

SDCPAS Sponsored CPE Courses 2022

Please be sure to check out our monthly newsletters and website (sdcpa.org) for new course additions and/or any changes throughout the year.

+ Indicates a live simulcast is available in addition to in-person attendance

<u>Date</u>	<u>Course</u>	<u>Credits</u>	<u>Location</u>
5/20/2022	K2's An Accountant's Guide to Blockchain and Cryptocurrency	4	Online
6/9/2022	Auditing Financial Statements of 401(k) Plans	4	Online
6/9/2022	Estate Planning for the 99%—Portability and More	4	Online
6/13/2022	Developing Your Alternative Workforce Strategy	4	Online
6/13/2022	Tax-Exempt Organizations—Planning and Compliance for Tax Matters	4	Online
6/14/2022	Accounting, Audit, and Attest Update for Practitioners with Small-Business Clients	8	Online
6/15/2022	Construction Contractors: Accounting and Financial Reporting Issues	4	Online
6/16/2022	Accounting and Reporting for Not-for-Profit Organizations	8	Online
6/21/2022	Advanced Trust Issues: A Roadmap for Success in An Increasingly Complex Area	4	Online
6/29/2022	Controller's Update: Today's Latest Trends	4	Online
8/9/2022	Conquering the New Lease Standard	4	Online
8/11/2022	Social Security and Medicare: Maximizing Retirement Benefits	4	Sioux Falls +
8/11/2022	Reviewing Individual Tax Returns: What Are You Missing?	4	Sioux Falls +
8/12/2022	Reviewing Partnership Tax Returns: What Are You Missing?	4	Sioux Falls +
8/12/2022	Reviewing S Corporation Tax Returns: What Are You Missing?	4	Sioux Falls +
8/24/2022	Estate Tax Planning Options for Farmers	4	Online
8/25/2022	Data and Predictive Analytics and Business Intelligence for Controllers/CFOs	4	Online
9/21/2022	Bridging the Generations Gap and Leading to Achieve Great Service	4	Pierre
10/21/2022	2022 Preparation, Compilation and Review Update for the Local Firm	8	Online
10/25/2022	Accounting and Auditing Update for the Real World	8	Sioux City
Nov 8 th -9 th	43rd Annual Tax Institute	16	Sioux Falls +
11/8/2022	Best S Corporation, Limited Liability, and Partnership Update Course by Surgent	8	Sioux Falls +
11/9/2022	Best Individual Income Tax Update Course by Surgent	8	Sioux Falls +
11/11/2022	Federal Tax Update: Individuals and Business	8	Sioux City +
12/5/2022	Tax Advisors Update	8	Online
12/7/2022	This Year's Best Income Tax, Estate Tax and Financial Planning Ideas	8	Online
12/7/2022	Getting Ready for Busy Season: Key Changes Every Tax Practitioner Should Know	4	Online
12/8/2022	2022 Accounting & Auditing Update	8	Online
12/13/2022	Tax Forms Boot Camp: LLCs, Partnerships, and S Corporations	8	Online

+ Indicates a live simulcast is available in addition to in-person attendance



43rd Annual Tax Institute – November 8th-9th – Sioux Falls & Online

This 2-day conference includes 16 hours of the best business and individual tax courses by Surgent. See descriptions of each course on their individual days. Get useful tools, strategies, and insights to serve your clients.

Individual course registration is available as well.

Day One: The Best S Corporation, Limited Liability, and Partnership Update Course by Surgent

This year practitioners need to keep abreast of tax changes affecting pass-through entities used by their business clients and employers, and this enlightening course delivers that information. You will learn invaluable strategies, techniques, innovative tax-planning concepts, income-generating ideas, and other planning opportunities available to S corporations, partnerships, LLCs, and LLPs. Continually updated to reflect enacted legislation.

Day Two: The Best Individual Income Tax Update Course by Surgent

This highly informative course comprehensively covers all the latest tax law developments. The focus is on individual taxation and discussion of the planning opportunities practitioners need to understand to help clients respond effectively. You will come away from the course with the up-to-date knowledge to educate your individual tax clients and implement tax-saving ideas that will serve their ever-evolving needs. This course is continually updated to reflect enacted legislation.

