Will you be ready?

Professional Education
Catalog 2019

Seminars | Conferences | Webcasts | On Demand | Certificate Programs
Will you be ready?

American Institute of CPAs president and CEO, Barry Melancon, forecasts the accounting profession will change beyond recognition over the next ten years. In fact, he believes it will happen much quicker. “I really mean five years, but people get scared when I say that,” commented Melancon. “We’ve changed significantly in just the past year. We’re never going to see a pace of change that’s slower than what we’re seeing now. And, we know we won’t be obsolete, particularly if we embrace these changes.”

Position yourself and your organization for success with some of these featured courses

- **Data Analytics for CPAs Who Don’t Know Much About Data Analytics**
  - July 23 - West Des Moines
  - Oct. 23 - S. Sioux City, Neb.
  - Oct. 29 - Coralville

- **Change the Way You Work: Success as a Virtual CFO**
  - Aug. 20 - West Des Moines
  - Sept. 26 - Coralville

- **Technology Conference**
  - June 10-11 - West Des Moines

- **Finance Business Partnering: The Essentials**
  - Sept. 27 - West Des Moines

- **Skills to Succeed: Coaching Skills for CPAs, Financial Managers and Controllers**
  - Sept. 16 - S. Sioux City, Neb.

- **Women’s Leadership Forum: Be The Exception**
  - Oct. 17 - Cedar Rapids
  - Oct. 18 - West Des Moines

- Live webcast available

Chart your course at www.iacpa.org/cpe/events
Meet the ISCPA team

Kathy Nicholson
director of education
Contact Kathy for:
• CPE scheduling
• On site CPE
• Conferences
• CPE requirements
• General CPE information
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515-985-7103

Katie Shields
CPE administrator
Contact Katie for:
• CPE registrations, cancellations, transfers and refunds
• Webcasts and on demand
• Transcripts
• General CPE information
kshields@iacpa.org
515-985-7103

Cindy Adams
chief executive officer

Lindsey Haley
membership and student initiatives coordinator

Toni Roof
director of information technology

Michelle Thompson
finance and data services coordinator

Register now!
2019 ISCPA conferences and events

Leadership Conference and Annual Meeting
May 3 | Altoona

Local Government Update
May 13 | West Des Moines

Iowa Governmental Roundtable
May 14 | West Des Moines

Financial Institutions Conference
May 21 | West Des Moines

Technology Conference
June 10-11 | West Des Moines

Insurance Industry Conference
June 18 | West Des Moines

Emerging Leaders Conference
Aug. 8-9 | Ankeny

Fall CPE Conference
Sept. 19-20 | Cedar Rapids

Women’s Leadership Forum: Be The Exception
Oct. 17 | Cedar Rapids
Oct. 18 | West Des Moines

Nonprofit Organizations Conference
Oct. 21 | West Des Moines

Federal Tax Update – Individual and Business
Nov. 11 | South Sioux City, Neb.
Nov. 15 | Spencer

Federal Tax Update for Individuals
Nov. 12 | West Des Moines
Dec. 9 | Coralville

Federal Tax Update for Corporations and Partnerships
Nov. 13 | West Des Moines
Dec. 10 | Coralville

Business and Industry Conference
April 2020 | Des Moines metro area

- Live webcast available
Cancellation policy

No refunds on cancellations received seven (7) days or less prior to the course. Registration fees for cancellations received seven days or less prior to the course are nonrefundable and will be placed on account to use for a future course during the same fiscal year (May 1-April 30). No refunds for cancellation of the substituted course. Cancellations or transfers received within seven days of the event may be subject to a fee since meal guarantees have been made. You may substitute another individual for your registration. The substitute is subject to the member/nonmember registration fee policy. Please notify ISCPA of substitutions.

No refund or transfer is available once eMaterials have been downloaded.

Registration and fees

Member fee - extended to individual members of ISCPA or another state CPA society.

Nonmember fee - nonmembers are required to pay an additional fee unless otherwise noted. A membership application can be completed online at www.iacpa.org.

Late fee - paid registrations post-marked or submitted online less than 21 calendar days prior to the course will be assessed a $35 late fee for most in-person courses. For conferences, the late fee is assessed 14 days prior to the event.

AICPA members - individual members of AICPA attending classroom courses developed by AICPA are eligible for a $30 discount on most 8 or 16 hour courses.

