

## 2019-2020 CPE Schedule by Date

<b>Date</b>	<b>Course</b>	<b>Location</b>
6/25/2019	Annual Update for Accountants and Auditors	Sioux Falls
6/25/2019	Annual Update for Accountants and Auditors (Simulcast)	Online
6/26/2019	Leases: Mastering the New FASB Requirements	Sioux Falls
6/26/2019	Leases: Mastering the New FASB Requirements (Simulcast)	Online
6/27/2019	Analytics and Big Data for Accountants	Sioux Falls
6/27/2019	Analytics and Big Data for Accountants (Simulcast)	Online
7/29/2019	Form 990: Exploring the Form's Complex Schedules	Sioux Falls
7/29/2019	Form 990: Exploring the Form's Complex Schedules (Simulcast)	Online
8/19/2019	Preparing Complex 1040s	Sioux Falls
8/20/2019	Advanced Partnership Issues—Featuring New Partnership Audit Regime & Tax Cuts & Jobs Act Changes	Sioux Falls
8/28/2019	Farm Taxation Update	Sioux Falls
8/28/2019	Farm Taxation Update (Simulcast)	Online
9/16/2019	Skills to Succeed: Coaching Skills for CPAs, Financial Managers and Controllers	Sioux City
9/16/2019	Strategic Planning for the Finance Professional	Sioux City
9/17/2019	Annual Update for Controllers	Sioux City
Sept 18-19	<b>SDCPAS Annual Meeting &amp; Convention</b>	Deadwood
9/18/2019	The CPA as Coach: Learn and Practice Essential Coaching Skills	Deadwood
9/18/2019	Multiply Your Value with Strategic Thinking Skills	Deadwood
10/17/2019	Reviewing Individual Tax Returns: What Are You Missing?	Sioux City
10/17/2019	Reviewing Partnership Tax Returns: What Are You Missing?	Sioux City
10/17/2019	The 2018 Yellow Book Revision	Sioux City
10/17/2019	The Most Dangerous Elements of a GAAS Audit	Sioux City
10/18/2019	Accounting, Audit, and Attest Update for Practitioners with Small-Business Clients	Sioux City
10/23/2019	2019 Preparation, Compilation and Review Update for the Local Firm	Sioux City
10/23/2019	Data Analytics for CPAs Who Don't Know Much About Data Analytics	Sioux City
10/31/2019	Securing a Comfortable Retirement in the Age of Spending	Sioux City
11/1/2019	Fiduciary Income Tax Returns-Form 1041 Workshop with Filled-In Forms	Sioux City
Nov 5-6	<b>Tax Institute</b>	Sioux Falls
11/5/2019	Cut Your Client's Tax Bill: Individual Tax Planning Tips and Strategies	Sioux Falls
11/6/2019	AICPA's Annual Federal Tax Update	Sioux Falls
11/11/2019	Federal Tax Update-Individuals and Business	Sioux City
Nov 11-12	<b>West River Tax Cluster</b>	Rapid City
11/11/2019	Tax Considerations and Consequences for Closely Held Businesses	Rapid City
11/12/2019	AICPA's Annual Federal Tax Update	Rapid City
3/24/2020	Advanced Controller and CFO Skills	Sioux Falls
3/25/2020	Enterprise Risk Management: New Approaches for Today's Complexities	Sioux Falls

## ACPEN Signature

### 2019 Annual Curriculum

<u>Date</u>	<u>Subject</u>
May 8, 2019	<b>Estate Planning and Trusts for CPAs</b> Second Chance Live Replay: June 5, 2019 Last Chance CPE Replays: December 13, 2019 Best of ACPEN Replay Series: January 10, 2020
May 29, 2019	<b>S Corporation Update after Tax Reform</b> Second Chance Live Replay: June 26, 2019 Last Chance CPE Replays: December 16, 2019 Best of ACPEN Replay Series: January 11, 2020
June 19, 2019	<b>Not-for-Profit Accounting, Auditing &amp; Tax Update</b> Second Chance Live Replay: July 31, 2019 Last Chance CPE Replays: December 17, 2019 Best of ACPEN Replay Series: January 14, 2020
July 24, 2019	<b>Governmental Accounting &amp; Auditing Update</b> Second Chance Live Replay: September 4, 2019 Last Chance CPE Replays: December 19, 2019 Best of ACPEN Replay Series: January 16, 2020
August 21, 2019	<b>Compilation and Review Update</b> Second Chance Live Replay: September 17, 2019 Last Chance CPE Replays: December 20, 2019 Best of ACPEN Replay Series: January 9, 2020
September 25, 2019	<b>Business Fraud Update</b> Second Chance Live Replay: October 17, 2019 Last Chance CPE Replays: December 18, 2019 Best of ACPEN Replay Series: January 8, 2020
October 23, 2019	<b>Accounting &amp; Auditing Update</b> Second Chance Live Replay: November 21, 2019 Last Chance CPE Replays: December 27, 2019 Best of ACPEN Replay Series: January 17, 2020
November 13, 2019	<b>Partnerships &amp; LLCs After Tax Reform</b> Second Chance Live Replay: November 22, 2019 Last Chance CPE Replays: December 23, 2019 Best of ACPEN Replay Series: January 21, 2020
December 11, 2019	<b>Annual Tax Update</b> Second Chance Live Replay: December 26, 2019 Last Chance CPE Replays: December 30, 2019 Best of ACPEN Replay Series: January 2, 2020



The Society has partnered with numerous providers to give members a variety of offerings. Due to the volume of offerings, please check our website for current offerings. New listings are added weekly or monthly.