Steve Wagner has extensive accounting, tax and business experience in the servicing of various size companies, as well as individuals. His core industry focus has included growth businesses, professional service organization, retail, manufacturing, real estate development investments and financial institutions. Wagner consistently receives high evaluations for his technical expertise and his practical application of tax law to real-world situations. He has been teaching tax courses for the Society the last seven years and is a winner of the AICPA's Outstanding Discussion Leader.

Additional Tax Update Courses – In-Person and Online

Federal Tax Update: Individuals and Business (Sioux City and Simulcast Online)

TaxSpeaker: November 11th

Tax Advisors Update (Simulcast)

CliftonLarsonAllen LLP: December 5th

Tax Advisors Update (Webinar)

CliftonLarsonAllen LLP: January 2023

Please note Simulcast/Online courses will be held in CT unless noted differently.

SDCPAS Sponsored CPE Courses Coming in 2023!

1/11/2023	Getting Ready for Busy Season: Key Changes Every Tax Practitioner Should Know	4	Online
3/23/2023	Annual FASB Update and Review	4	Sioux Falls
3/23/2023	Critical Issues That CPAs in Industry Will Need to Face This Year	4	Sioux Falls
3/24/2023	Controller/CFO Update: Hot Topics Facing Today's Financial Professional	4	Sioux Falls
3/24/2023	Gaining a Competitive Advantage: Critical Skills for CFOs and Controllers	4	Sioux Falls

Policies and Procedures

This catalog contains the core group of continuing professional education programs being presented in 2022. 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.

*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 website – sdcpa.org under the CPE section.*

MATERIALS – Materials will be offered in an online format only. A link to the materials will be sent out via e-mail to all registrants prior to the program. All materials provided for the events are copyrighted and permission to access/print is granted to the paid participant of the event exclusively. Materials will not be provided to you at the event. Once the materials are sent, **no** cancellation/transfer/refund is available.

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 one-fifth or one-half increments.

ONLINE/SIMULCAST COURSES – An email with instructions how to access the online course will be sent to all registrants prior to the program. These links are intended for the paid participant only and should not be shared with others.

DOCUMENTATION / ATTENDANCE – After the completion of the course we will send a certificate of attendance via email for your records. You will need to retain documentation for 4 years. 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 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.

NON-SPONSORED CPE COURSES - 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 sdcpa.org or on the [SD Board of Accountancy](https://sdboardofaccountancy.com) website.

LODGING ARRANGEMENTS – Blocks of sleeping rooms have been reserved for participants in correlation with our in-person CPE courses. Please make your sleeping room reservations directly with the hotel 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 hotel accommodations, please contact the Society office at 605-334-3848 for assistance. Visit our 'Locations and Lodging' page on our website for a full list of hotels and room rates.

**SAVE THE
DATE**

SEPT 20-21



**ANNUAL
CONVENTION**

PIERRE, SD

CPE 40 CERTIFICATE & CPE 24 BUNDLE

CPE 40 Certificate & CPE 24 Bundle allows individual members, firms, and companies to save money by purchasing a block of hours.

CPE 40 Certificate

40 hours of qualifying courses must be sponsored by SDCPAS and be labeled as In-Person, Simulcast or Online.
For additional information about the CPE40 Certificate please visit sdcpa.org or contact the Society.

Certificate Price:

\$1150 (\$1550 for non-members) if purchased by May 31st and 40 hours are selected and used within the CPE year.

\$1250 (\$1600 for non-members) can be purchased any time and no course selection is required.

_____ CPE 40 Certificates for \$1150 (\$1550 for non-member)
Must be purchased by May 31, 2022

_____ CPE 40 Certificates for \$1250 (\$1600 for non-member)
May be purchased anytime

CPE 24 Bundle

24 hours of qualifying courses must be sponsored by SDCPAS and be labeled as In-Person, Simulcast, Online or Webinars.
For additional information about the CPE24 Bundle please visit sdcpa.org or contact the Society.

Bundle Price:

\$780 (\$990 for non-members) can be purchased any time and no course selection is required.

_____ CPE 24 Bundle for \$780 Member

_____ CPE 24 Bundle for \$990 Non-Member

Firm/Company: _____

Address/City/State/Zip: _____

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.	_____	_____	_____	_____
9.	_____	_____	_____	_____
10.	_____	_____	_____	_____

2022 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

2022 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

2022 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