Registrations - includes electronic course materials and lunch (for 8+ hour courses) unless otherwise noted.

Registrations - accepted online, by mail, fax and phone. You are not registered for the course until payment is received. Contact ISCPA if you have not received a confirmation within three days of registering to confirm your registration was received.

Course times - most full day courses are 8 a.m.–4 p.m. unless otherwise noted. Conference and half-day course schedules vary. Check the course information in the CPE catalog or on your confirmation. Registration opens 30 minutes before the course begins.

Course materials

ISCPA CPE course manuals are now paperless. No printed copies will be distributed onsite. eMaterials will be available to download 5-7 days prior to the course in the My CPE Tracker section of the ISCPA website. eMaterials may be saved to your electronic device or printed. Visit www.iacpa.org/paperless to learn more about this new approach.

No refund or transfer is available once eMaterials have been downloaded.

Special needs

If you have medically necessary/dietary or ADA needs, please contact ISCPA at least one week prior to the course.

Inclement weather policy

Courses will be held as long as the facility is open and the instructor is present.

When a course is canceled due to inclement weather, ISCPA will make every effort to contact registrants immediately. Please keep your emergency/cell phone contact information current. If a course is canceled, you will receive a full refund. In the instance of inclement weather, ISCPA will post a message on www.iacpa.org and on the individual course listing in the online CPE catalog, in addition to contacting participants directly.

If you are unable to attend due to inclement weather and the course has not been canceled, you must notify ISCPA the day of the course. You will be issued a credit, minus a cancellation fee, that may be used for another ISCPA sponsored course within one year of the original course date.

CPE credit

Participants attending ISCPA CPE programs are required to sign in twice at every 8 hour course, once in the morning and once at the end of the day. ISCPA courses are designed to qualify for CPE credit under the Iowa Accountancy Examining Board rules. Some courses may also qualify for Iowa Insurance CE, Iowa Continuing Legal Education, IRS, CFP and other specialty designations. Check the individual course listing for additional information on designations. Contact ISCPA at 800-659-6375 or 515-223-8161 if you wish to obtain continuing education credit for a course not already approved for the specialty credit you desire. Advance notice is required and in some cases require as much as 45 days notice.

Track your CPE credits online

My CPE Tracker is an ISCPA member-only benefit. ISCPA sponsored courses will automatically be posted to the online transcript as soon as possible after the course is held. Members may add non ISCPA courses to My CPE Tracker at any time. The online transcript can be printed or emailed for easy record keeping.

Nonmember attendees at ISCPA courses will receive a transcript via mail or email at the end of the month a course was attended.

Cell phones and electronic devices

We love our devices too, but please silence yours during CPE courses.

Disclaimer

Printed materials and oral presentations of speakers at programs sponsored by ISCPA are not intended to be definitive analyses of the subjects covered. Seminar attendees and users of accompanying course materials are hereby cautioned that neither the program presenters nor the ISCPA intends that reliance be placed upon these presentations or materials in making professional judgments, business decisions, or rendering advice without confirming and updating information obtained with independent research.
Be an onsite coordinator

Earn cash or save on your CPE.
The ISCPA CPE Department is looking for members to serve as onsite coordinators at select ISCPA courses outside of the Des Moines area (except Sioux Falls, S.D.).

Duties:

• Greet participants.
• Inspect and make arrangements for any necessary classroom changes.
• Confirm break and lunch schedule with facility staff.
• Distribute and collect evaluation forms, attendance sheets and other materials at event.
• Return evaluations, attendance sheets and extra materials to ISCPA.
• You will receive detailed instructions of your duties prior to the event. It's easy!

Onsite coordinators will receive a registration discount or direct compensation of $125 per day per eight hour course and $60 per four hour course. The discount may be taken off the course fee upon registration or the coordinator can be directly compensated after the course has taken place and duties have been fulfilled.

To be an onsite coordinator visit www.iacpa.org/cpe/onsite-coordinator or complete and return the form below.