Search for available webcasts online: **AICPA, ACPEN, Surgent, CALCPA & CPA Crossings** all in one place by [clicking here](#).

**Please note that when ordering webcasts/self-study the Society receives a commission if you order through our website and/or enter referral code, so please consider this when registering.**

**Surgent Referral Code: 476136cf-814b-4a0a-8f2f-5bdb5167985e**

Non-Sponsored CPE Courses - as a reminder proper documentation is required on all CPE. If you attend non-sponsored courses, you are required to maintain documentation including course title, sponsor, date, credited hours and VERIFICATION OF ATTENDANCE. A Non-Sponsor CPE Verification Form can be found at [www.sdcpa.org](http://www.sdcpa.org)

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## Annual Update for Accountants and Auditors

Keep abreast of the fast-paced changes in accounting and auditing. This comprehensive course covers relevant pronouncements, exposure drafts, and other guidance recently issued in the accounting, auditing, review, compilation, and preparation engagement arenas. Let us sort through the complexities and help you identify and apply recently issued FASB, PCAOB, ARSC, and ASB standards and guidance. With the rate of change in today's regulatory environment, you must stay current on the topics impacting the profession – don't get left behind!

**Date:** June 25, 2019  
**Credits:** 8  
**Level:** Update  
**Instructor:** Curtis Quickel

**Developer:** AICPA  
**Area:** Accounting and Auditing  
**Price:** A (add \$50 after 6/3)  
**Location:** Eide Bailly LLP

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## Annual Update for Accountants and Auditors (Simulcast)

Keep abreast of the fast-paced changes in accounting and auditing. This comprehensive course covers relevant pronouncements, exposure drafts, and other guidance recently issued in the accounting, auditing, review, compilation, and preparation engagement arenas. Let us sort through the complexities and help you identify and apply recently issued FASB, PCAOB, ARSC, and ASB standards and guidance. With the rate of change in today's regulatory environment, you must stay current on the topics impacting the profession – don't get left behind!

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**Instructor:** Curtis Quickel

**Developer:** AICPA  
**Area:** Accounting and Auditing  
**Price:** A (add \$50 after 6/3)  
**Location:** Online

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## Leases: Mastering the New FASB Requirements

How do the leasing requirements in the new standard differ from current GAAP? This course addresses that question by examining the core principles of the new standard, including identification, recognition, measurement, presentation and disclosure requirements. Examples with journal entries are included to illustrate application of the new standard. This course explains the lessee accounting model, including lease classification, amortization of the right-of-use asset, and interest on the lease liability. This course also explains the lessor accounting model, including transfer of risk, profit recognition, and collectability. Additional topics include short-term leases, purchase options, variable lease payments, and sale and leaseback transactions. In addition, this course addresses the business context of implementing the new standard by identifying key factors for managing this significant change.

**Date:** June 26, 2019  
**Credits:** 8  
**Level:** Intermediate  
**Instructor:** Curtis Quickel

**Developer:** AICPA  
**Area:** Accounting and Auditing  
**Price:** A (add \$50 after 6/4)  
**Location:** Eide Bailly LLP

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## Leases: Mastering the New FASB Requirements (Simulcast)

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**Date:** June 26, 2019  
**Credits:** 8  
**Level:** Intermediate  
**Instructor:** Curtis Quickel

**Developer:** AICPA  
**Area:** Accounting and Auditing  
**Price:** A (add \$50 after 6/4)  
**Location:** Online

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## Analytics and Big Data for Accountants

Analytics is the new force driving business. Tools have been created to measure program impacts and ROI, visualize data and business processes, and uncover the relationship between key performance indicators, many utilizing the unprecedented amount of data now flowing into organizations. In this course you will discuss leading-edge topics in analytics and finance in a session that is packed with useful tips and practical guidance that you can apply immediately.

**Date:** June 27, 2019  
**Credits:** 8  
**Level:** Basic  
**Instructor:** Curtis Quickel

**Developer:** AICPA  
**Area:** Accounting and Auditing  
**Price:** A (add \$50 after 6/5)  
**Location:** Eide Bailly LLP

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**Developer:** AICPA  
**Area:** Accounting and Auditing  
**Price:** A (add \$50 after 6/5)  
**Location:** Online

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## Form 990: Exploring the Form's Complex Schedules

Mastery of the current Form 990 beyond its Core Form pages requires understanding of the Form's transparency demands relating to multiple complex issues: transactions with certain insiders; expanded disclosure of highly-comp'd individuals' calendar year compensation; identifying, and reporting in the presence of, "related organizations," nuances of the two "public support tests;" undertaking of foreign operations; and more. This course covers the most advanced tax and nonprofit issues that are the subject of the Form 990's Schedules. Participants will not only gain an understanding of the tax and practical points necessary to complete Schedules A, C, F, J, K, L, N and R of the current Form 990, but also be advised as to how to communicate with exempt clients on each of these Schedules' unique demands.

