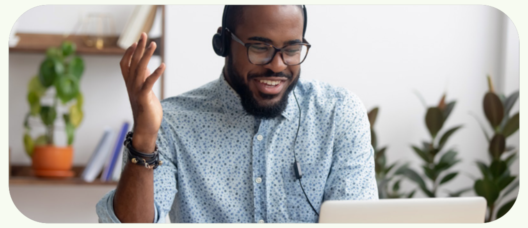


Triumph Amidst Challenges: How a Top Accounting Firm Reshaped Their Offshore Office

Evolving the Practice: Specialized CAAS Training Maximizes the Potential of Client Accounting and Advisory Services

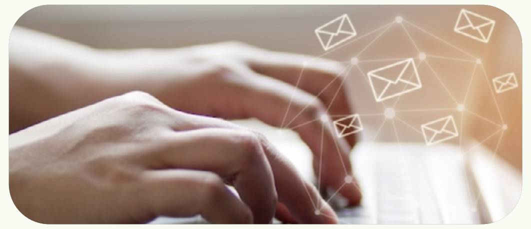
Featured Insights

Forging Strong Leaders: The Crucial Role of CPD (Continuing Professional Development) for Accountants

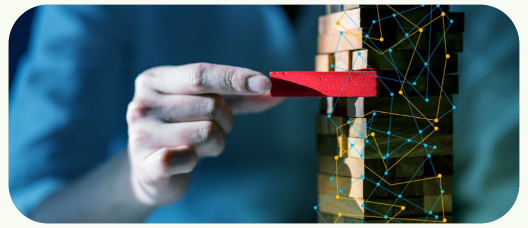


In-Person Training vs Online Training? You're Asking the Wrong Question

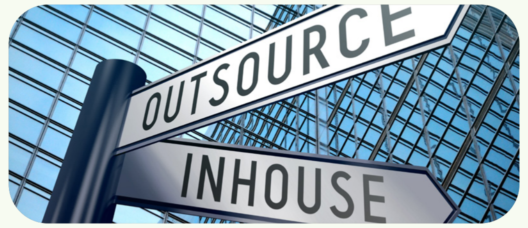
Unlocking Global Potential: 3 Compelling Reasons to Outsource Offshore Accounting Staff Training



Increase Your Profitability By Using Three Writing Techniques



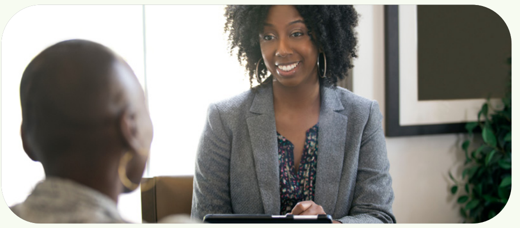
Breaking the Cycle of Complacency: Can SAS 145 Transform Audit Risk Assessment?



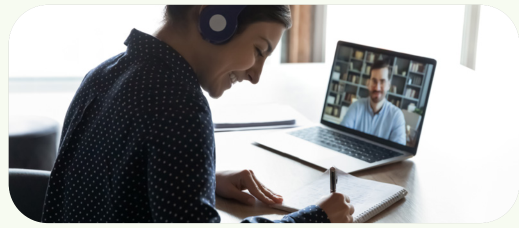
Play to Your Strengths: When In-House Training Is the Right Choice

Accounting Training: 3 Strategies for Regional CPA Firms to Attract Top Talent

Build Genuine Trust, Active Listening and Networking to Unlock Your Full Potential



Hard Facts on Soft Skills for Accountants: How Effective Relationship Management Can Differentiate Your CAAS Practice



Yearning for Learning: Why Knowledge is the Key to Recruiting and Retention

Educating the Tax Pros: Enrolled Agent Training vs. CPA Continuing Education

Three Attributes for Improving Your Business Development and Networking Skills

Measuring ROI in Training Programs for Accounting Firm

Engaging Your Participants in a Virtual Environment

MORE INFO

For more information contact:

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