ISCPA onsite coordinator form

Course requested (acronym) ______ Location __________________________ Date____________________
Course requested (acronym) ______ Location __________________________ Date____________________
Course requested (acronym) ______ Location __________________________ Date____________________
Course requested (acronym) ______ Location __________________________ Date____________________

Name ____________________________________________________________
Email ____________________________________________________________
Firm/company ______________________________________________________
Address ____________________________ City/State/Zip ____________________
Work phone ________________________________

If necessary, may we contact you the day of the course on your cell phone?: ☐ yes ☐ no | Phone ________________________
Preferred onsite coordinator materials mailing address: ☐ home ☐ office
Discount preference: ☐ Registration discount ☐ Direct compensation
Check the online CPE catalog frequently for course additions, changes and information for in-person training, webcasts, on demand and certificate programs. ▶ Indicates a live webcast is available in addition to in-person attendance.

<table>
<thead>
<tr>
<th>Date</th>
<th>Title/acronym</th>
<th>Location</th>
<th>CPE credit</th>
</tr>
</thead>
<tbody>
<tr>
<td>April 12</td>
<td>Business and Industry Conference (BIC)</td>
<td>Des Moines</td>
<td>7.5</td>
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<tr>
<td>April 22</td>
<td>CFO Series: 2019 Technology Trends Update (TTU)</td>
<td>West Des Moines</td>
<td>8</td>
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<tr>
<td>April 23</td>
<td>Excel Bootcamp: Building Great Spreadsheets (EB)</td>
<td>West Des Moines</td>
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<td>May 13</td>
<td>Governmental Ethics: Theory and Application (GE)</td>
<td>West Des Moines</td>
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<td>May 13</td>
<td>Iowa Governmental Audits - Local Government Update (IGA)</td>
<td>West Des Moines</td>
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<td>May 14</td>
<td>Iowa Governmental Roundtable (IGR)</td>
<td>West Des Moines</td>
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<tr>
<td>May 21</td>
<td>Financial Institutions Conference (FIC)</td>
<td>West Des Moines</td>
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<tr>
<td>May 22</td>
<td>Section 199A: Applications and Challenges in 2019 (AIG4)</td>
<td>West Des Moines</td>
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<td>May 22</td>
<td>Ethical Considerations for CPAs (ETH4)</td>
<td>West Des Moines</td>
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<td>May 23</td>
<td>Advanced Audits of 401(k) Plans: Best Practices and Current Developments (AAFP)</td>
<td>West Des Moines</td>
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<tr>
<td>June 3</td>
<td>The New Yellow Book: Government Auditing Standards, 2018 Revision (YBRV-IC)</td>
<td>Coralville</td>
<td>8</td>
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<tr>
<td>June 4</td>
<td>The New Yellow Book: Government Auditing Standards, 2018 Revision (YBRV-DM)</td>
<td>West Des Moines</td>
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<tr>
<td>June 10-11</td>
<td>Technology Conference (TC)</td>
<td>West Des Moines</td>
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<td>June 13</td>
<td>Taking the Numb Out of Numbers: Explaining and Presenting Financial Information with Confidence and Clarity (TNUMB)</td>
<td>West Des Moines</td>
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<td>June 18</td>
<td>Insurance Industry Conference (IIC)</td>
<td>West Des Moines</td>
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<td>June 19</td>
<td>FREE Member Event: Watch for details</td>
<td>West Des Moines</td>
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<tr>
<td>June 20</td>
<td>Tackling the Tough Issues in Adopting The New Revenue Recognition Standard (NRRS)</td>
<td>West Des Moines</td>
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<tr>
<td>June 21</td>
<td>Enhancing Audit Quality: Best Practices in Documenting and Reviewing Your Work (SWLD-DM)</td>
<td>West Des Moines</td>
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<tr>
<td>June 25</td>
<td>Annual Update for Accountants and Auditors (AUAA-SF)</td>
<td>Sioux Falls, S.D.</td>
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<tr>
<td>June 25</td>
<td>Form 990: Mastering its Unique Characteristics (EOF990IC)</td>
<td>Coralville</td>
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<tr>
<td>June 26</td>
<td>Emerging Issues in the Cannabis Industry: Hot Buttons, Lessons Learned, Challenges and Trapdoors (EICI)</td>
<td>West Des Moines</td>
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<tr>
<td>June 26</td>
<td>Ron Seigneur’s Business Valuation Update (BV)</td>
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<td>June 26</td>
<td>Leases: Mastering the New FASB Requirements (LEAS-SF)</td>
<td>Sioux Falls, S.D.</td>
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<tr>
<td>June 27</td>
<td>Analytics and Big Data for Accountants (DAAN-SF)</td>
<td>Sioux Falls, S.D.</td>
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<tr>
<td>June 27</td>
<td>Form 990: Mastering its Unique Characteristics (EOF990DM)</td>
<td>West Des Moines</td>
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<tr>
<td>July 23</td>
<td>Data Analytics for CPAs Who Don't Know Much About Data Analytics (DAAUD4DM)</td>
<td>West Des Moines</td>
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<tr>
<td>July 23</td>
<td>Common Peer Review Issues and How To Avoid Them (CPR4)</td>
<td>West Des Moines</td>
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<tr>
<td>July 24</td>
<td>Conquering the New Not-for-Profit Accounting Standards (NFPAS)</td>
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<tr>
<td>July 25</td>
<td>Construction Industry: Accounting, Financial Reporting and Taxation (CIAT)</td>
<td>West Des Moines</td>
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</table>
Looking for a specific course? Search the online CPE catalog for course topics, curriculum, location, instructor and more. Indicates a live webcast is available in addition to in-person attendance.