**Date:** July 29, 2019  
**Credits:** 8  
**Level:** Advanced  
**Instructor:** Eve Borenstein

**Developer:** AICPA  
**Area:** Taxation  
**Price:** A (add \$50 after 7/8)  
**Location:** Eide Bailly LLP

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## Form 990: Exploring the Form's Complex Schedules (Simulcast)

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**Date:** July 29, 2019  
**Credits:** 8  
**Level:** Advanced  
**Instructor:** Eve Borenstein

**Developer:** AICPA  
**Area:** Taxation  
**Price:** A (add \$50 after 7/8)  
**Location:** Online

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## Preparing Complex 1040s

For many clients, tax simplification under the Tax Cuts and Jobs Act was ultimately an empty promise from politicians. This program is designed for the accountant who is ready to handle the most complex individual client's income tax preparation. The program will look at areas that vex CPAs when dealing with individual taxes, including the Section 199A qualified business income deduction, passive activity rules, and the net investment income tax.

**Date:** August 19, 2019  
**Credits:** 8  
**Level:** Intermediate  
**Instructor:** Ed Zollars

**Developer:** Loscalzo Associates  
**Area:** Taxation  
**Price:** B (add \$50 after 7/29)  
**Location:** Eide Bailly LLP

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## Advanced Partnership Issues—Featuring the New Partnership Audit Regime and Tax Cuts and Jobs Act Changes

As we bid farewell to the TEFRA consolidated audit rules, we face the brave new world of the completely revised partnership audit regime. This takes effect with partnership years beginning in 2018. Partnerships and their advisers need to understand how these new rules radically change the nature of partnership examinations and the likely future impact on the structure of partnerships. All of this adds to the inherent complexity of partnerships, including partnership allocations (including targeted capital account based allocations), the required allocations for contributed property under 704(c) and more, areas this course will cover to help advanced practitioners deal with the practical problems faced by their partnership clients.

**Date:** August 20, 2019  
**Credits:** 8  
**Level:** Advanced  
**Instructor:** Ed Zollars

**Developer:** Loscalzo Associates  
**Area:** Taxation  
**Price:** B (add \$50 after 7/29)  
**Location:** Eide Bailly LLP

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## Farm Taxation Update

This session will help practitioners recognize unique tax opportunities and pitfalls for taxpayers in the agriculture industry. Our education sessions give tax professionals a forum to discuss current issues affecting their farm and ranch clients. In addition to covering income and deduction items unique to agribusiness producers, we will also cover what we have learned from the 2017 Tax Cuts and Jobs Act.

**Date:** August 28, 2019  
**Credits:** 8  
**Level:** Intermediate  
**Instructor:** Paul Neiffer

**Developer:** CliftonLarsonAllen LLP  
**Area:** Taxation  
**Price:** C (add \$50 after 8/6)  
**Location:** Holiday Inn Sioux Falls City Centre

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## Farm Taxation Update (Simulcast)

This session will help practitioners recognize unique tax opportunities and pitfalls for taxpayers in the agriculture industry. Our education sessions give tax professionals a forum to discuss current issues affecting their farm and ranch clients. In addition to covering income and deduction items unique to agribusiness producers, we will also cover what we have learned from the 2017 Tax Cuts and Jobs Act.

**Date:** August 28, 2019  
**Credits:** 8  
**Level:** Intermediate  
**Instructor:** Paul Neiffer

**Developer:** CliftonLarsonAllen LLP  
**Area:** Taxation  
**Price:** C (add \$50 after 8/6)  
**Location:** Online

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## Skills to Succeed: Coaching Skills for CPAs, Financial Managers and Controllers

Professional athletes have multiple coaches-business people rarely use coaches. Learn the coaching skills that are required to raise the performance of your staff. This course will teach you various coaching strategies and how to plan, structure and deliver an effective coaching session.

**Date:** September 16, 2019 (8:00am - 11:45am)  
**Credits:** 4  
**Level:** Intermediate  
**Instructor:** Jim Lindell

**Developer:** Thorsten Consulting Group Inc  
**Area:** Business Management & Organization Management  
**Price:** F (add \$25 after 8/26)  
**Location:** Delta Hotels - Sioux City

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## Strategic Planning for the Finance Professional

Are you ready to take your role as controller to the next level while adding significant value to the organization? A successful Controller will go beyond financial statements, internal controls and general accounting to create new value for the organization. Developing strategic thinking skills is essential to navigate change and deliver exceptional value to your organization, clients, and constituents. Learn the essence of strategic thinking, how to integrate it with traditional planning activities, and proactively build strategic thinking into your daily routine as a leader.

**Date:** September 16, 2019 (12:45pm - 4:30pm)  
**Credits:** 4  
**Level:** Intermediate  
**Instructor:** Jim Lindell

**Developer:** Thorsten Consulting Group Inc  
**Area:** Business Management & Organization Management  
**Price:** F (add \$25 after 8/26)  
**Location:** Delta Hotels - Sioux City

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## Annual Update for Controllers

Strengthen your abilities as a controller and help your management team understand current economic issues through the latest trends in accounting, finance, human resources, treasury management, and business systems. In this course you will discuss leading-edge topics in managerial accounting and finance in a session that is packed with useful tips and practical guidance that you can apply immediately.

**Date:** September 17, 2019  
**Credits:** 8  
**Level:** Update  
**Instructor:** Jim Lindell

**Developer:** AICPA  
**Area:** Accounting and Auditing  
**Price:** G (add \$50 after 8/26)  
**Location:** Delta Hotels - Sioux City

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## The CPA as Coach: Learn and Practice Essential Coaching Skills

Coaching continues to grow in popularity as a professional development tool. Many CPA-leaders misunderstand the essence of coaching and lack essential coaching skills. Gain an understanding of why coaching is uniquely effective for developing your employees and why younger generations crave it from their leaders. Learn essential skills and how to apply them. Practice your skills in a live setting to enhance your learning.

**Date:** September 18, 2019 (8:30am - 12:00pm)  
**Credits:** 4  
**Level:** Intermediate  
**Instructor:** Jon Lokhorst

**Developer:** Lokhorst Consulting LLC  
**Area:** Personal Development  
**Price:** F (add \$25 after 8/27)  
**Location:** Cadillac Jack's Gaming Resort

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## Multiply Your Value with Strategic Thinking Skills

Is strategic planning dead? Not likely. But traditional strategic planning alone is insufficient in today's rapidly changing, global environment. Developing strategic thinking skills is essential to navigate change and deliver exceptional value to your organization, clients, and constituents. Learn the essence of strategic thinking, how to integrate it with traditional planning activities, and proactively build strategic thinking into your daily routine as a leader.

**Date:** September 18, 2019 (12:30pm - 4:00pm)  
**Credits:** 4  
**Level:** Intermediate  
**Instructor:** Jon Lokhorst

**Developer:** Lokhorst Consulting LLC  
**Area:** Personal Development  
**Price:** F (add \$25 after 8/27)  
**Location:** Cadillac Jack's Gaming Resort

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## Reviewing Individual Tax Returns: What Are You Missing?

Join us as we discuss the common errors practitioners make on individual tax returns that are often missed by review staff. The intent is to sharpen skills for reviewers by examining case studies and discussing issues where additional information from the client may be warranted and areas of tax law where proper treatment requires additional analysis and information. Multiple issues will be discussed including pass-through K-1s, home office issues, hobby losses, rental property, hiring spouses, depreciation, §179 issues, amortization and more! Course materials include the impact of the Tax Cuts and Jobs Act of 2017 (TCJA) tax reform law. This course follows a highly illustrative case study format to increase participant comprehension and retention.

**Date:** October 17, 2019 (8:00am - 11:45am)  
**Credits:** 4  
**Level:** Intermediate  
**Instructor:** William Taylor

**Developer:** AICPA  
**Area:** Taxation  
**Price:** E (add \$25 after 9/25)  
**Location:** Delta Hotels

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## Reviewing Partnership Tax Returns: What Are You Missing?

Join us as we discuss the common errors practitioners make on partnership tax returns that are often missed by review staff. The intent is to sharpen skills for reviewers by examining case studies and discussing issues where additional information from the client may be warranted and areas of tax law where proper treatment requires additional analysis and information. Multiple issues will be discussed including income, deductions, K-1 reporting, and more! Course materials include the impact of the Tax Cuts and Jobs Act of 2017 (TCJA) tax reform law. This course follows a highly illustrative case study format to increase participant comprehension and retention.

**Date:** October 17, 2019 (12:45pm - 4:30pm)  
**Credits:** 4  
**Level:** Intermediate  
**Instructor:** William Taylor

**Developer:** AICPA  
**Area:** Taxation  
**Price:** E (add \$25 after 9/25)  
**Location:** Delta Hotels

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## The 2018 Yellow Book Revision

The 2018 Yellow Book revision represents the first comprehensive overhaul of the Yellow Book standards since 2011! This course not only explains the new standards, it also prepares you to excel in implementing the new Yellow Book. Learn precisely what the new Yellow Book does and does not require auditors to do. The course materials utilize a highly illustrative and innovative format. Over 15 focused exercises are included to provide an enhanced knowledge of the new Yellow Book.

**Date:** October 17, 2019 (8:00am - 11:45am)  
**Credits:** 4  
**Level:** Basic  
**Instructor:** Michael Morgan

**Developer:** Surgent CPE, LLC  
**Area:** Accounting and Auditing  
**Price:** F (add \$25 after 9/25)  
**Location:** Delta Hotels

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## The Most Dangerous Elements of a GAAS Audit

The formula for a successful audit today consists of many elements. Some of those elements require more thoughtfulness and caution in their application than others. In this course, we will explore those more combustible elements that can cause the audit to blow up with the budget, peer reviewers, clients and others. The course materials utilize a highly illustrative and innovative format. Over 15 focused exercises are included to provide an enhanced working knowledge of today's GAAS.

**Date:** October 17, 2019 (12:45pm - 4:30pm)  
**Credits:** 4  
**Level:** Intermediate  
**Instructor:** Michael Morgan

**Developer:** Surgent CPE, LLC  
**Area:** Accounting and Auditing  
**Price:** F (add \$25 after 9/25)  
**Location:** Delta Hotels

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## Accounting, Audit, and Attest Update for Practitioners with Small-Business Clients

Specifically tailored for practitioners who do not perform audits, but provide other attest and non-attest services to small and medium sized businesses, this course is a comprehensive update covering recently issued accounting, compilation, and review standards, as well as other professional guidance impacting small and medium sized business accountants. The course uses practical examples and illustrations to help you understand and apply the material in practice.