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<tr>
<td>July 29</td>
<td><strong>Form 990: Exploring the Form's Complex Schedules (F990A-SF)</strong></td>
<td>Sioux Falls, S.D.</td>
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<tr>
<td>Aug. 8-9</td>
<td><strong>Emerging Leaders Conference (ELC)</strong></td>
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<td>Aug. 19</td>
<td><strong>Preparing Complex 1040s (PCR-SF)</strong></td>
<td>Sioux Falls, S.D.</td>
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<td>Aug. 20</td>
<td><strong>Advanced Partnership Issues-Featuring the New Partnership Audit Regime and Tax Cuts and Jobs Act Changes (APIA-SF)</strong></td>
<td>Sioux Falls, S.D.</td>
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<td>Aug. 20</td>
<td><strong>Change the Way You Work: Success as a Virtual CFO (VCCO4-DM)</strong></td>
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<td>Aug. 20</td>
<td><strong>Analyzing a Company’s Financial Statement (FSABM4)</strong></td>
<td>West Des Moines</td>
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<td>Aug. 21</td>
<td><strong>Annual Update for Controllers (SKSB)</strong></td>
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<td>Aug. 22</td>
<td><strong>Farm Taxation Update (FTU-DM)</strong></td>
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<td><strong>Revenue Recognition: Mastering the New FASB Requirements (INRR-IC)</strong></td>
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<tr>
<td>Aug. 28</td>
<td><strong>Farm Taxation Update (FTU-SF)</strong></td>
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<td>Sept. 16</td>
<td><strong>Skills to Succeed: Coaching Skills for CPAs, Financial Managers and Controllers (STS4-SC)</strong></td>
<td>S. Sioux City, Neb.</td>
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<td>Sept. 16</td>
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<td><strong>Annual Update for Controllers (SKSB-SC)</strong></td>
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<td>Sept. 17-19</td>
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<td>Sept. 19-20</td>
<td><strong>Fall CPE Conference (EIFC-CR)</strong></td>
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<td>Sept. 26</td>
<td><strong>Change the Way You Work: Success as a Virtual CFO (VCCO4-IC)</strong></td>
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<td>Sept. 26</td>
<td><strong>Controller’s Update: Today’s Latest Trends (SKSB4-IC)</strong></td>
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<td>Sept. 27</td>
<td><strong>Finance Business Partnering: The Essentials (FBPB)</strong></td>
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<td>Oct. 14</td>
<td><strong>CFO Series: Financial Leadership (FL)</strong></td>
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<td>Oct. 15</td>
<td><strong>CFO Series: Strategy and Critical Thinking (SCT)</strong></td>
<td>West Des Moines</td>
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<tr>
<td>Oct. 16</td>
<td><strong>Church and Minister Taxation (CMT)</strong></td>
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<tr>
<td>Oct. 17</td>
<td><strong>Leases: Mastering the New FASB Requirements (LEAS-DM)</strong></td>
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<td>Oct. 17</td>
<td><strong>Reviewing Individual Tax Returns: What Are You Missing? (ITRM4-SC)</strong></td>
<td>S. Sioux City, Neb.</td>
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<td>Oct. 17</td>
<td><strong>Reviewing Partnership Tax Returns: What Are You Missing? (PTRM4-SC)</strong></td>
<td>S. Sioux City, Neb.</td>
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<td>Oct. 17</td>
<td><strong>The 2018 Yellow Book Revision (QUA4-SC)</strong></td>
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<td>Oct. 17</td>
<td><strong>The Most Dangerous Elements of a GAAS Audit (GAA4-SC)</strong></td>
<td>S. Sioux City, Neb.</td>
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<td>Oct. 17</td>
<td><strong>Women's Leadership Forum: Be The Exception (WLF-CR)</strong></td>
<td>Cedar Rapids</td>
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<td>Oct. 18</td>
<td><strong>Accounting, Audit and Attest Update for Practitioners with Small-Business Clients (SMBP-SC)</strong></td>
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<td>Oct. 18</td>
<td><strong>Reviewing Individual Tax Returns: What Are You Missing? (ITRM4-DM)</strong></td>
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<td>Oct. 21</td>
<td><strong>Nonprofit Organizations Conference (NFP)</strong></td>
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<td>Oct. 22</td>
<td><strong>Applying the Uniform Guidance in Your Single Audits (INUG)</strong></td>
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<td>Oct. 22</td>
<td><strong>Management and Leadership Essentials (STP4A-IC)</strong></td>
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<tr>
<td>Oct. 23</td>
<td><strong>Advanced Management and Leadership Essentials (STP5A)</strong></td>
<td>West Des Moines</td>
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Get the ISCPA ‘CPE experience’