**Date:** October 18, 2019  
**Credits:** 8  
**Level:** Update  
**Instructor:** Michael Morgan

**Developer:** Surgent CPE, LLC  
**Area:** Accounting and Auditing  
**Price:** C (add \$50 after 9/26)  
**Location:** Delta Hotels

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## 2019 Preparation, Compilation and Review Update for the Local Firm

This course offers a look at issues that practitioners have in implementing clarified SSARS section 70 "Preparation of Financial Statements", clarified SSARS section 80 "Compilation Engagements" and clarified SSARS section 90 "Review of Financial Statements". This course also includes several new cases for 2019 that will cover all aspects of SSARS application including accounting, disclosure and reporting from the perspective of a local firm practitioner. Several new accounting standards are integrated into the new cases, including the new revenue recognition and leasing standards. It also covers the proposed "Selected Procedures" (Agreed-upon Procedures "light") standard that is scheduled to be finalized in 2019.

**Date:** October 23, 2019 (8:00am - 11:45am)  
**Credits:** 4  
**Level:** Update  
**Instructor:** James Martin

**Developer:** Real World Seminars of Georgia  
**Area:** Auditing  
**Price:** F (add \$25 after 10/1)  
**Location:** Delta Hotels

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## Data Analytics for CPAs Who Don't Know Much About Data Analytics

All the data mining software in the world can't help you if you don't know what to mine for! This class focuses on scanning procedures and other data selection techniques that will help assure your audit tests provide you with the best possible chance to discover misstatements caused by error or fraud.

**Date:** October 23, 2019 (12:45pm - 4:30pm)  
**Credits:** 4  
**Level:** Basic  
**Instructor:** James Martin

**Developer:** Real World Seminars of Georgia  
**Area:** Accounting and Auditing  
**Price:** F (add \$25 after 10/1)  
**Location:** Delta Hotels

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## Securing a Comfortable Retirement in the Age of Spending

This course gives CPAs the knowledge to help their clients plan for retirement by evaluating how much retirement income they will require and planning for how to reach their retirement goals.

**Date:** October 31, 2019  
**Credits:** 8  
**Level:** Intermediate  
**Instructor:** Michael Frost

**Developer:** Surgent CPE, LLC  
**Area:** Taxation  
**Price:** C (add \$50 after 10/9)  
**Location:** Delta Hotels

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## Fiduciary Income Tax Returns-Form 1041 Workshop with Filled-In Forms

This course is designed for participants to understand the core concepts of trust and estate income tax preparation. The course explains the common terminology and complicated income tax rules of estates and trusts, fiduciary accounting, and an introduction to or refresher on preparing Form 1041. This practical, over 300-page manual is an excellent reference source for your practice, which begins with quite simple cases. Building upon that base throughout the manual, the course ends with two complicated preparation cases, one trust and one estate, each with filled-in forms.

**Date:** November 1, 2019

**Credits:** 8

**Level:** Intermediate

**Instructor:** Michael Frost

**Developer:** Surgent CPE, LLC

**Area:** Taxation

**Price:** C (add \$50 after 10/10)

**Location:** Delta Hotels

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### Tax Institute

This two day tax conference includes AICPA's Annual Federal Tax Update Tax Update and an additional 8 hours of tax. See descriptions on their individual days.

**Date:** November 5, 2019 – November 6, 2019

**Credits:** 16

**Level:** Intermediate/Update

**Instructor:** Steve Wagner

**Developer:** AICPA

**Area:** Taxation

**Price:** D (add \$50 after 10/14)

**Location:** Sioux Falls Convention Center

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### Cut Your Client's Tax Bill: Individual Tax Planning Tips and Strategies

Make sure your clients are protecting themselves from higher taxes. Get the latest techniques for building and conserving wealth through proactive tax-planning and investment strategies. Completely updated for tax law changes, this course will bring you up-to-date on the latest strategies which will preserve your clients' wealth and ensure your role as trusted advisor to your clients! Course materials include the impact of the Tax Cuts and Jobs Act of 2017 (TCJA) tax reform law.

**Date:** November 5, 2019

**Credits:** 8

**Level:** Intermediate

**Instructor:** Steve Wagner

**Developer:** AICPA

**Area:** Taxation

**Price:** G (add \$50 after 10/14)

**Location:** Sioux Falls Convention Center

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### AICPA's Annual Federal Tax Update

Save time and keep current on the latest tax developments! This comprehensive course covers all legislative, judicial, and IRS developments of the past year with a focus on implementation and compliance. Discover how to effectively and confidently complete tax planning and compliance engagements. Cover current developments affecting individuals (including those regarding income, deductions and losses, tax calculations, individual credits, filing matters), business entities (including those regarding S Corporations and their shareholders, C Corporations, partnerships), estates and trusts, retirement plans, and more. Course materials include the impact of the Tax Cuts and Jobs Act of 2017 (TCJA) tax reform law.

**Date:** November 6, 2019

**Credits:** 8

**Level:** Update

**Instructor:** Steve Wagner

**Developer:** AICPA

**Area:** Taxation

**Price:** G (add \$50 after 10/14)

**Location:** Sioux Falls Convention Center

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### Federal Tax Update-Individuals and Business

Upon the completion of this course, you will be able to-Apply the latest tax law changes to the current Form 1040/1120/1120S/1065 tax returns you prepare; Properly use many federal tax provisions prior to their expiration date; Determine if your clients had job related business expenses; Determine if your clients had any work related education expenses; Summarize the various methods of accounting that are available; Advise clients on how to properly account for inventory; Determine when a change in accounting method has occurred, when IRS approval is needed and when it is not needed, and what situations qualify for automatic approval.

**Date:** November 11, 2019

**Credits:** 8

**Level:** Update

**Instructor:** Ron Roberson

**Developer:** TaxSpeaker

**Area:** Taxation

**Price:** C (add \$50 after 10/21)

**Location:** Delta Hotels



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## West River Tax Cluster

This two day tax conference includes AICPA's Annual Federal Tax Update Tax Update and an additional 8 hours of tax. See descriptions on their individual days.

**Date:** November 11, 2019 – November 12, 2019

**Credits:** 16

**Level:** Intermediate/Update

**Instructor:** Steve Wagner

**Developer:** AICPA

**Area:** Taxation

**Price:** D (add \$50 after 10/21)

**Location:** Ramkota Inn

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## Tax Considerations and Consequences for Closely Held Businesses

Provide insightful recommendations for the challenges faced by your closely held business clients. Employ smart business decisions that will minimize the tax burden, not only on the business, but also on the owners. The concepts are uniquely laid out in the course to allow you to easily and quickly identify those tax- saving strategies that fit your client's situation. Course materials include the impact of the Tax Cuts and Jobs Act of 2017 (TCJA) tax reform law.

**Date:** November 11, 2019

**Credits:** 8

**Level:** Intermediate

**Instructor:** Steve Wagner

**Developer:** AICPA

**Area:** Taxation

**Price:** G (add \$50 after 10/21)

**Location:** Ramkota Inn

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## AICPA's Annual Federal Tax Update

Save time and keep current on the latest tax developments! This comprehensive course covers all legislative, judicial, and IRS developments of the past year with a focus on implementation and compliance. Discover how to effectively and confidently complete tax planning and compliance engagements. Cover current developments affecting individuals (including those regarding income, deductions and losses, tax calculations, individual credits, filing matters), business entities (including those regarding S Corporations and their shareholders, C Corporations, partnerships), estates and trusts, retirement plans, and more. Course materials include the impact of the Tax Cuts and Jobs Act of 2017 (TCJA) tax reform law.

**Date:** November 12, 2019

**Credits:** 8

**Level:** Update

**Instructor:** Steve Wagner

**Developer:** AICPA

**Area:** Taxation

**Price:** G (add \$50 after 10/21)

**Location:** Ramkota Inn

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## Advanced Controller and CFO Skills

This course examines best practices of leading-edge controllers and CFOs. Demonstrate your advanced skills that add value and contribute to the success of the organization. You will learn specific skills every CFO or controller needs to be successful, and you will find that you suddenly have more power and influence than you ever thought possible. Show the company's leadership how vital you are to their profitability!

**Date:** March 24, 2020

**Credits:** 8

**Level:** Advanced

**Instructor:** John Cox

**Developer:** AICPA

**Area:** Accounting and Auditing

**Price:** A (add \$50 after 3/2)

**Location:** Eide Bailly LLP

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## Enterprise Risk Management: New Approaches for Today's Complexities

New risks are arising from technological change, political uncertainty, cyber-crime and increasing drivers of intangible value. It is mandatory for organizations to be proactive in anticipating and managing risks. This approach requires organizations to build a risk awareness and management culture putting increased emphasis on compliance and governance. New approaches to enterprise risk management are emerging. Revisions to COSO and ISO31000 share the ambition to integrate risk management into all aspects of the organization's activities and emphasize the importance of developing a risk culture that aligns with the organization's values and ability to handle complexity. This course will address new approaches to enterprise risk management, including recent updates to COSO and ISO frameworks with focus on managing risk in increasingly complex business environments. Core tenets of strategy development, risk culture, and performance management will be covered to help practitioners implement best practices in enterprise risk management.

**Date:** March 25, 2020

**Credits:** 8

**Level:** Intermediate

**Instructor:** John Cox

**Developer:** AICPA

**Area:** Accounting and Auditing

**Price:** A (add \$50 after 3/3)

**Location:** Eide Bailly LLP

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## Policies and Procedures

This catalog contains the core group of continuing professional education programs being presented in 2019. The SDCPA Society Board of Directors has approved the programs, fees, and the following policies and procedures. All courses are designed to meet the CPE requirements of the South Dakota Board of Accountancy. There are no continuing education requirements for membership in the South Dakota CPA Society. However, there are CPE requirements for licensees in the state as well as for members of the American Institute of CPAs. To see all CPA Policies and Procedures, visit [www.sdcpa.org](http://www.sdcpa.org) under the CPE section.

*South Dakota CPA Society is in compliance with the CPE rules required by the SD Board of Accountancy. For a complete list of the CPE rules see the web site – [www.sdcpa.org](http://www.sdcpa.org) under the CPE section.*

**PRICES** – See price codes for fees.

**Prices for LATE FEES:** ALL late registrations will be subject to the \$50 late fee, (\$25 late fee for 4hr CPE courses).

**METHOD OF PAYMENT** – CPE may be paid by check or credit card. Checks should be made payable to “SDCPAS” or “South Dakota CPA Society”. The Society accepts VISA, MasterCard and Discover Card. Credit card payments are not accepted for CPE-40 Certificates and CPE-24 Bundles.