On demand
Anytime, anywhere learning provides you the convenience of starting, stopping and resuming your course work on your own schedule.

Webinars
Watch and learn from thousands of courses offering engaging content — from technical skills to management, problem solving, communication and more.

Conferences
Whether it’s tax, banking, insurance, technology, nonprofit, government, young professionals or other area of interest or expertise, we’ve got you covered!

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There’s nothing quite like learning the latest topics in person from quality instructors — plus networking, sharing best practices and freshly baked cookies!

Onsite training
Bring ISCPA content to your office or event and let us take care of the details. Our CPE staff will work with you to determine focus, length and cost for your onsite training needs.

AICPA certificates
Explore new practice areas and increase revenue. Ensure you are ready for the transitions taking place in the finance and accounting profession.

Why choose ISCPA for your learning and development? As a 501(c)(6) organization, we are not organized for profit and our net earnings don’t benefit shareholders — they fund member programs and initiatives to benefit you.

Get your experience at www.iacpa.org/cpe
## 2019-20 schedule of courses

Check the online CPE catalog frequently for course additions, changes and information for in-person training, webcasts, on demand and certificate programs. Indicates a live webcast is available in addition to in-person attendance.

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<td>Oct. 23</td>
<td>2019 Preparation, Compilation and Review Update for the Local Firm (CRUC4-SC)</td>
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<td>Oct. 23</td>
<td>Data Analytics for CPAs Who Don’t Know Much About Data Analytics (DAAUD4SC)</td>
<td>S. Sioux City, Neb.</td>
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<td>Oct. 24</td>
<td>The Complete Trust Workshop (TCTW-CR)</td>
<td>Cedar Rapids</td>
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<td>Oct. 25</td>
<td>2019 Preparation, Compilation and Review Update for the Local Firm (CRUC-DM)</td>
<td>Altoona</td>
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<td>Oct. 25</td>
<td>Social Security and Medicare: Planning for You and Your Clients (SSRB-CR)</td>
<td>Cedar Rapids</td>
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<td>Oct. 28</td>
<td>Conquering the New Leasing Standard (CLS-IC)</td>
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<td>Nexus After Wayfair: Multi-state Sales and Income Taxation of Business (MSTB)</td>
<td>West Des Moines</td>
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<td>Oct. 28-30</td>
<td>AHI Staff Training: Semi-Senior (STP2A)</td>
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<td>2019 Preparation, Compilation and Review Update for the Local Firm (CRUC4-IC)</td>
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<td>Oct. 29</td>
<td>Data Analytics for CPAs Who Don’t Know Much About Data Analytics (DAAUD4IC)</td>
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<td>Oct. 29</td>
<td>Social Security Benefits-Advising Clients (SSB)</td>
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