**REGISTRATION** – Registrations are accepted at any time. All courses require prepayment and there is a \$50 late fee for registrations postmarked after the date published with each course in this catalog. Deadlines are approximately three weeks prior to the course presentation dates. Online, mail, fax, and phone registrations are accepted.

**CONFIRMATIONS & CANCELLATIONS** – Approximately three weeks prior to the course date a determination will be made as to whether or not the course will be held. If the program will be held, confirmations will be sent via email to all participants approximately seven days in advance of the course, reminding them of the date, time, course title, and location. If the program will be canceled (most likely due to insufficient number of registrants) an attempt will be made to reach each participant to notify him or her of the cancellation. If you do not receive the confirmation and link to the materials five days prior to the course, please contact the Society office.

**PAPERLESS** – Materials will be offered in PDF format only. A link to the materials will be sent out via e-mail to all registrants at least three days prior to the program. Electronic Materials Terms and Conditions; Electronic materials for the events are copyrighted and permission to print is granted to the paid participant of the event exclusively. Materials will not be provided to you at the event. Should you choose to bring your laptop to the event, a charging station will be available for you to use. Internet access will be provided in the meeting rooms. Once the materials are sent; refunds, transfers and cancellations are not accepted.

**COMPUTATION OF CREDITS** - All course hours are based on a 50-minute classroom hour. A minimum of one CPE credit must be earned initially, but after the first CPE credit has been earned, credits may be earned in a one-fifth or one-half increments beginning July 2019.

**DOCUMENTATION / ATTENDANCE** – After the completion of the course we will send proof of attendance via email for your records. You will need to retain documentation for 4 years. All participants are asked to register their attendance at the course site on signature sheets. Copies of these sheets as well as the list of participants are forwarded to the South Dakota Board of Accountancy for their records. The same information will be kept on file at the South Dakota CPA Society office for a period of five calendar years following the calendar year of the course.

**Your CPE transcripts can now also be found at [www.sdcpa.org](http://www.sdcpa.org) under My CPE Transcripts. You can also enter Non-Society courses on your page to store all your CPE in one location.**

**AUDITS** - the South Dakota CPA Society is an approved CPE sponsor. All documentation of attendance has been sent to the South Dakota Board of Accountancy. Therefore you are not required to submit documentation on courses that you attend through the CPA Society in the event of an audit.

**SITE LOCATIONS** – Below are locations of all courses not being held at a hotel:

Sioux Falls – Eide Bailly LLP (River Centre Building) 200 East 10 <sup>th</sup> St (2 <sup>nd</sup> Floor) Sioux Falls, SD 57104	Sioux Falls Convention Center 1201 Northwest Ave Sioux Falls, SD 57104
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**LODGING ARRANGEMENTS** – Blocks of sleeping rooms have been reserved for participants on a first-come first-served basis and will be released three weeks prior to the course dates by the motels. Please make your sleeping room reservations directly with the motel and tell the reservation staff that you are attending a South Dakota CPA Society presentation in order to receive the quoted rate. If you have difficulty making your motel accommodations, please contact the Society office at 605-334-3848 for assistance.

Downtown Sioux Falls Hilton Garden Inn  
(Near Eide Bailly LLP)  
201 E. 8<sup>th</sup> Street – 605-444-4700  
\$144.00

Sioux Falls Sheraton Hotel  
(Adjacent to Convention Center)  
1211 Northwest Ave  
\$109.00

Sioux Falls Holiday Inn City Centre  
100 W 8th Street– 605-339-2000  
\$109.00 August

Rapid City Ramkota Inn  
I-90 at Exit 59 – 605-343-8550  
\$72.00 November

Rapid City The Rushmore Hotel  
445 Mt Rushmore Rd– 605-348-8300  
(Please call for rates)

Sioux City – Delta Hotels (formerly Maria Inn)  
East 4<sup>th</sup> and B Streets – 402-494-4000  
S. Sioux City NE 38776  
(Please call for rates)

Sioux Falls Ramada Hotel & Suites  
(Near Convention Center)  
1301 West Russell Street – 605-336-1020  
\$84.95

Sioux Falls Comfort Inn & Suites  
3721 West Avera Drive – 605-275-9577  
\$89.00 ([click here](#) for reservation)

Deadwood Cadillac Jack’s Gaming Resort  
360 Main Street – 605-571-2200  
\$99.00

CPE Price Codes				
PRICE CODE	SOCIETY MEMBER/ AICPA MEMBER	SOCIETY MEMBER/ NON AICPA MEMBER	NON SOCIETY MEMBER/ AICPA MEMBER	NON SOCIETY MEMBER/ NON AICPA MEMBER
A	\$240	\$270	\$290	\$320
B	\$270	\$270	\$320	\$320
C	\$285	\$285	\$335	\$335
D	\$390	\$420	\$440	\$470
E	\$140	\$155	\$165	\$180
F	\$155	\$155	\$180	\$180
G	\$255	\$285	\$305	\$335
If you register after the deadline for a course, add \$50 late registration fee.				

### CPE 40 Certificate

The CPE 40 certificate allows members or their firm/company to save money by purchasing a block of qualifying 40 CPE hours.

#### Certificate Price:

\$1150 (\$1300 for non-members) if purchased by May 31st and 40 hours are selected and used within the CPE year.

\$1250 (\$1350 for non-members) can be purchased any time and no course selection is required.

CPE 40 Certificates qualify for South Dakota CPA Society sponsored courses – live seminars and simulcasts only.

For additional information about the CPE40 Certificate please visit [sdcpa.org](http://sdcpa.org) or contact the Society.

\_\_\_\_\_ CPE 40 Certificates for \$1150 (\$1300 for non-member)  
Must be purchased by May 31, 2016

\_\_\_\_\_ CPE 40 Certificates for \$1250 (\$1350 for non-member)  
May be purchased anytime

### CPE 24 Bundle

The CPE 24 bundle allows members or their firm/company to save money by purchasing a block of qualifying 24 CPE hours

#### Bundle Price:

\$780 (\$840 for non-members) can be purchased any time and no course selection is required.

CPE 24 Bundles qualify for South Dakota CPA Society sponsored courses – live seminars, webinars and simulcasts.

For additional information about the CPE24 Bundle please visit [sdcpa.org](http://sdcpa.org) or contact the Society.

\_\_\_\_\_ CPE 24 Bundle for \$780 Member

\_\_\_\_\_ CPE 24 Bundle for \$840 Non-Member

Firm/Company: \_\_\_\_\_

Contact Name: \_\_\_\_\_ E-Mail: \_\_\_\_\_

(credit card payments are not accepted for CPE40 Certificates and CPE24 Bundles)

	DATE	HOURS	COURSE	PARTICIPANT
1.	_____	_____	_____	_____
2.	_____	_____	_____	_____
3.	_____	_____	_____	_____
4.	_____	_____	_____	_____
5.	_____	_____	_____	_____
6.	_____	_____	_____	_____
7.	_____	_____	_____	_____
8.	_____	_____	_____	_____

### 2019 South Dakota CPA Society CPE Registration Form

(Please duplicate this form as needed)

Name \_\_\_\_\_  
Company \_\_\_\_\_  
Address \_\_\_\_\_ State: \_\_\_\_\_  
City \_\_\_\_\_ Zip: \_\_\_\_\_  
Phone: \_\_\_\_\_  
After Hours Phone: \_\_\_\_\_  
Email: \_\_\_\_\_  
SD CPA Member? ☐ Yes ☐ No  
CPA? ☐ Yes ☐ No AICPA Member # \_\_\_\_\_

- ☐ Sole Practitioner, Shareholder, Partner  
☐ CPA Firm Staff ☐ Industry  
☐ Staff ☐ Government, Education

Course \_\_\_\_\_  
Course Date \_\_\_\_\_  
☐ Check Amount Enclosed \$ \_\_\_\_\_  
Charge: ☐ Visa ☐ MasterCard ☐ Discover  
Acct. # \_\_\_\_\_ Exp. \_\_\_\_\_  
Name on Card \_\_\_\_\_  
Billing Address \_\_\_\_\_ Billing Zip: \_\_\_\_\_

#### Make checks payable to SDCPAS and mail to:

South Dakota CPA Society  
5024 South Bur Oak Place, Suite 108  
Sioux Falls, SD 57108  
Telephone: (605) 334-3848 Fax: (605) 334-8595  
www.sdcpa.org

### 2019 South Dakota CPA Society CPE Registration Form

(Please duplicate this form as needed)

Name \_\_\_\_\_  
Company \_\_\_\_\_  
Address \_\_\_\_\_ State: \_\_\_\_\_  
City \_\_\_\_\_ Zip: \_\_\_\_\_  
Phone: \_\_\_\_\_  
After Hours Phone: \_\_\_\_\_  
Email: \_\_\_\_\_  
SD CPA Member? ☐ Yes ☐ No  
CPA? ☐ Yes ☐ No AICPA Member # \_\_\_\_\_

- ☐ Sole Practitioner, Shareholder, Partner  
☐ CPA Firm Staff ☐ Industry  
☐ Staff ☐ Government, Education

Course \_\_\_\_\_  
Course Date \_\_\_\_\_  
☐ Check Amount Enclosed \$ \_\_\_\_\_  
Charge: ☐ Visa ☐ MasterCard ☐ Discover  
Acct. # \_\_\_\_\_ Exp. \_\_\_\_\_  
Name on Card \_\_\_\_\_  
Billing Address \_\_\_\_\_ Billing Zip: \_\_\_\_\_

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City \_\_\_\_\_ Zip: \_\_\_\_\_  
Phone: \_\_\_\_\_  
After Hours Phone: \_\_\_\_\_  
Email: \_\_\_\_\_  
SD CPA Member? ☐ Yes ☐ No  
CPA? ☐ Yes ☐ No AICPA Member # \_\_\_\_\_

- ☐ Sole Practitioner, Shareholder, Partner  
☐ CPA Firm Staff ☐ Industry  
☐ Staff ☐ Government, Education

Course \_\_\_\_\_  
Course Date \_\_\_\_\_  
☐ Check Amount Enclosed \$ \_\_\_\_\_  
Charge: ☐ Visa ☐ MasterCard ☐ Discover  
Acct. # \_\_\_\_\_ Exp. \_\_\_\_\_  
Name on Card \_\_\_\_\_  
Billing Address \_\_\_\_\_ Billing Zip: \_\_\_\_\_

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